



## **Press release**

### **The “Deutschland Online – Getting Connected” study is published in Berlin**

**Berlin, January 28, 2008** – The current “Deutschland Online” study expects the dynamic growth in the German broadband market to continue and, in line with the increasing trend towards mobile Internet use, to make a significant contribution to the networking of our daily lives. The study predicts a market growth to just under 30 million broadband lines by 2015. It also shows that mobile broadband Internet access will in future become a natural and omnipresent way of accessing the Internet. Over 20 million mobile broadband-enabled devices are expected to be used in Germany by 2015. The study shows that the portfolio of bundled products as well as customer service are the specific challenges facing market providers and enabling them to take the lead over competitors. According to the study, the growth in broadband is expected to significantly increase the overall importance of the information and telecommunications sector for Germany’s economy.

The main results of the current “Deutschland Online” study will be published today as part of Deutsche Telekom AG’s Internationales Pressekolloquium in Berlin. Its main focus is on major current developments in the broadband market, such as sector growth, and on central topics for providers, such as convergence, integration and service aspects in the broadband market. It also covers current trends like mobile Internet and digital life, and contains an analysis of international broadband developments.

The “Deutschland Online” study was designed and carried out by Prof. Dr. Bernd W. Wirtz who has been involved in the study series since 2003. The study is one of the most comprehensive combined surveys of experts and consumers carried out in Germany on the topic of broadband Internet.

Major results of the study:

*Dynamic broadband growth in Germany*

The development of broadband Internet in Germany will continue to be highly dynamic. The results of the study predict a significant growth in broadband lines to just under 30 million lines by 2015. The experts questioned expect to see a continued increase in bandwidths, predicting that around 30 percent of users will be using bandwidths of over 16 Mbit/s by 2015. The study also concludes that, in line with this broadband growth, the importance of the information and telecommunications sector will increase significantly, and expects this sector to account for just under 12 percent of Germany’s gross domestic product by 2015.

*Mobile Internet, Web 2.0 and digital life as current sector trends*

According to the study, mobile broadband Internet access will become standard and the number of broadband-enabled mobile devices will continue to rise. “Deutschland Online” estimates that there will be over 20 million of these devices in Germany by 2015. Among mobile broadband Internet services, information and communication services will be at the forefront. The trend towards Web 2.0 applications will also continue - over 80 percent of the experts questioned think that central social web applications such as social networks and forums will have a very high or high importance in the future. The study anticipates a further increase in the use of networked applications in areas such as communities, instant messaging and personal social networking by 2015.

The trend towards a digital lifestyle also appears to be clear. Around 90 percent of the experts agreed very strongly or strongly that broadband Internet will increasingly affect all areas of life. Almost 70 percent expect that the trend towards Internet-based personal networking will act as a significant driver for mobile Internet usage. In addition, the study anticipates seeing the gradual development of an 'IP generation.' The proportion of very-high-intensity users will increase to almost a quarter of all Internet users in Germany by 2015.

### *Market trends of bundled offers and service differentiation*

With the increasing importance of entertainment over the Internet and mobile Internet usage, the importance of bundled products combining telephony, Internet access, Internet-based entertainment (e.g., IPTV) and mobile communications is also on the up. By 2015 it is expected that the proportion of triple play and quadruple play offers will increase to around 50 percent of all bundled offers.

As well as innovative products and services, quality and service leadership will be the major criteria for success allowing broadband service providers to differentiate themselves from their competitors. Around 75 percent of the experts surveyed considered quality to be very important or important as a success factor, over 60 percent voted for service and just under 57 percent for innovative products.

### *International broadband growth as a driver for global development*

Dynamic broadband growth is also taking place at an international level, and broadband Internet is a factor of growing importance for competitive international locations. In future, the information society will be less dominated by the USA. Among broadband Internet applications, communication and entertainment services are the most attractive services also from an international perspective. International experts also consider the potential in mobile broadband Internet to be very high; 75 percent of them view the mobile Internet as a driver for development in the global broadband Internet market.

### **About “Deutschland Online”:**

The “Deutschland Online” study examines the latest developments and views on broadband Internet. Experts and consumers have provided detailed information on current developments as well as on sector convergence, VDSL, Internet TV and the Social Web. The combination of opinions of experts and consumers results in particularly relevant results. The study shows which applications and business models will feature on the broadband market in the coming years.

The “Deutschland Online” study was designed and carried out by Prof. Bernd W. Wirtz, who has been involved in the study series since 2003. Publication of the results of the study is supported by Deutsche Telekom AG.

As part of the study published on January 28, 2008, 142 experts from Germany and abroad were questioned. 14,578 people took part in the online consumer survey. “Deutschland Online” is therefore one of the most comprehensive combined surveys of experts and consumers which has been carried out in Germany on the topic of broadband Internet.

The detailed results of the study are contained in the “Deutschland Online” report. The report can be accessed online at: [www.studie-deutschland-online.de](http://www.studie-deutschland-online.de).

For further information:

Deutsche Telekom AG

Corporate Communications

Tel.: +49 (0) 228 / 181 49 49

E-mail: [presse@telekom.de](mailto:presse@telekom.de)