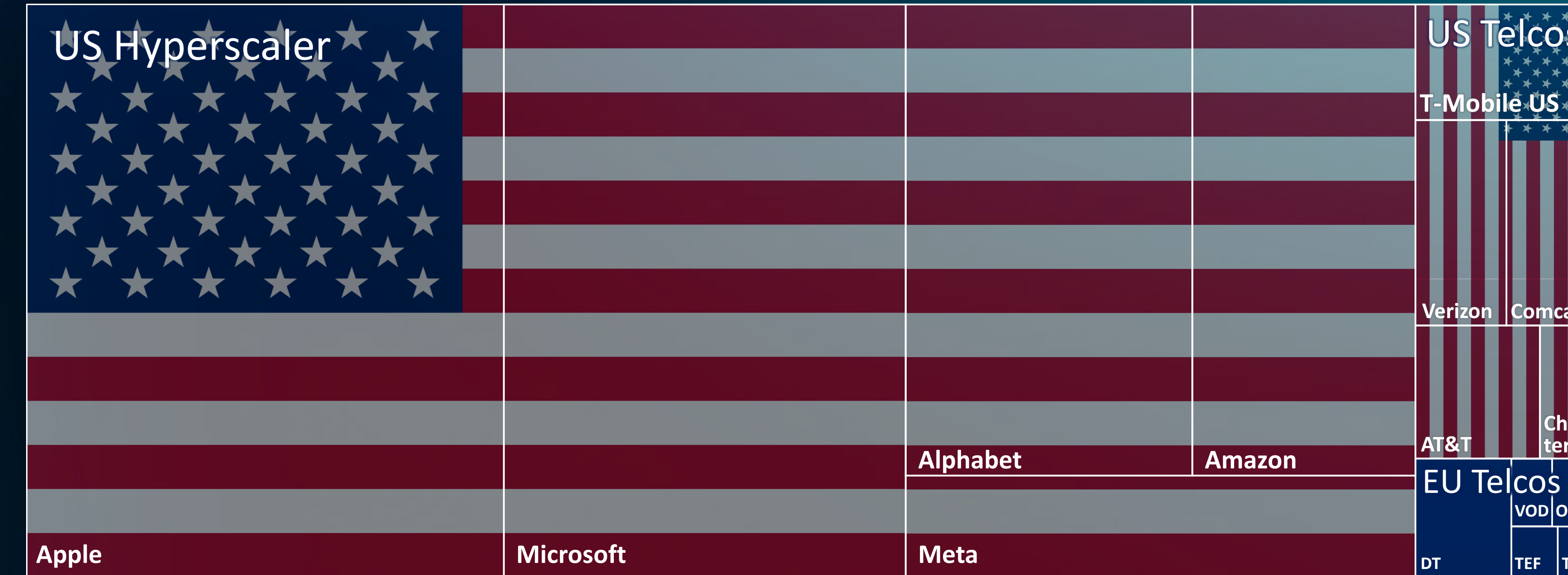




EUROPE:  
GET OUT OF THE  
COMFORT ZONE



# NO EQUAL LEVEL PLAYING FIELD



Source: Market Cap as of 14.02.2023



# EUROPE IS NOT COMPETITIVE IN THE DIGITAL SPACE

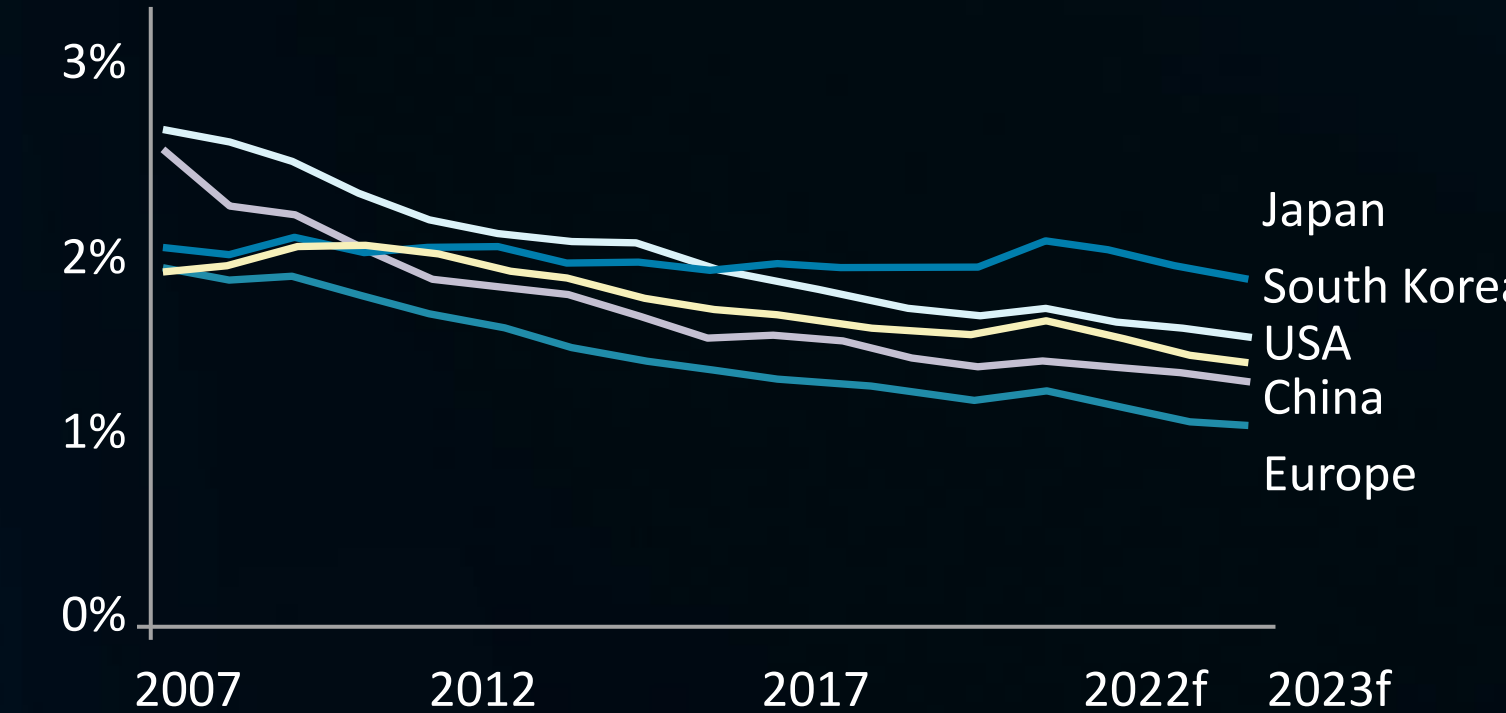
## Semiconductors

**3**  
of the top-15 semiconductor producers are European  
But: European Photolithography is leading worldwide

## Telecommunication

	USA	ASIA (CN, JPN, KOREA)	EUROPE
<b>5G Coverage</b> <small>Source Etno (%)</small>	<b>96</b>	<b>86</b> <b>90</b> <b>95</b>	<b>73</b>
<b>Downlink speed fixed</b> <small>(Etno ookla 2022) (mbps)</small>	<b>230</b>	<b>246</b> <b>234</b> <b>226</b>	<b>169</b>

Telecom spend as a proportion of GDP

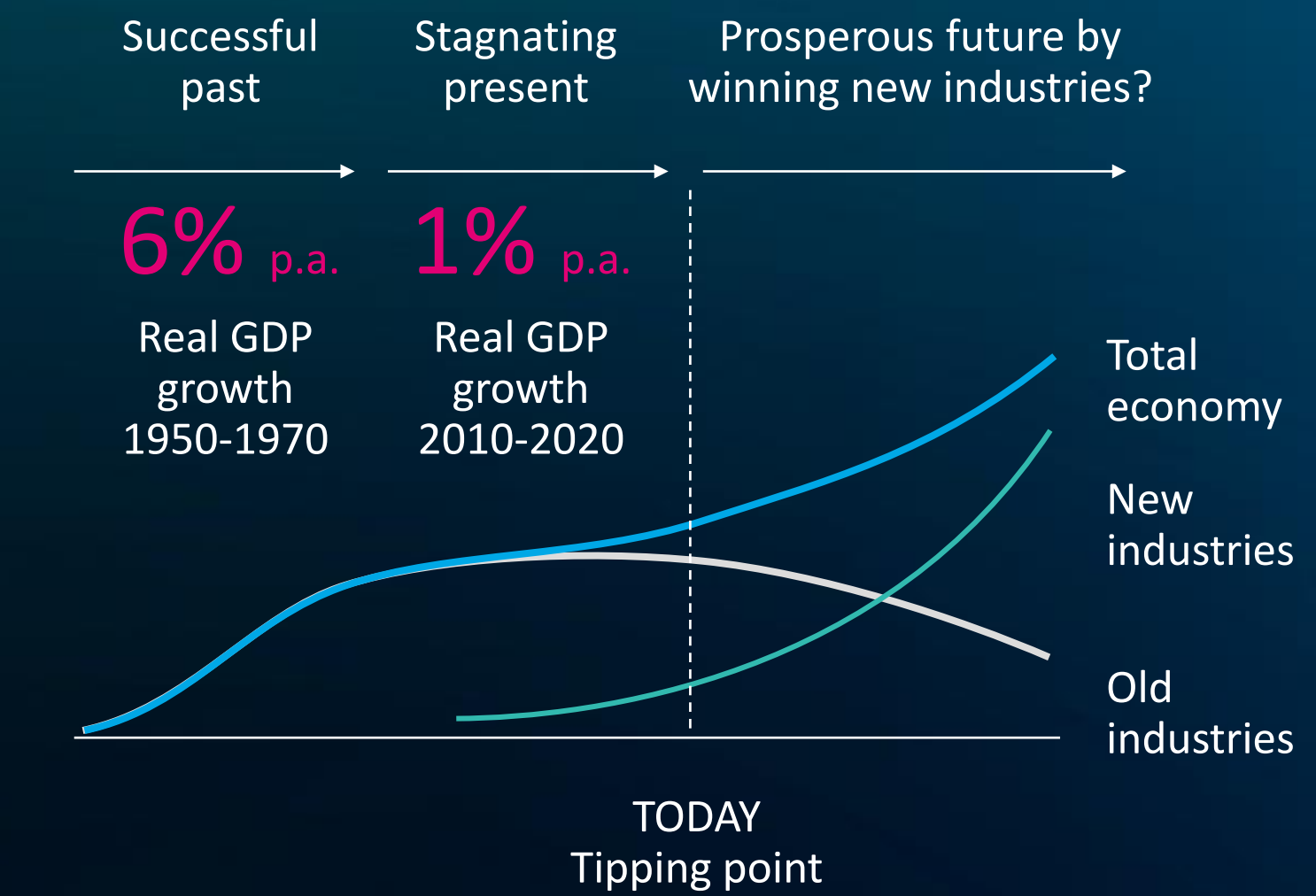


## Data

**92%**  
of all data of the Western world is stored in the USA

## Innovations

New investments for further growth  
Example: Germany



DEPENDENCY IS EASY,  
SOVEREIGNTY IS NOT:  
EUROPE, GET OUT OF THE  
COMFORT ZONE!



# CONTRIBUTION: DEUTSCHE TELEKOM

## Best Infrastructure

Digital infrastructure investor :  
**>€ 20 bn 2022**

Broadband



**>10 mn HH**  
with fiber until 2024



**8 mn HH**  
with fiber until 2024

Mobile

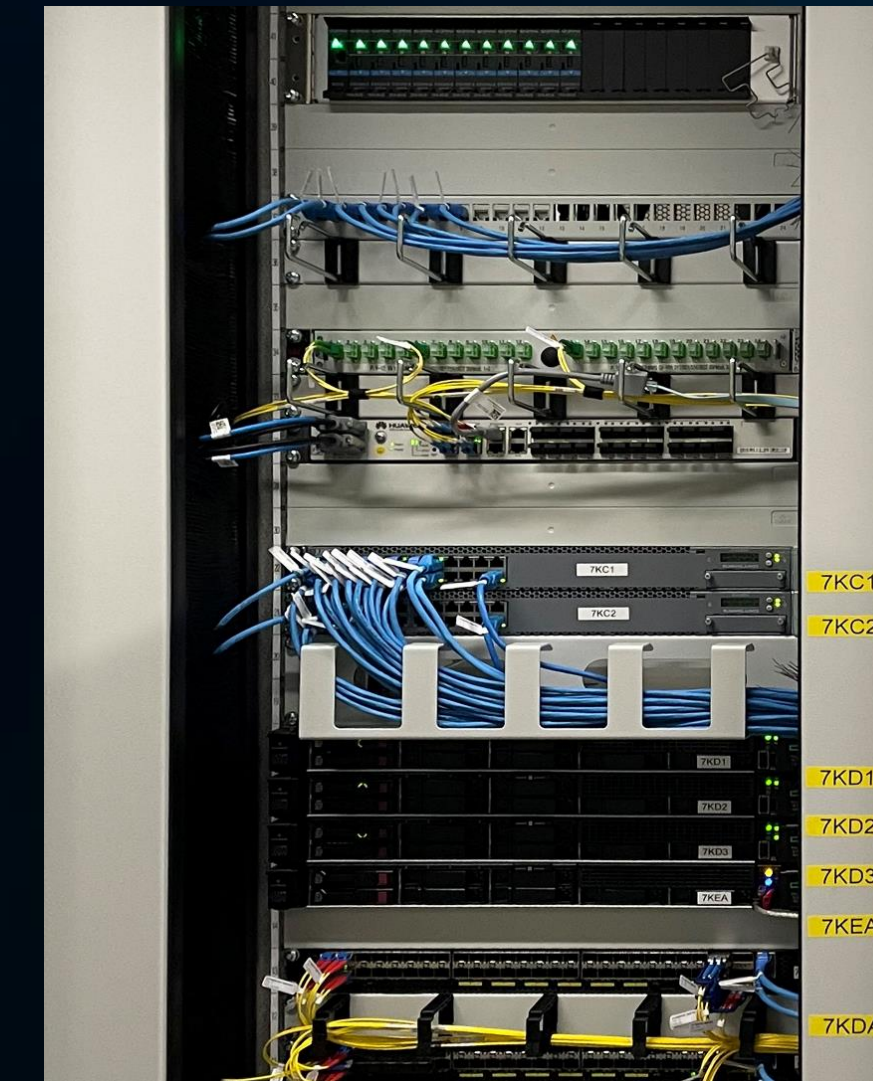


**97% 5G**  
Pop. Coverage until 2024



**>75% 5G**  
Pop. Coverage until 2024

## Software Company



(Access 4.0)

## Sustainable Business Model

Ambition	Year
100% renewable electricity for DT Group	From 2021 onwards
Double energy efficiency in DE & EU	2024 vs 2020
Net-zero for direct and indirect energy consumption (Scope 1 & 2)	2025 vs 2017
Net-zero emissions (Scope 1-3)	Latest 2040
100% circular around technology and devices	In 2030

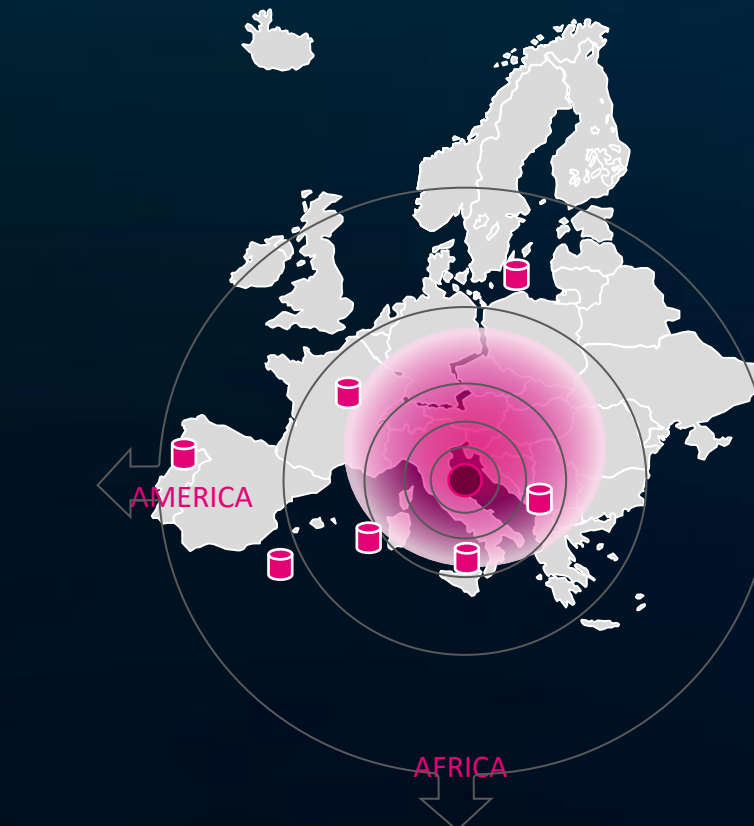


2022: Telekom Group gave back more than **€ 2.6 bn** to society worldwide

## Digitize Customers



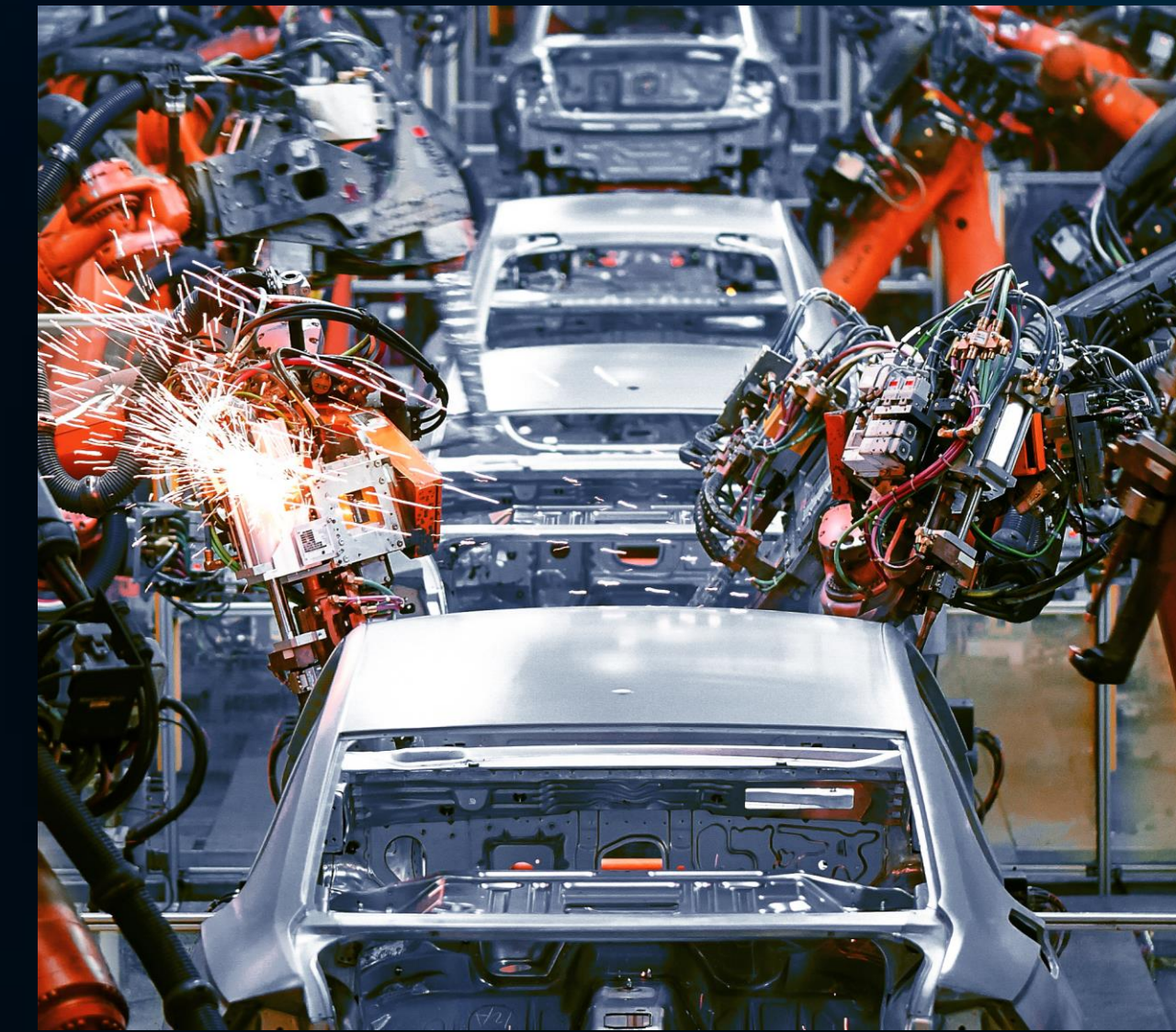
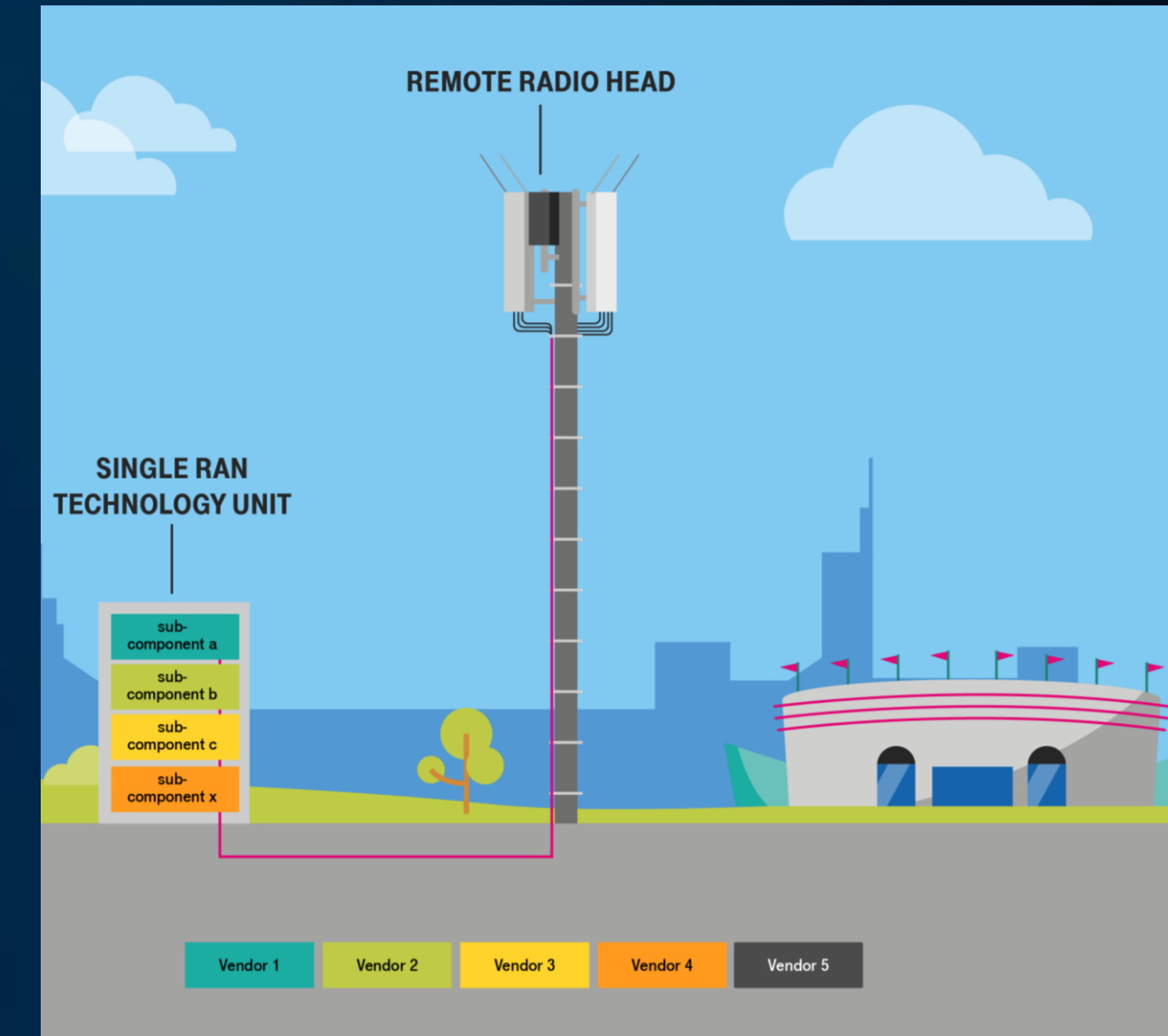
T PHONE PRO  
5G FOR EVERY POCKET



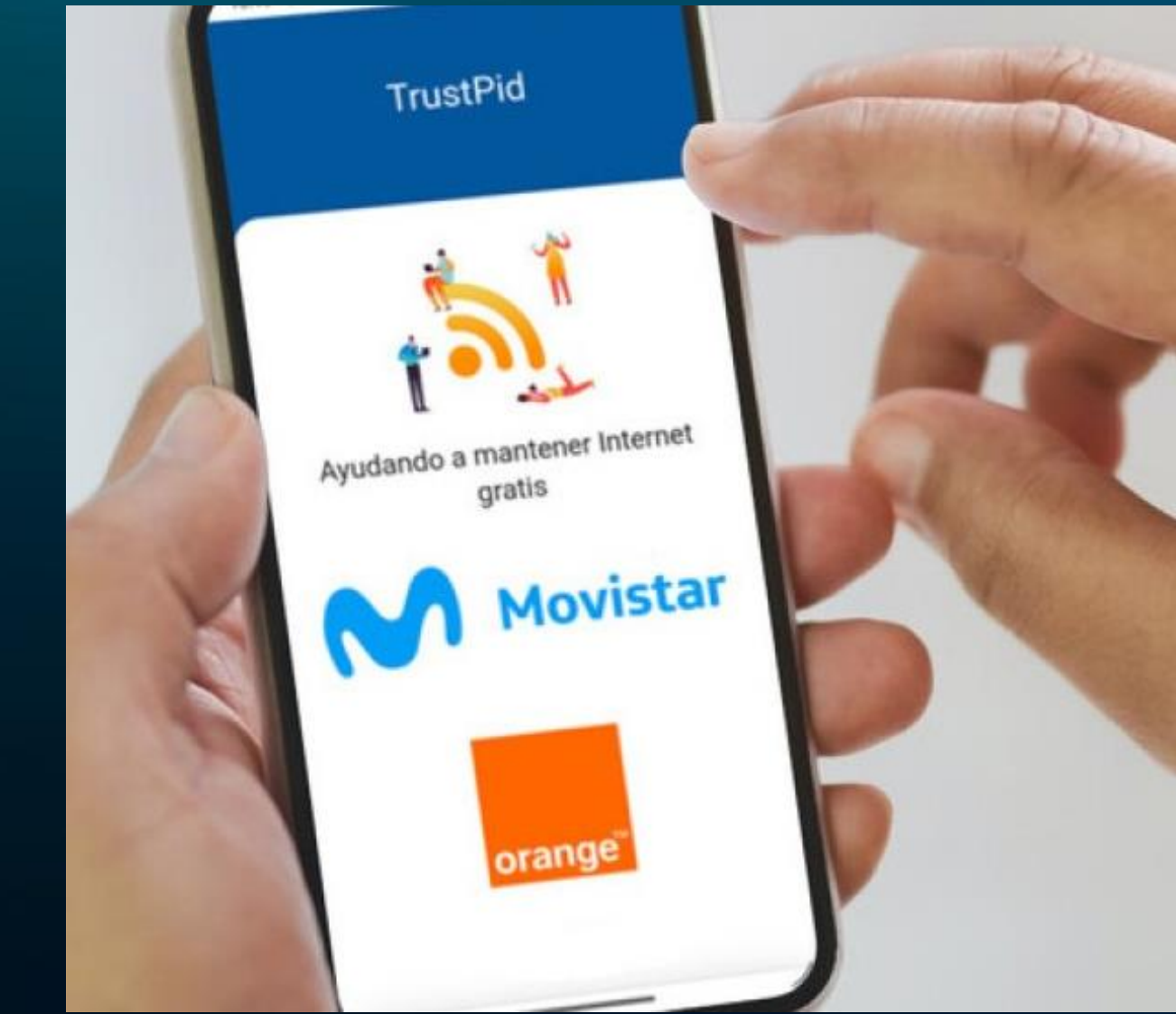
Data Intelligence Hub



# CONTRIBUTION: INDUSTRY



AD-Tech JV





# CONTRIBUTION: POLITICS

## Digital administration

- eGovernment,
- create demand for sovereign Cloud



## Market Structure

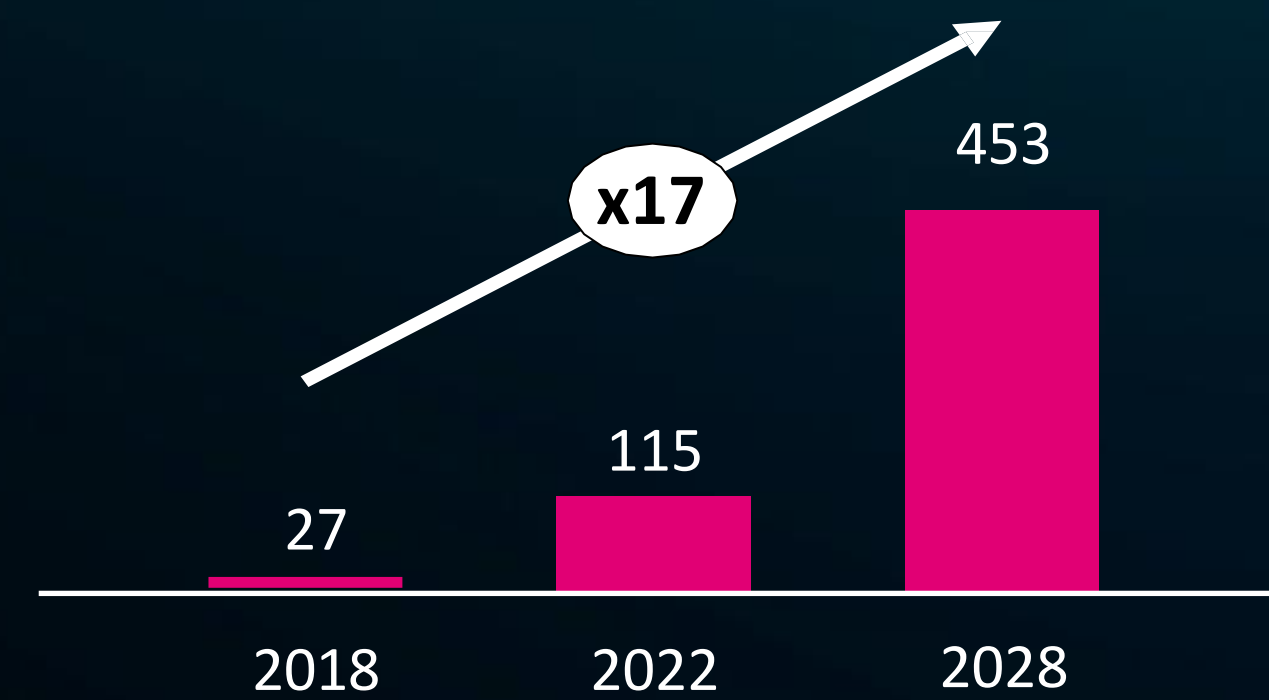
- Consolidation
- Spectrum policy



## Regulation

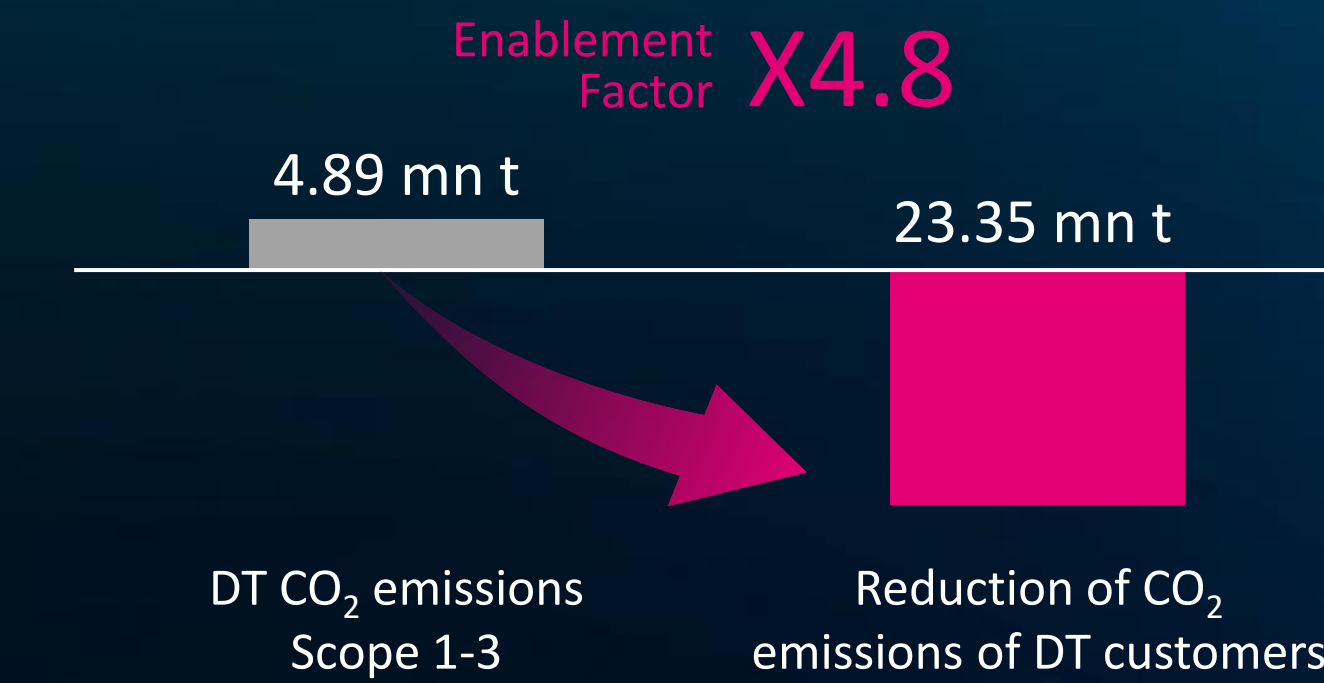
- Fair Share

x17 lobal mobile data traffic until 2028



## Energy

- Secure sustainable and competitive energy supply
- Include Telco-Investments in EU Taxonomie





## GET OUT OF THE COMFORT ZONE BY...

1

Place scale over “petty statehood”. Consolidation can mean: Platform consolidation (CPaaS)

2

Built Telcos as platforms and create a new “developers garden” (APIs)

3

Trust your nerds! Technologies first. Business plans second.

4

Sovereignty is solidarity. Create Win-Win-Win-Situations

5

**Learn from crisis management:**  
New speed through less regulation