

# MBN/ SD Networks

Sourcing Advisors & Analysts Days 2023 //  
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# Management Summary

## MagentaBusiness Networks



### SDX ECOSYSTEM APPROACH

We transformed from a **centralized platform** approach to an **agile MBN Ecosystem** approach

### ADAPTIVE SDX PLATFORM

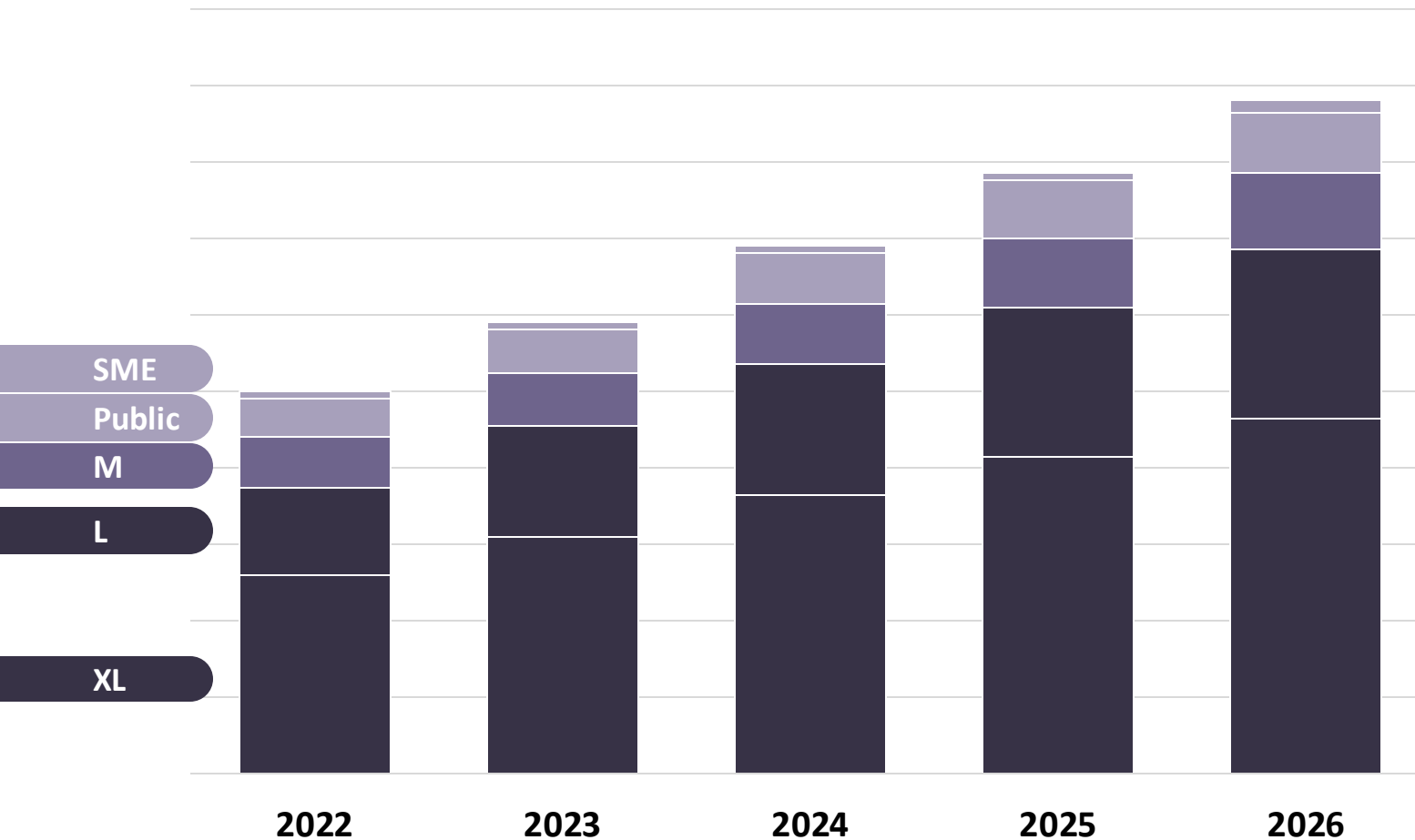
SDX Ecosystem **development according to global market demand**

### MODULAR DESIGN

Deutsche Telekom offers **modular product components** that are **easy** for customers **to combine** and integrate

# Projected growth for SD volume across our sales teams

Other (SME/Public) Mid-market (M) Large accounts (XL/L)

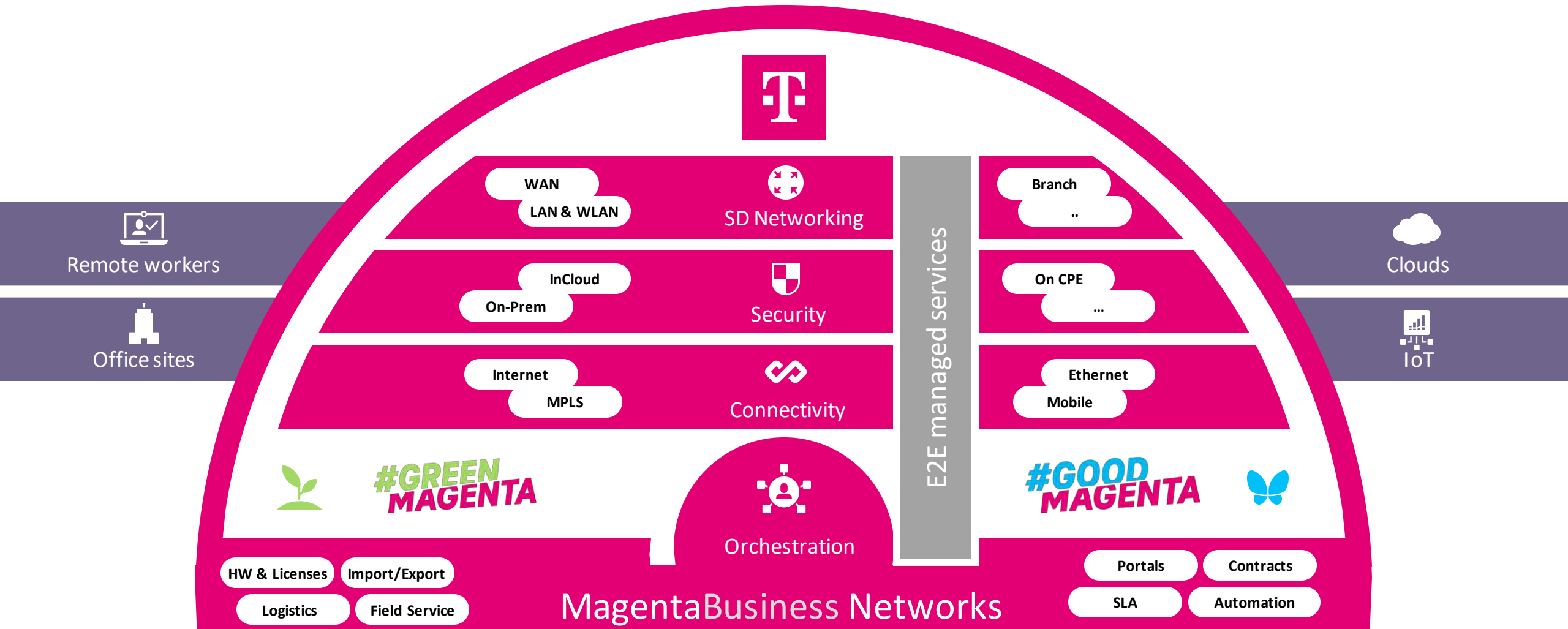


Source: McKinsey market model

## Observations

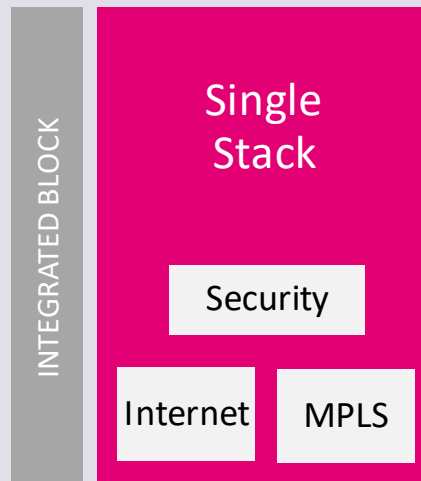
- **Large accounts (XL/L) demand ~6-7x vs mid-market demand (until 2026)**
- **Mid-market demand (M) expected to grow from a low base until 2026 and accelerate from that point on**
- **Focus on large account demand today**
- **Ensure readiness for growing midmarket demand**

# We present to the market: MagentaBusiness networks with intelligence built-in



# Flexible SDX Ecosystem instead of a pure central platform

## FROM CENTRALIZED PLATFORM APPROACH...



- No flexibility on market-side
- Long “time to market”
- Long provisioning times

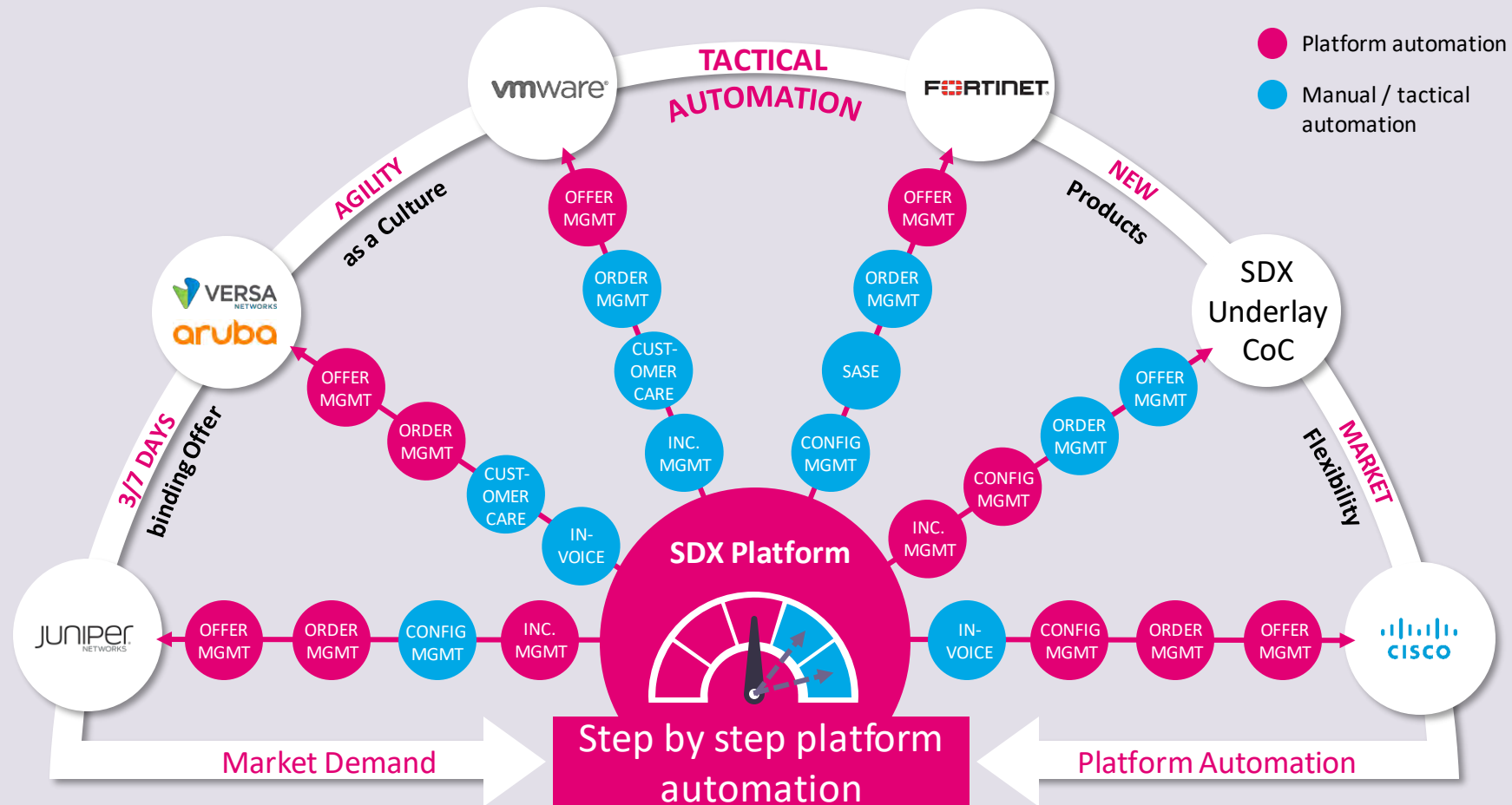
## ...TO A MODULAR SDX ECOSYSTEM APPROACH



- Automated & vendor-agnostic
- Market launch on 1st September, pilot customer phase ongoing
- Combine platform efficiency with flexible SDX scaling method

# The Flexible Scaling Method

## Adaptive platform development

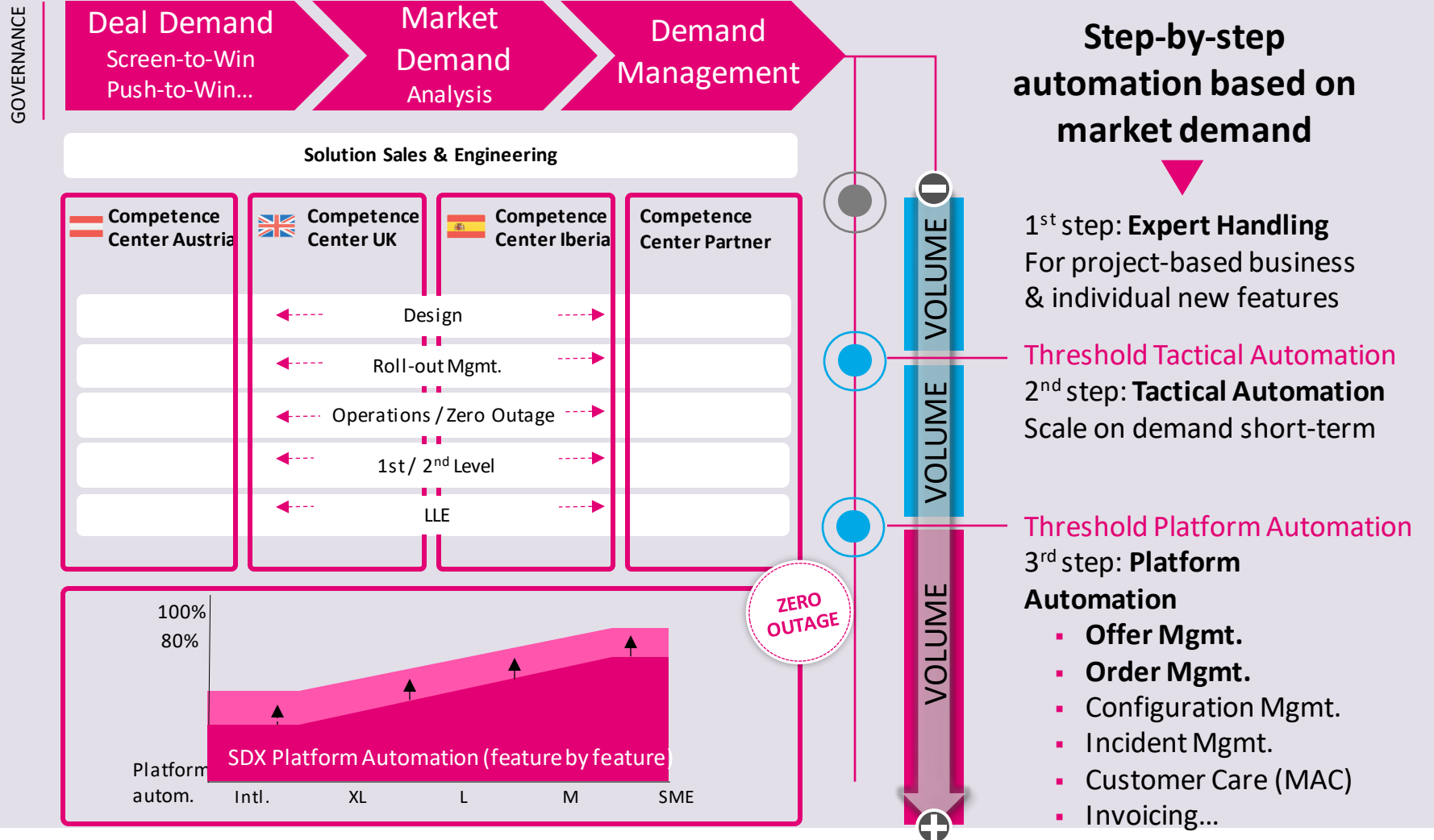


Target Picture Q4 / 2023

## Flexible Scaling Method

- Existing **competence centers** are **integrated** in a **scalable ecosystem**
- Automation-level** in line with **market demand**
- Central SDX platform** to enable **overall automation**
- Agile approach**: **New products** launched in satellites and only **onboarded** on the **platform** with **sufficient volume**
- M and top SMEs demand** at competitive price points to be addressed with **highest automation**

# Demand driven and agile SDX Ecosystem



## SDX Ecosystem

- The **Solution Sales & Engineering team** defines the **best solution** for our customers
- **IT roadmap prioritization** according to **market demand**
- **Demand Management** acts in line with the market demand
  - The **definition** of the **IT roadmap** and the **prioritization** of the **Tactical Automation** activities

# DT offers modular product components — easy to combine and integrate

## CUSTOMER SUCCESS FACTORS



## DEUTSCHE TELEKOM'S APPROACH

- **Modularized SD offerings** for multiple customer segments
- **Utilized single programmable service delivery platform**



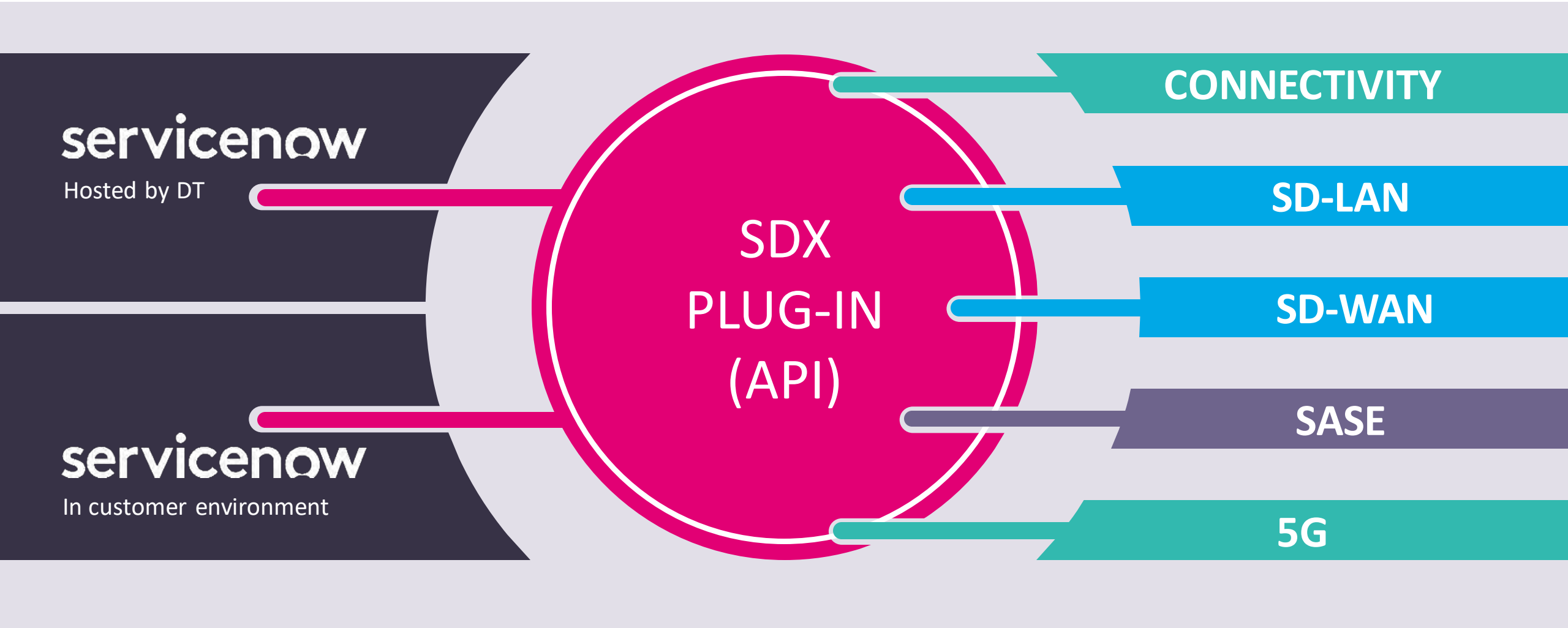
■ Manual processing  
■ Automated via platform

MODULES	OPTIONS			
Management	Fully managed	Co-managed	API-based access	
SD-WAN/(W)LAN	SD-WAN only	SD-LAN/WLAN only	Integrated	
SD-WAN features	Lean		Advanced	
Security	Local & basic	Local & advanced	SASE	
Cloud Connect	On-ramp	Private connectivity	Multi-cloud	
Coverage	National	Regional	Global	Special (e.g., CN)
Underlay	BYOA	DT provided access	Premium Internet	BYOA & DT provided



# With SDX

our clients will be guided on their digital transformation journey



# Telekom SDX platform

comes with co-management options for entire service lifecycle

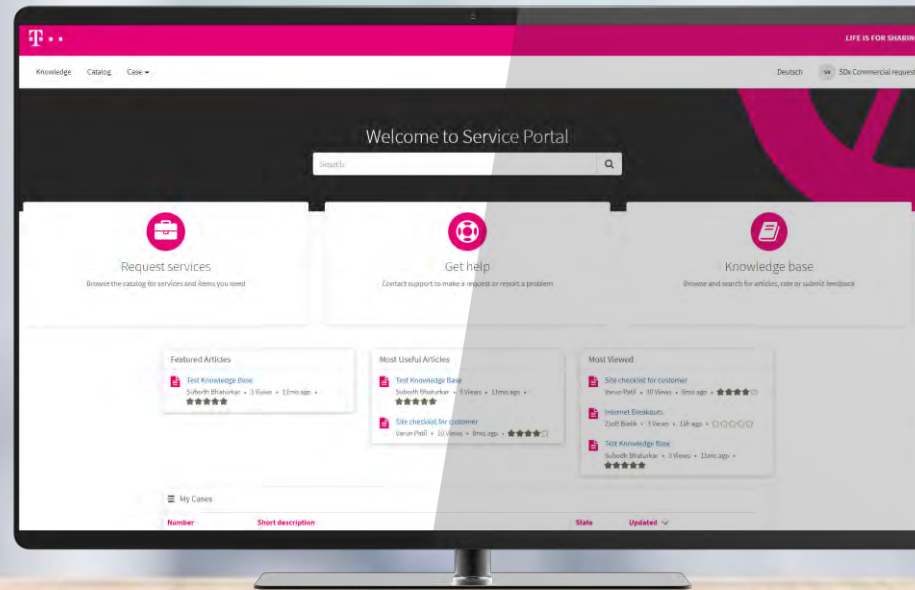
Telekom  
SDX  
platform  
(service  
layer)

## Managed SD services

- Operations & support with SLA
- EU GDPR conformity

## Globally distributed networks

- Provisioning and support globally



## Co-management

- Self-configuration / Self-ordering
- Roles and responsibilities for customer and DT

## Experts on demand

- Expert-support on demand for every process step

## Best IT Service Management

Design

Quote

Order

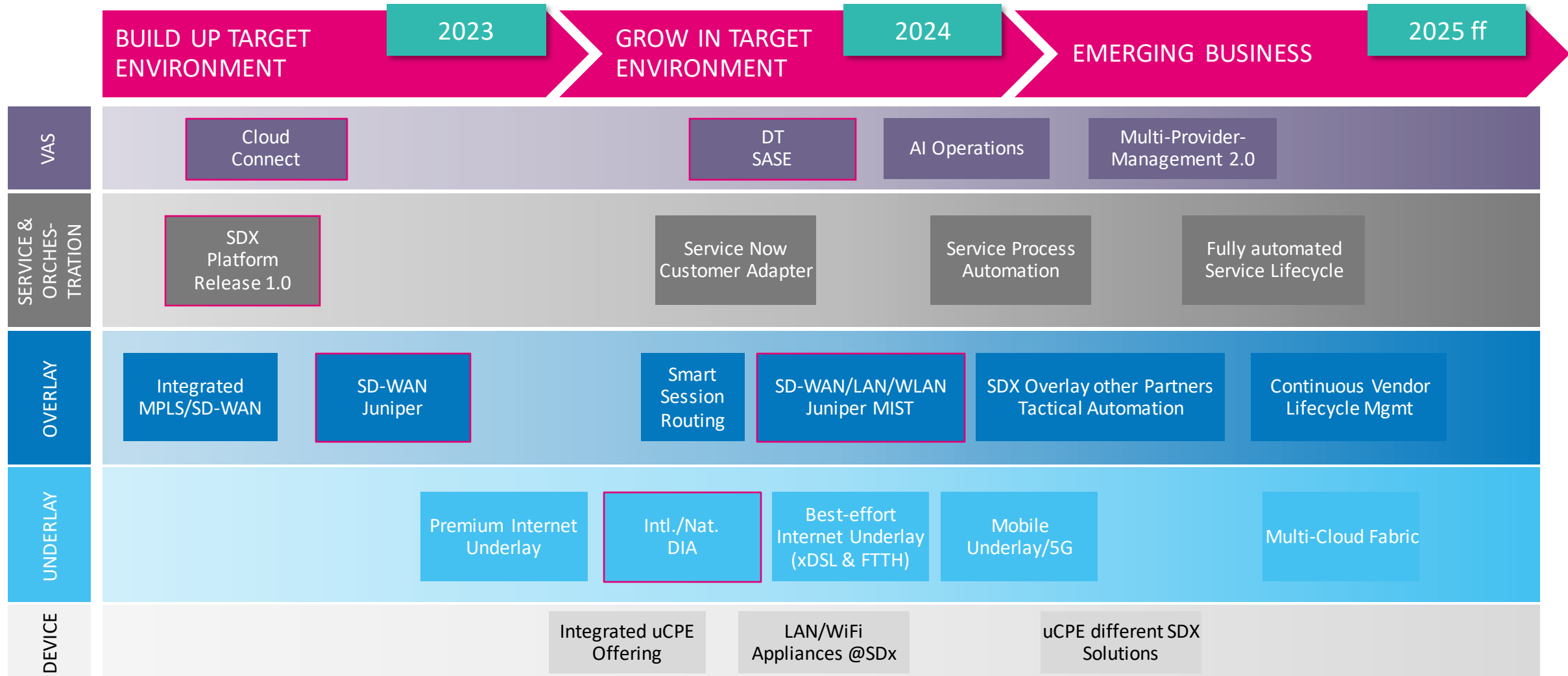
Roll-out

Configure

Operate

Extend

# Roadmap highlights powered by our SDX platform are being introduced continuously



# Key takeaways MagentaBusiness Networks



We play your network  
like a symphony



We are your global  
partner with a local touch



We provide tailored  
business-centric solutions

- 1 **MBN:** DT has established a modular and agile ecosystem for MagentaBusiness Networks
- 2 **Flexible scaling:** DT shapes its product portfolio based on **market demand** through **step-by-step automation**
- 3 **SDX ecosystem:** DT delivers on a **global scale**
- 4 **Comprehensive portfolio:** DT provides network solutions for **all market segments**
- 5 **Safe pair of hands:** DT provides **end-to-end managed** enterprise networks services (Zero Outage)

# Contact



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# Backup

# Networks are transforming

from centralized to hybrid ecosystems with a constant need for adoption

## CUSTOMER EXPECTATION

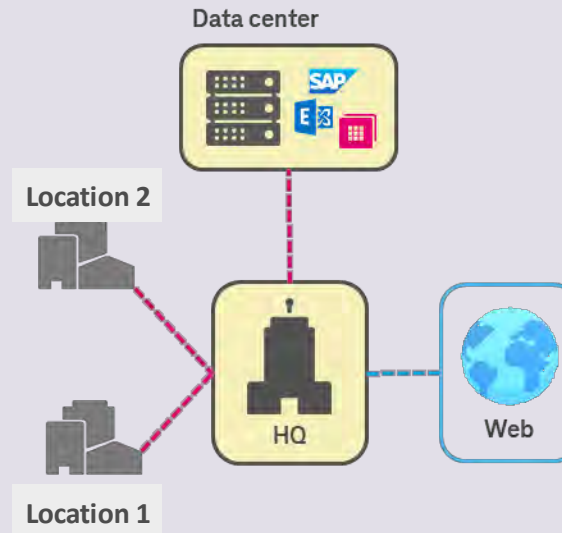
 Low Complexity

 High Agility

 Value For Money

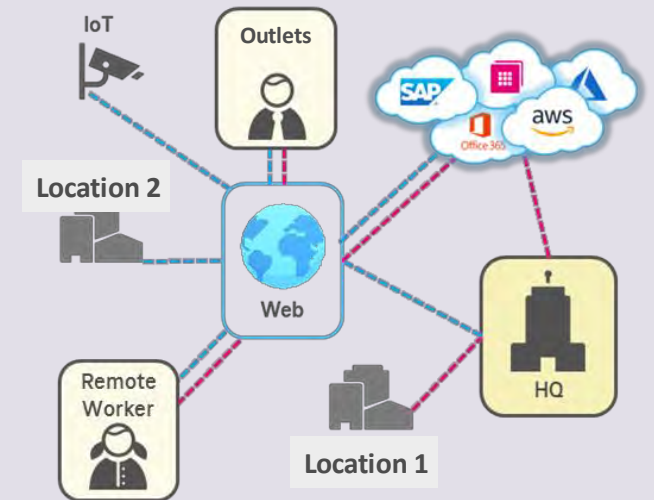
 Security / Data Protection

## FROM CENTRALIZED...



- Centralized topology
- Access to public network secured and managed centrally

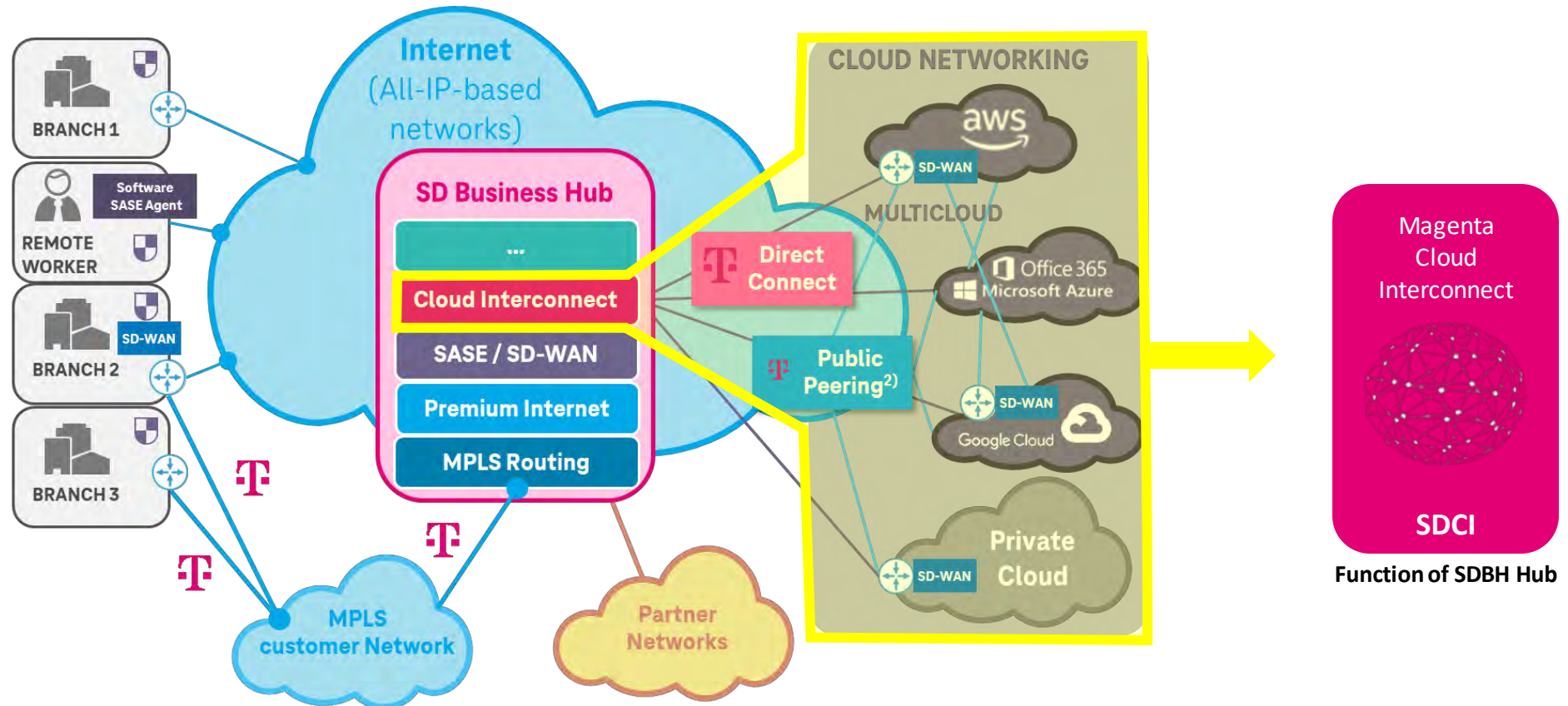
## ...TO DECENTRALIZED INFRASTRUCTURE



- Business happens in the cloud
- Remote workers demand best access
- The location of offices is less relevant

# Magenta Cloud Interconnect and SDBH

**Cloud connectivity** is one of the capabilities provided by the **Virtualized Telco PoP (SDBH)**





# SDX overlay portfolio

## Ecosystem

### Overlay Portfolio Strategy

