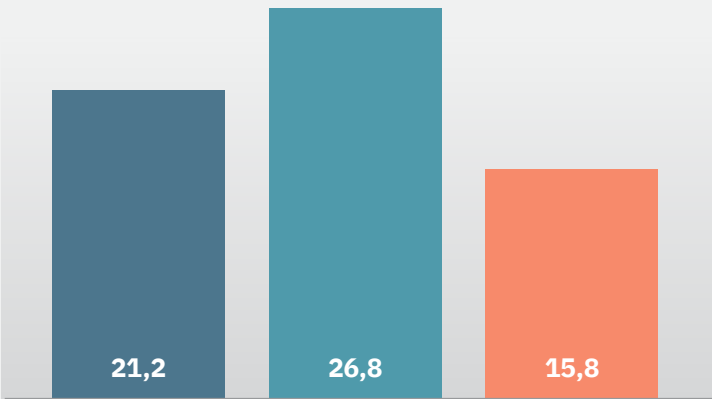


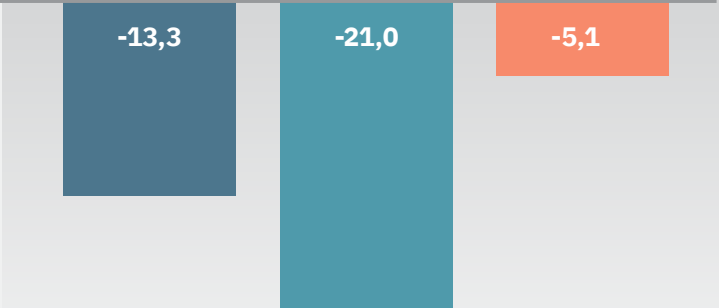
The business situation is viewed as broadly positive, but investment conditions are not.

Telecommunications Business Climate Index

CURRENT BUSINESS SITUATION



INVESTMENT CONDITIONS



■ Geschäftsklimaindex Telekommunikation
■ Aktuell
■ Entwicklung nächste 6 Monate

Source: Survey of network operators (n=175–183)

METHODOLOGY

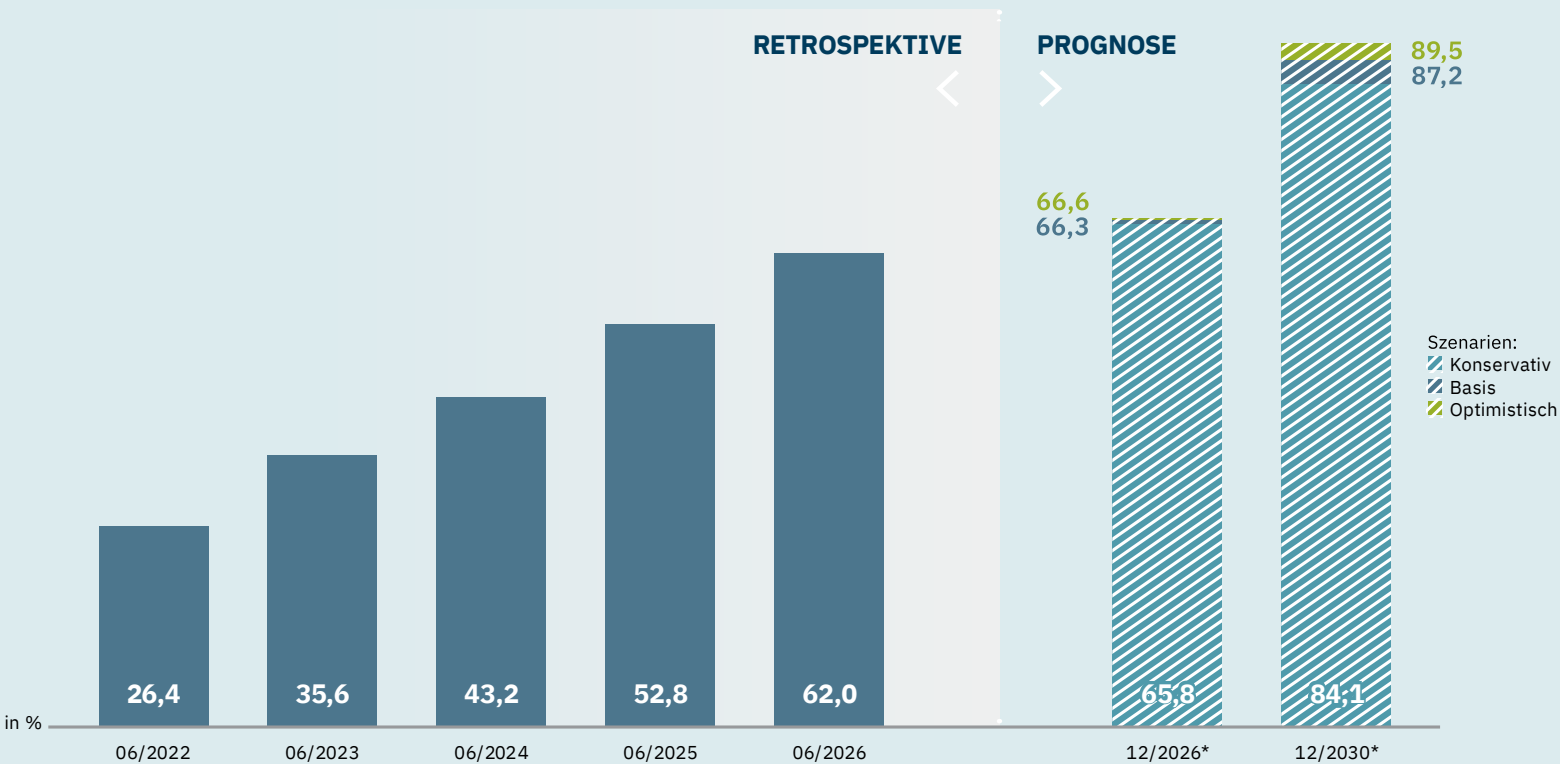
Network operators assess their current business situation and their expectations for the next six months. The response options are “good,” “satisfactory,” and “poor”, and “more favourable,” “unchanged,” and “less favourable”, respectively.

The reported figure is the balance of shares of responses “good” and “poor”, and “more favourable” and “less favourable”, respectively. The Telecommunications Business Climate Index is calculated as the average of the balances for the current business situation and expectations.

Interpretation guide:
A value of +100 means that all respondents assess the current business situation as good or expect an improvement. A value of -100 means that all respondents assess the current business situation as poor or expect a deterioration.

Fibre rollout coverage rises to 62 per cent (28.7 million homes passed).

Fibre rollout coverage over time



Source: Survey of network operators (n=178); Deutsche Telekom AG (2026a); Deutsche Telekom AG (2026b); Deutsche Telekom AG (2025a); Deutsche Telekom AG (2025b); Federal Statistical Office of Germany (2026); Statistical Offices of the Federation and the Länder (2026); Basis for fibre rollout coverage 06/2026: 46.2m premises (residential units, businesses)

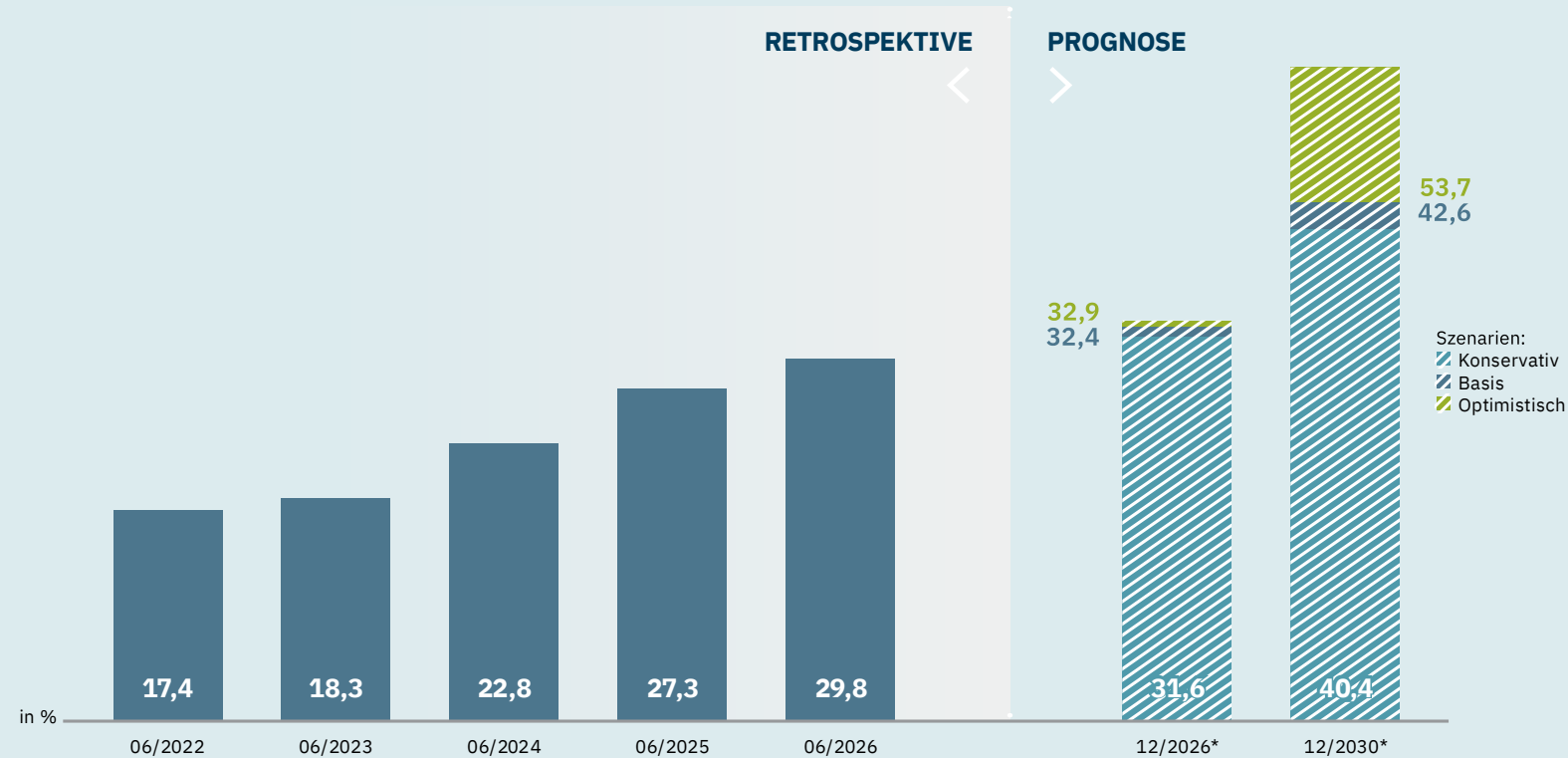
DETAILED RESULTS

- Fibre rollout coverage stood at 62.0% at the end of June 2026, equivalent to 28.7m homes passed.
- Under the baseline scenario, coverage is projected to increase by 4.3 percentage points by the end of 2026, reaching 66.3%.
- By the end of 2030, fibre rollout coverage is expected to range between 84.1% and 89.5%, depending on the scenario.*

*Forecast:
The scenarios are based on differing assumed growth trajectories and therefore reflect different conditions for further investment in fibre rollout.

The fibre connection rate rises moderately year-on-year.

The fibre connection rate over time



Source: Survey of network operators (n=178); Deutsche Telekom AG (2026a); Deutsche Telekom AG (2026b); Deutsche Telekom AG (2025a); Deutsche Telekom AG (2025b); Federal Statistical Office of Germany (2026); Statistical Offices of the Federation and the Länder (2026); Basis for the fibre connection rate 06/2026: 46.2m premises (residential units, businesses)

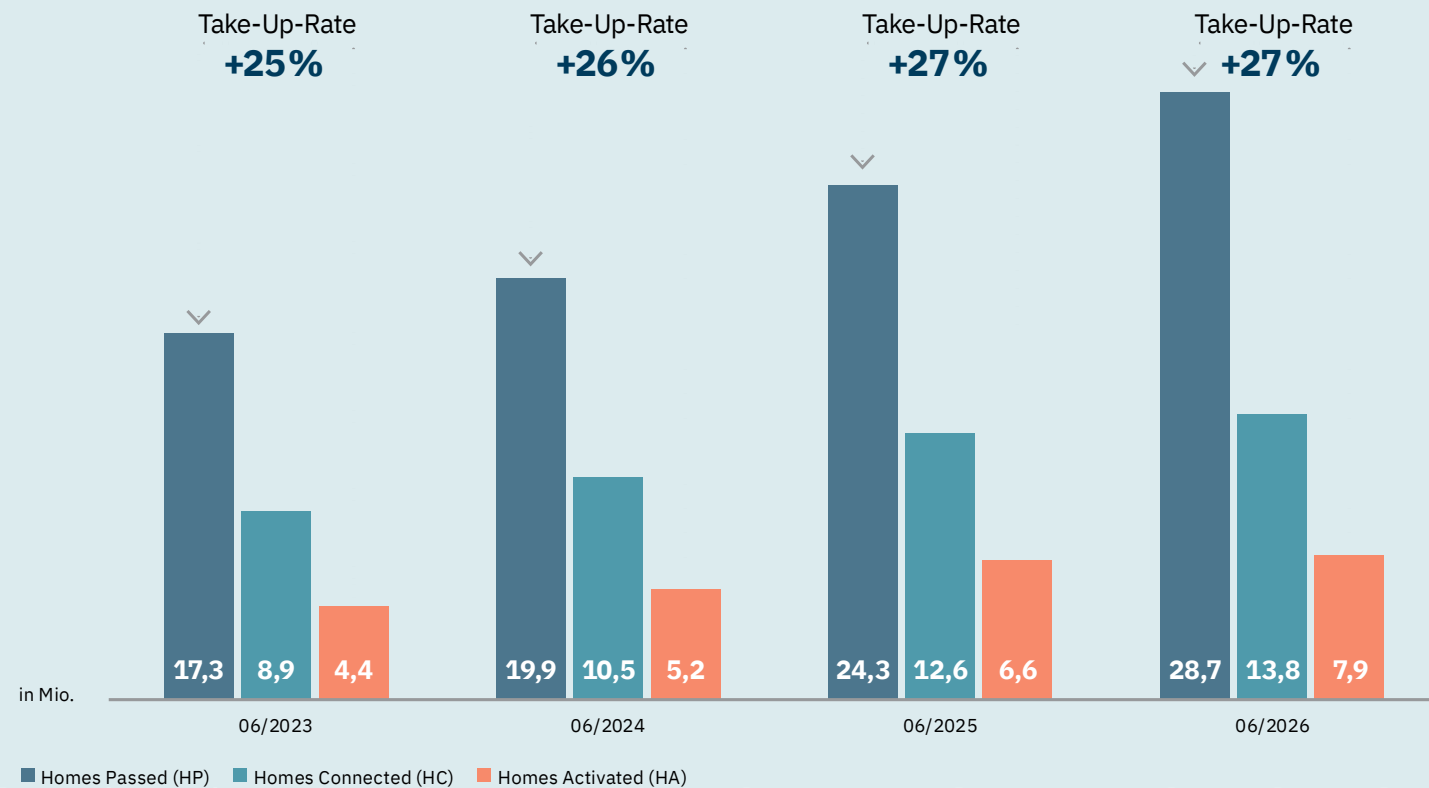
DETAILED RESULTS

- The fibre connection rate stood at 29.8% at the end of June 2026, equivalent to 13.8m homes connected.
- Under the baseline scenario, the connection rate is expected to reach 32.4% by the end of 2026.
- By the end of 2030, the projected fibre connection rate* is 42.6% under the baseline scenario. Under the optimistic scenario, it could rise to 53.7%.

*Forecast:
The scenarios are based on differing assumed growth trajectories and therefore reflect different conditions for further investment in fibre rollout.

The take-up rate remains stable compared with the previous year.

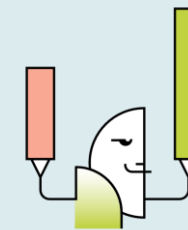
Fibre take-up rate over time



Source: Network operator survey (n = 178); Deutsche Telekom AG (2026a); Deutsche Telekom AG (2026b); Deutsche Telekom AG (2025a); Deutsche Telekom AG (2025b)

- The number of subscribed fibre connections (Homes Activated) increased significantly by 1.3 million year on year to 7.9 million.
- The number of Homes Passed also increased significantly. Consequently, the take-up rate remained stable year on year at 27 percent.
- The take-up rate of competitors stands at approximately 33 percent, compared with around 20 percent for Deutsche Telekom.

DETAILED RESULTS

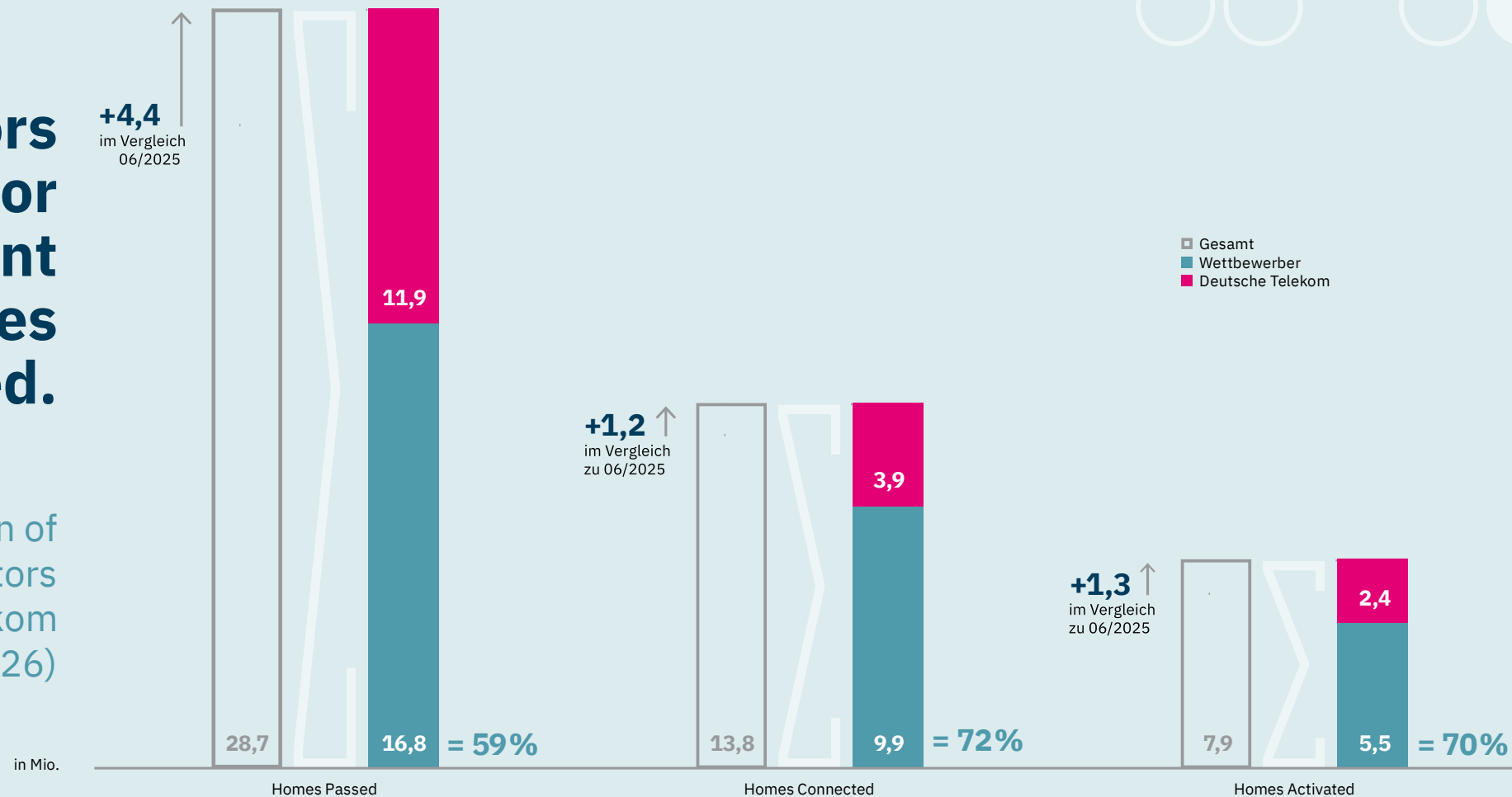


+13 percentage points

Competitors' take-up rate vs. Deutsche Telekom

Competitors account for 72 per cent of homes connected.

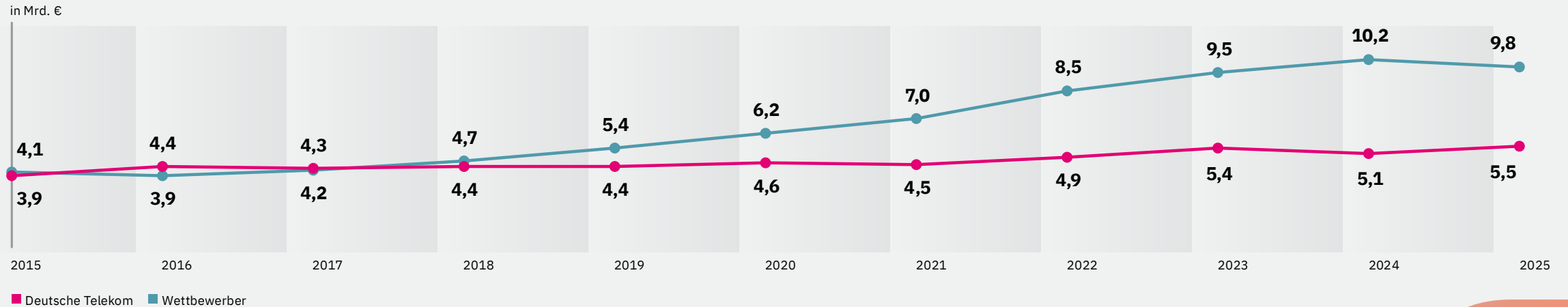
Distribution of connections: competitors and Deutsche Telekom (as of 06/2026)



Source: Survey of network operators (N=178); Deutsche Telekom AG (2026a); Deutsche Telekom AG (2026b); Deutsche Telekom AG (2025a); Deutsche Telekom AG (2025b); Deutsche Telekom figure for homes passed as of 30 June 2026 = 13.6m; Values used for Deutsche Telekom (BREKO estimate, Glasfaser Plus is attributed to Deutsche Telekom, while other partnerships, e.g. Glasfaser Nordwest and various municipal utility partnerships, are attributed to competitors): homes passed = 1.85m, homes connected = 3.9m, homes activated = 2.35m

Total investment in the telecommunications market amounts to €15.3 billion.

Investment in broadband network infrastructure (incl. public funding)*



Total investment in 2025: €15.3 billion. Competitors' investment declined slightly, while Deutsche Telekom's investment increased slightly.

- Total investment since 1998: €245.1 billion

- Investment shares since market liberalization in 1998:

- 56% Competitors
- 44% Deutsche Telekom

- Investment by BREKO members in 2025: €4.4 billion**

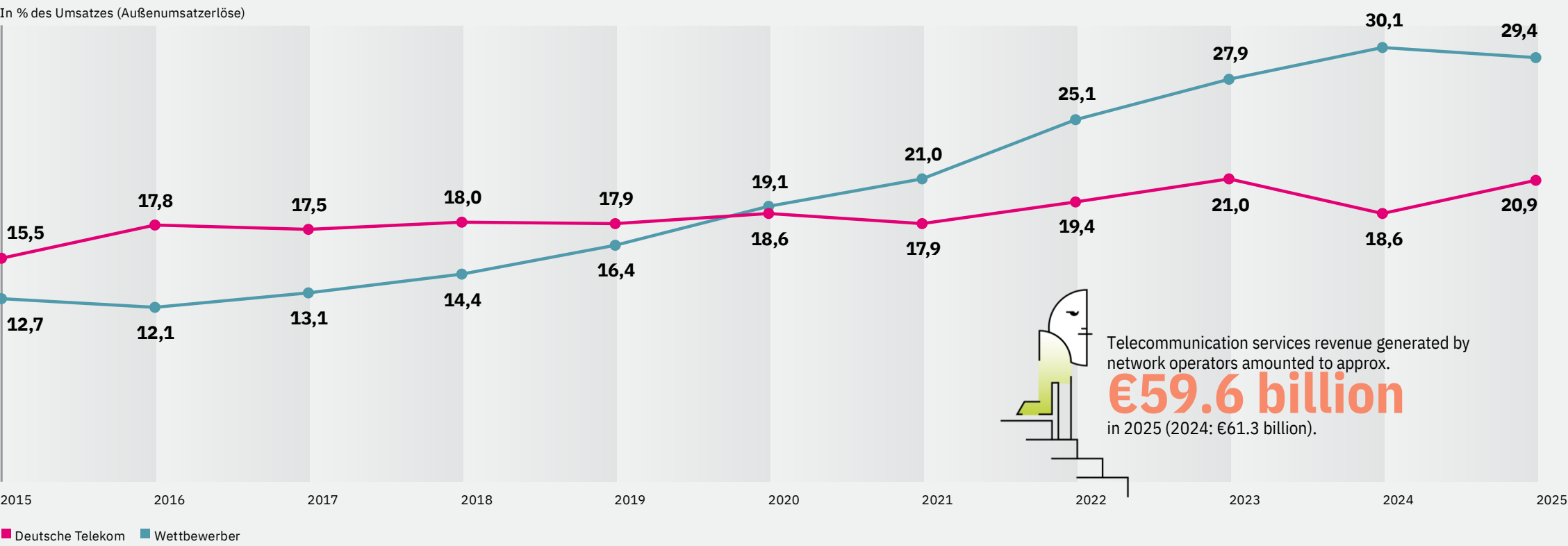
- Share of public funding in 2025: 8%

*Investment in new and existing broadband network infrastructure (excluding investment in mobile spectrum licenses)
Source: Federal Network Agency (2025a), Federal Network Agency (2025b), Annual Report 2025, p. 8; own calculations

**Compared with 2024, BREKO: approx. €4.9 billion

Competitors' investment ratio has increased significantly over the past ten years.

Investment ratio in broadband network infrastructure

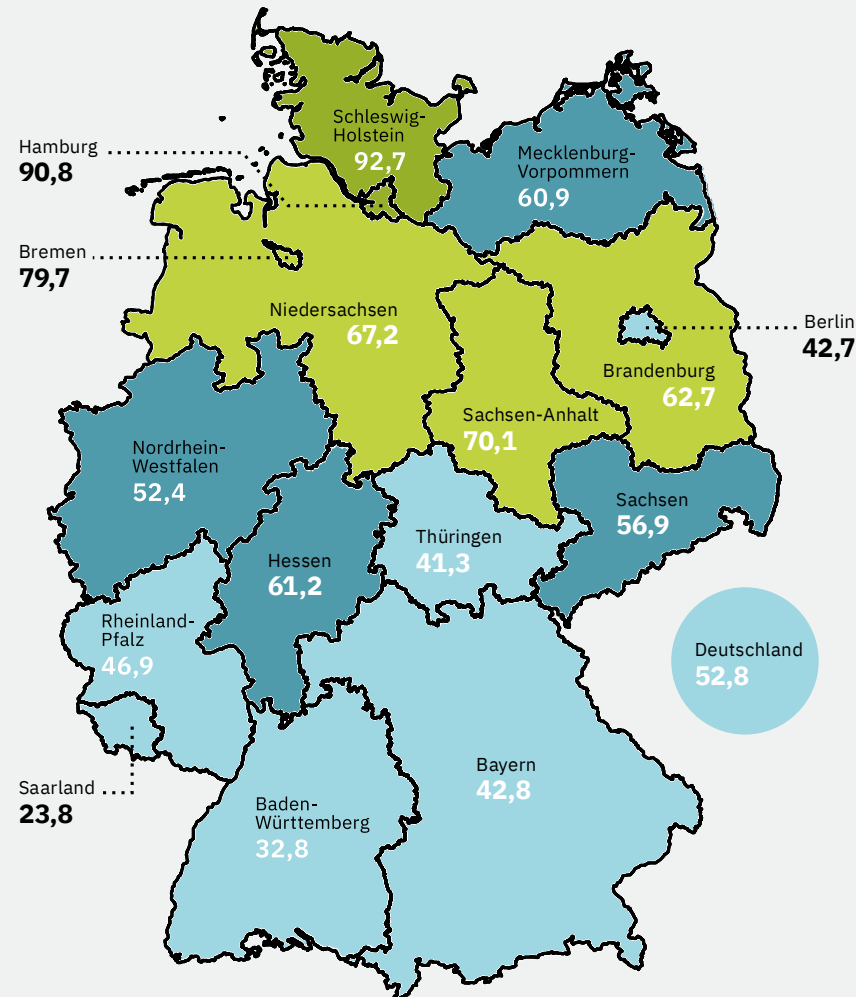


Source: Bundesnetzagentur (2025a), Bundesnetzagentur (2025b)

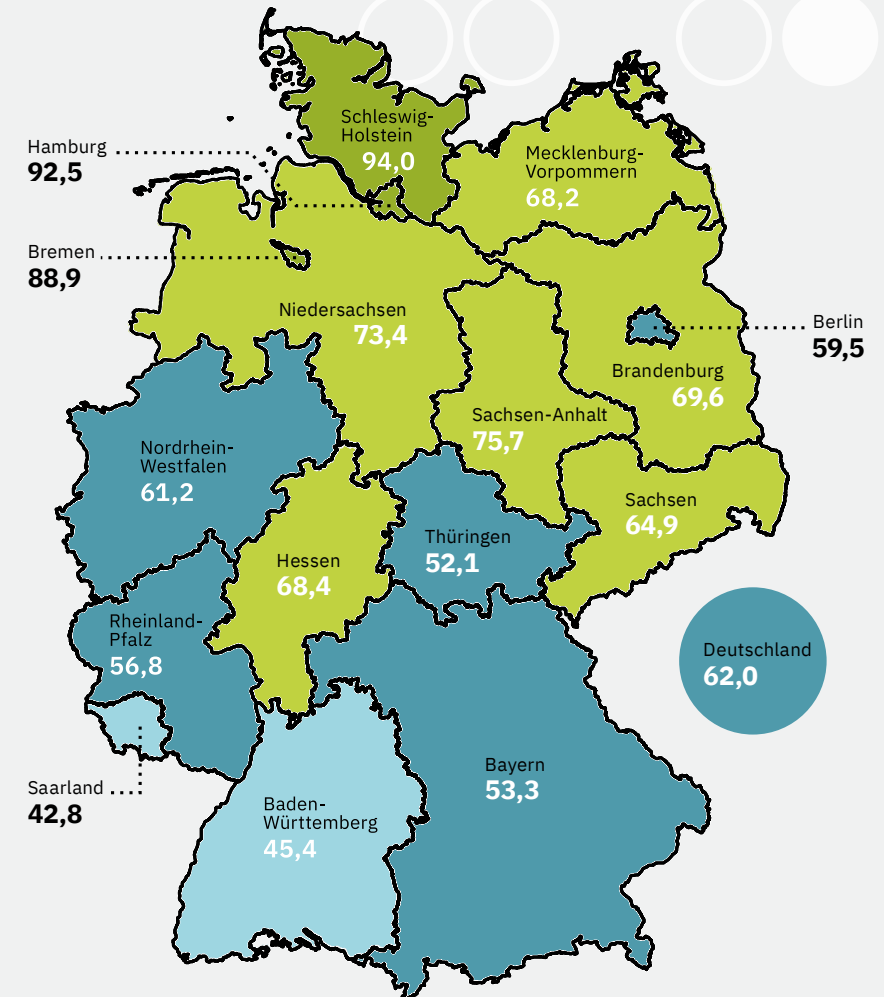
Schleswig-Holstein leads the way among Germany's federal states.

Federal states compared – fibre rollout rate

06/2025



06/2026



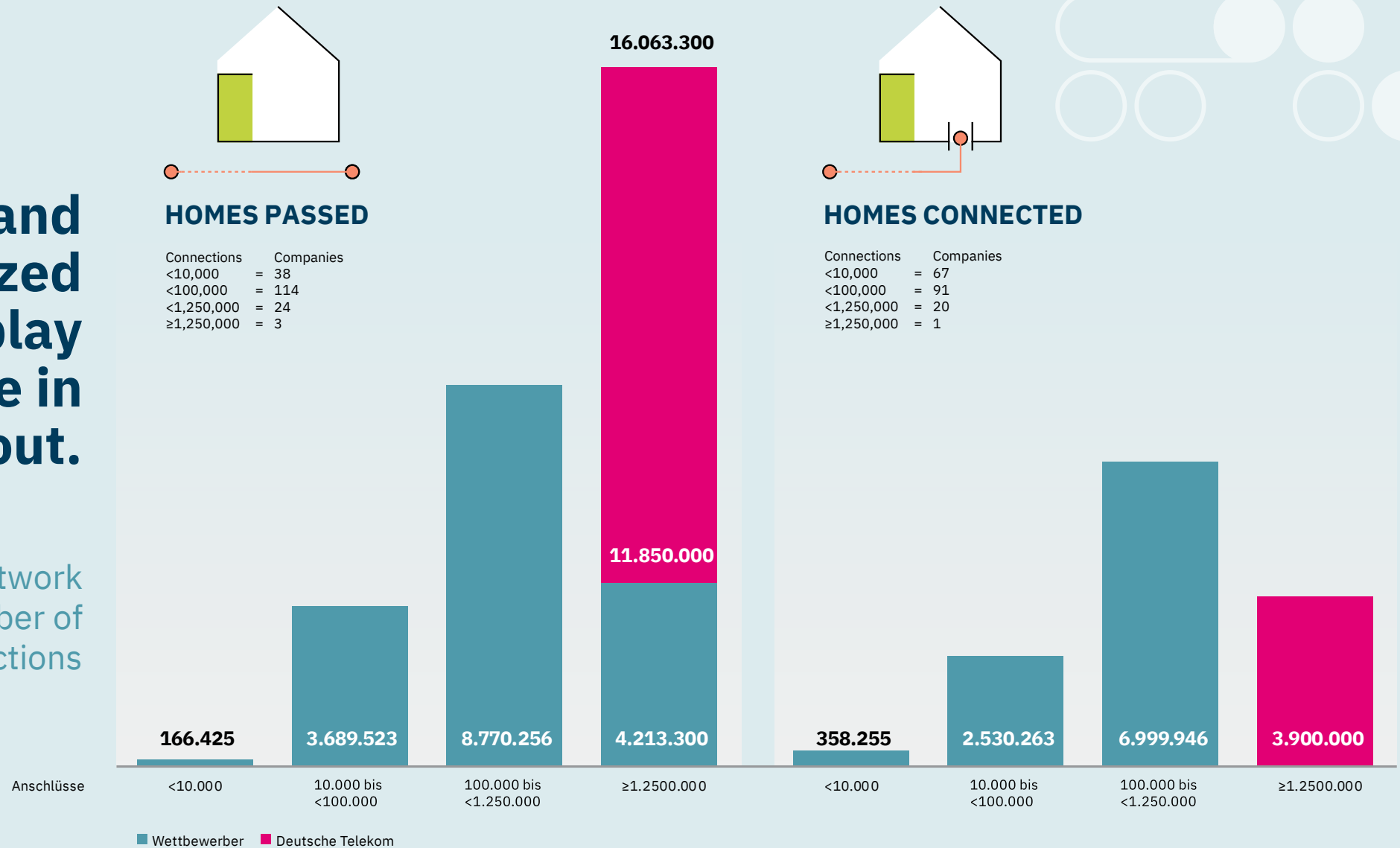
Glasfaserausbauquote in Prozent der Wirtschaftseinheiten

- ≤50,0 %
- ≤62,0 %
- ≤80,0 %
- >80,0 %

Source: Survey of network operators (n=178); Deutsche Telekom AG (2026a); Deutsche Telekom AG (2026b); Deutsche Telekom AG (2025a); Deutsche Telekom AG (2025b); Federal Statistical Office (2026); Statistical Offices of the Federation and the Federal States (2026); own calculations

Small and medium-sized enterprises play a key role in fibre rollout.

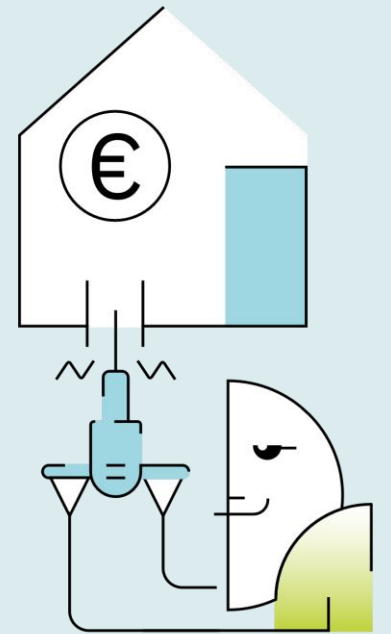
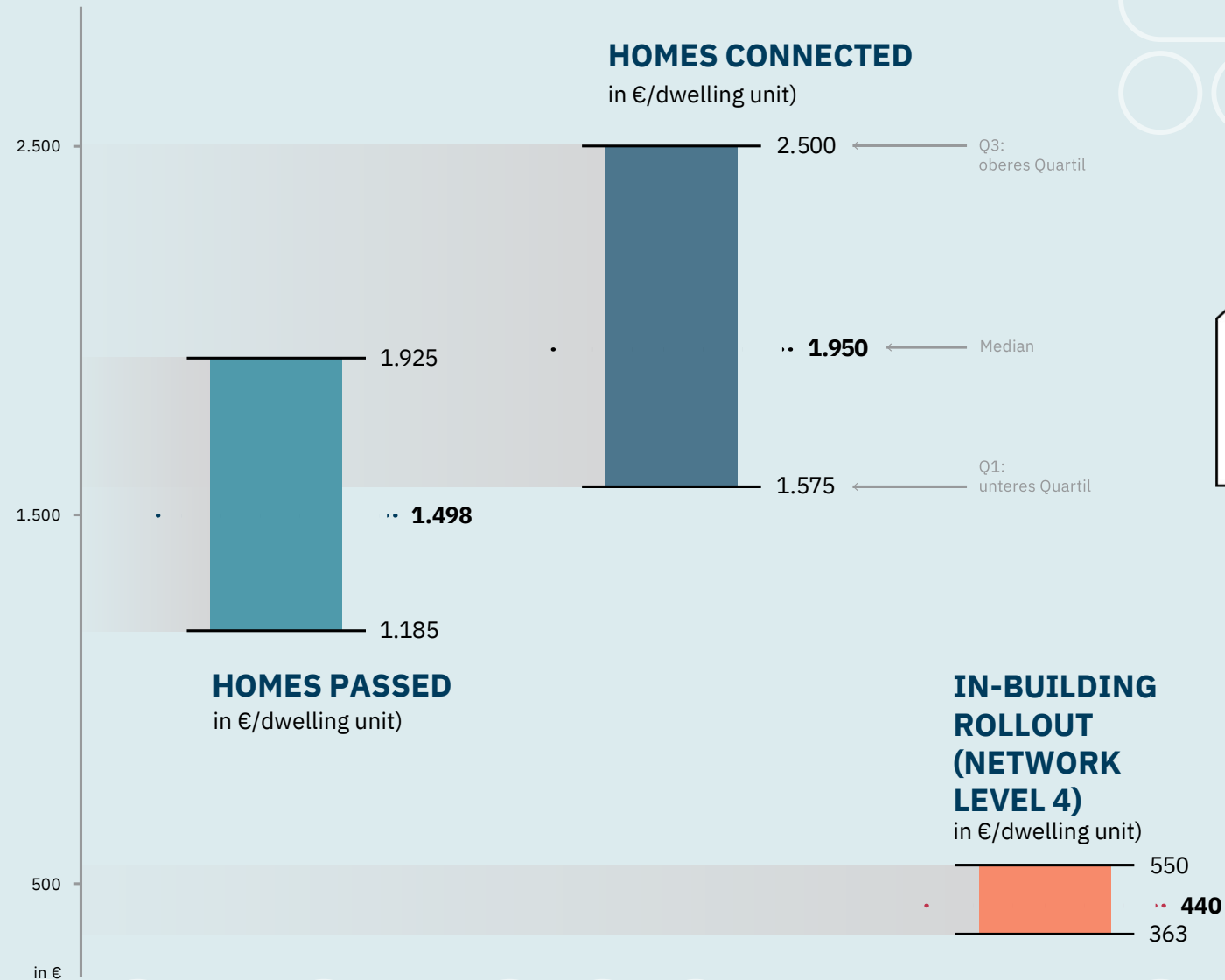
Distribution of network operators by number of connections



Source: Network operator survey (n=178); Deutsche Telekom AG (2026a); Deutsche Telekom AG (2026b); Deutsche Telekom AG (2025a); Deutsche Telekom AG (2025b); Deutsche Telekom's reported figure for Homes Passed as of 30 June 2026: 13.6 million; figures used for Deutsche Telekom (BREKO estimate; Glasfaser Plus is attributed to Deutsche Telekom; other cooperations, e.g. Glasfaser Nordwest and various municipal utility cooperations, are attributed to competitors): Homes Passed = 11.85 million, Homes Connected = 3.9 million, Homes Activated = 2.35 million.

Rollout costs vary considerably. The building connection is the most expensive.

Average net costs for the different rollout stages per connection in euros*

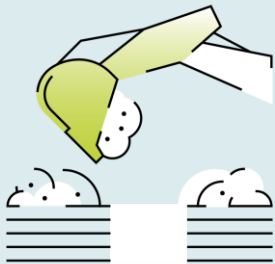
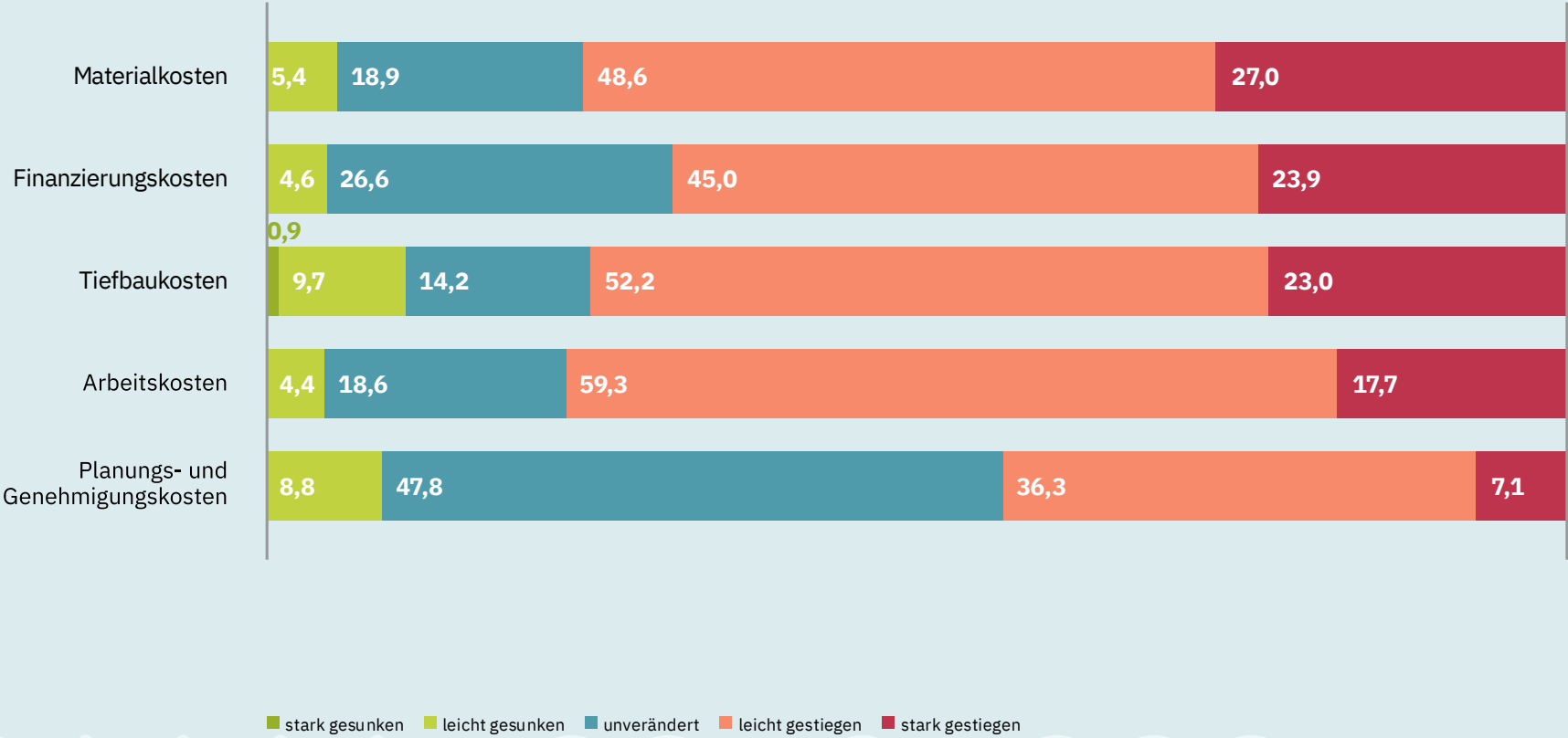


Source: Survey of network operators (n = 48–60), question: "What are your average costs for the different rollout stages per connection? (Estimates are sufficient)"

Outliers were removed from the raw data using the IQR method. The median represents the middle value of the adjusted distribution. Q1: 25 per cent of values in the distribution are lower. Q3: 25 per cent of values in the distribution are higher

The various components of rollout costs have risen sharply over the past three years.

Share of surveyed companies, in per cent

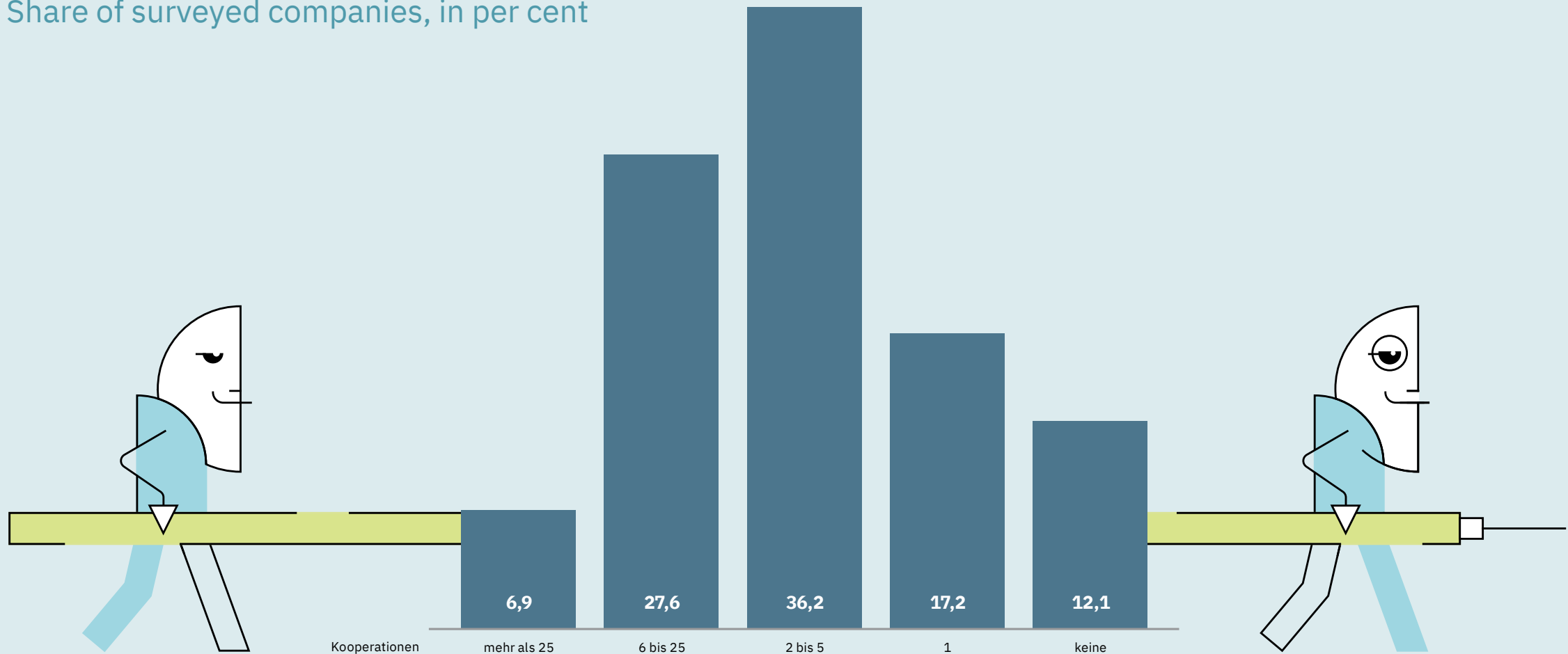


Approx. **75%** of companies report rising civil engineering costs.

Source: Survey of network operators (n = 109–113), question: “How have the following cost components developed over the past three years?”, sorted in descending order by “increased sharply”. Deviations from 100 per cent are due to rounding.

Almost 90 per cent of companies cooperate on network rollout and operation.

Share of surveyed companies, in per cent

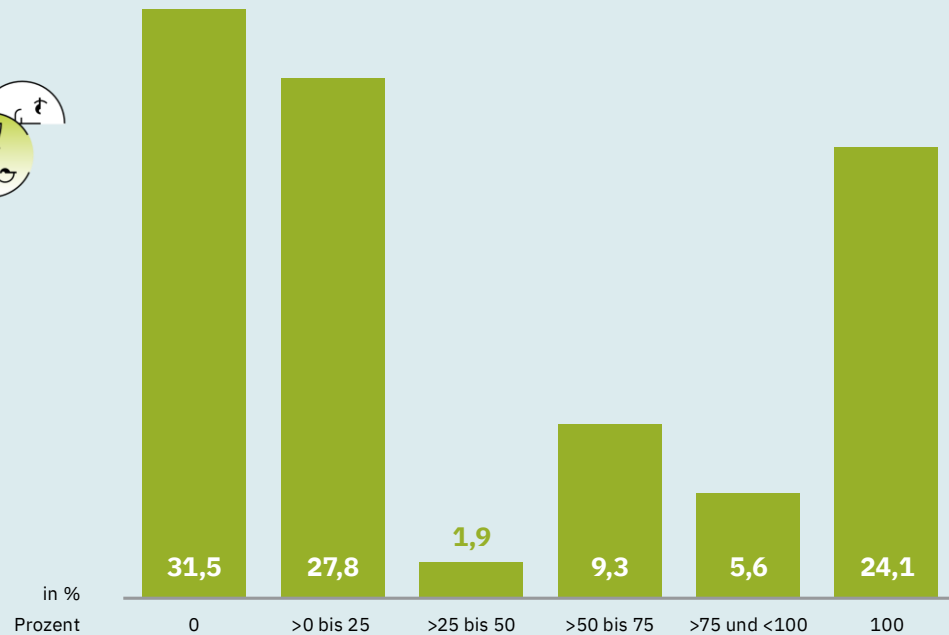
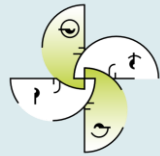


Source: Survey of network operators (n = 58), question: "How many companies do you currently cooperate with? Cooperation refers to collaboration on the rollout, operation and marketing of FTTB/H networks."

In cooperation arrangements, marketing now generally starts within one year.

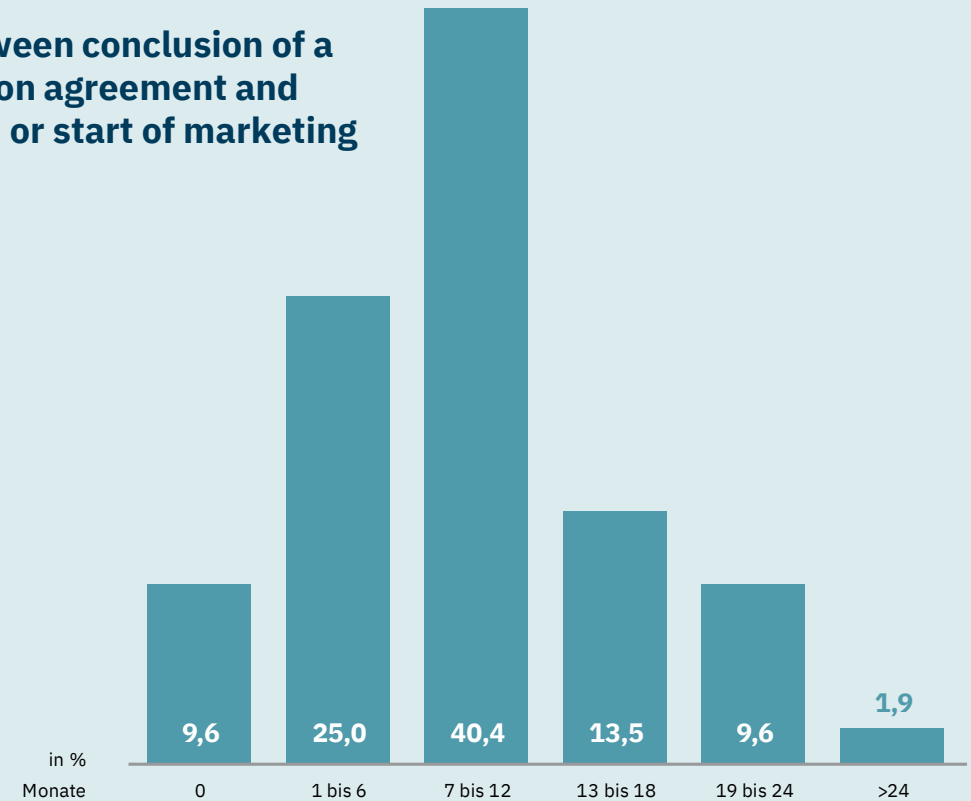
Share of surveyed companies, in per cent

Share of connections marketed by cooperation partners



Interpretation: "24.1 per cent of surveyed network operators state that 100 per cent of their connections are marketed by cooperation partners."
Source: Survey of network operators (n = 54), question: "What share of your connections (Homes Passed) is marketed by cooperation partners?"

Time between conclusion of a cooperation agreement and activation or start of marketing

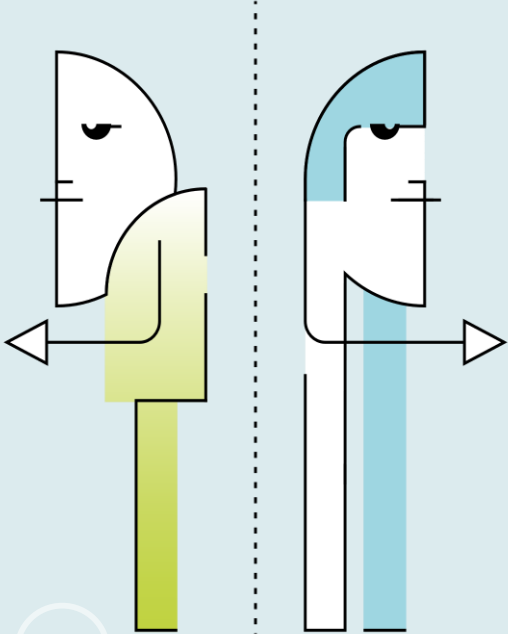
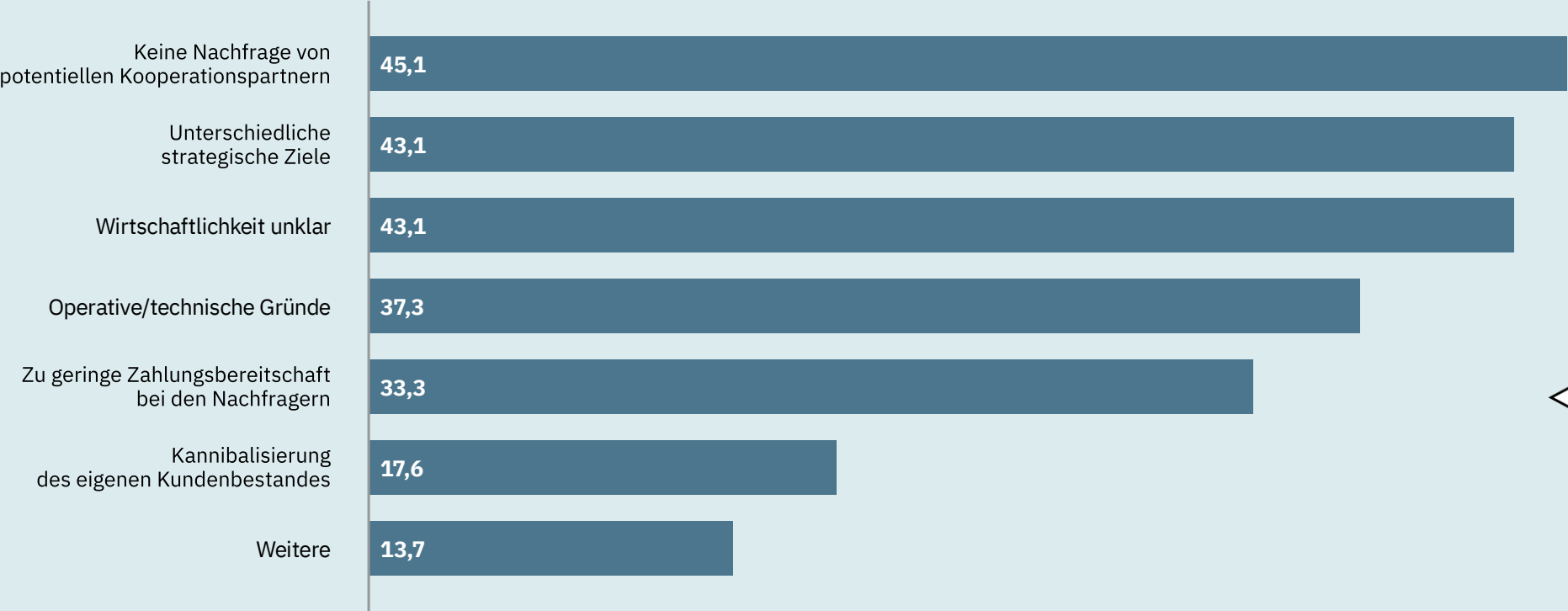


Interpretation: "1.9 per cent of surveyed network operators state that, on average, more than 24 months elapse between conclusion of a cooperation agreement and activation or the start of marketing."
Source: Survey of network operators (n = 52), question: "On average, how much time elapses between conclusion of a cooperation agreement and activation or the start of marketing?"

Uncertain profitability and differing objectives prevent cooperation.

Share of surveyed companies, in per cent

REASONS AGAINST COOPERATION

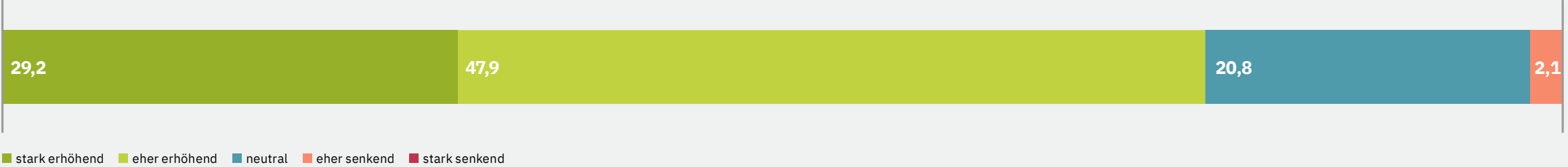


Source: Survey of network operators (n=51), question: “Why did cooperation arrangements not materialise?” (multiple responses possible)

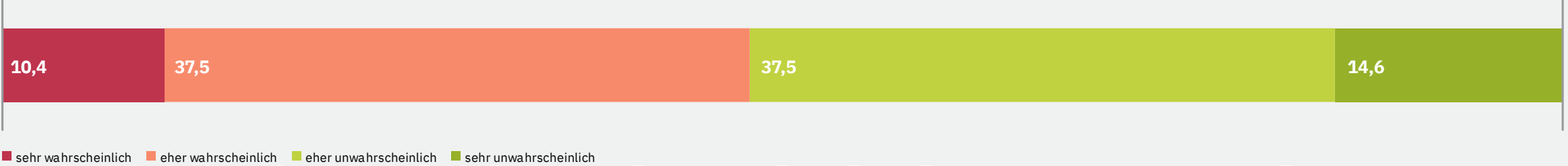
Clear, competition-friendly rules for the copper-to-fiber transition safeguard investment in fiber deployment.

Share of surveyed companies, in percent

What impact would a competition-friendly, rules-based framework for copper-to-fiber migration have on your willingness to invest in FTTB/H networks?



How likely are you to refrain from further fiber deployment in parts of your roll-out areas because you do not expect a competition-friendly, rules-based solution for copper-to-fiber migration?

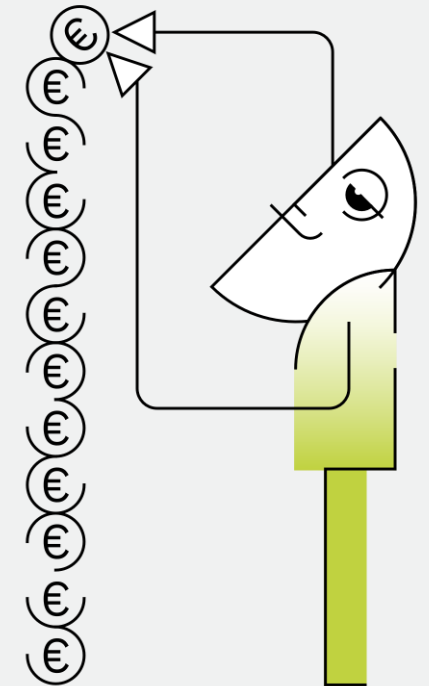
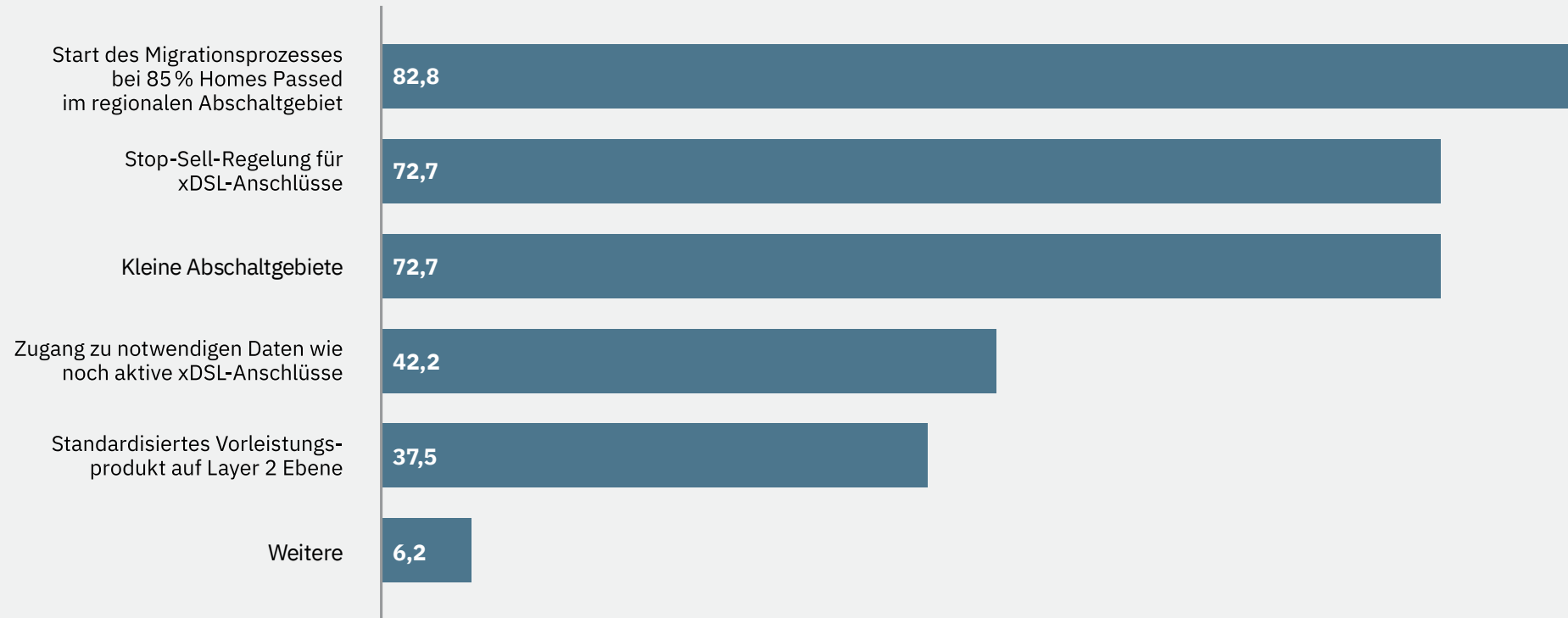


Source: Survey of network operators (n=144); question (top): “What impact would a competition-friendly, rules-based framework for copper-to-fiber migration have on your willingness to invest in FTTB/H networks?”; question (bottom): “How likely are you to refrain from further fiber deployment in parts of your roll-out areas because you do not expect a competition-friendly, rules-based solution for copper-to-fiber migration?”

Initiating the copper-to-fiber transition at a high Homes Passed rate would increase investment.

Share of surveyed companies, in percent

FACTORS THAT WOULD POSITIVELY AFFECT WILLINGNESS TO INVEST

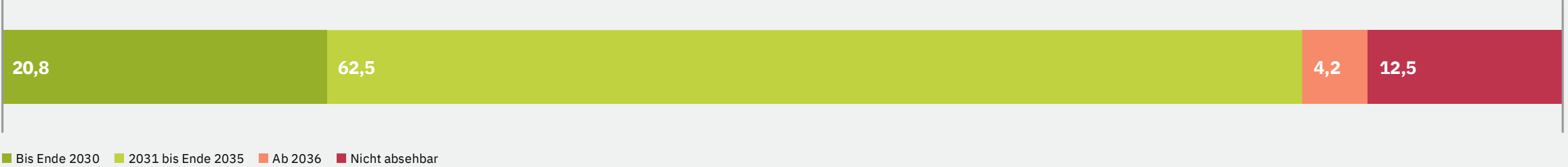


Source: Survey of network operators (n=128), question: "Which of the following factors would have a positive impact on your willingness to invest in FTTB/H networks?" Note: This question refers to the initiation of the transition process, not to the timing of the DSL switch-off.

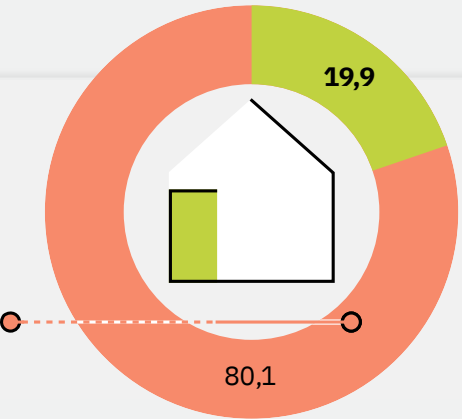
A large share of companies believe a competition-friendly, rules-based copper-to-fiber transition by 2035 is feasible.

Share of surveyed companies, in percent

By when do you consider a complete copper-to-fiber migration in your roll-out areas realistic, assuming a competition-friendly, rules-based framework?



An estimated **5.7 million households and business locations** (Homes Passed) are located in areas where, according to the surveyed network operators, **the copper-to-fiber migration process could already begin today**, as sufficient fiber coverage (85 percent Homes Passed) has already been achieved.

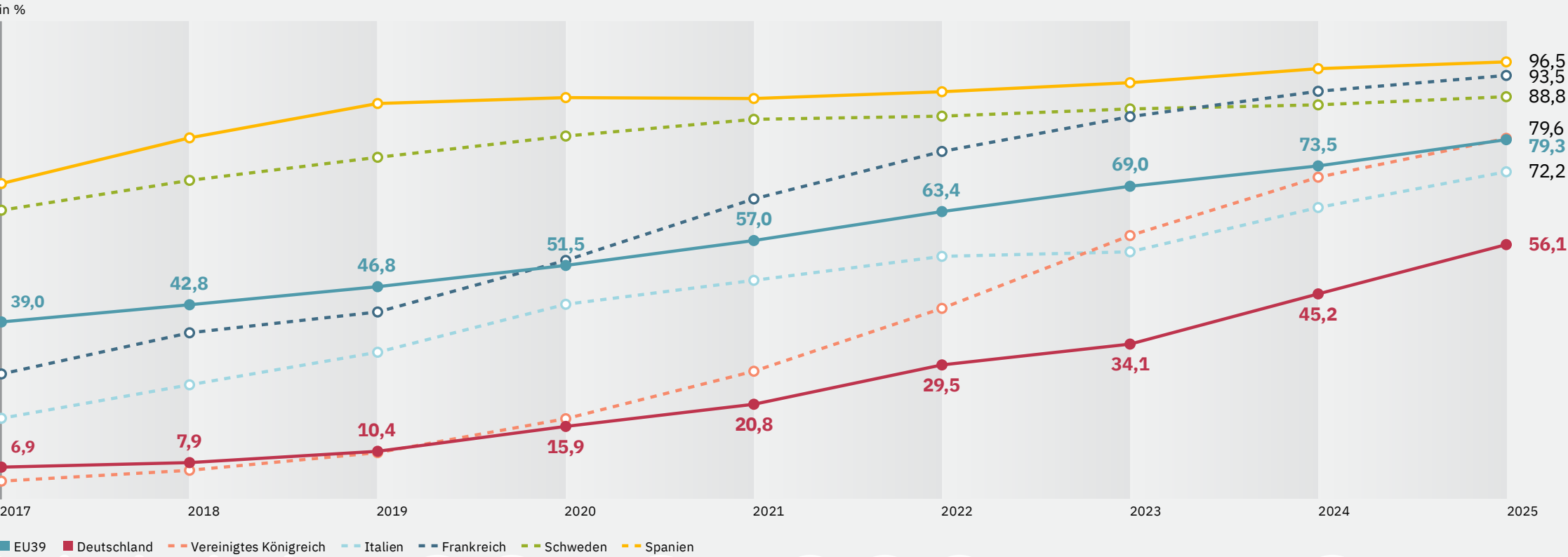


This corresponds to 19.9 percent of all Homes Passed in Germany.

Source: Survey of network operators (n=144 for the top chart; n=83 for the bottom chart); question (top): "By when do you consider a complete copper-to-fiber migration in your roll-out areas realistic, assuming a competition-friendly, rules-based framework?"; question (bottom): "How many distribution cabinet areas within your fiber roll-out areas could, in your view, already begin the migration process today because sufficient fiber coverage (85 percent Homes Passed) has been achieved? How many households/business locations (Homes Passed) would be affected by this migration?"

Germany is catching up in the EU comparison.

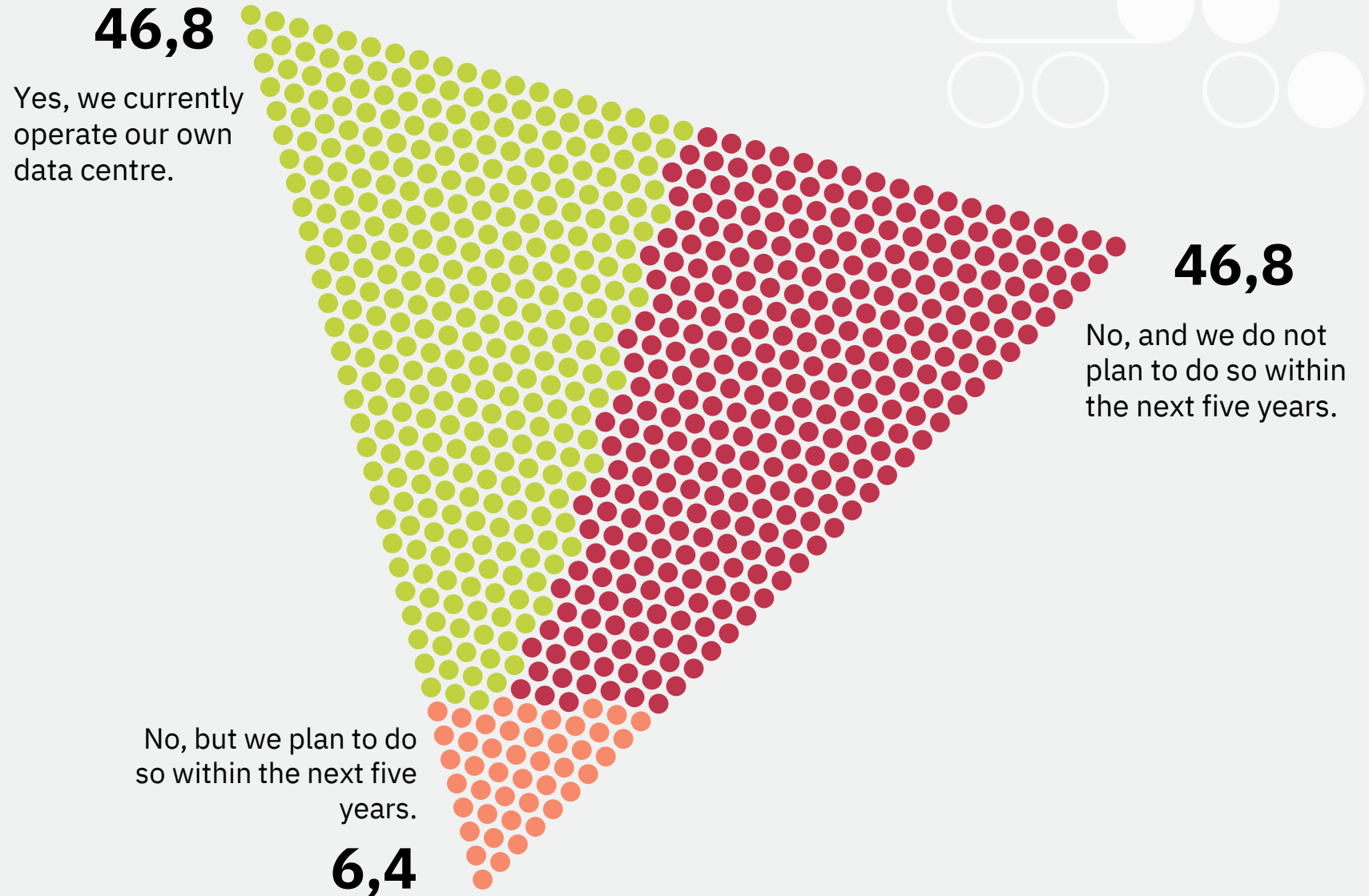
Fibre rollout rate* in the EU39, Germany and selected countries, as a percentage of households



*FTTH/B rollout rate (households passed / households)
Source: FTTH Council Europe (2026)

More than half of network operators operate or plan to operate their own data centre.

Share of surveyed companies, in per cent

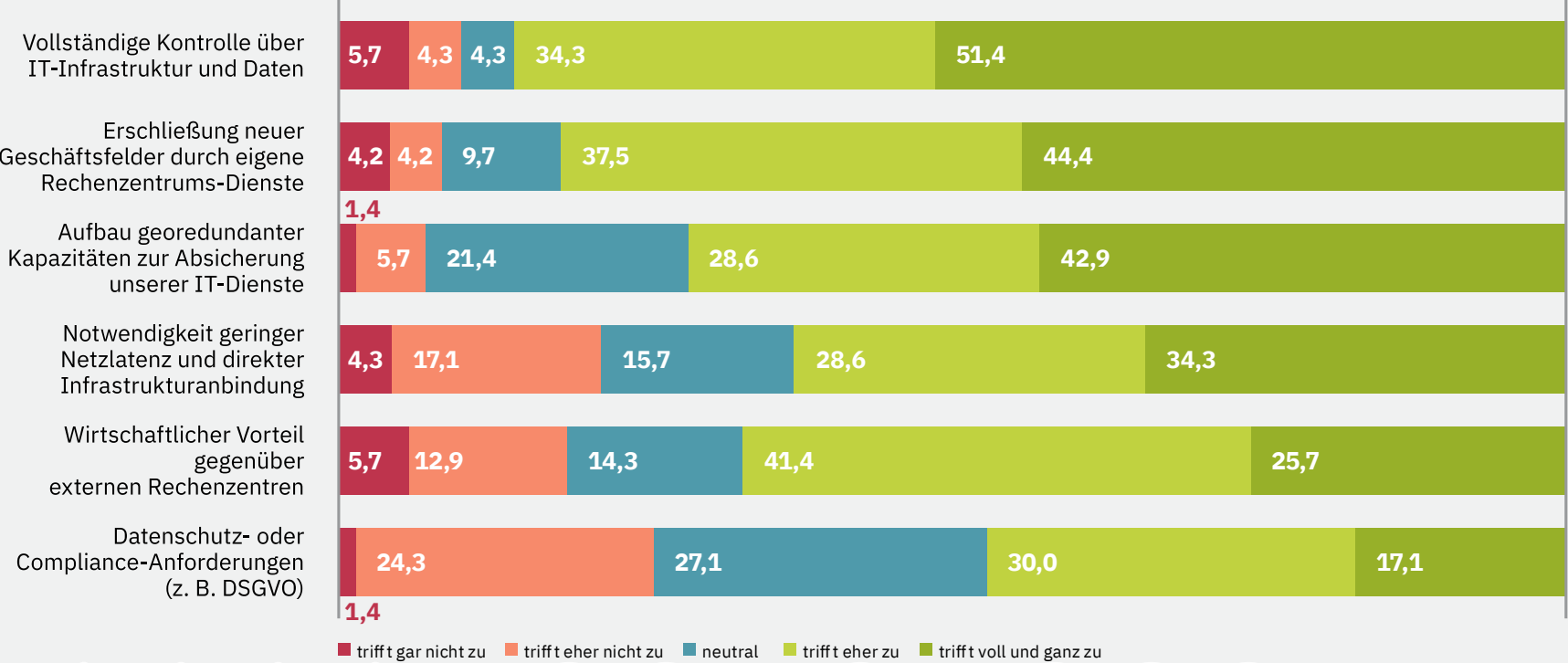


Source: Survey of network operators (n=141), question: "Does your company currently operate at least one of its own data centres (with an IT load of at least 100 kW), or are you planning to operate one in the future?"

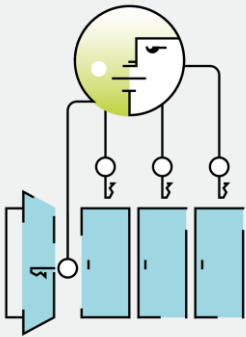
Data sovereignty is the main reason companies operate their own data centres.

Share of surveyed companies operating their own data centres, in per cent

REASONS FOR OPERATING OWN DATA CENTRES



Source: Survey of network operators (n=70–72). Question: “Why did your company decide to operate its own data centre?”

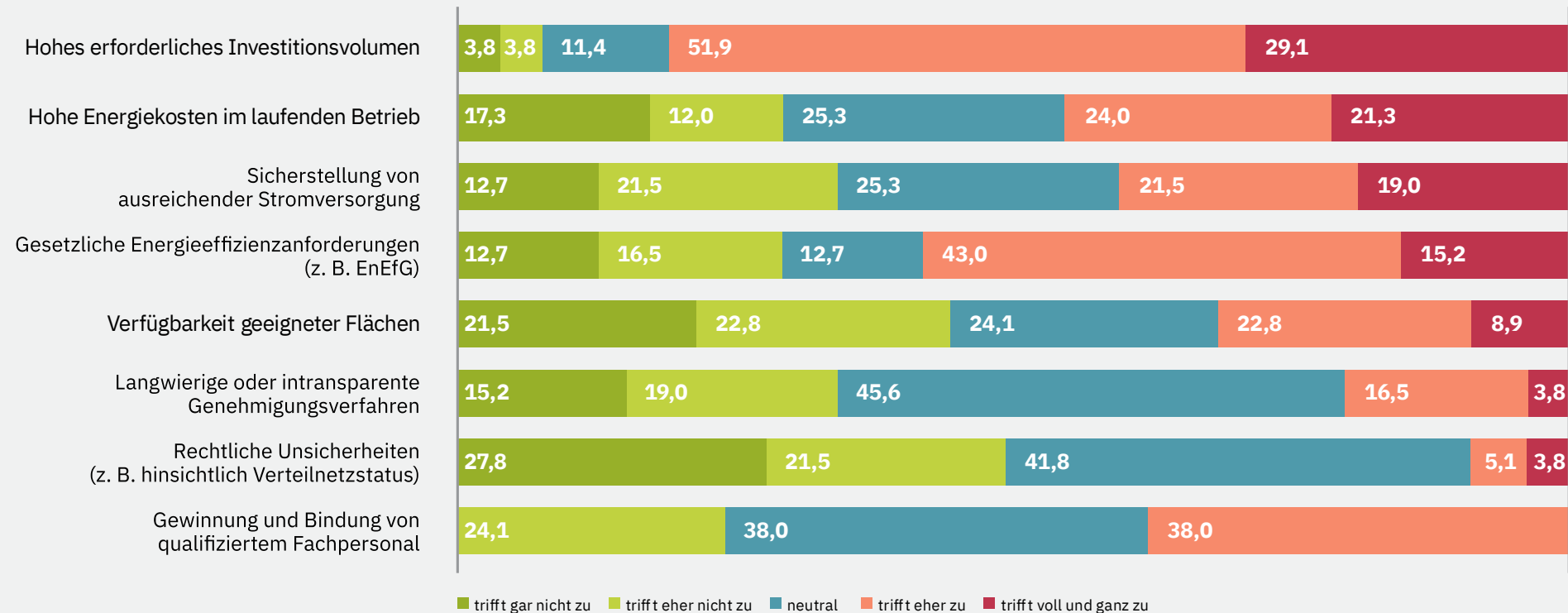


For **82%** of companies, developing new business areas through their own data centre services is a key reason for operating a data centre.

Investment and energy costs are barriers to building and operating data centres.

Share of surveyed companies operating their own data centres, in per cent

BARRIERS TO BUILDING AND OPERATING THEIR OWN DATA CENTRES

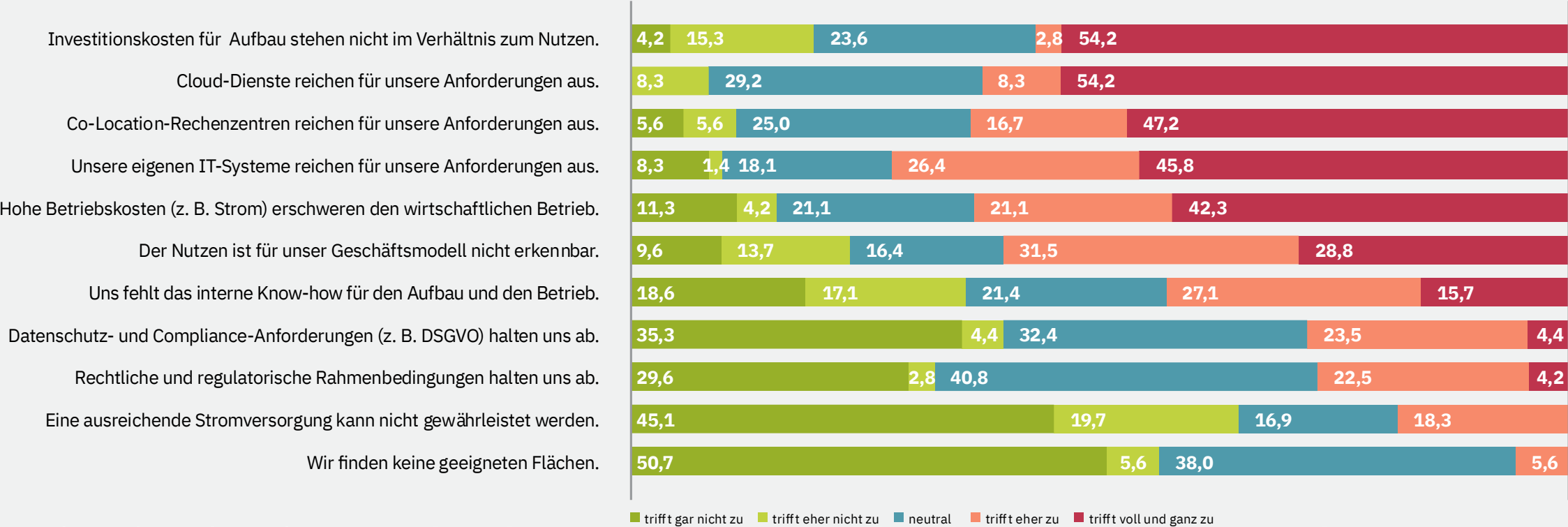


Source: Survey of network operators (n=75–79). Question: “To what extent do the following factors hinder the construction or operation of your data centre?”
Figures may not add up to 100 per cent due to rounding.

Costs deter companies from operating their own data centres. Cloud services often meet their needs.

Share of surveyed companies not operating their own data centres, in per cent

REASONS WHY TELECOMMUNICATIONS COMPANIES DO NOT OPERATE THEIR OWN DATA CENTRES

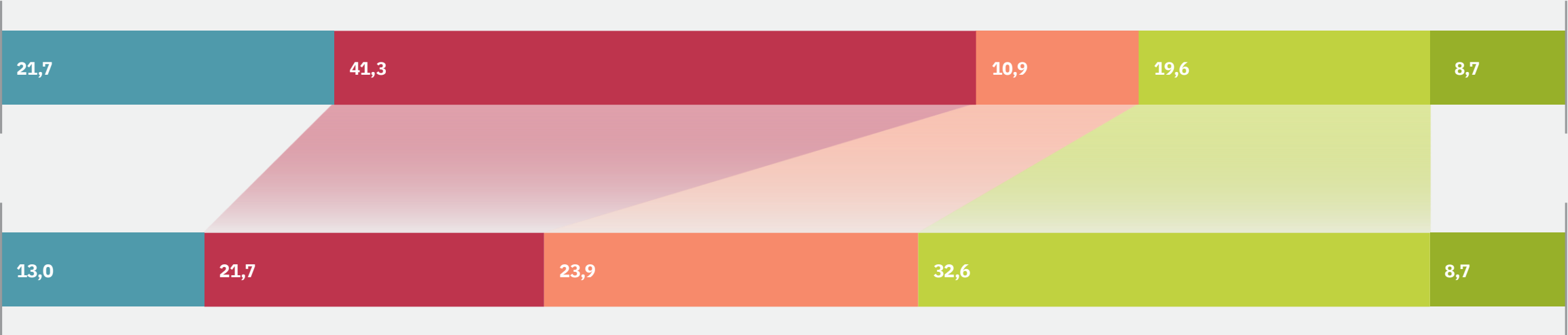


Source: Survey of network operators (n=68–72). Question: “Why does your company not operate its own data centre?”

Providing infrastructure for third-party data centres is becoming increasingly important.

Share of surveyed companies, in per cent

How important is providing your infrastructure to third-party data centres **currently** to your overall business?



How important do you expect the provision of your infrastructure to third-party data centres to be for your overall business over **the next five years?**

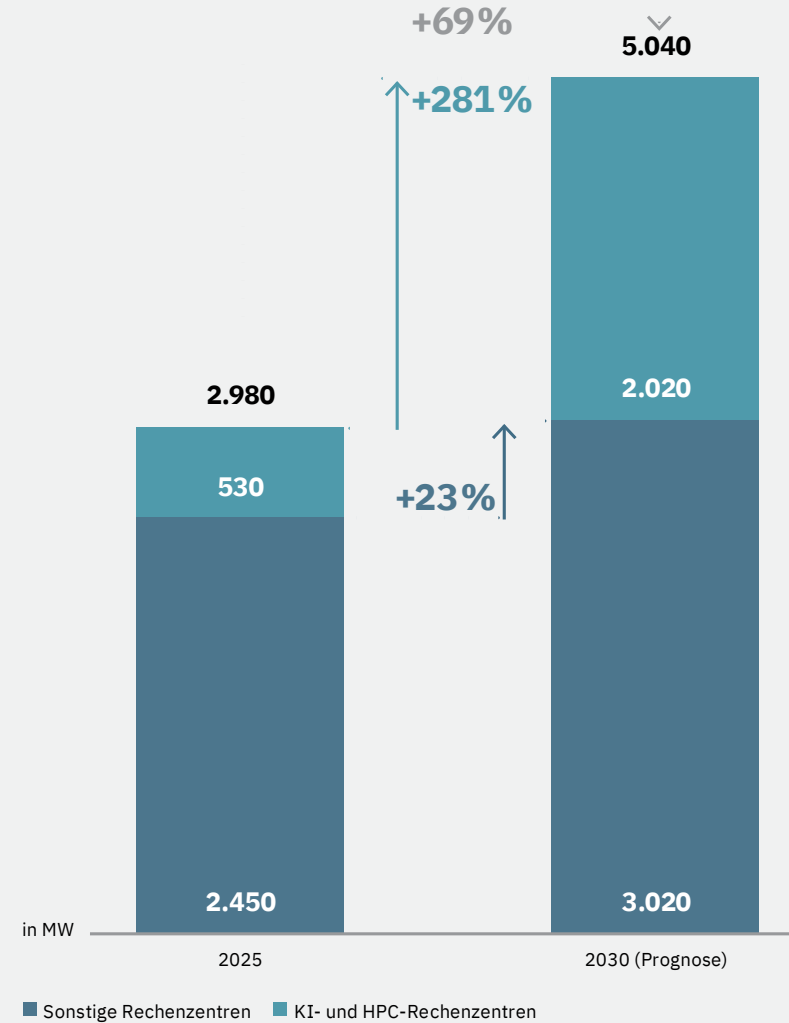
■ keine Bedeutung ■ sehr niedrige Bedeutung ■ eher niedrige Bedeutung ■ eher hohe Bedeutung ■ sehr hohe Bedeutung

Source: Survey of network operators (n=144), question (top): “How does a competition-compliant and rules-based design of the copper-to-fibre migration affect your willingness to invest in FTTB/H networks?”, question (bottom): “How likely is it that you will refrain from further fibre rollout in parts of your rollout areas because you do not expect a competition-compliant solution for the copper-to-fibre migration?”

AI will drive the expansion of data centre capacity.

IT power capacity of German data centres in megawatts (left)*
Share of surveyed companies operating their own data centres, in per cent (right)

IT POWER CAPACITY



EXPANSION OF OWN DATA CENTRE CAPACITY

“Rising demand driven by digitalisation and AI is driving our expansion plans.”

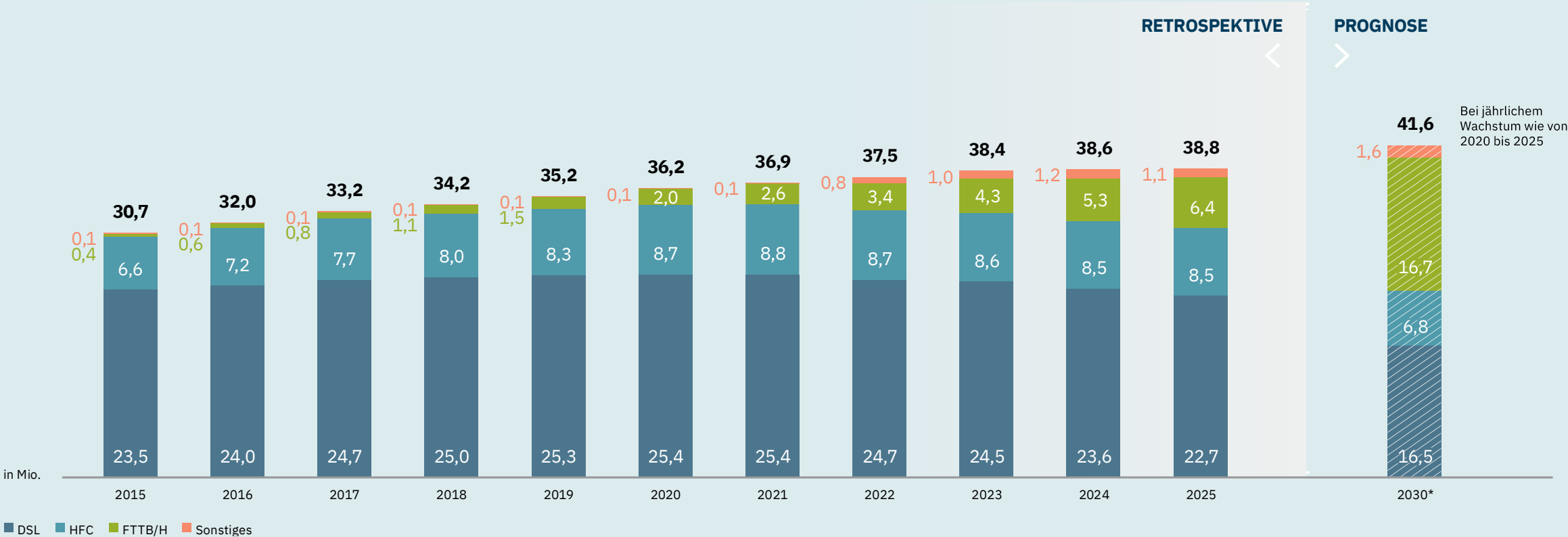


*Data centres and smaller IT installations in Germany

Source (left): Bitkom (2025): Data Centres in Germany. Source (right): Survey of network operators (N=84), question: “Please assess the extent to which the following statements regarding the framework conditions for the future planning of additional own data centre capacity apply to your company.”

Fibre connections could outnumber DSL connections by 2030.

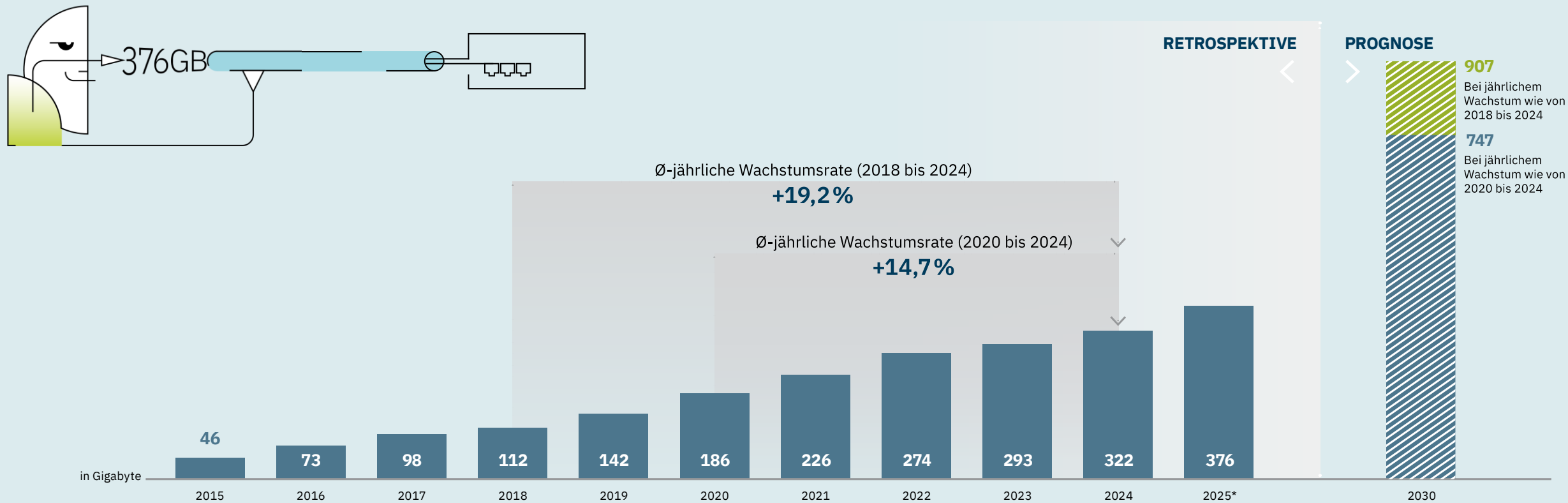
Active fixed broadband connections by technology



*Forecast based on growth from 2020 to 2025
Source: Federal Network Agency (2025a), Federal Network Agency (2025b), own calculations

Monthly fixed-line data usage per connection is 376 GB.

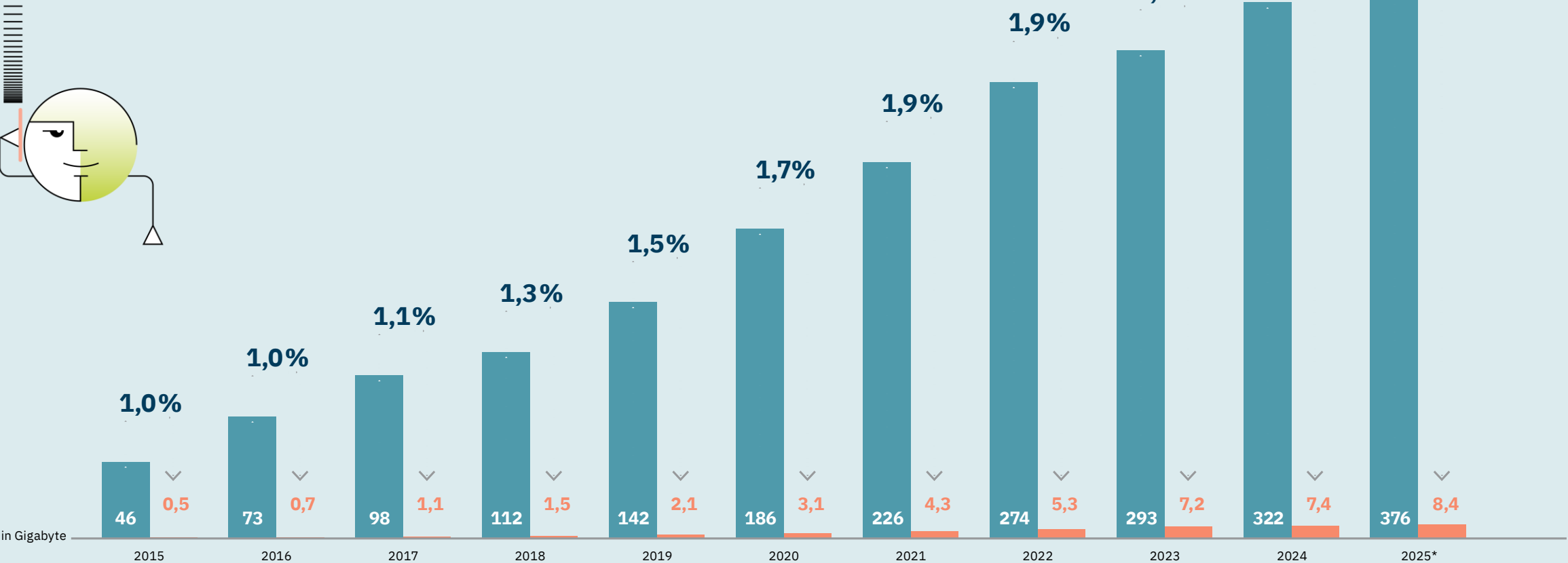
Trends in fixed-line data usage, per connection per month



*Includes IPTV over closed networks from 2025; limited comparability with earlier years
Source: Federal Network Agency (2025a), Federal Network Agency (2025b), Telecommunications Annual Report 2025, p. 21, own calculations

Mobile data remains stable at a share of around two per cent.

Data volume in fixed and mobile networks, per connection & month

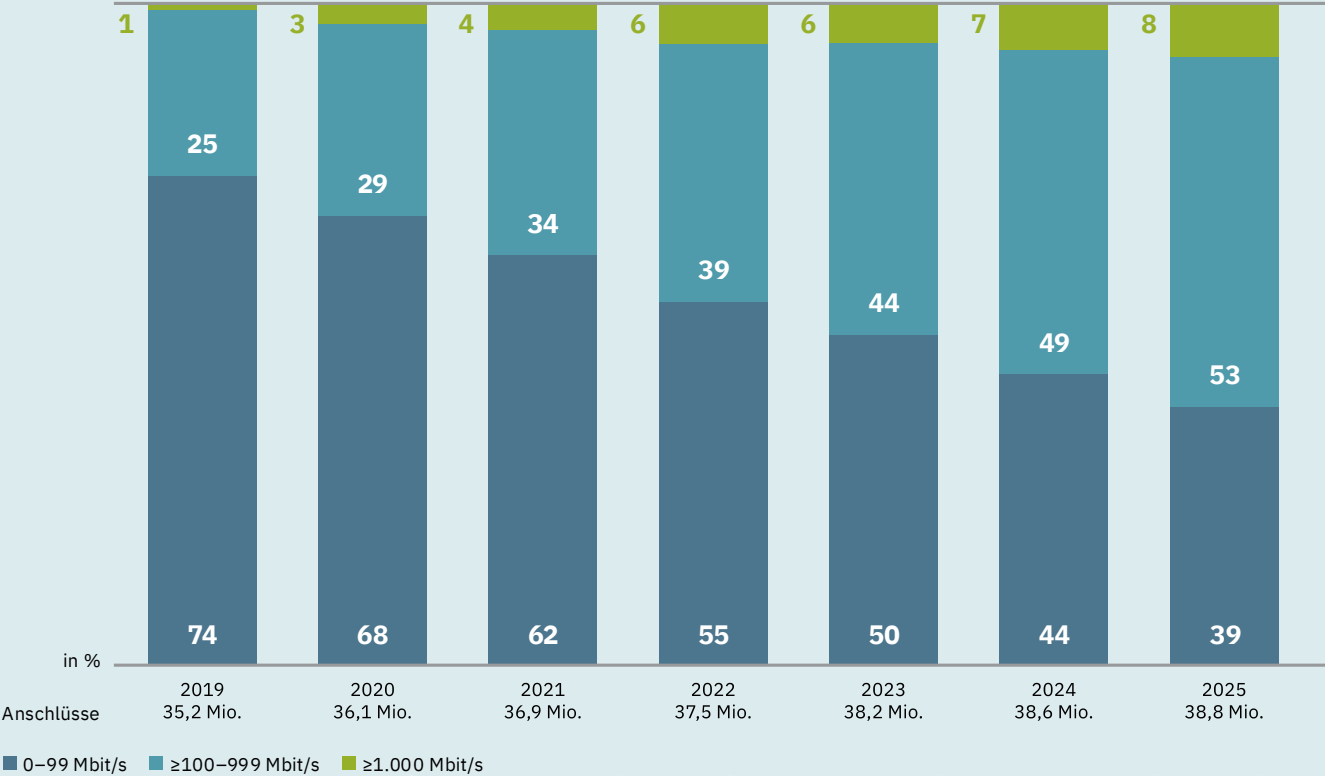


■ Festnetz* ■ Mobilfunk**

*From 2024: includes data traffic via fixed wireless broadband services; IPTV usage via closed data networks is included from 2025 onwards. Comparisons with previous years are therefore only possible to a limited extent. **Excludes data traffic via fixed wireless broadband services since the end of 2024. Comparisons with previous years are therefore only possible to a limited extent.
Source: Federal Network Agency (2025a), Federal Network Agency (2025b), Telecommunications Annual Report 2025, pp. 21 and 27.

Higher-speed connections are becoming increasingly popular.

Distribution of subscribed fixed broadband connections by speed*



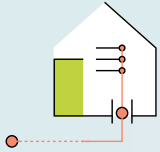
** Marketed maximum download speed
Sources: Federal Network Agency (2025a), Federal Network Agency (2025b), *Telecommunications Annual Report 2025*, p. 12; BREKO share: survey of network operators (n=51), question: "Please state the absolute number (alternatively: percentage distribution) of your end-customer connections by bandwidth."

DEVELOPMENT

Bitrate	Change in connections
≥1.000 Mbit/s	+0,5 Mio. ↑
↓ Share of connections ≥ 1 Gbit/s among BREKO members is approx. 14.4%. (Previous year: 14.7%)	
≥100-999 Mbit/s	+1,6 Mio. ↑
10-99 Mbit/s	-1,9 Mio. ↓

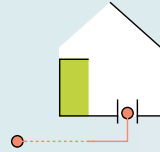
Definitions

Fibre rollout



HOMES ACTIVATED

Homes Activated refers to **all active customer contracts**.

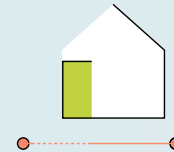


HOMES CONNECTED

Homes Connected refers to **all available connections that can be activated without additional construction work**:

The building connection has already been completed and the fibre-optic infrastructure reaches the building (FTTB) or extends to the network termination point at the end customer (FTTH).

- All terms such as Premises Passed as defined by BEREC, Homes Ready and Homes Prepared are assigned to this category.
- The figure includes Homes Activated.



HOMES PASSED

Homes Passed refers to **connections that still require construction work in public space**:

- The fibre-optic infrastructure runs in the immediate vicinity of the property boundary, and an active connection can be established within a reasonably short period of time (4 weeks). The specified timeframe refers solely to technical feasibility and not to the actual installation of the connection.
- FTTC/backbone fibre routes are not included.
- The figure includes Homes Passed Plus, Homes Connected and Homes Activated.



ECONOMIC UNITS

Economic units (EUs) include **dwellings and companies**:

- For dwellings, the number of dwellings in residential buildings (including halls of residence) according to official statistics (Federal Statistical Office, 2026) is used, based on the latest available data (2025).
- For companies, the number of companies in selected economic sections (B–N, P–S excluding S94) according to the WZ 2008 Classification of Economic Activities is taken from the business register system (Statistical Offices of the Federation and the Länder, 2026), based on the latest available data (2023).

Methodological approach of the BREKO Market Analysis 2026

The methodology follows scientific standards

The BREKO Market Analysis 2026 primarily uses two approaches to data collection:



Primary data collection:
Survey of BREKO member network operators



Secondary data collection:
Including publications by the Federal Network Agency and key players in the telecommunications market, e.g. Deutsche Telekom AG (see slide 45)

DATA COLLECTION

The BREKO Market Analysis 2026 uses the following methods for data analysis:

- Cleaning of primary data using statistical methods
- Analysis using relevant statistical methods (including descriptive statistics and trend forecasts)
- Analysis of the database taking key market questions into account
- Validation of survey results using secondary sources (including fibre rollout rates and broadband connections by technology)

DATA ANALYSIS

Data collection and analysis for the BREKO Market Analysis 2026 result in the following:

- Visualised analysis results
- Representative rollout and connection rates for the German fibre market, based on rollout figures from all relevant players involved in fibre rollout in German
- Numerous additional meaningful findings for the German telecommunications market
- Deduction of policy demands for the further development of the German telecommunications and fibre market*

RESULTS

*Data collection and analysis were conducted by IW Consult. The key policy demands (slide 6) were derived by BREKO on the basis of the results.

Survey of BREKO member network operators

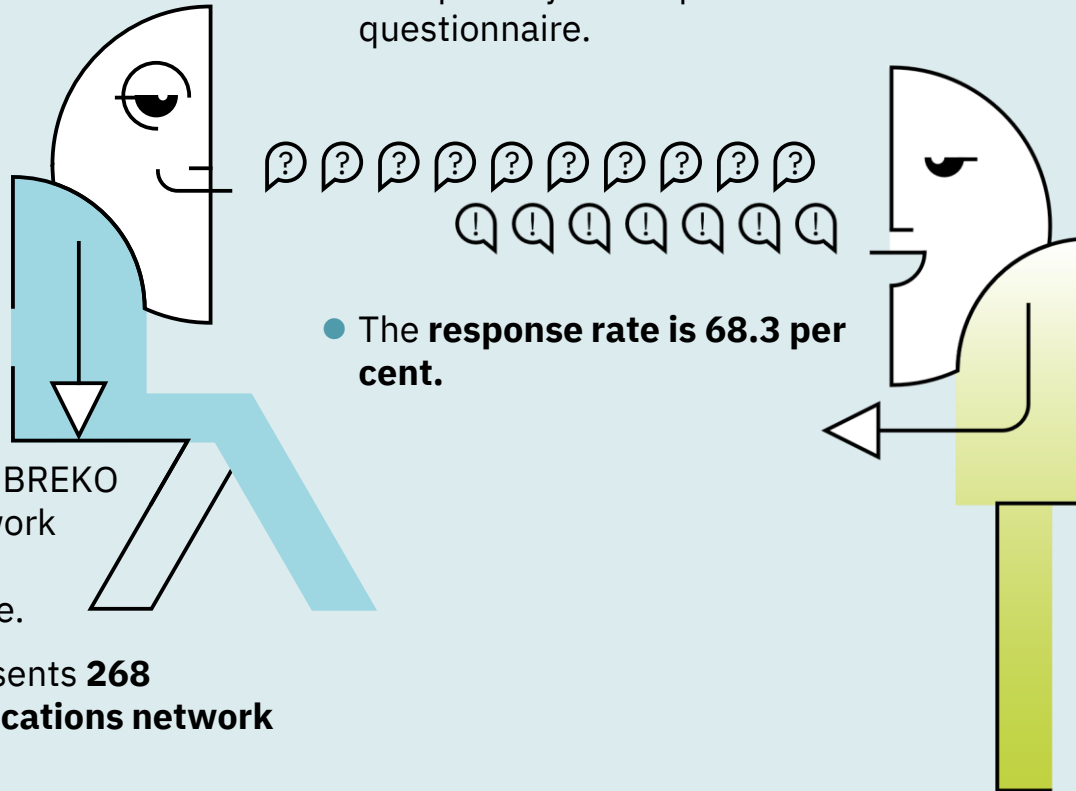
Key survey data

- The survey of BREKO member network operators is representative.
- BREKO represents **268 telecommunications network operators**.*

- **183 network operator**ing **BREKO members** completed the specially developed questionnaire.

- The **response rate is 68.3 per cent**.

- The survey was conducted **from May to July 2026**.
- Respondents were **executives** (e.g. managing directors).



*In Germany, there are around 300 active telecommunications network operators that have reported FTTB/H coverage to the Broadband Atlas (BMDS, 2025).

Usage of secondary sources

Overview of sources

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https://imagepool.1und1.ag/v2/download/berichte/GB_1u1_2025_DEU.pdf

ADAC, 2026, Motorways in Germany: Map, Figures and Further Information:

<https://www.adac.de/verkehr/recht/verkehrsvorschriften-deutschland/autobahnen-deutschland/>

Bitkom, 2025, Data Centres in Germany:

<https://www.bitkom.org/sites/main/files/2025-11/bitkom-praesentation-rechenzentren-2025.pdf>

Federal Ministry for Digital Transformation and Government Modernisation (BMDS), 2026a, Fact Sheet on Federal Broadband Funding – Status: Early August 2026 and Special Analysis of Approved Federal Funding and Funding Disbursement

Federal Ministry for Digital Transformation and Government Modernisation (BMDS), 2026b, List of Funding Award Recipients:

<https://www.gigabitfoerderung.gov.de/liste-der-zuschlagsgewinner/>

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<https://bmds.bund.de/fileadmin/BMDS/Dokumente/Bericht-Glasfaserausbau-V10-SCREEN-BF-Maps-highres.pdf>

Federal Network Agency (BNetzA), 2026, Data Portal, Digital & Telecommunications, Number of Homes Passed, Homes Connected and Homes Activated:

https://www.bundesnetzagentur.de/DE/Fachthemen/Datenportal/1_Digitales_Telekommunikation/_svg_TK/TK_Festnetz/Glasfaserausbau/Glasfaserausbau.html

Federal Network Agency (BNetzA), 2025a, Telecommunications Annual Report 2025:

<https://data.bundesnetzagentur.de/Bundesnetzagentur/SharedDocs/Mediathek/Jahresberichte/JB2025TK.pdf>

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Federal Network Agency (BNetzA), 2025c, Final Report of the Monitoring Body and Results Report of Ruling Chamber 3 on Parallel Fibre Rollout:

https://www.bundesnetzagentur.de/DE/Fachthemen/Telekommunikation/Breitband/Doppelausbau/Abschlussbericht.pdf?__blob=publicationFile&v=4

Deutsche Telekom AG, 2026a, Press Release: Telekom Builds 240,000 Fibre Connections in June:

<https://www.telekom.com/de/medien/medieninformationen/detail/telekom-baut-240-000-glasfaseranschluesse-im-juni-1106230>

Deutsche Telekom AG, 2026b, Q2 2026 Results:

<https://www.telekom.com/resource/blob/1106164/d3a5c94a5370554cb4853d4693760e81/dt-26q2-presentation-data.pdf>

Deutsche Telekom AG, 2025a, Annual Report 2025:

https://bericht.telekom.com/geschaeftsbericht-2025/_assets/downloads/entire-dtag-gb25.pdf

Deutsche Telekom AG, 2025b, Business Performance of the Operating Segments, Germany:

<https://bericht.telekom.com/geschaeftsbericht-2025/lagebericht/geschaeftsentwicklung-der-operativen-segmente/deutschland.html>

(as well as reports from previous years)

FTTH Council Europe, 2026, 2026 FTTH Market Panorama – Report by Country:

<https://fibrecouncil.eu/committees/market-intelligence/2741/2026-ftth-market-panorama-report-by-country>

Statistical Offices of the Federation and the Länder, 2026, Business Demography – Enterprises by Selected Sections of Economic Activity (WZ 2008) – Year – Regional Levels (52111-54-01-4-B), Business Register System (URS):

<https://www.regionalstatistik.de/genesis/online?operation=themes&code=5>

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<https://genesis.destatis.de/datenbank/online/url/eda9e2fd>

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<https://reports.investors.vodafone.com/view/897876789/20/>

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