AI Investor Day

AI is not just another tool,

AI IS AN ENTERPRISE REDESIGN

DT built the digital foundations early – AI is the next step

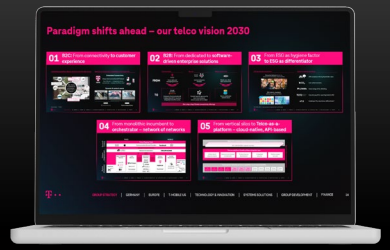
Cycle 1: Leading EU telco



“Fix the basics”:

- IP everywhere:
  100% IP accesses
- Service transformation:
  customer and digital first
- Convergence Push:
  Magenta EINS
- AI Guidelines:
  build principles for the responsible use of AI (2018)

Cycle 2: Leading Digital Telco



Step up in software and orchestration capabilities:

- From buyer to builder:
  Access 4.0, one API layer for Europe, first O-RAN
- Scaling digital experts and enabling an agile organization
- Proving transatlantic scale with OneApp

Cycle 3: Data-informed, AI-enabled, digital-first



Infuse AI into all processes and areas of DT

- AI for everyone: AI CC & AI Factory; all employees enabled
- AI in production:
  500+ internal projects live
- Sovereign AI:
  Industrial AI Cloud with Nvidia – Europe’s largest
- New revenue pools with AI-native products and services

Next: Leading AI Telco



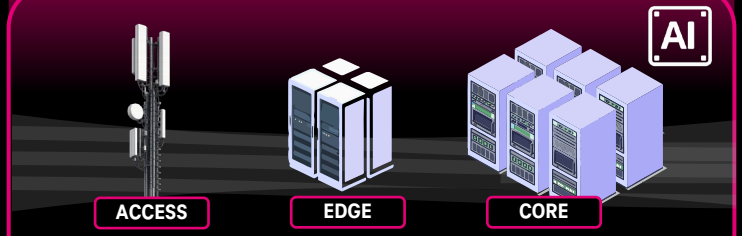
AI-native by design

- Network runs itself: autonomous operations as the default
- AI-driven Service:
  agents resolve the majority of interactions
- Connectivity for agents:
  monetizable, low-latency
- Scaling new AI revenue pools
- Human-led agent teams

CMD 2015 → **CMD 2021** → **CMD 2024**

AI is rewriting telco economics across three dimensions

1 Network



From bits & bytes to a **new monetizable intelligence:** powering Physical AI with low latency services (6G) & sovereign AI Clouds

Run cost **Resilience** **New revenues**

2 Customer



From people in queues to **agents running the workflows:** democratizing coding, AI-assisted decisions and automated processes

Cost-to-serve **NPS** **Retention**

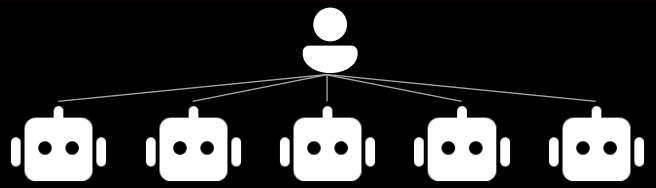
3 Enterprise



From selling ICT to **powering enterprise AI**: with sovereign, scalable and industry-specific AI solutions

AI Revenues

Enabler: a new AI operating model



From functional hand-offs to **human-led agent teams**: redesigning, building and scaling AI E2E

- **AI-native teams:** Tiger teams, AI restructuring offices, business ownership
- **One Group approach:** common design, reusable data products, local integration
- **AI by default:** AI-native development, reusable harnesses & strong evals
- **Value accountability:** business-owned adoption along audacious targets

Productivity **Cycle times** **G&A**

AI-native products as new revenue pools

Consumer AI

The trusted AI companion for everyday life. Smart. Secure. Device- & App agnostic



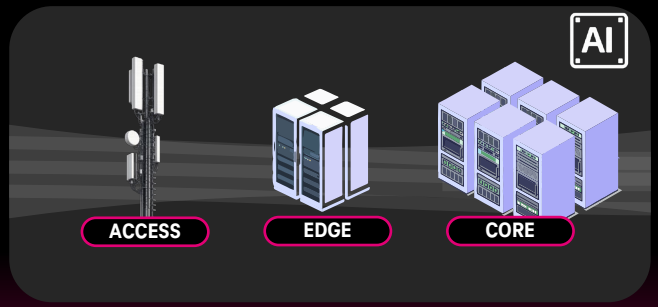
Industrial / Enterprise AI

AI enterprise solutions across the whole stack



AI-ready connectivity

More intelligent, low latency, tokenizable networks for the physical AI era



€1 bn + revenue potential until 2030[1]

[1] DT ex US

From trusted connectivtity to trusted AI: Our right to play in AI

Our Game

DT plays where trust and control matter most:
combining **sovereignty** and **security** with access to **leading-edge technology**

Not our Game

Frontier models: We don't build the next big LLM – we partner with the best

Hyperscale data centers: We don't compete on scale – we focus where specific customer needs differentiate us

Our right to play

Trust & Control

- #1 Telco brand in the world
- Reliable partner for government services
- Europe's largest SoC

From trusted connectivity to trusted AI

Context & Scale

- ~200 mn customers
- 100 bn calls on our network
- 100 mn contact center interactions p.a.

Unmatched customer access and insights on both side of the Atlantic

Infra assets

- Leading network infra-structure across EU & US
- Sovereign compute in EU with AIIC live
- E2E sovereign AI stack

A sovereign AI infrastructure – already built, already live.

Ecosystem access

- Partnerships with all leading frontier models
- >€300 mn investment in leading AI companies (n8n, BFL, Lovable, Nscale, Decagon, ...)

Direct access (and insights) to the heart of the AI ecosystem

People

- >250k AI enablements since 2023
- 24.8% share of digital experts
- AI toolsets deployed

Our people are AI-ready – all set and motivated to embrace the AI journey

Sustainability, Trust and Resilience are key differentiators

AI Capability > Scale > Value

Efficient technology

Scale AI with efficient energy, compute and resources

- **100%** renewable electricity
- **PUE 1.2** in Munich AI Factory
- **Net zero emissions since 2025** (Scope 1 & 2)
- **2024 – Green AI Principles** for coding and infrastructure
- **Heat re-use &** intelligent **cooling** in Data Centers
- **Hardware circularity** – ensuring availability and management of IT and network resources

Trust & security

Enable safe and reliable AI use for customers and business

- **AI-powered Cybersecurity at scale**
  - AI-analysis of >5bn security-relevant datapoints per day
  - AI-powered detection and defense of >20k DDoS attacks per month
  - 99% accuracy in AI-detection of false positives (first level support)
- **European sovereignty** – trusted data and AI operations
- **Secure-by-design** – building trust from development to operation

Resilient infrastructure

Ensure continuity when systems, sites and supply are under stress

- **Crisis** management – being where we are needed
- Built-in **network resilience** – redundancy, power and recovery
- Intelligent **protection** of network and services **against extreme weather and physical threats**
- **Business continuity** by design

Today: AI is not a vision anymore



>95% faster incident handling — **RAN Guardian**

~42% Code — **AI generated Code**

2.6 mn deflected calls / H1 ‘26 — **AI driven Bot**

>83% AI usage — **Employees use AI**

~10k NVIDIA GPUs — **Industrial AI Cloud**

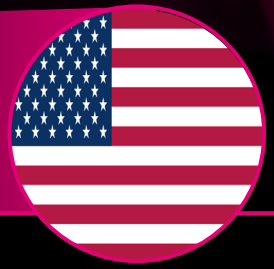
400+ Use Cases — **B2B Use Cases,** e.g. Voice AI Notes, Agentic Hub, “Schockraum”



AI Innovation Hub
Joint lab researching future AI use cases e.g. AI RAN

Building the network of the future: 6G
Joint initiative to design and standardize the future AI-native network

T-Challenge
Joint events to discover and interact with the AI ecosystem



-55% # Calls — **Call reduction**

+12% NPS — **Expert Assist**

~32% Contacts handled — **AI Agent**

>30 k adjustments — **Antenna adjustments during Winter Storm Fern**

AI Transformation operationally steered via 2030 AI ambitions

DT ex US; selected 2030 examples

Customer interface

100%
calls initially handled by AI

50–55%
reduced calls & chats (vs 2023)

Up to 70%
retention & tariff changes via digital

+5
tNPS Sales & Service touchpoints

Network

10–15%
Network gross savings[1]

Level 4
Autonomous Network for high value use cases

>4 CXI
for >90% of mobile customers

It & Software

+ 50–60%
software developer productivity

70–80%
of our code written with AI

15–20%
IT gross savings[1]

Financial Impact

~€1.1 bn by 2027
Gross savings from AI and automation[2]

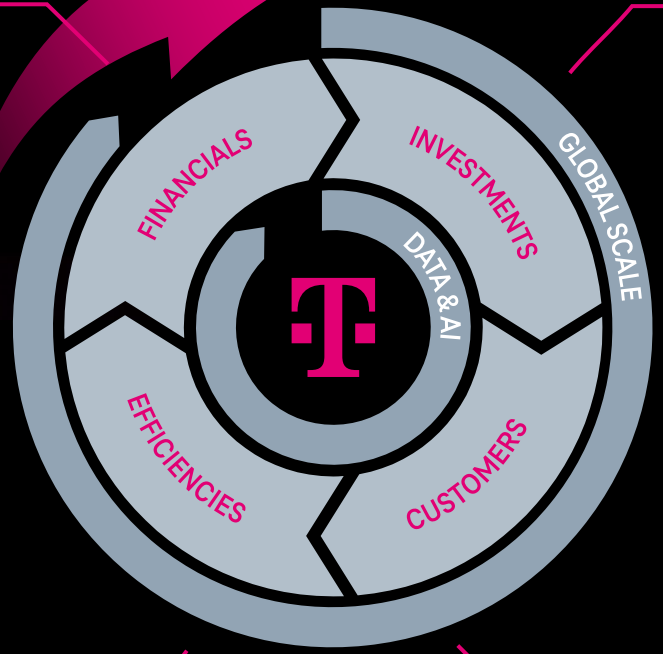
~€2.5 bn by 2030
Gross savings from AI and automation[1]

>€ 1 bn
Additional revenues from new AI value pools by 2030

[1] IDC AL, 2030 vs. 2023, DT ex US, excl. token costs, incl. cap. labour [2] vs 2023, IDC AL and Capex, excl. token costs

AI reinforces our successful flywheel strategy

Data & AI
Accelerate every turn



Financials

Enhancing consistent growth, **higher margins and new revenue pools**

Investments

A network **powering Physical AI with low latency services (6G) & sovereign AI Clouds**

Efficiencies

AI-powered operations **across every single workflow**

Customers

Hyperpersonalized, intelligent, instant **experiences and products**

Our T: People & Brand

Growing our **people for AI-native execution** & turning our **trusted brand into an AI advantage**

Global scale

Leveraging **transatlantic scale in the AI economy**