

We Play Networks Like a Symphony

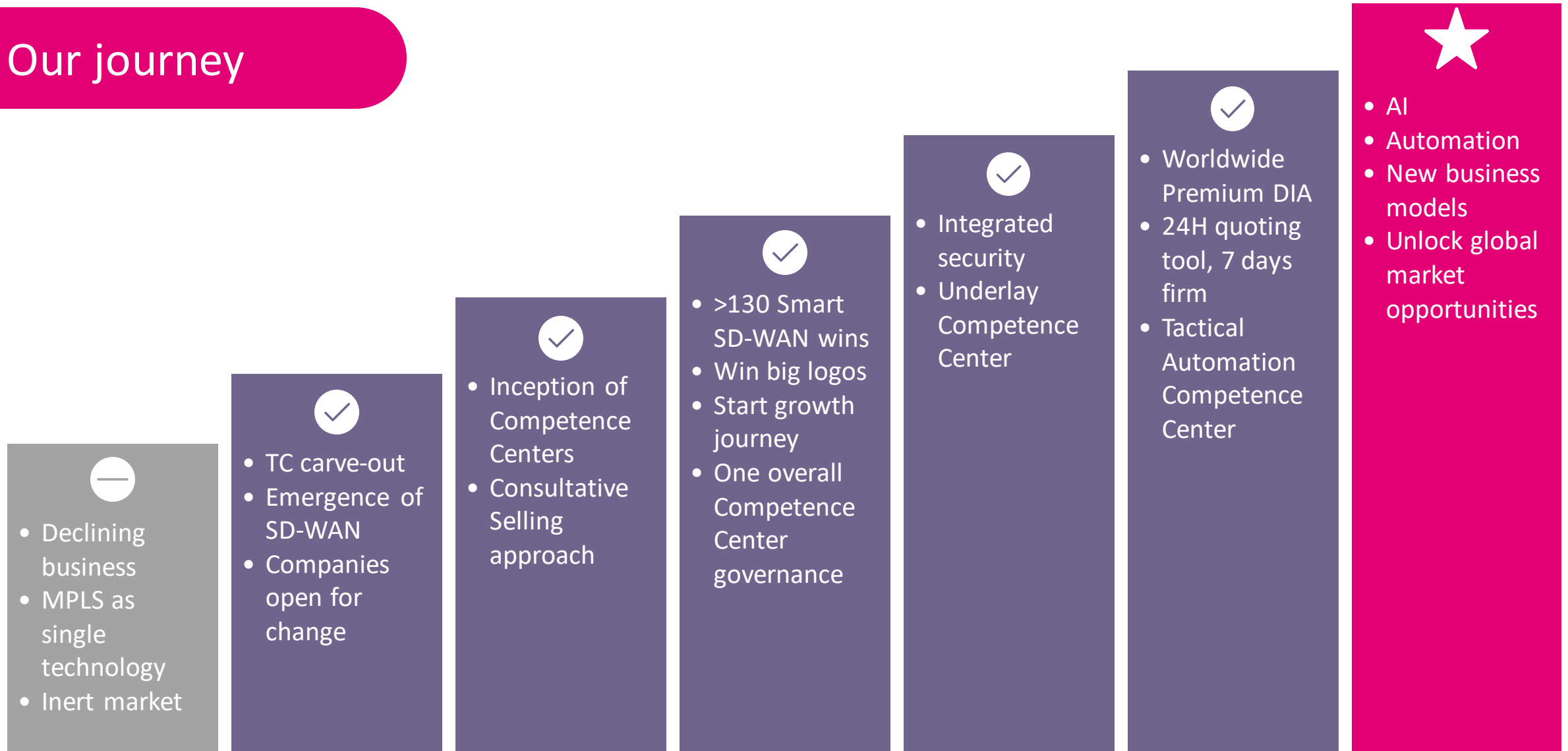
Sourcing Advisors & Analysts Days 2023 //
Breakout Session, June 28

Vikash Ramnewash, Felipe Arrudi



Deutsche Telekom Global Business

Our journey



Deutsche Telekom Global & Solutions



Hagen
Rickmann

B2B Powerhouse



Timotheus Höttges
Chief Executive Officer (CEO)
Deutsche Telekom AG



Srini Gopalan
Board member for
Germany

Sub-
sidiaries

Public

Global
Carrier

Sales
SME

Sales
M

Sales
L

Sales
XL

B2B-GS

Market Sales

Solution Business Unit

Strategy,
Transfor-
mation &
Marketing

Digital
Business &
Transfor-
mation

Portfolio

Global
SD-X

Enterprise
Networks

HR

Finance

Sales
Operations



Dirk
Lukaschik

SVP B2B-GS

T-Global
Business

Today's
Focus

Solution Sales
& Engineering



Vikash Ramnewash
MD Netherlands
Representative of
Dirk Lukaschik for
T-Global Business



Conrad Riedesel
VP SSE



Felipe Arrudi
VP Global Service Management

We are a provider with global reach and network coverage

249,155 km
international fiber backbone

2,700
MPLS access points
(IP-VPN) worldwide

VoIP in the WAN: Central SIP gateways with

over 50,000
channels per gateway in active operation

>750
global POPs

28
B2B country legal entities
with dedicated specialists
covering all regions

4
SD-WAN competence
centers located in
Austria, Spain, the
United Kingdom and
Germany

120,000
IP VPN service points

Approximately

130 L1/L2-NNIs

3,500
petabytes/month
Tier 1 Internet backbone
(AS3320)

Deutsche Telekom Global Business — 3 pillars of B2B

Driving national and international growth

International B2B Business

- Customer **headquarter** & contract **outside Germany**
- Service points all over the world
- **Financial stability, global reach, local touch** make a strong customer engagement
- **Growing presence** in countries
- **24h** budgetary quote, **7 days** for a **binding offer**



Germany In- / Outbound

- **Germany outbound:** Customer **headquarter & contract in GER** & int'l service points outside GER
- **Germany Inbound:** Contract signed outside GER and service points / billing in GER
- **Joint approach** in making customer aware of our global reach (global coordinated account set-up)
- White spot analysis to offer a specific (internationally) relevant portfolio



Global SD-WAN Competence Center

- **4 global Smart SD-WAN** Competence Centers with **7 SD-WAN products**
- **Plan, build, run** of **Smart SD-WAN deals** of all kinds
- **Underlay Competence Center** to focus on the dis-entanglement of over- and underlay
- **Increased automation** and **ecosystem setup** to remain flexible and agile in response to customer needs



The customer experience is the key

Setup of Global Business

We follow the international demand of our customers

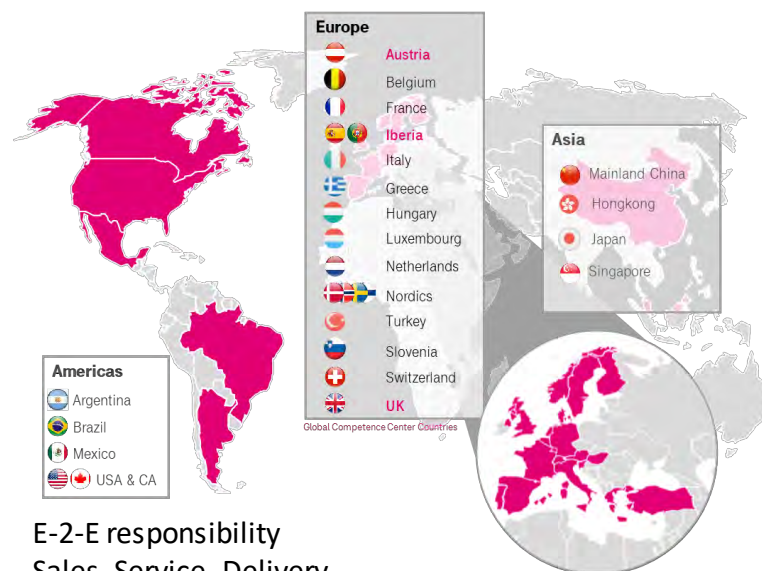


Deutsche Telekom Global Business

28 COUNTRIES

&

CENTRAL ORGANIZATION



ACTING AS ONE

Sales
Operations &
Development

Commercial
Management

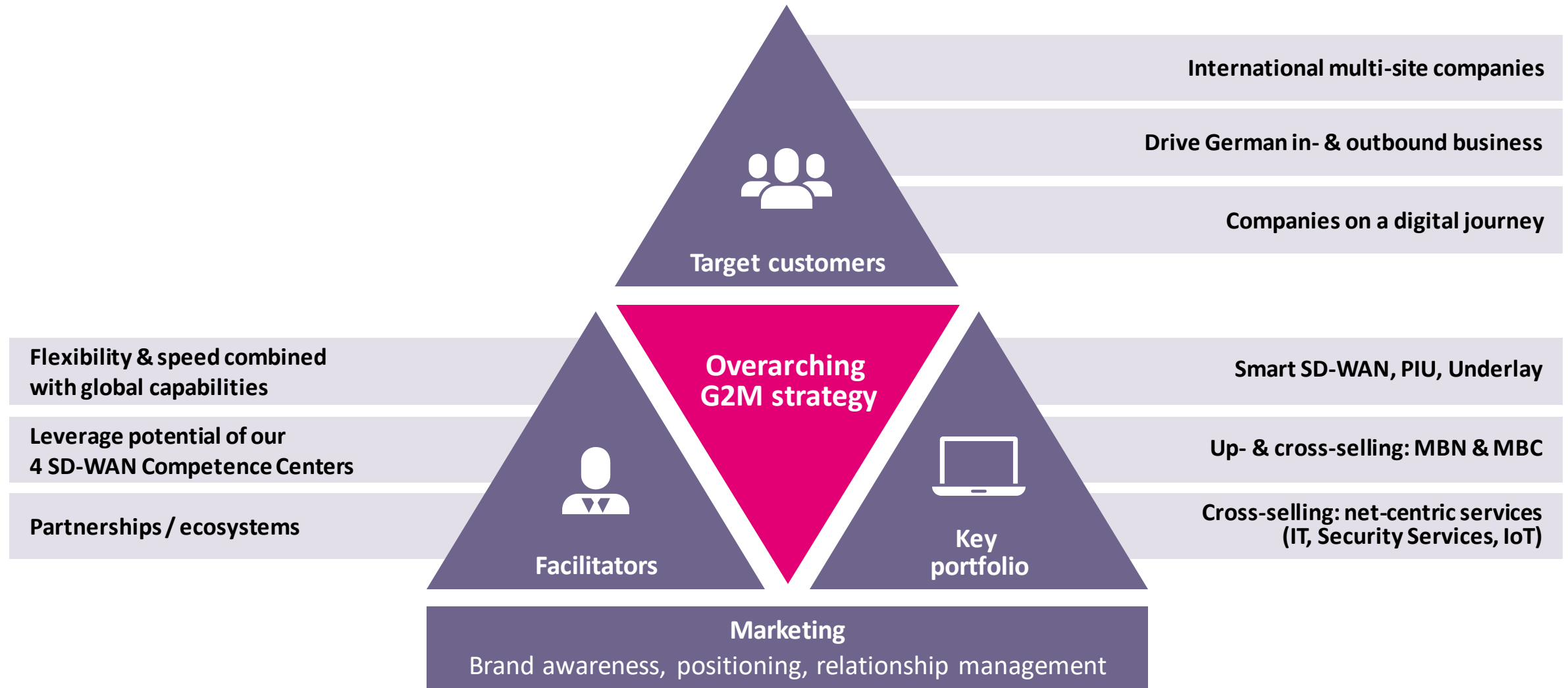
Portfolio Mgmt
& Competence
Centers

Service Mgmt &
Delivery

- **28 B2B country legal entities** for local touch
- **Truly international** (95 % multinational customer contracts)
- **600 employees at Deutsche Telekom Global Business** and a further **1,500 employees at points of production** around the globe
- **4 international Smart Software-Defined Competence Centers** for German and international customers (7 Smart SD-Products)
- DTGB is a growth driver — International **big logos** are **signed** and **>130 Smart Software-Defined WAN wins** (since 2020)
- **Smart SD as door-opener** for the whole Magenta Business Network (**MBN**) offering, Magenta Business Collaboration (**MBC**) and **Network Security** as focus portfolio.

How we approach the market:

Our go-to-market





Our powerful portfolio

fits your customers' global network demands

Magenta Business Networks



- SASE/SD-WAN
- MPLS
- Premium Internet Underlay
- Cloud connectivity
- SD-LAN

Magenta Business Collaboration



- Unified communications
- Mobile
- Contact centers / CCaaS
- Voicification & AI
- SIP trunking

T-Digital



- IoT solutions
- Digitization consultancy
- 5G campus networks

Cyber Security

Seamlessly integrated with our market-leading security services including SOC/SIEM

Germany inbound and outbound

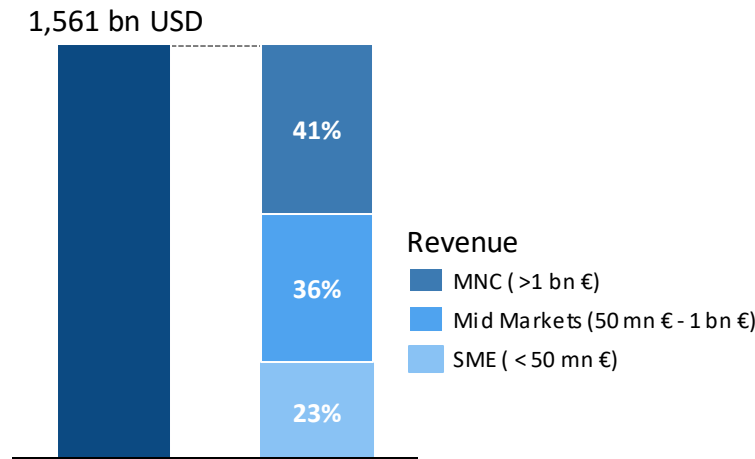
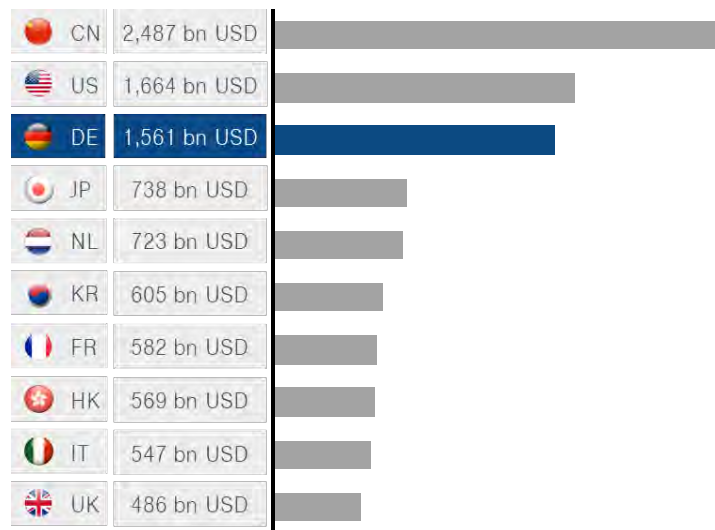
Huge international market potential



Germany is the world's third largest exporter¹

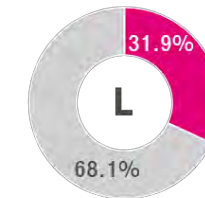
...with MNCs and mid-sized companies representing >77% of exports²

...consequently, a large number of our customers have international subsidiaries³



Enterprise customers (XL)

- 100 % of our XL customers (excl. Public) have subsidiaries outside of Germany → High importance of international delivery capability



Large customers (L)

- Ca. 32 % of L customers have subsidiaries outside of Germany
- New customer potential in mid-market with additional international subsidiaries

1) Source: statista.com 2) Source: Statistisches Bundesamt 3) Source: TDG GK Strategy Analysis

How we materialize the market potential



GERMANY OUTBOUND & GERMANY INBOUND

- Conduct structured analysis of "outbound penetration"
- Cross-functional account approach based on white spot analysis
- Joint international product position to help our customers grow their business



We provide agile, business-centric...



... Network Solutions

Fully managed: **overlay, underlay**
and **security**

E2E management and steering

Consultative approach

SASE evolution with market
leading vendors

Flexibility, co-management, bring
your own underlay

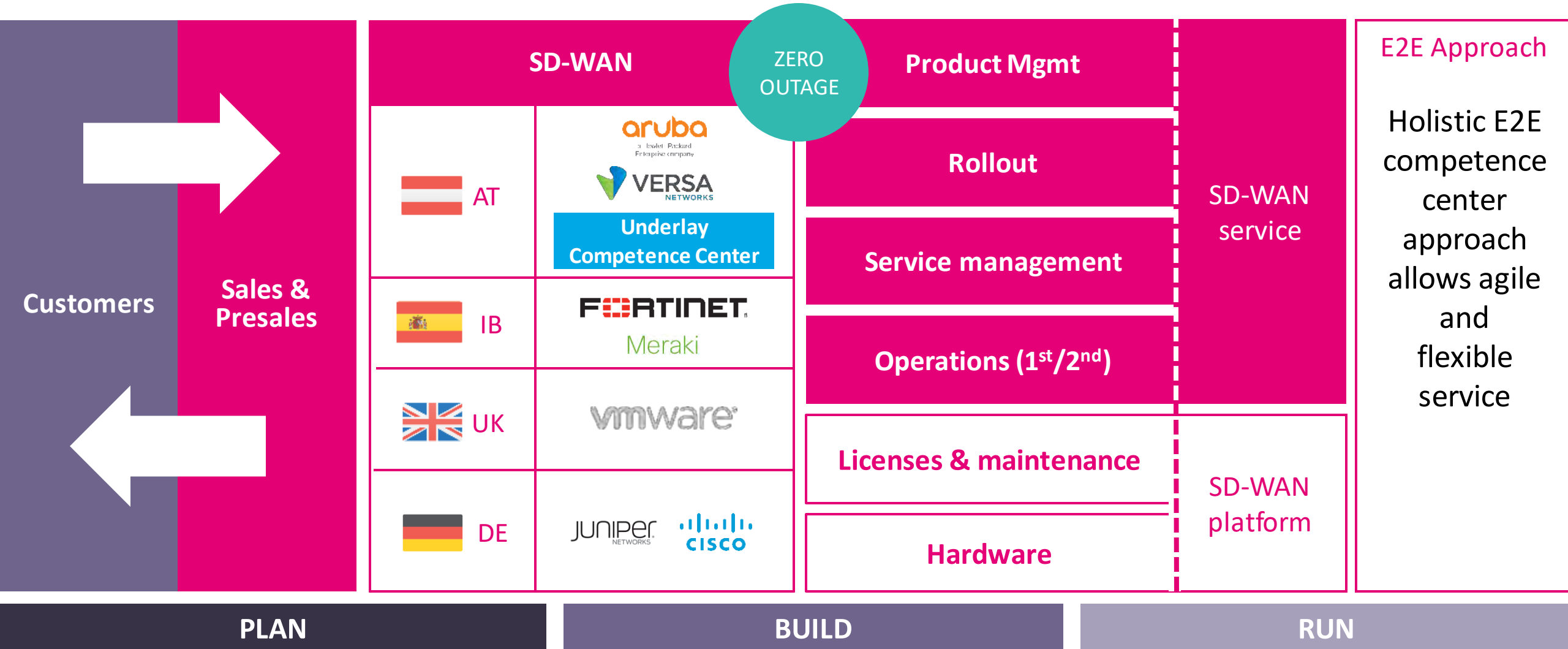
4 global competence centers for 7
SD-WAN / SD-LAN products

Tailored business-centric network
solutions



Our powerhouses: Global Competence Centers

Full SD-WAN & underlay services for our customers

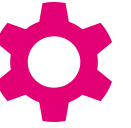


E2E Approach

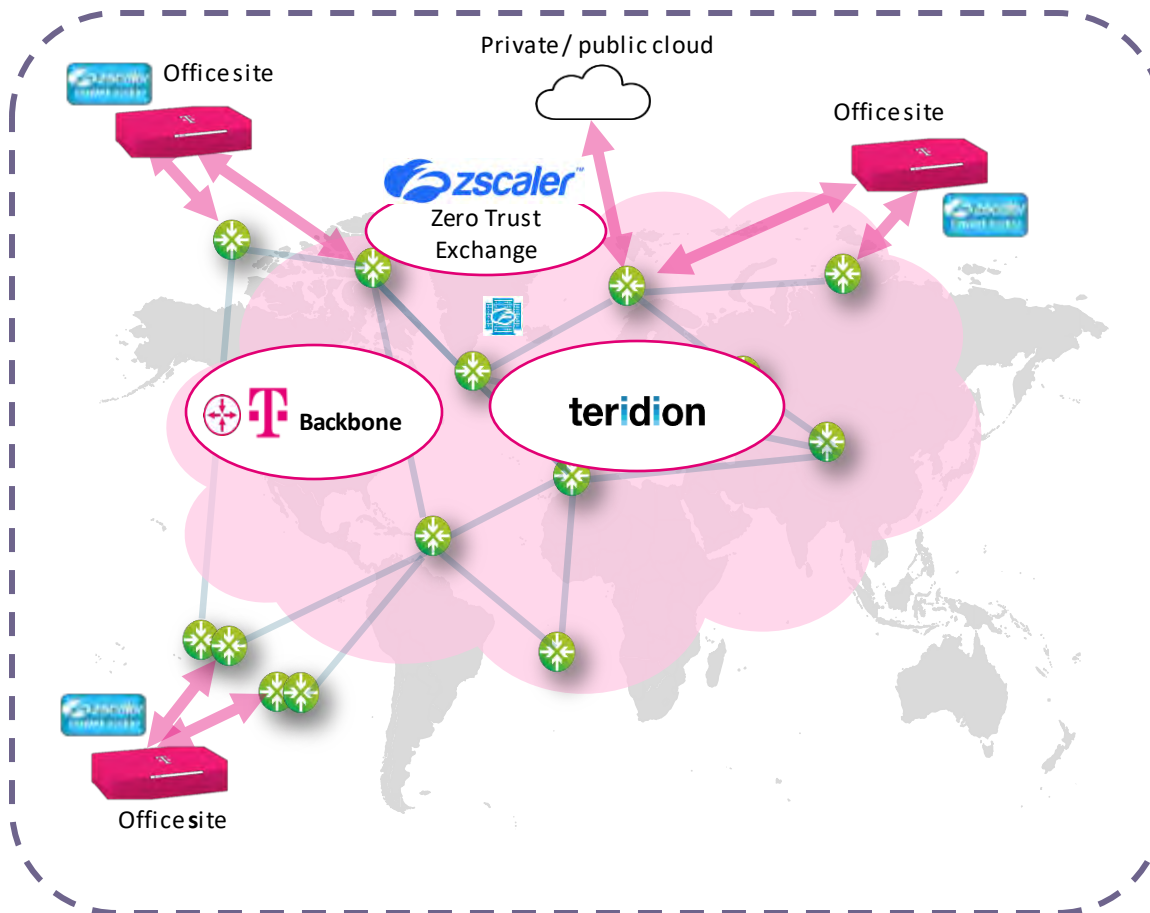
Holistic E2E competence center approach allows agile and flexible service

Premium Internet Underlay (PIU)

Low costs without compromising on quality



Global Premium Internet Backbone



- Deutsche Telekom acquired a major stake in **Teridion**, a provider of **hyper-scaler connectivity**.
- With PIU, we offer an **end-to-end managed premium internet underlay** solution with **MPLS-grade SLAs**.
- It's a complete solution of Internet access, backbone, and CPE.
- Unique position by combining **Telekom's IP network** with **Teridion's cloud-based/ software-only WAN** solution.
- **750 PoPs** worldwide with **25 cloud & infrastructure providers**.
- We can set up **new PoPs within hours**.

Customer experience as transformative differentiator

#WEWONTSTOP

**UNTIL EVERY CUSTOMER
REMEMBERS US FOR THEIR
BEST EXPERIENCE EVER**



Business Outcomes

A global team with mindset focused on success that understands unique needs of our customers and provides personalized solutions



Digital Operations

We evolved to state-of-the art tools (AI, REST APIs) and co-management models to boost the customer experience



Quality

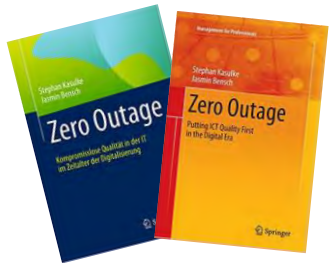
We deliver the best quality based on the Zero Outage standard to ensure our customers obtain their expected business outcomes

Zero Outage

Uncompromising quality is in our DNA

Methodology

> Deutsche Telekom has developed an industry standard



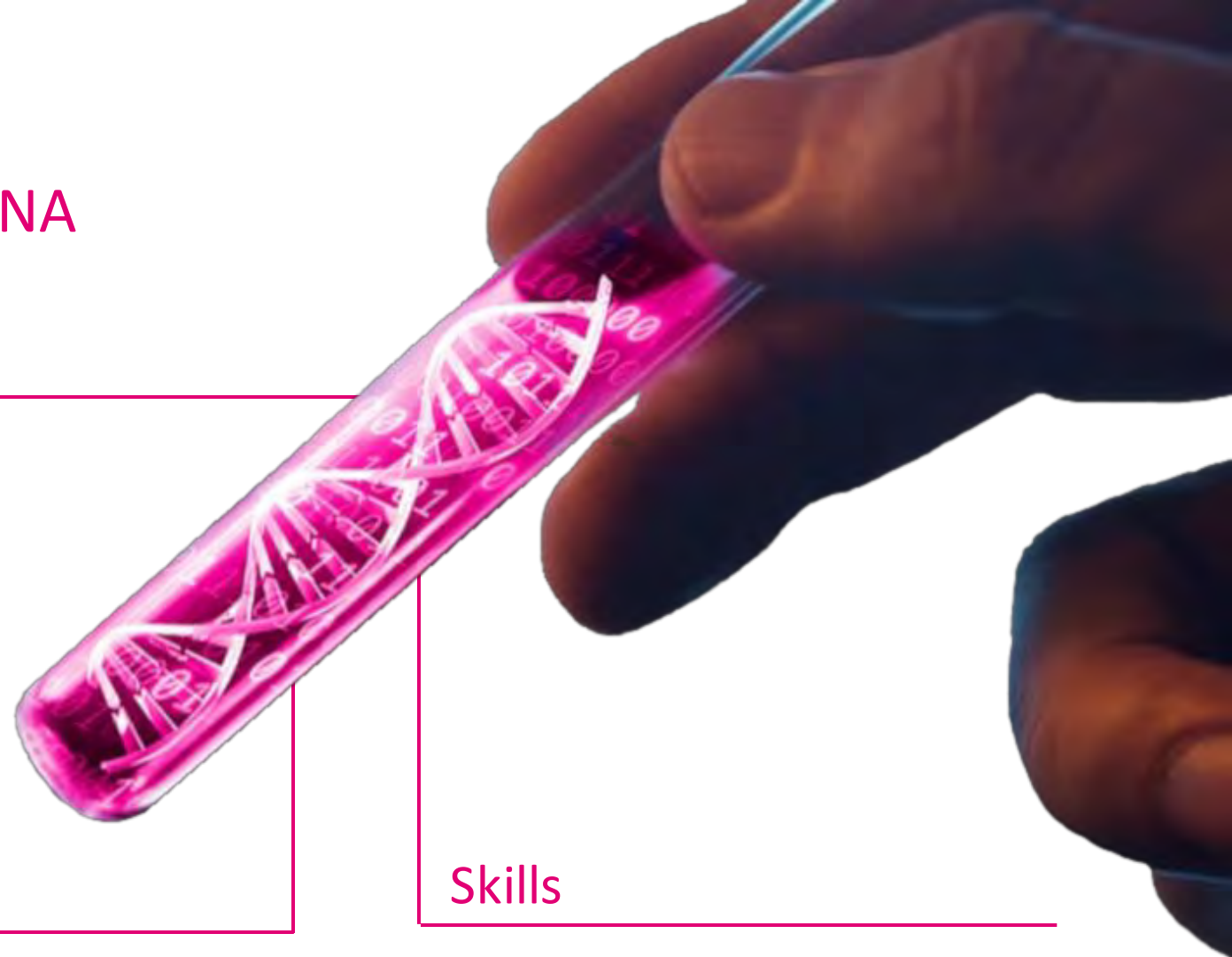
> It focuses on people, processes, platforms, products, and partners across all levels of Deutsche Telekom and the full lifecycle of our services

Results

- > **Top 10% European benchmark** (TRI*M) for customer satisfaction: **96**
Overall satisfaction, trust, commitment and advocacy
- > **90%** of our international **customers renew** their business with us

Skills

- +95% Zero-Outage-certified staff
- 140 managers on duty 24x7 worldwide
- Global operations control center 24x7



The way forward

International B2B business

Growth & focus

- **Continue growth story**
- **Build new ecosystems & strong partnerships**
- Explore **new business models**
- Push **uCPE**



Germany inbound / outbound

Win international deals & enablement

- **Win with Competence Centers**
Increase usage of Smart SD-WAN & Premium Internet Access
- **Go international**
enable and train German resources on our international capabilities



Global SD-WAN Competence Center

Automation & SASE

- Higher degree of **automation**
(bots, ServiceNow)
- **Expanding further to SASE layer**
(network security process integration)
- Unlock the **potential of AI**



Customer Service Excellence

Key takeaways



DT GLOBAL BUSINESS

is a true international player

GLOBAL COMPETENCE CENTERS

are agile and flexible

CUSTOMER EXPERIENCE

is a key driver of our success

Contact



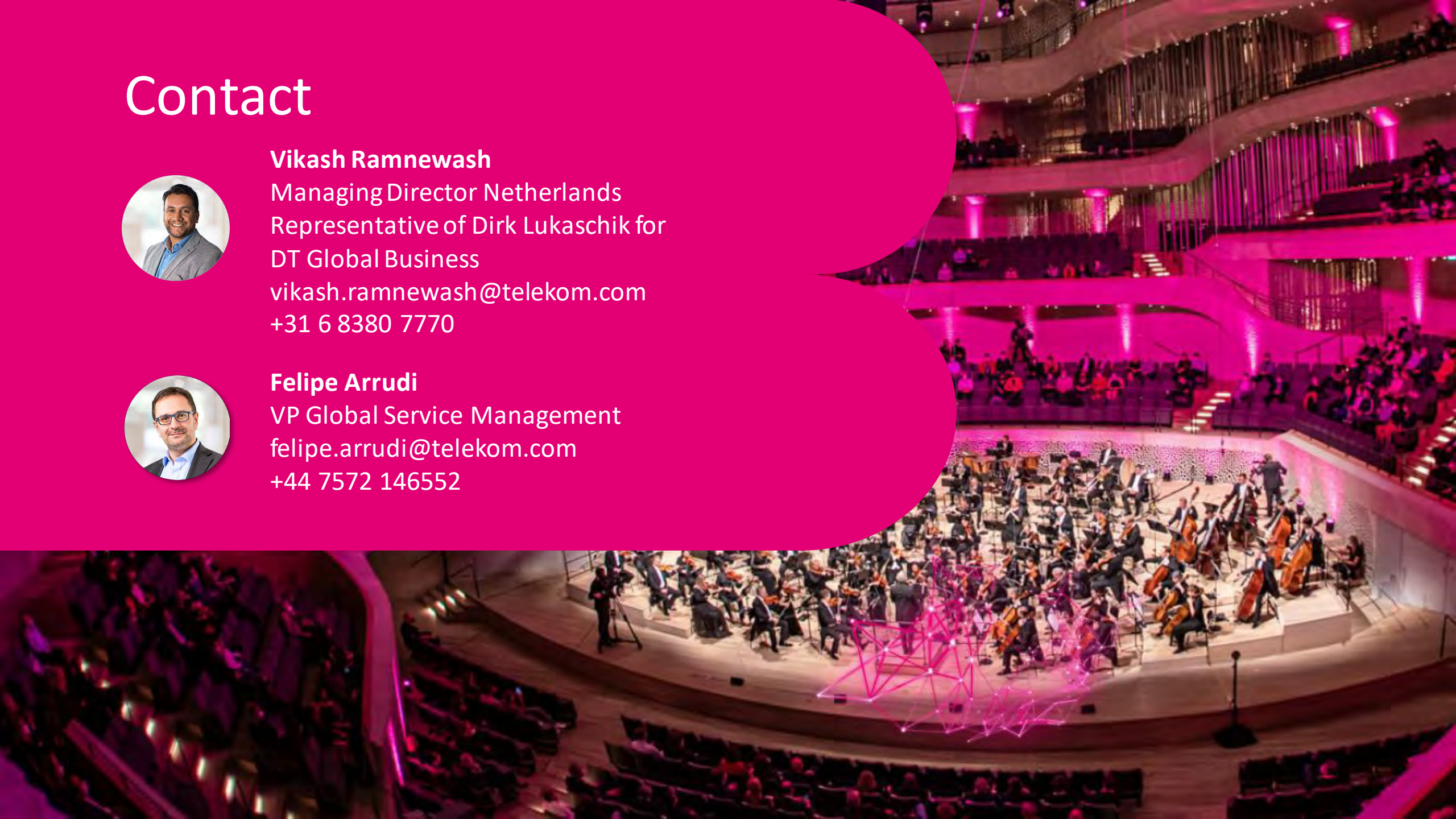
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Thank
You!

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