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Executive brief

Key people moves in recent weeks have included the appointment of a new DT boardroom representative at the UK's BT Group, with some clear readthrough regarding its priorities for future ties with the challenged operator (including the possibility of them being brought to an end). Its last delegate, former T-Systems CEO Adel Al-Saleh, was appointed back in 2020, when things were different and DT's leadership appeared primarily focused on how to enhance collaboration with BT on common problems such as legacy burdens and stunted B2B profitability. Since then, things have got even more complicated in BT and DT's ties, with the former's continued share price slump depressing the worth of DT's stake and allowing Patrick Drahi's Altice group to opportunistically build up a sizeable minority holding in the UK operator. The appointment of Chief Operating Officer Raphael Kübler, an exec with high-level operational and M&A knowhow, seems designed to help DT draw a line under relationship turbulence, one way or another. [pp.6-8.]

Within DT's own operations, **many of the New Year people moves that have emerged so far have had a digitisation and transformation theme**, tying in with DT's ongoing focus on cost savings through tech and organisational change. There has been a leadership switch at Telekom Deutschland's Fiber Factory function — engine room of the German FTTH build mega-project — as well as a new, SVP-level job for T-Mobile US software lead Meg Knauth, within the operator's Technology division, and a senior, cross-function efficiencies appointment at T-Sys. [pp.9-12,25,26.]

Also of note on the recruitment scene has been the reuniting of two former senior figures at DT — Dirk Wössner and René Obermann — at private equity player Warburg Pincus, to scope out investment opportunities in Europe's telecoms and tech sectors from the group's Berlin office. [pp.9–12.]

GERMANY: TDE has continued to build up its forces for a long-planned push into cable rivals' housing association heartland, aided by the imminent removal of their "*nebenkostenprivileg*" ("*additional cost privilege*") advantage for retaining clients. The German NatCo has already been seeking gains in advance of the change, by offering a period of 'free' or discounted services to housing tenants that switch to its services — and has now refreshed its flagship *MagentaTV* platform to back up the campaign. Rival Vodafone Group's latest results presentation saw channelling of analyst concern over how badly its German business will be hit by the regulatory change. [pp.16–18.]

TDE has also had positive news on another competitive front, via an unspectacular update from challenger 1&1 on its troubled setup process as a full-fledged MNO. It conceded it still has only about 100 antennas up and running to support its own network, and thus remains heavily reliant on roaming partners Telefónica Deutschland and Vodafone Germany. [pp.19–21.]

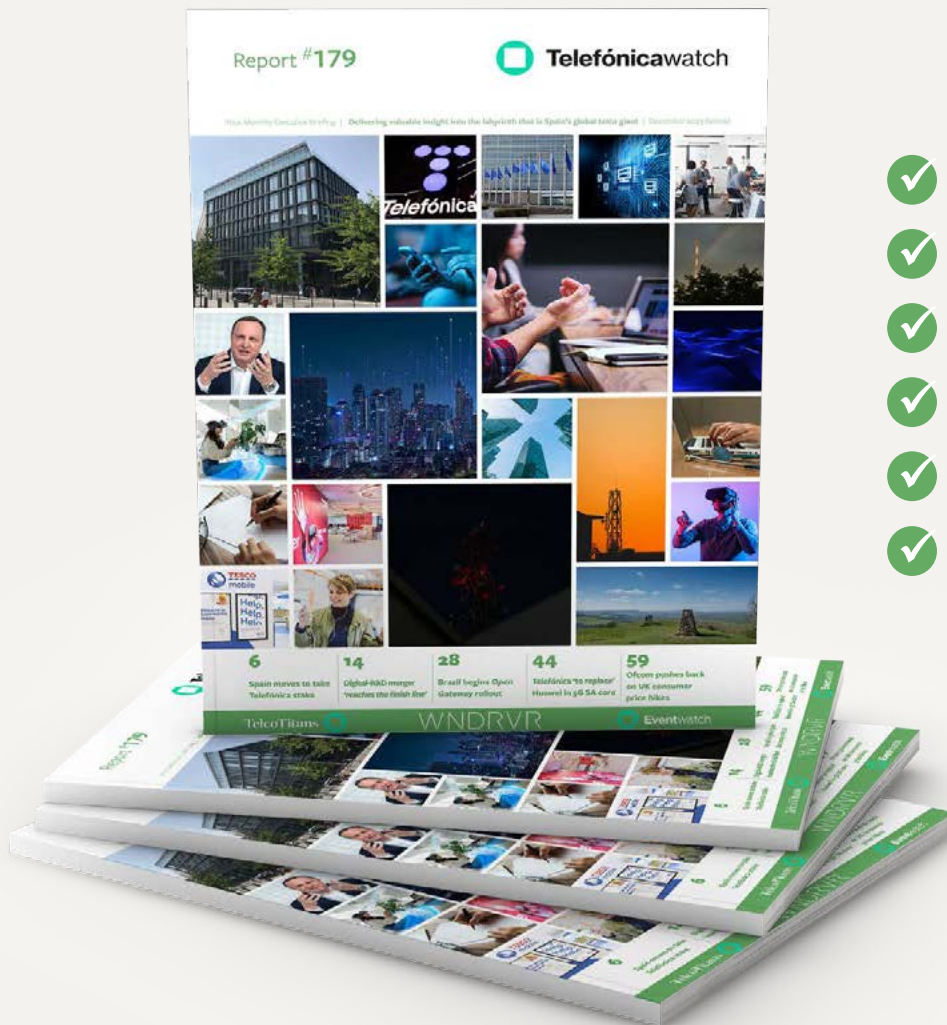
In the B2B space, **Deutsche Telekom Multimedia Solutions, the Group's recently realigned digital services unit, continues to widen its Web3 ecosystem** by becoming a validator of the *Fetch.ai* blockchain network. It has become the first corporate partner of the non-profit organisation that runs *Fetch.ai*, and will work alongside co-founder Bosch to develop the network for industrial applications combining blockchain and AI tech. [pp.22,23.]

EUROPE: Two new deals have been highlighted in the Europe segment by existing Group suppliers. Amdocs secured wins with Magenta Telekom and Magyar Telekom, both focused on upgrades to charging control systems. Hrvatski Telekom retained Ericsson Nikola Tesla as its exclusive radio access network supplier. ENT gained a similar deal on HT's core only a few weeks ago. [pp.29–32.]

USA: In a similar vein, two contract wins have been announced by members of T-Mobile US's vendor old guard. Netcracker landed a repeat win with the operator's Wholesale division, supporting TMUS' bet on MVNO and IoT partnerships as a future driver of revenue growth and monetisation of its huge spend on 5G. TMUS plumped for Nokia's new gateway product to supercharge its *5G Home Internet* fixed wireless offering. [pp.36–41.]

Out Now.

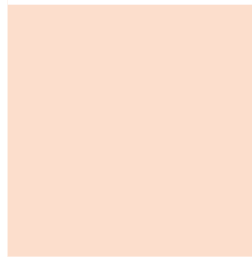
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ELSEWHERE IN GROUP



Image: BT

PEOPLE

Deutsche Telekom goes strategic with new BT board rep

- DT Chief Operating Officer Raphael Kübler to join BT boardroom to oversee stake and keep an eye on transformation agenda.
- Exec replaces former T-Systems CEO Adel Al-Saleh.
- Appointment gives DT strategy lead insight into BT as questions swirl about future of shareholding.
- Imminent CEO swap may leave BT with another seat to fill.

BT Group has added a new Deutsche Telekom (DT) representative to its Board of Directors, filling the seat left vacant by Adel Al-Saleh's departure at the end of last year.

Raphael Kübler, Chief Operating Officer at DT, became a Non-Independent Non-Executive Director at BT in January. He has been appointed to the Nominations Committee as part of the role.

BT described Kübler as having oversight of the “*overall strategic transformation*” of DT. He is a *Team Magenta* stalwart, having spent nearly three decades at the Group. Past roles include senior finance positions at ex-home market standalone mobile business T-Mobile Deutschland, a stint leading mergers & acquisitions, and five years as Senior Vice-President for Group Controlling.

His current mandate includes leadership of Strategic Group Transformation.

It means DT has an M&A-minded exec to oversee its BT stake and ensure the Group progresses against its cost transformation targets.



While Al-Saleh was an enterprise focused DT pointman at DT, as the former CEO of T-Systems, the Kübler appointment means DT's 'insider' now has **M&A pedigree and a transformation agenda** at a time when DT's [stake in the operator is under the spotlight](#) and both BT and DT are performing major, tech-based internal efficiency programmes (*BTwatch*, #341, #346–#347, and *passim*). DT Chief Executive Tim Höttges has made some **frank assessments** of the BT stake following its share price slump of recent years, including calling it his “*biggest mistake*” and in August urging BT management to [deliver improvements](#) within twelve months.

Table 1 BT Group's largest shareholders

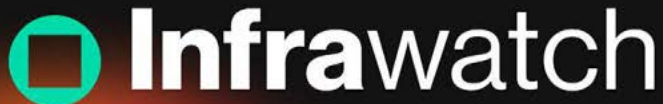
Shareholder	Stake
Altice UK S.à.r.l	24.5%*
T-Mobile Holdings	12.06%**
BlackRock	5.88%**

Notes: * As of 23 May 2023. ** As of 31 March 2024.

Source: BT.

Alongside his new BT seat, Kübler holds board positions at OTE Group (Greece) and T-Mobile US, and externally at (former DT investment) Ströer SE & Co and satellite communications operator SES Global.

Oddly, Luxembourg-based SES is also the new stomping ground of Kübler's predecessor at BT, Al-Saleh. The former T-Systems CEO relinquished the board seat when he [exited DT at the close of 2023](#), and became CEO at SES in February.



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Table 2 BT Group Board of Directors, February 2024

Director	Position	Committees	Year appointed
Adam Crozier	Chair	<ul style="list-style-type: none"> Nominations (Chair) 	2021
Allison Kirkby	CEO	<ul style="list-style-type: none"> Executive (Chair) Investigatory Powers 	2019
Simon Lowth	Chief Financial Officer	<ul style="list-style-type: none"> Executive 	2016
Ruth Cairnie	Senior Independent Non-Executive Director	<ul style="list-style-type: none"> Audit & Risk Remuneration Nominations 	2023
Sabine Chalmers	Group General Counsel Company Secretary Director of Regulatory Affairs	<ul style="list-style-type: none"> Audit & Risk Compliance Executive Nominations Remuneration 	2018
Steven Guggenheimer	Independent Non-Executive Director	<ul style="list-style-type: none"> Digital Impact & Sustainability Nominations 	2022
Isabel Hudson	Independent Non-Executive Director	<ul style="list-style-type: none"> Compliance (Chair) Digital Impact & Sustainability Nominations Remuneration 	2014
Maggie Chan Jones	Independent Non-Executive Director	<ul style="list-style-type: none"> Nominations Digital Impact & Sustainability 	2023
Matthew Key	Independent Non-Executive Director	<ul style="list-style-type: none"> Audit & Risk (Chair) Nomination Remuneration 	2018
Raphael Kübler	Non-Independent Non-Executive Director	<ul style="list-style-type: none"> Nominations 	2024
Sara Weller	Independent Non-Executive Director	<ul style="list-style-type: none"> Digital Impact & Sustainability (Chair) Audit & Risk Compliance Nominations 	2020

Source: BT.



Image: Deutsche Telekom

Moves roundup: new digital leads in USA, T-Sys, and fibre

- Group — DT installs new reps to keep an eye on developments at minority interests BT Group and Utiq.
- Germany — Operator continues to display strong interest in tech-based fibre rollout speed and efficiency gains, with new exec appointments at field services division and Fiber Factory.
- Europe — Austrian fibre JV Alpen Glasfaser switches finance boss.
- Systems Solutions — challenged division continues to focus on internal transformation, and highlights public transport as a growth vertical.
- USA — software head Meg Knauth receives a promotion to SVP layer.
- Alumni — high-profile ex-execs Dirk Wössner and Axel Clauberg gain new roles at Group partners (Warburg Pincus and AWS, respectively). Former Group Chief Executive René Obermann hires one-time lieutenant Wössner to help build out European investment portfolio.

Group — Gunter Everink, Anna Frank, Raphael Kübler, Martina Welslau

- **Utiq**, Deutsche Telekom's (DT) fledgling adtech joint venture (JV) with Orange, Telefónica, and Vodafone (*Deutsche Telekomwatch*, #125 and *passim*), has appointed DT executive **Gunter Everink** as **Chief Financial Officer** (CFO). Everink was previously part of Group Financial Controlling.
- DT has selected Chief Operating Officer (COO) **Raphael Kübler** as its new representative on the Board of Directors of minority investment **BT Group** (see separate). He succeeds Adel Al-Saleh, who vacated his seat on the board at the end of last year after exiting T-Systems (T-Sys) for satellite operator SES (*Deutsche Telekomwatch*, #129).



The **Kübler** appointment means DT's 'BT insider' has M&A and transformation pedigree at a time when DT's stake in the UK operator is under the spotlight, and both BT and DT are performing major tech-based reboots, the former under new Chief Executive Allison Kirkby (*Deutsche Telekomwatch*, #127 and *passim*).



- **Deutsche Telekom Services Europe:** **Martina Welslau** has moved to Deutsche Telekom Services Europe Romania, the local arm of DT's shared services division, as Director of **Human Resources & Finance**. She was previously Programme Lead for DT's *Bringing New Work to Life* scheme.
- **Telekom Mobility Solutions:** The Group's fleet management-focused Telekom Mobility Solutions unit has appointed **Anna Frank** Head of Lifecycle Management. She was previously Head of Technical Service & Insurance Management.

Germany — Arne Freund, Jörg-Peter Heeb, Dr. Markus Limberger...



Arne Freund

Deutsche Telekom

- **Deutsche Telekom Außendienst:** **Dr. Markus Limberger** has been appointed Head of **Operational Excellence, Internal Services** at Deutsche Telekom Außendienst, Telekom Deutschland's (TDE) field service division. He indicated the role will see a focus on optimising and redefining processes and structures, supporting "*related transformation initiatives*", and "*further development of methods/tools, including IT systems*".
- **Deutsche Telekom Technik:** **Arne Freund**, Managing Director of Deutsche Telekom Außendienst, has taken over responsibility for the '**Fiber Factory**' build out function of Deutsche Telekom Technik (DTT), TDE's infrastructure and technology business (see *separate*). Freund, who retains the Deutsche Telekom Außendienst role, took over Fiber Factory at the start of January, succeeding **Jörg-Peter Heeb**. Heeb, who has led Fiber Factory for the past seven years, has a new, broader brief as Senior Vice-President (SVP) of Fibre & Transformation at DTT, where he will "*contribute his extensive experience to shaping Deutsche Telekom's fibre optic strategy*", a spokesperson told *Deutsche Telekomwatch*.
- **Martin Philipp** is the new Head of **Production & Operations Management** for the **West** branch of DTT.

Europe — Christian Fingerhut, Robert Jelinek-Nacke, Birgit Niemeyer

- **Austria:** **Robert Jelinek-Nacke** — the startup **CFO** of **Alpen Glasfaser**, Magenta Telekom's [fibre JV with investment group Meridiam](#) — has left the business to become CFO at German altnet **Plusnet**. **Christian Fingerhut**, formerly Head of Finance at the JV, has stepped up into Jelinek-Nacke's role.
- **Birgit Niemeyer** has joined **Magenta Telekom** as VP of **Human Resources**. She was formerly Head of People Team at Samsung Austria, and previous to that had a five year spell at T-Systems Austria.



Systems Solutions — Stephan Harsch, Bernard Lehning

- T-Sys has bolstered its **Public Transport** team with the addition of **Stephan Harsch**, previously Head of Mobility & Logistics at T-Systems Switzerland. In his new twin role, as COO, Public Transport and Director, Vertical Operations & Business Development, Harsch said he will focus on “*driving digital innovation in public transport by orchestrating our teams, accounts, and partners to become the preferred digitalisation partner of the industry*”. He will work alongside Head of Public Transport Dirk Balgheim on T-Sys’ activities in the space.
- **Bernard Lehning** has gained a new role within T-Sys’ ongoing efficiencies programme, becoming VP of **Digitalisation, Commercial & Cross Functions**. He was formerly VP of the division’s Lifecycle Management offering.

USA — Meg Knauth, Akther Javid, Benjamin Peacock

- **Meg Knauth** has been promoted to become **SVP of Technology** at T-Mobile US, leading the NatCo’s service engineering and enablement teams, according to her *LinkedIn* profile. She was previously VP of Software Development, with a lead role in large [application installations with partners](#) such as Adobe, Amdocs, and Salesforce. TMUS did not respond to a request for more information on the switch.
- **Akther Javid** and **Benjamin Peacock** have gained new roles within TMUS’ ongoing push for enterprise growth. Javid is now **VP of Strategy** at T-Mobile for **Business**, shifting from her previous position as Senior Director, Strategy & Strategic Partnerships for the B2B arm. Peacock has become Director of Portfolio Strategy at T-Mobile for Business. He was formerly Senior Manager, Business Strategy at the NatCo.

Alumni — Axel Clauberg, Kim Juchem, Dirk Wössner

- Former Group network innovation point-man **Axel Clauberg** has taken on a new, broader role at **Amazon Web Services**, becoming Director of Partner Solutions Architects for Europe, Middle East, and Africa. He was previously Solutions Architects Leader for Germany — the position he took on after departing DT for AWS in 2019 (*Deutsche Telekomwatch*, #90). Clauberg, a former Chairman of Telecom Infra Project, had spells heading T-Sys’s telecoms services portfolio and DT’s infrastructure cloud development while at the Group.
- Former DT executive **Kim Juchem** has been appointed Chief Commercial Officer at German altnet **DNS:NET Internet Service**. Juchem was at the Group between 2006 and 2017, most latterly as VP of Investment Management, with a focus on DT’s investment in BT. In 2018 he co-founded Group IoT services spinout 1NCE, and spent three years there as COO.

**Dirk Wössner**

Deutsche Telekom

- **Dirk Wössner**, one-time CEO at TDE, has been [appointed SVP at Warburg Pincus Deutschland](#), teaming up with former DT CEO René Obermann (now Co-Head of Europe at the private equity house). In a brief statement, Warburg said Wössner will “work closely alongside” Obermann — who was DT’s Group CEO between 2006 and 2013 (*Deutsche Telekomwatch*, #18) — and fellow MD Max Fowinkel, both of which have led the Berlin office since it opened in 2018. Warburg’s release did not reference any specific plans to tap into Wössner’s telecoms experience, although the exec made a nod to Warburg’s focus on “long-term and sustainable growth” as something that could chime with his knowledge of the sector, as well as the broader software and tech market.

Wössner was at one point mooted as a potential successor to current DT CEO Timotheus Höttges, but [left the Group](#) in 2020, after a three-year stint heading up TDE. Upon departing he was appointed to lead healthcare IT services rival CompuGroup Medical. Previously, in 2017, he had been lured back in by DT from Canada’s Rogers Communications, where he had spent the previous two years serving as President of Consumer. Before exiting for Rogers in 2015, he had filled various roles within DT, including as Sales Director and Head of Wholesale at TDE (*Deutsche Telekomwatch*, #92 and *passim*).

At **Warburg**, Wössner will help manage (and presumably build out) a portfolio that includes: UK altnet Community Fibre (also a DT interest, via DTCP Infra); Dutch operator Odido ([formerly T-Mobile Netherlands](#), which Warburg and Apax Partners bought from DT in 2021–2022); and German cloud services player IONOS Group (part of the United Internet family that competes with DT in various spaces). Former investments include German altnet inexio, bought by EQT in 2019 (and then merged with Deutsche Glasfaser), and satellite operator (and DT’s *European Aviation Network* partner) Inmarsat, acquired by Viasat last year. In total, Warburg reports it has more than \$84bn (€77.6bn) in assets under management.

Ecosystem — Dr. Stephan Zimmermann

- **Open Dutch Fiber**: Open Dutch Fiber, a Dutch altnet and DTCP Infra interest, has appointed **Dr. Stephan Zimmermann** as its new **COO**, with responsibility for all operations and construction activity, including in-house build company Open Dutch ConnectCo. A former senior executive at Deutsche Glasfaser and Vodafone, Zimmermann has also been involved in setup of another DTCP Infra investment, German fibre construction specialist Fiber Experts Deutschland (*Deutsche Telekomwatch*, #112).

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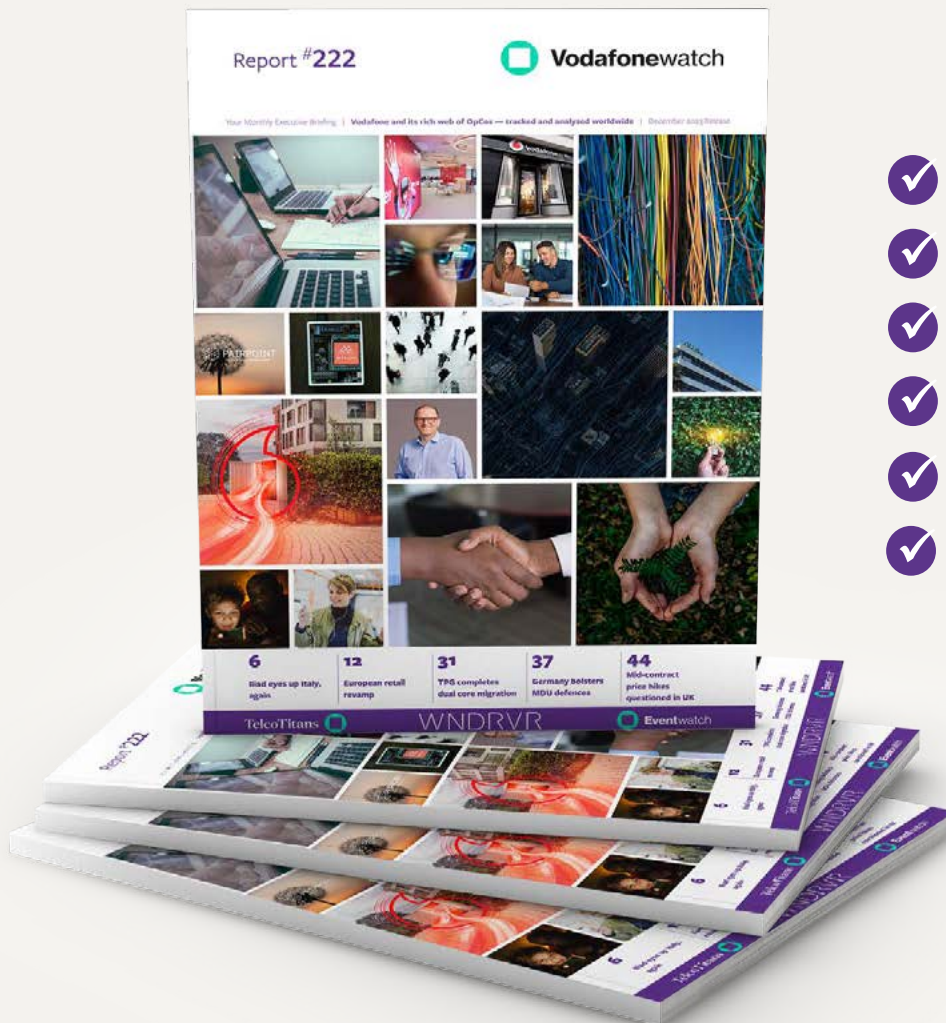
Image: Unsplash / Ross Parmlly

ELSEWHERE IN GROUP

- **Aviation Network partner stays on board**
- Satellite comms player **ViaSat has pointed to a refresh of in-flight broadband ties with DT** as a highlight of its latest fiscal quarter, to 31 December 2023. The SatCo — which inherited part-ownership of the *European Aviation Network* system, alongside DT, from its May 2023 takeover of Inmarsat (*Deutsche Telekomwatch*, #122 and passim) — talked up the agreement of a new, “*long-term*” deal with DT as a signal of operational progress in the three months. The reworked arrangement, which followed up Inmarsat’s switch to new ownership, saw ViaSat call the EAN the “*right solution for certain fleets in Europe*”. In late-January, the two partners flagged an EAN contract win with Lufthansa Group, covering more than 150 aircraft. Lufthansa joins Iberia, British Airways, Vueling, and AEGEAN as clients of EAN, which came to market in 2019.

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Germany

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ELSEWHERE IN GERMANY



Image: Pixabay / mozzagrebinfo

STRATEGY

TDE targets cableco churn with MagentaTV refresh

- German NatCo steps up offensive to win more TV customers from cable providers, ahead of *nebenkostenprivileg* removal.
- Refreshed TV platform focuses on customisation, OTT content, and access from anywhere.
- Move aligns with Group plan to implement a unified OTT strategy based on the *Android TV OS*.

Telekom Deutschland (TDE) has refreshed its flagship *MagentaTV* platform as part of a campaign to grab a larger share of the pay-TV sector in Germany once housing associations are prohibited from bundling television services and broadband into leases for multi-dwelling unit (MDU) homes from 1 July 2024.

The German NatCo said the revamped *MagentaTV*, which is based on Google's *Android TV* operating system, comes with a new user interface, improved search functionality and customisation, and a tighter integration of live TV and streaming, with an enhanced focus on over-the-top (OTT) content. In addition, the inclusive *Megathek* video-on-demand service is to be rebranded as *MagentaTV+*.

The changes are due to take effect from 15 February for new *MagentaTV* customers, and from 20 February for existing customers.

TDE is already offering incentives to persuade housing association tenants that are customers of cable providers such as Tele Columbus and Vodafone Germany to switch to its *MagentaTV* pay-TV service.



Drilling down on this message, Arnim Butzen, Head of TV & Entertainment at TDE, claimed that *MagentaTV*'s “*unique combination*” of live TV and streaming is the “*perfect alternative with the best price-performance ratio*” for such tenants, and described *MagentaTV* as a “*smart aggregator for all viewing habits*”.

TDE has wasted no opportunity to ensure that tenants are made fully aware of the changes that will take effect. Essentially, the so-called “*nebenkostenprivileg*” (“*additional cost privilege*”) — which allows for the inclusion of mandatory cable TV or broadband charges in housing association rental contracts, whether the service is used or not — is to be scrapped. The move has opened the way for other broadband and TV service providers to **churn individual users away** from cablecos' bulk deals (*Vodafonewatch*, #115, #163, and #195).

Personal touches

Dubbed *MagentaTV 2.0* in its beta phase last year, the new *MagentaTV* platform promises greater ease-of-use for customers, allowing them to customise and personalise the newly designed user interface and employ voice commands to find content, for example.

It is supported by current Telekom hardware such as the *MagentaTV One* box based on the *Android TV OS* and the *MagentaTV Stick*. Telekom Deutschland also indicates on the *MagentaTV 2.0* beta site that the service is compatible with *Apple TV 4K* and the *Fire TV Stick*, and can be accessed via *Android* and *Apple iOS* smartphone applications, as well as applications on Philips, Samsung, Sony, and Xiaomi smart TVs.

However, the NatCo noted that the new service is not supported by TV receivers with hard drives, such as the *MR400/401/601 Sat* and *MagentaTV Box*.

In terms of tariffs, the new *MagentaTV SmartStream* is to be added to existing plans including *MagentaTV MegaStream*, *MagentaTV Smart* and *MagentaTV Basic*, and bundles in the ad-supported versions of *Disney+*, *Netflix*, and *RTL+* for a basic monthly fee of €17.

Telekom Deutschland further noted that *MagentaTV* can be booked “*regardless of internet connection*” and can also be used in other countries in the European Union. The pay-TV service is said to include “*up to 300 TV channels and more than 100 HD channels*”, and offer functions such as timeshift, restart, and seven-day replay.



The MagentaTV brand was first introduced in 2018 (*Deutsche Telekomwatch*, #77, #104, and #105). In January 2022, DT started marketing in Germany the **MagentaTV One box**, which was announced as part of an expanded partnership between the operator and Google that includes *Rich Communications Services* and a sovereign cloud offering with T-Systems (*Deutsche Telekomwatch*, #112).

In 2023, **Pedro Bandeira**, Vice-President of Product and New Business at Deutsche Telekom (DT) Europe, [further emphasised the importance](#) to the operator of having a proprietary “device”, such as a set-top box (STB), to deliver aggregated content to its Magenta TV customers. However, Bandeira also acknowledged the need to “*aggregate on the TV panel directly*”.

Meanwhile, **Daniel Bravo**, Head of TV Product for Europe at DT, [speaking at the Connected TV World Summit](#) in May 2022, said DT was keeping an eye on new devices like *Sky Glass* and that it was a “possibility” that the operator could launch a streaming TV service with its own user interface. At the time, Bravo highlighted progress on implementing a unified, OTT TV strategy across its European footprint based on the *Android TV OS*.

Battle on the home front

TDE reported 4.25 million pay-TV customers at the end of September 2023, up from 4.2 million in the previous quarter. It said its fibre-to-the-premises network passed eight million homes at 26 January 2023. The NatCo also reached the milestone of one million active fibre subscribers.

While the NatCo is hoping to make broadband and pay-TV gains from July, cable providers are bracing themselves for likely losses. For example, Vodafone Germany is at risk of losing a substantial share of about €800m of pay-TV income. The operator [previously indicated it](#) was embarking on a process intended to ensure that changes set to reshape the pay-TV sector do not undermine its progress (*Vodafonewatch*, #195, #216, and *passim*). [In Q3 FY23–24](#), Vodafone Germany lost 136,000 TV customers.

In its results statement for FY22, Tele Columbus indicated the amendments to Germany’s *Telekommunikationsgesetz* (“Telecommunications Act”/TKG), including the abolition of the *nebenkostenprivileg*, “*will have unexpected negative effects on the TV business model*” at the provider. The cableco said it had 1.87 million cable TV revenue-generating units at the end of September 2023, down from about 1.9 million after the first six months of the year.





Image: Freepik / frimufilms

Rival 1&1 wants to pick up pace on network rollout

- CEO of German challenger sets yet another target for antenna sites, although activations remain low at just 100.
- Operator does not have form on meeting many of its targets to date.
- In a rare media outing, Dommermuth also sheds light on succession planning for the United Internet group of companies.

German operator 1&1 aims to step up the pace of construction on its own mobile network and is now targeting 1,350 antenna sites by the end of March 2024, up from the 1,000 sites it was hoping to have erected by the end of 2023. In addition, the operator plans to have signed lease contracts for a further 750 sites on rooftops and other viable deployment locations.

In an interview at the *Internationaler Club Frankfurter Wirtschaftsjournalisten* (*International Club of Frankfurt Economic Journalists/ICFW*), 1&1 Chief Executive Ralph Dommermuth nevertheless conceded that only 100 antennas are currently operational.

He cited difficulties with connecting the masts to the fibre network as the primary bottleneck. The operator has also previously blamed its slow rollout progress on delivery [delays from main passive infra partner Vantage Towers](#) (*Deutsche Telekomwatch*, #126).

According to *Reuters*, despite the various setbacks, Dommermuth is sticking to his goal of 12,600 antennas by 2030.

In its report for the quarter to 30 September 2023 (Q3 FY23), 1&1 claimed to have 503 sites in place, up from the 193 reported at the end of Q2. Starting from 2024, 1&1 stated that it plans to add a further 2,000 antenna sites annually. Its **longer term goal is to cover 25% of German households** with its network by 2025, and [50% by 2030](#).

Another day, another target

Observers of 1&1's progress will no doubt greet Dommermuth's latest pledge to accelerate progress with a certain amount of caution given the shifting targets and slow deployment of the 5G network to date.

For instance, 1&1 failed to hit an end-2022 [regulatory deadline of reaching 1,000 sites](#) as well as a target of [1,207 antenna sites by the end of 2023](#) (Vodafonewatch, #214–#215).

There has been some positive news in recent months. In December, the operator finally activated 5G mobile services after a rejig of network partnerships, including a late-stage expansion of its national roaming agreement with Telefónica Deutschland (O2).

Ahead of the launch, the operator said 1&1 customers will automatically have access to O2's network in areas where it does not yet have coverage through its own, open RAN-based and still very limited-range network. It also noted that the [national roaming deal with O2 had been expanded](#) to include 5G, having previously only covered 2G, 3G, and 4G.

Further out, 1&1 is set to start using national roaming from Vodafone Germany from summer 2024 and gradually reduce its reliance on O2, its long-time network partner. The challenger has said the agreement with Vodafone will deliver 5G mobile coverage starting from no later than 1 October 2024.

1&1 has been offering fixed-wireless access (FWA) services since its open radio access network went into operation in late-2022.

1&1 signed a [national roaming agreement with Vodafone Germany](#) in August 2023, replacing O2 as the partner through which it will be able to extend network reach while it rolls out its own infrastructure (Vodafonewatch, #219). O2 [has implemented](#) a three-year [Accelerated Growth & Efficiency Plan](#) in part to mitigate the loss of the 1&1 contract. It will continue to leverage existing long-term wholesale contracts in fixed and mobile.

In June, Germany's Bundeskartellamt (Federal Cartel Office) announced that it was **investigating whether Vodafone or Vantage Towers had violated German and European competition law** by "*impeding*" the greenfield network operator's options for co-using radio masts (Vodafonewatch, #217). Dommermuth has made it clear, however, that he hopes to negotiate the Vantage dispute "[out of court](#)" to avoid any protracted legal process, and avoid any further damage to the relationship the operator has with its TowerCo partner (Vodafonewatch, #219).



Dommermuth's retirement planning

Framing the interview at ICFW as a rare media outing by the 1&1 CEO, German publication *Frankfurter Allgemeine Zeitung* (FAZ) described Dommermuth as one of the most successful founders in Germany in recent decades, but one that is often, wrongly it believes, forgotten.

The paper recounted how Dommermuth, who turned 60 in 2023, surprised journalists by opening up about his work ethic, family life (wife Judith, also an entrepreneur, and son Philipp) and more during a two-hour discussion at the club.

It also revealed that the CEO is giving serious thought to his retirement, and who his successor should be at the constituent businesses of holding company United Internet, including 1&1. According to FAZ, Dommermuth does not want to commit to a specific timetable and is likely to retire “*in instalments*”, potentially over the next three to seven years.

As noted by *Reuters*, he wants to fundamentally reorganise the group before handing over the reins. “*The aim is to hand over a company that is easier to manage*”, Dommermuth said. For example, the subsidiaries could be made independent, and the holding company scaled down.

Currently, 1&1, web hosting and cloud services provider Ionos, and United Internet are listed on the stock market. Other brands include German fibre network operator 1&1 Versatel.

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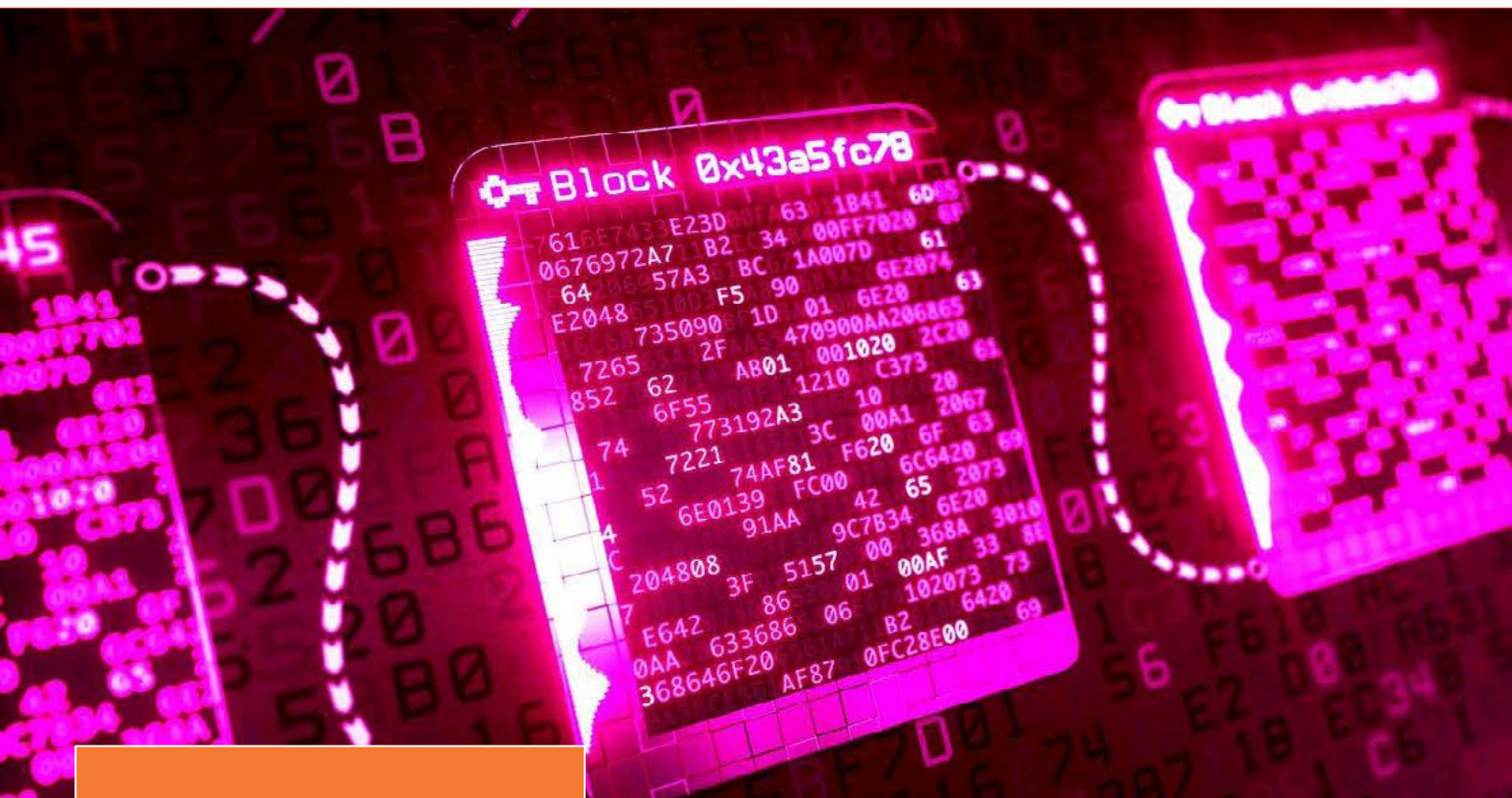


Image: Deutsche Telekom

PARTNERSHIPS

DT MMS backs Fetch.AI in industrial blockchain drive

- Group becomes first corporate partner of Web3-focused foundation established last year by Bosch and Fetch.AI.
- Deutsche Telekom MMS adds another blockchain network validator role to its growing portfolio.
- Move builds on a long-standing collaboration between the three partners.

Deutsche Telekom has joined the Fetch.ai Foundation to bolster its activities in the fields of artificial intelligence, blockchain, and Web3. The move sees Deutsche Telekom Multimedia Solutions (DT MMS), the Group's German-aligned digital services unit, expanding its blockchain play by becoming a validator of the *Fetch.ai* blockchain network.

DT said it has become the first corporate partner of the non-profit organisation, whose members currently include founders Bosch and Cambridge, UK-based Fetch.ai. It is not clear if DT will join the foundation's board, which currently comprises six members, of which two are from Bosch and four from Fetch.AI.

Peter Busch, Head of Distributed Ledger Technology Mobility at Bosch and Chair of the Board of the Fetch.ai Foundation, noted that DT is “contributing its infrastructure and expertise as a telecommunications provider” to the foundation.

Germany-based Bosch joined a *Fetch.ai* test network in 2019. The pair became research and development partners in 2021 and formed the Fetch.ai Foundation in February 2023. The aim of the foundation is to **promote AI and Web3 technologies on the Fetch.ai network**. The focus is on promoting an open platform that is accessible to a broad user base.



Industrial IoT focus

The role of DT MMS will be to ensure “*network security during the integration of devices, individuals, and services into the blockchain*”. The unit, [which was rebranded](#) as part of a “*strategic alignment*” in 2023 (*Deutsche Telekomwatch*, #119 and #123), said Fetch.AI’s technology combines blockchain with AI and has “*autonomous agents*” at its core, which manage resources, conduct transactions, and analyse traffic flows.

Fetch.ai services are currently said to be focused on various sectors including healthcare, automotive, supply chain management, and digital identities. The open source *Fetch.ai* platform is built on the Cosmos protocol and uses the *FET* coin as digital currency within the Fetch.ai ecosystem.

Dirk Röder, Head of the Web3 Infrastructure & Solutions Team at DT MMS, indicated the collaboration between Bosch, DT, and Fetch.ai will seek to combine industrial applications with the *Internet of Things* (IoT). “*Autonomous agents will automate industrial services, simplify processes and make them secure and scalable thanks to blockchain technology*”, Röder said.

DT MMS already runs validator services for several blockchain networks. In an interview with Röder, posted on DT’s website in late-June 2023, he confirmed that in excess of €60m of assets sit on its infrastructure via eight blockchain networks, including [Celo](#), Chainlink, Energy Web, Ethereum, [Flow](#), [Polkadot](#), Polygon, and Q, with more than 200 validators.

More recently, DT MMS joined the MultiversX and Aleph Zero blockchain networks, again as validator.

Building blocks

The move builds on existing relationships between DT and both Bosch and Fetch.AI. For instance, DT’s research arm T-Labs signed a Memorandum of Understanding with Fetch.ai in 2019, aiming to research, build, and deploy autonomous economic agents on the *Fetch.AI* test network (*Deutsche Telekomwatch*, #85).

Furthermore, Bosch, Fetch.AI, and T-Labs have collaborated on e-mobility software as members of the Trusted IoT Alliance (TloTA), which merged with the Industry IoT Consortium (IIC) in January 2020. The IIC is a programme of the Object Management Group (OMG), which announced in January that it will integrate the IIC with the Digital Twin Consortium.

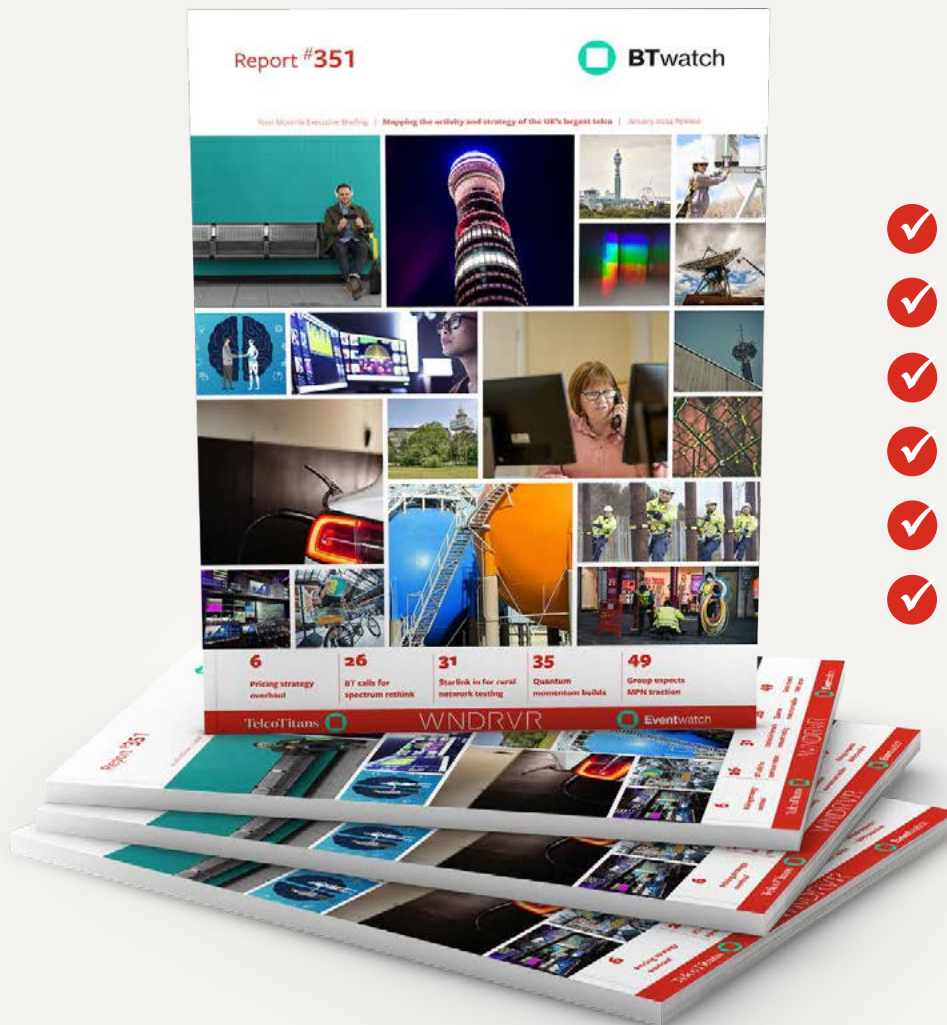
Meanwhile, DT has nurtured a Group-wide partnership with Bosch, including a [recent collaboration](#) with Ericsson-owned Cradlepoint and T-Mobile US on a host of IoT connectivity solutions.

In June 2022, the Group launched a green energy supply trial with Bosch, focused on generating electricity for network systems from solid oxide fuel cells (*Deutsche Telekomwatch*, #115). The partners have also cooperated on autonomous driving and vehicle-to-vehicle comms technology (*Deutsche Telekomwatch*, #57).

In February 2024, DT MMS and Fetch.ai will participate in the Bosch Connected Experience IoT and AI hackathon, where “*new ideas will be developed on the Fetch.ai blockchain*”.

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PEOPLE

Image: Deutsche Telekom

DTT appoints new Head of 'Fiber Factory'

- Arne Freund replaces Jörg-Peter Heeb, who has taken on a new, strategic role at the Factory's parent unit Deutsche Telekom Technik.
- Fiber Factory's "challenging programme" for 2024 includes bringing "significantly more customers" to the fibre network.
- Freund is doubling up on oversight of DT's German field services and fibre buildout operations.

Arne Freund has become the new Head of Telekom Deutschland's (TDE) Fiber Factory unit, replacing Jörg-Peter Heeb, who has been appointed to the role of Senior Vice-President, Fibre and Transformation, at Deutsche Telekom Technik (DTT).

A spokesperson for Deutsche Telekom confirmed that Freund took over responsibility for Fiber Factory with effect from 1 January 2024, while retaining his existing role as Managing Director of Deutsche Telekom Außendienst, the operator's field service division.

Heeb, who has managed the Fiber Factory unit for the past seven years, will now "contribute his extensive experience to shaping Deutsche Telekom's fibre optic strategy", the spokesperson added.

Writing on *LinkedIn*, Freund hailed the achievements of Fiber Factory in 2023, including the launch of a new [civil engineering unit](#) called Deutsche Telekom Tiefbau (or "Magenta Bagger", as it is referred to internally) and the recruitment of another 1,300 employees to bolster the already sizeable operation.

He also noted that the unit has a "challenging programme" ahead of it in 2024, including bringing "significantly more customers" to the fibre network for both TDE and wholesale partners. It will also continue efforts to reduce costs, improve efficiencies, reduce repair times, and "massively digitise processes".



All systems go

DTT functions as TDE's network technology business and oversees Fiber Factory, as well as related projects such as the *Fiber Planning Factory* and *FTTH Factory*.

As indicated by Freund, the change in management at Fiber Factory could also signal that the German NatCo's "factory-like" approach towards the construction of fibre-to-the-premises network has reached a certain level of operational maturity, allowing a greater focus on subscriber take-up, and not only on the number of homes passed.

TDE has passed about eight million homes with full-fibre and recently reached the milestone of signing up its one millionth active subscriber. However, it remains challenging to convince more customers to upgrade to a fibre contract. Group Chief Financial Officer Christian Illek previously attributed the relatively slow take-up "first and foremost" to the "exceptional strength and quality of our vectoring network".

The NatCo is also hoping to make broadband and pay-TV gains from July, once housing associations are prohibited from bundling television services and broadband into leases for multi-dwelling unit (MDU) homes.

In December 2023, TDE said it is on track to achieve its **flagship target of passing ten million premises** with its FTTP network in 2024 after reaching the eight million homes mark on 26 January 2023. The operator again aims to pass more than 2.5 million new premises in 2024. Longer term, its rollout target is to reach 25 million–30 million households by 2030. The German federal government has targeted full fibre coverage of the country by 2030.

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Image: Unsplash / Andreas Gücklhorn

ELSEWHERE IN GERMANY

● TDE breaks into seven figures on fibre

- Telekom Deutschland (TDE) has broken into seven figure territory on full-fibre users**, calling it a “significant milestone”. The NatCo connected its one millionth fibre-to-the-home customer in late-January, in the city of Halle. Deutsche Telekom (DT) Chief Financial Officer Christian Illek had flagged in November that the one million subscriptions target was in sight, and the data point will no doubt get a mention when the Group reports its FY23 numbers later in February, with DT — like many fibre players across Europe — having recently shifted monetisation of fibre investment to the top of its strategic priority list. TDE did not provide a fresh figure for its FTTH footprint or penetration, but had 910,000 users at 30 September, against 7.1 million homes passed (just 13%).
- Glasfaser Northwest, TDE’s regional fibre joint venture with utility EWE, has agreed a wholesale contract** with the NatCo’s rival 1&1. Glasfaser Northwest, which is operating on an open access basis, indicated that the deal will give 1&1 a targetable add-on of more than one million households and business locations from 30 June 2024. The JV’s network passed just over 700,000 premises at 30 June 2023, and it is aiming to cover 1.5 million by 2030 (*Deutsche Telekomwatch, passim*). Plusnet and TDE are among other wholesale clients.
- Deutsche Telekom IoT (DT IoT) is working with Danish robotics specialist Capra Robotics** on development of automated solutions for road maintenance, parcel delivery, and other applications. The vendor is using DT IoT’s mobile and satellite connectivity, and *Precise Positioning* system, to enable its robots. *Precise Positioning*, pitched as a super-accurate system for navigation use-cases, is based on a tie-up between DT and US technology player Swift Navigation, announced in 2020 (*Deutsche Telekomwatch, #95*).
- Group rival **Telefónica has made a show of commitment to Germany** by completing an increase in ownership of its domestic operating business to beyond 90%. The move came via an opportunistic minority shareholder buyout offer, initiated in early-November 2023, after Telefónica Deutschland saw its shares dip, and was forced into a strategy rethink, in the wake of 1&1’s shift to Vodafone Germany as its network partner (a deal that also had the effect of getting DT CEO Timotheus Höttges’ hackles up). It has seen the Spanish group increase its stake in Telefónica Deutschland from 71.81% to 93.1%.



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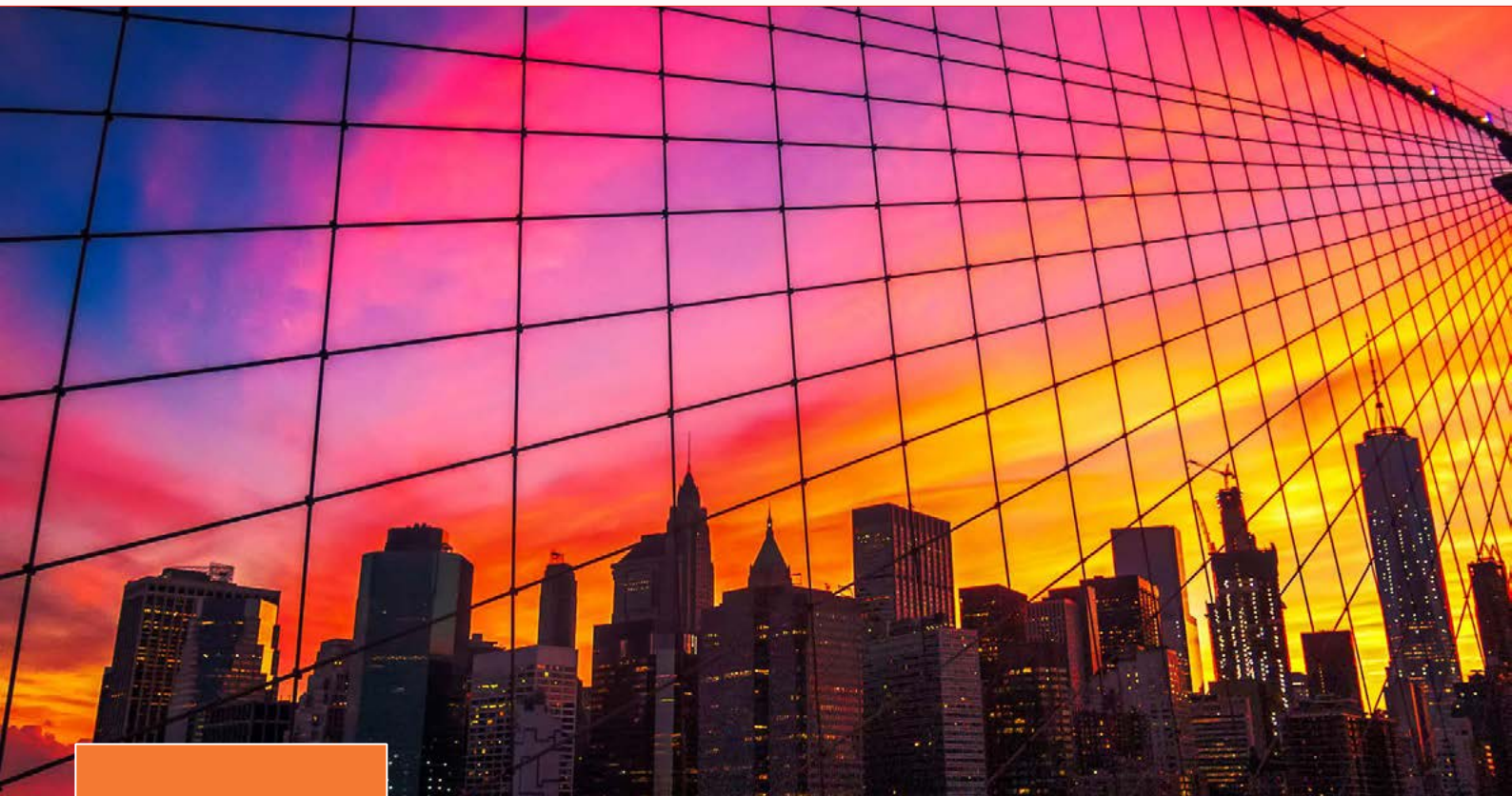


Image: Amdocs

REGION

Amdocs wins more DT business in Austria, Hungary

- Magyar Telekom signs up for Amdocs Policy to improve 5G monetisation.
- Amdocs' CEO also highlights a new contract with Austria's Magenta Telekom to support 5G SA.
- T-Mobile US remains the provider's second-biggest client.

IT software and services provider Amdocs has revealed further contract wins within Deutsche Telekom, this time supporting NatCos in Austria and Hungary with elements of their respective 5G services.

Speaking during the provider's earnings call for the quarter to 31 December 2023 (Q1 FY23–24), Amdocs' Chief Executive Shuky Sheffer said Magyar Telekom had “elected to deploy Amdocs' Policy and Charging Control function”, while Amdocs had also “reached an agreement with Magenta Telekom in Austria to upgrade Amdocs' Online Charging System to support their 5G standalone modernisation journey”.

Amdocs has separately confirmed the contract with Magyar Telekom, noting that the Hungarian NatCo has selected the “next-generation Amdocs Policy to modernise their Policy and Charging Control function and capture the opportunities of the 5G era”.

László Bóka, Platform and Core Services Tribe Lead, at Magyar Telekom, said the new contract builds on an existing billing relationship with Amdocs and is aimed at improving the monetisation of both 4G and 5G networks. “This collaboration will allow us to accelerate our innovative services, ensuring our customers benefit from the best-in-class solutions across our expanding 5G network, which now covers over 65% of Hungary”, Bóka said.



Amdocs has not yet provided further details about the contract with Magenta Telekom, which despite the reference to an “*upgrade*” is not separately listed among the provider’s clients in its 2023 *Annual Report*. However, T-Mobile Austria, which came together with UPC Austria to form Magenta Telekom in 2018 (*Deutsche Telekomwatch*, #81), previously deployed Amdocs’s billing solutions and *ClarifyCRM* for customer support.

Notably, Amdocs has just announced a new deal with the Austrian NatCo’s rival **A1 Telekom Austria** to improve its digital services offering.

Howdy partner

Amdocs has broad and longstanding relationships with businesses within DT. In 2016, for example, it listed NatCos in Austria, Croatia, Czech Republic, Germany, Hungary, Montenegro, the Netherlands (now sold off), and the USA as customers.

Amdocs’ latest, end-2023 client list includes Deutsche Telekom, Magyar Telekom, and T-Mobile US (TMUS), with the latter remaining the provider’s second-largest customer after rival AT&T. In the fiscal years 2023, 2022, and 2021, TMUS accounted for 23%, 20%, and 19% of Amdocs’ revenue, respectively.

In FY22–23, Amdocs said customers in North America accounted for 67.7% of its overall revenue figure of \$4.88bn (€4.5bn). In Q1 FY23–24, revenue from North America increased by 3.1% to \$838m.

Sheffer [revealed last year](#) that TMUS had selected Amdocs’ *Home Operating System* to “*simplify internet and device management, and to automate customer support for its 5G Home Internet customer*”.

The supplier also [recently indicated](#) it is helping TMUS to implement digital ways of working throughout its customer care channels, providing the Amdocs *Commerce & Care Suite* for omnichannel customer support and the Amdocs *Monetization Suite* for charging, billing, and partner management.

While ties stretch back much further, in February 2021 TMUS and Amdocs announced a “*multi-year strategic partnership agreement*” to accelerate the operator’s digital transformation and next-generation hybrid cloud operations. Reference was made to supporting “*post-merger integration activities*” and to “*unlock operational synergies*” from the TMUS–Sprint merger. As part of the strategic partnership, the NatCo selected AmdocsONE to provide its consumer and business customers with “*next-generation communication and media services*”.

A year later, Amdocs [flagged a “key” contract](#) award from TMUS focused on DataONE, its cloud-based *data intelligence platform*. Earlier in 2022, the vendor also highlighted what it [claimed was further progress](#) in helping the NatCo “*accelerate*” post-merger synergies with Sprint.



Image: Ericsson

CROATIA

HT gets back on the radio to Ericsson Nikola Tesla

- Croatian vendor adds 5G-focused radio access network deal to core network upgrade contract announced in December.
- “Cooperation agreement” gives Ericsson affiliate continued exclusivity within Hrvatski Telekom RAN.
- Deal lays groundwork for 5G SA application rollout.

Croatia’s Hrvatski Telekom has further underlined its enthusiasm when it comes to using Ericsson Nikola Tesla (ENT), the Swedish vendor’s local affiliate, to support its mobile network.

In a statement, Hrvatski Telekom said it had handed a deal to ENT to serve as its sole radio access network (RAN) supplier until December 2027, extending an (also exclusive) RAN contract that it gave the supplier back in 2020 (*Deutsche Telekomwatch*, #95).

It also follows only weeks after ENT was [confirmed as Hrvatski Telekom’s exclusive mobile core network supplier](#) in a deal covering both its home market operation and Montenegrin subsidiary Crnogorski Telekom (*Deutsche Telekomwatch*, #130).



Described as a “*cooperation agreement*” — a form of deal that tends to lay out a framework for working relationships between two parties — the arrangement will see ENT bring the “*latest products and solutions of Ericsson’s radio system*” into the Hrvatski Telekom network, the Croatian operator said.

Its language also indicated it sees the contract as a stepping stone for the release of more advanced, 5G standalone (5G SA)-based offerings, building on the “*cloud-native*” core ENT is supplying under the December agreement. Hrvatski Telekom has not yet provided a firm timeframe for 5G SA release.

“*With this partnership we are not only redefining the 5G landscape in Croatia but also opening doors to exciting new business opportunities, as well as providing a crucial platform for country’s accelerated digitalisation and social progress*”, wrote Kostas Nebis, Hrvatski Telekom’s [outgoing Chief Executive](#).

ENT is 49%-owned by Ericsson, and has a **long relationship** with Hrvatski Telekom stretching back through multiple mobile and fixed network generations, and across both its Croatian business and regional interests Crnogorski Telekom and HT Mostar (in the Federation of Bosnia and Herzegovina). At the same time, the two businesses recently unwound a decade-long network field services relationship on 1 January 2024 that saw Hrvatski Telekom [bring activities in-house](#) (Deutsche Telekomwatch, #125).

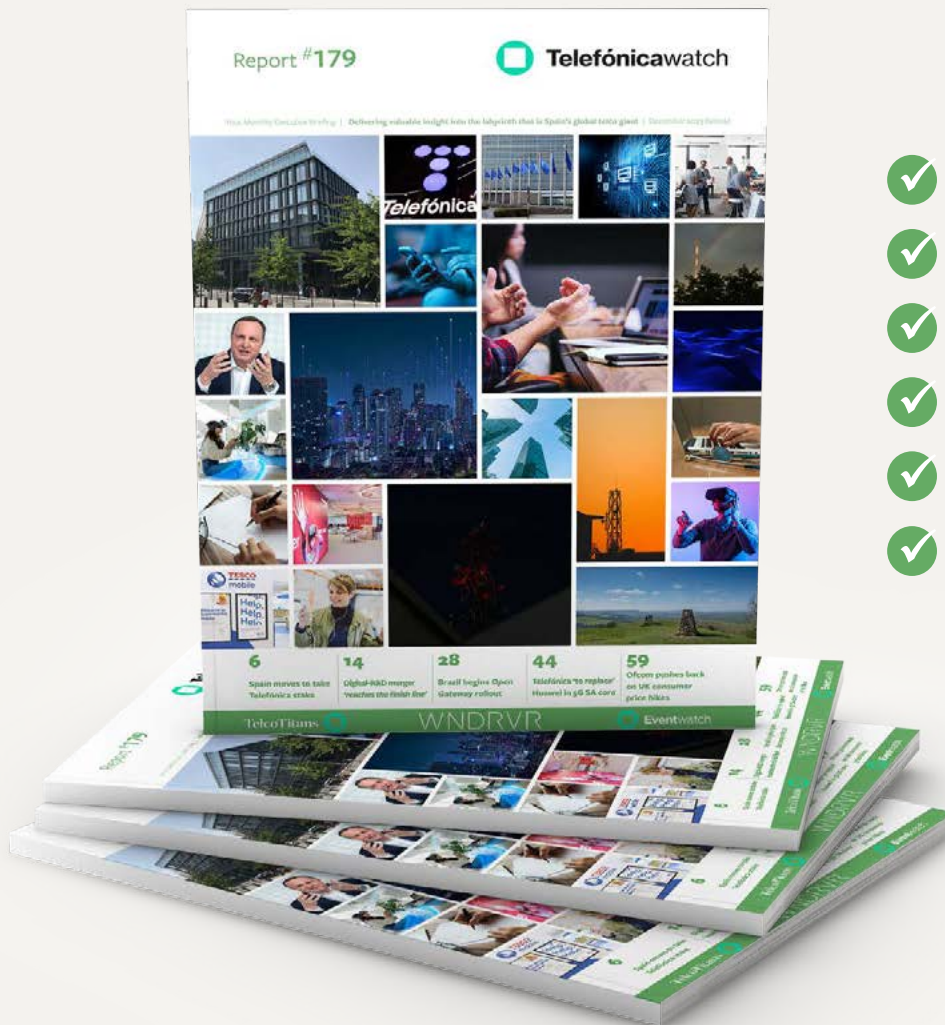


ELSEWHERE IN EUROPE

- **Mavenir goes quad-play**
- **Region: Four Europe segment businesses — Magenta Telekom, OTE Group, Slovak Telekom, and T-Mobile Czech Republic — are to harmonise their messaging systems** via a deal with network tech vendor Mavenir. Continuing Deutsche Telekom's (DT) long programme of tech consolidation within its regional network of NatCos, the quartet has adopted Mavenir's *Message Controller* solution to handle 2G–5G application-to-person traffic and IoT/M2M applications that employ messaging. Mavenir highlighted modernisation, innovation, and “5G readiness” as key benefits.
- **Croatia:** On the Group's increasingly busy legacy decommissioning front, **Hrvatski Telekom (HT) has become the latest NatCo to flag it has been progressing retirement of 3G kit.** The operator is to perform the first of a planned wave of regional 3G shutdowns in mid-March 2024, covering Đakovo, Daruvar, Donji Miholjac, Osijek, and Valpovo. DT businesses that have already completed 3G retirement include HT-controlled Cronogorski Telekom, as well as Magyar Telekom (MT), Telekom Deutschland, T-Mobile Czech Republic, and T-Mobile US.
- **Greece: OTE has flagged that it now has kit in the ground to support Greece's Ultra-Fast Broadband Infrastructure (UFBB) scheme,** for which the operator secured [three out of seven regional deployment contracts](#) in mid-2023 (*Deutsche Telekomwatch*, #125). The first fibre-to-the-home cabinet has been installed in Drama, one of the areas covered by the scheme's *Lot 1* contract. UFBB is described as Greece's largest telecoms infrastructure project to date, and aims to connect about 830,000 premises (including 10,000 public buildings) to fibre. OTE subsidiary Ultrafast OTE is handling its involvement. The programme has a budget of €743m (before VAT), of which €250m is coming from the public sector. Participants will gain a 23-year concession to run the networks before handing them back to the state.
- **OTE has hosted a kick-off event for 6G-PATH,** a European Union-funded project focused on development of 6G applications, standards, and metrics. The scheme began on 1 January, with a two-day meeting at OTE's headquarters in Athens, and is scheduled to last three years.
- **Hungary: MT has reportedly formed a tie-up with Recommerce Group,** a French device refurbishment specialist, in a presumed reflection of ongoing pressure on customer budgets and resultant lengthening mobile handset replacement cycles (as well as the sustainability goals telcos typically like to frame these sorts of partnerships around). *Romania Insider* writes that the deal will see MT build out its smartphone portfolio with Recommerce's second hand range, and follows on from the vendor's opening of an office in Budapest in October. Recommerce has a similar relationship with Vodafone Germany.
- **MT has said it is ditching plans to introduce a four-day working week** for staff, following a 20-month pilot project. The Hungarian operator said the test had initially received positive feedback from the 300 participants, who worked in areas including customer service, technical fault repair, technology sales support, and managing SAP systems. However, over the course of the whole project, it became clear that “*not all areas and colleagues were able to perform their tasks with the same efficiency*”, said MT. The pilot is to come to an end on 29 February.

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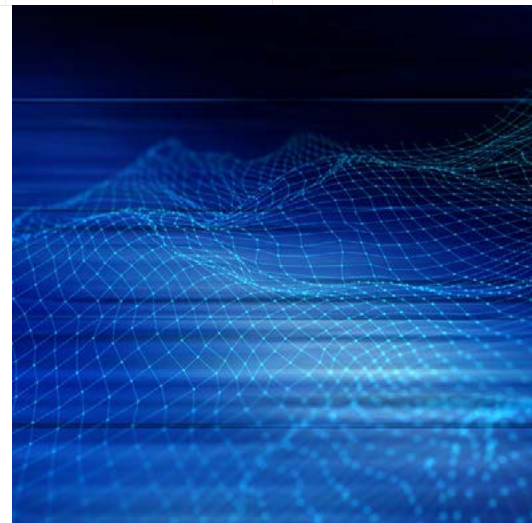
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ELSEWHERE IN USA



Image: Nokia

NETWORK

Nokia recruited to boost 5G fixed wireless play

- Finnish vendor to provide its Multi-Access Gateway to improve FWA scalability and efficiency.
- TMUS continues to explore ways to expand its FWA business, as Verizon also makes further gains.
- New collaboration offers further, tacit support for Nokia in wave of AT&T switchup.

Nokia has hailed an extension of its relationship with T-Mobile US (TMUS) through the addition of a new gateway product that aims to supercharge the American NatCo's 5G fixed wireless access (FWA) offering.

The Finnish telecoms equipment provider said its *Multi-Access Gateway* (MAG) product, which supports LTE, non-standalone 5G, and standalone 5G technologies, will help TMUS “*improve service scalability and time to market*”.

In essence, TMUS will be hoping to improve the efficiency of its FWA network as it rolls it out to more homes. According to John Saw, the operator's Executive Vice President and Chief Technology Officer, the Nokia MAG will “*allow us to simplify our architecture and reduce operational life cycle management, and our energy footprint*”.



In an August 2023 blog, Nokia said it was beginning to see the first large-scale commercial deployments of the Multi-Access Gateway, which it said implements disaggregated broadband network gateway (DBNG) architecture with control and user plane separation (CUPS). In addition to TMUS, Nokia has publicly announced trials of the product with **China United Network Communication Group (CUC)** and a deployment at **UAE-based operator du**.

Notably, Nokia said the platform “can incrementally scale the bandwidth” for TMUS’s high-speed internet (HSI) traffic to “**multiple Terabits-per-second**”. As TMUS expands its HSI service to more homes, it will benefit from higher bandwidth with lower space and power, the vendor added.

The expanded collaboration with TMUS could also help boost **Nokia’s somewhat battered ego** in the wake of AT&T’s announcement that it plans to collaborate with Ericsson and Fujitsu, not Nokia, on open radio access network (RAN) technology in the coming five years. In December, Mike Sievert, Chief Executive of TMUS, emphasised that the operator values its partnerships with both Ericsson and Nokia, and generally sees it “as an advantage that we can buy up and down the stack from multiple partners”.

In 2021, TMUS signed five-year deals with Ericsson and Nokia to supply it with 5G RAN equipment (*Deutsche Telekomwatch*, #101). At the time, the two vendors were tasked with expanding 5G coverage, capacity, and speed across all of the operator’s spectrum bands. The deals built on previous 5G contracts awarded to Nokia and Ericsson in February and July 2018 and February 2018 (*Deutsche Telekomwatch*, #69 and #75).

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On the home straight

TMUS launched its 5G FWA service, called *5G Home Internet*, [in April 2021](#) (*Deutsche Telekomwatch*, #102 and *passim*). In the three months to 30 September 2023 (Q3 FY23), it signed up another 557,000 users to the service, bringing the total base to 4.2 million (*Deutsche Telekomwatch*, #127). The operator continues to progress towards a mid-term target of achieving seven million to eight million FWA customers.

TMUS has consistently stuck to a somewhat conservative network resource allocation approach to FWA, which sees the service offered only in areas where the operator has capacity to spare, beyond mobile data — and not offered dedicated bandwidth.

Speaking on TMUS's results call for Q3, Sievert [acknowledged that](#) the operator remains “*open minded to whether there are techniques that would allow us to deploy capital specifically for 5G broadband... but so far, we haven't drawn any conclusions that that's a scalable opportunity for us*”.

It is not clear the degree to which the deployment of Nokia's MAG will shift the FWA goalposts for TMUS, which is [exploring multiple options](#) to expand its fixed broadband business, including ongoing fibre network trials.

TMUS will also be casting anxious backward glances at Verizon, which continues to accelerate its own FWA rollout. In the three months to 31 December 2023, the rival operator signed up another 375,000 users to its FWA service, bringing the total base to over three million. Verizon also remarked that it is ahead of schedule to achieve a goal of four million to five million FWA subscribers by the end of 2025.

The **T-Mobile Fiber** service — [which the operator began offering in New York in 2021](#), in partnership with Pilot Fiber — has since been expanded to multiple locations in California (Palmdale and Oceanside), Colorado (Pueblo and Northglenn), Florida (Pinellas County and Polk County), Illinois (Rockford), Michigan (Farmington Area), Minnesota (Bloomington, Eden Prairie, and St. Cloud and Sauk Rapids), and Wisconsin (Kenosha). In Colorado, TMUS is reportedly working with Intrepid Fiber Networks, a startup backed by Canadian investor (and Deutsche Telekom's German and Austrian tower ally) **Brookfield** Infrastructure Partners. In Kenosha, its partner is Kenosha FiberCity, owned by open access fibre network provider **SiFi Networks**. According to *Fierce Telecom*, [which cited findings](#) from Wave7 Research, TMUS is also working with SiFi Networks in Farmington; Intrepid Networks in Bloomington and St. Cloud; and Tillman FiberCo in Pinellas County.



TECHNOLOGY

Image: Freepik / kjpgarter

TMUS aims to up B2B2X game with fresh Netcracker deal

- US NatCo continues effort to ignite its shrinking Wholesale business line by moving relationship with tech and services partner Netcracker into a new phase with fresh priorities.
- Deal, coming less than two years after last extension/expansion, seeks to bring AI into partner product set and ease configuration processes.
- Deal comes with TMUS continuing to highlight belief in *Wireless-as-a-Service* growth opportunities, but report falling level of top-line contribution from partnerships.

Netcracker Technology has won a “*multi-year*” extension to its support role in T-Mobile US’s (TMUS) *Wireless-as-a-Service strategy* — which underpins B2B2X tie-ups with MVNOs and IoT solution providers such as Google Fi, Helium Mobile, and pending acquisition Mint Mobile.

In a statement, Netcracker said TMUS had “*extended and expanded*” their relationship, centred on technical development of the operator’s wholesale BSS platform and accompanying managed services.

New components of the tie-up will include implementation of the vendor’s *Netcracker GenAI Telco Solution* in the realm of customer care, as well as expansion of T-Mobile Wholesale’s BSS capabilities in areas such as partner configuration, product cataloguing and billing, and the platform’s *MVNO Partner Portal*.

NetCracker said the new tie-up will help TMUS “*focus on driving revenue growth and loyalty while... giving its wholesale customers additional opportunities to create their own solutions*”.

Dan Thygesen, Senior Vice-President of T-Mobile Wholesale, highlighted that the addition of new functionality to its BSS comes with TMUS expanding its partner programme into “*more disruptive areas*” — a nod to recent agreements with innovative tech startups such as wildfire monitoring specialist Pano AI.

Plan evolves

NetCracker and TMUS last extended their wholesale BSS relationship quite recently, in March 2022, with priority deliverables including improvement of billing speed and accuracy, greater agility, and enabling a wider range of services and functionality for T-Mobile Wholesale partners (*Deutsche Telekomwatch*, #112).

Speaking at last year’s DTW23—Ignite event, TMUS execs indicated the operator, supported by Netcracker, has been working for up to five years to build out a fuller-fledged platform for partners, supporting white-label, bespoke, or low-touch/API-based commercial agreements. Capabilities now built into TMUS’ *Wireless-as-a-Service* proposition include service and offer, device and SIM, and subscriber management, as well as analytics, billing, and customer relationship management (*Deutsche Telekomwatch*, #128).

Table 3 T-Mobile Wireless-as-a-Service partners (selected)

Partner	Focus / background
Google Fi Wireless	Google Fi Wireless is an MVNO that launched in 2015 that utilises the TMUS network (<i>Deutsche Telekomwatch</i> , #91).
Halo	Driverless car startup Halo launched one of the first commercial driverless car services in the USA, in Las Vegas. The business uses the TMUS 5G network for connectivity and is a “graduate” of the <i>5G Open Innovation Lab</i> , founded by T-Mobile, Intel, and NASA in 2020 (<i>Deutsche Telekomwatch</i> , #94 and #118).
Helium Mobile	Crypto startup Nova Labs in September 2022 announced a five-year deal with T-Mobile, enabling anyone who subscribes to Helium Mobile, a crowdsourced network utilising wireless hotspots, to access TMUS’s 5G network throughout the USA (<i>Deutsche Telekomwatch</i> , #118). Moodbidri said the tie-up involved creation of some “ <i>custom connectivity</i> ”.
KORE	KORE is a long-time IoT aggregation partner of TMUS. The relationship was strengthened in 2014 with a deal that saw KORE acquire RacoWireless, which was acting as TMUS’s preferred reseller of network connectivity to solution providers (<i>Deutsche Telekomwatch</i> , #49 and <i>passim</i>).
Mint Mobile	In March 2023, TMUS confirmed a deal, worth up to \$1.35bn, to acquire Ka’ena Corporation, parent company of Mint Mobile, a budget MVNO provider that piggybacks on its network. The transaction also included the purchase of prepaid wireless service Ultra Mobile and Plum, a mobile virtual network enabler for the T-Mobile network. The deal is expected to close later in 2024. The actor Ryan Reynolds reportedly owns 25% of Mint and is set to maintain a “ <i>creative role</i> ” on behalf of the MVNO following the sale (<i>Deutsche Telekomwatch</i> , #121 and #123).
Pano AI	Highlighted at 2023’s <i>Mobile World Congress</i> , this tie-up has seen TMUS work with Pano AI on “ <i>disaster preparedness technology solutions</i> ”. The startup, another participant of the <i>5G Open Innovation Lab</i> , is using ultra-high-definition cameras and AI software, paired with TMUS’s 5G network, to monitor and detect wildfires in rural areas (<i>Deutsche Telekomwatch</i> , #118 and #126). “ <i>That type of application needs low latency and super high capacity, for the volume of data that needs to go to the AI, to distinguish between a cloud and smoke</i> ”, noted Moodbidri.
REALLY Wireless	Another ‘decentralised wireless’ (or ‘DeWi’) services player, REALLY Wireless announced a 5G-based tie-up with T-Mobile in September 2023. Initially focused on Austin, Texas, it extends its network by enabling home owners and businesses to “ <i>host</i> ” small-cell radios on their roofs or balconies.

Sources: T-Mobile, various.



For TMUS, Wireless-as-a-Service remains work-in-progress

TMUS presents the Wholesale function as a third, growth-oriented leg of its business, working alongside its much larger Consumer and Business-to-Business divisions to deliver return on its huge investments in 5G.

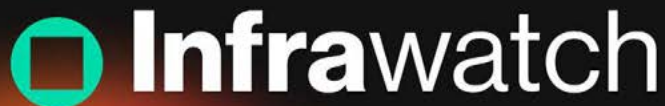
However, it has not yet fully laid out its growth ambitions in the space, and appears to remain in refresh mode when it comes to its IT estate, product portfolio, and client base.

The Wholesale business has actually been shrinking for some years — although this has been put down “*primarily*” to one-off reworking of some sizeable legacy customer relationships. The operator has also indicated it is yet to see significant growth in IoT: one of its two major target segments, alongside MVNOs.

As trailed by TMUS, the operator’s latest financial year, to 31 December 2023 (FY23), saw another significant decline in its ‘wholesale and other services’ revenue line — -14%, to \$4.78bn (€4.44bn). As such, its contribution to TMUS’s total revenue dropped by a percentage point, to just 8%.

TMUS has blamed the ‘wholesale and other services’ sales decline on various big movements, including 2023’s sale to Cogent Communications of the unwanted wireline business TMUS inherited from Sprint after its takeover, as well as the loss of two large wholesale partners, also through M&A.

The Wholesale business is seeing continuing outgoing customer migration of Boost Mobile users to competitor DISH Network, which bought the sub-brand as part of TMUS’s effort to secure approval for the Sprint deal. Also affecting user trends has been arch rival Verizon Communications’ continuing absorption of customers of TracFone Wireless, a former TMUS MVNO partner that it bought in late-2021 (*Deutsche Telekomwatch*, #95, #99, and #118).



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ELSEWHERE IN USA

● Sievert wants loyalty

- **T-Mobile US (TMUS) has stepped up its battle with churn** by launching a further loyalty programme, called “Magenta Status”. The scheme, which is accompanied by a *T-Life*-branded app, offers discounts and experiences across a range of services such as hotels, rental cars, movies, and concerts. Partners include Hilton, Hertz, and Dollar. Chief Executive Mike Sievert has regularly flagged customer retention as a [key priority](#) for his leadership, and top area of [focus for future technology investment](#) at TMUS. The operator indicated it will continue to operate its long-running *T-Mobile Tuesdays* benefits programme, despite the *Magenta Status* launch.
- **TMUS has highlighted another experimental 5G lab project with partners Ericsson and Qualcomm**, completing what it called the world’s first six-carrier aggregation call using sub-6GHz spectrum. The test is said to have achieved speeds of over 3.6Gbps by aggregating two channels in each of the 2.5GHz, AWS, and PCS bands.



- **TMUS has assured that Coverage Above & Beyond, its high-profile upcoming joint service with satellite comms partner SpaceX, remains on course** to release an initial messaging offering in 2024. “If things go well, we should have these capabilities in customer hands this year”, CEO Mike Sievert told analysts on the operator’s FY23 earnings call. The direct-to-cell service is slightly behind schedule, with SpaceX [launching the first spacecraft](#) capable of supporting it in early-January (*Deutsche Telekomwatch*, #131). Rivals have also been seeking to put a regulatory spanner in the works of Coverage Above & Beyond by raising concerns over potential interference with terrestrial wireless services (*Deutsche Telekomwatch*, #125).
- **T-Mobile for Business has tied with Cisco Systems to offer a 5G-based comms proposition** to medium-size businesses. The *Connected Workplace* solution bundles “unlimited” 5G data with Cisco Meraki access devices, security software, and a cloud-managed networking platform, as well as installation, software licence renewals, and “device upgrades every three years at no additional cost”.
- TMUS enterprise media tech partner **ActionStreamer has closed a \$2.4m (€2.2m) Series-A funding round** to support development of its platform for delivering audio and video from wearables and other connected devices. The startup — which is pitching its system to businesses in the sports, entertainment, and aerospace sectors, as a means to provide remote point-of-view (POV) footage — worked with TMUS to showcase its technology at a baseball event in 2021. The IoT/streaming space is of evident interest to TMUS, which recently applied to register a 5G POV brand for use within its [5G Advanced Network Solutions portfolio](#), and has been working with the SailGP racing series on use of 5G cameras and sensors to enhance broadcasting of races (*Deutsche Telekomwatch*, #115).

Deutsche Telekomwatch releases twelve monthly reports per year, with double issues typically in January/February and August/September each counting as two reports.

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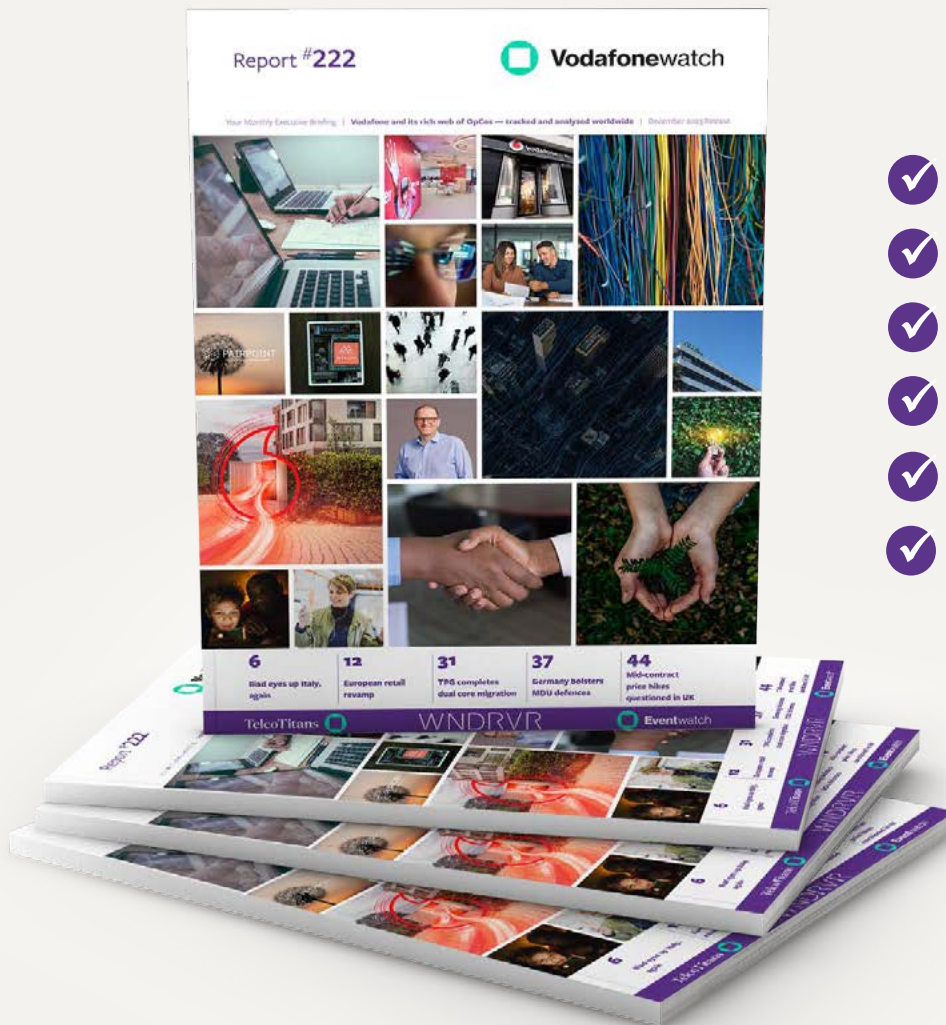
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