



# About Vodafone Group Plc

July 2020



# We connect people all over the world

22

countries in which we  
have mobile operations

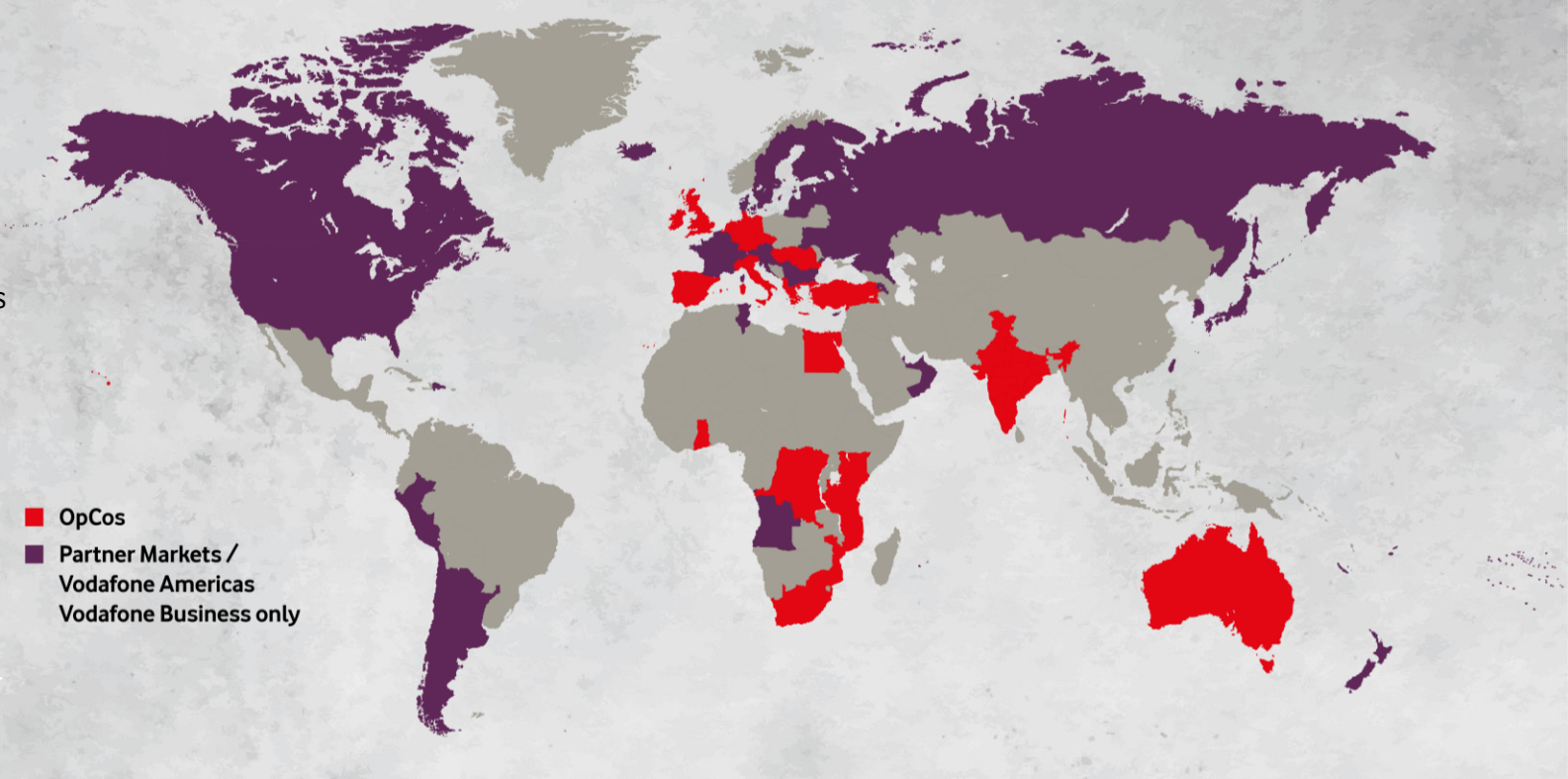
17

countries in which we  
have fixed operations

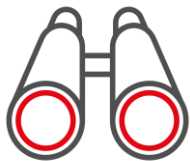
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Partner Markets

- OpCos
- Partner Markets /  
Vodafone Americas  
Vodafone Business only



# We build a digital future for everyone



## Vision

We believe in the power of new communications networks and technology to transform our lives and our societies



## Innovation

We make technology work for people, families, businesses and communities



## Inclusion

Leaving no one behind, expanding access where it doesn't exist, doing our part for a sustainable planet

We believe in a present and a future that includes everyone – and we're working hard to build it



## Investment

We're working in partnership with leading technology innovators, governments, and other businesses to meet the challenge of building the infrastructure on which our digital future depends





# Every 24 hours, Vodafone customers:

- make **7.4bn minutes** of mobile calls
- stream the equivalent of **18.8bn songs** on their smartphones
- watch the equivalent of **2.3bn 3 minute HD videos** over their fixed broadband connections<sup>1</sup>
- make **32m financial transactions** using M-Pesa
- are reunited with **three** missing cars thanks to Vodafone Automotive



# One of the world's leading converged operators

## Mobile

One of the world's largest  
mobile networks

**300m+ customers<sup>1</sup>**

## Fixed

Our NGN network  
is Europe's largest

**136m households<sup>2</sup>**

## TV

Europe's second largest  
TV platform

**22m customers<sup>2</sup>**

1. Includes joint ventures

2. Includes Vodafone Ziggo



# Europe's largest 5G network

- 5G markets with roaming
- 5G markets
- 5G trials

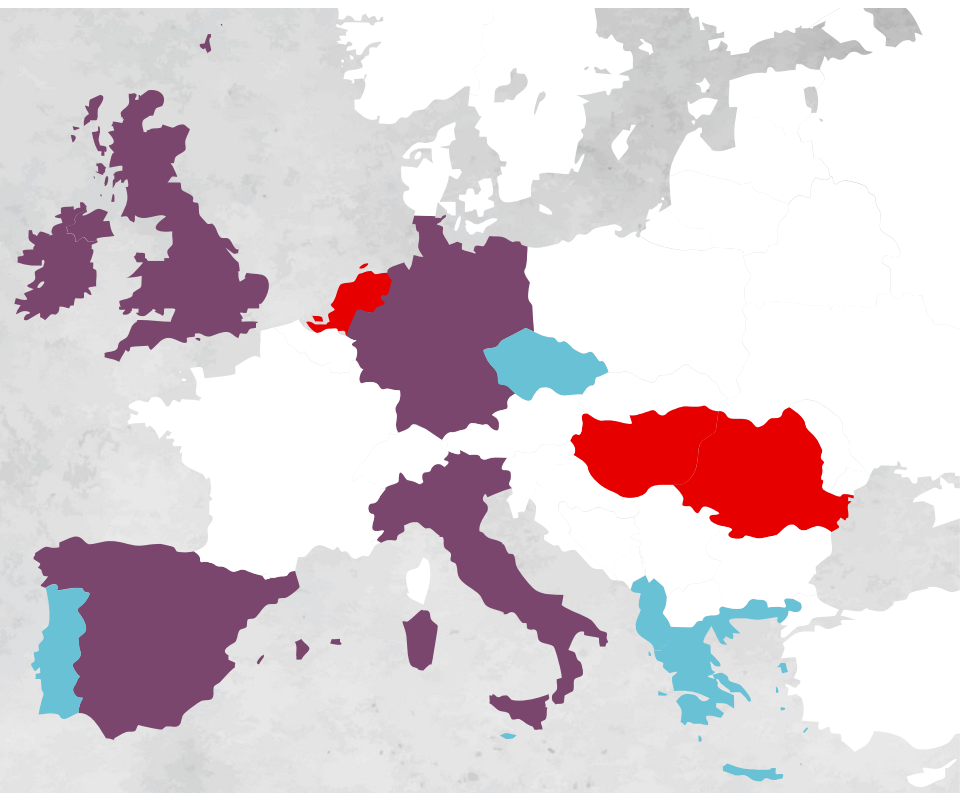
Commercial services in **8** European markets\*

Roaming available in **5** markets

Services live in **97** major cities

**1000+** 5G cell sites

**7** 5G-compatible handsets available



*\*Vodacom 5G services also now active in South Africa*





Europe's fastest growing  
superfast network

32m

households can access Vodafone's  
superfast Gigabit broadband<sup>1</sup>

136m

households, when wholesale  
agreements are taken into account<sup>1</sup>

1. Includes VodafoneZiggo



# Delivering content for customers across Europe

## 22m

TV customers in 10 markets<sup>1</sup>

Cloud-based IPTV platform  
powered by AI

Voice activated TV available  
in **Portugal** and rolling out  
across Europe

<sup>1</sup> Includes VodafoneZiggo  
C2 General





# M-Pesa provides financial freedom to millions of people in Africa

Launched in Kenya in

**2007**

**396,000**

agents

**42m**

active customers

Available in

**7 countries**





# World leading IoT platform



103m

connected SIMs

8

'V by Vodafone'  
consumer IoT markets

39

countries covered by our  
IoT platform<sup>1</sup>

2.9 tonnes

CO<sub>2</sub>e saved per tonne generated  
by Vodafone IoT customers

1. Includes partners and commercial agreements



# Vodafone Business



Trusted by more than **10m**  
organisations around the world



Sector expertise includes : energy  
and utilities, logistics and transport,  
insurance, automotive, retail  
and manufacturing.



Global reach – fixed network points of  
presence in **74** countries

Helping businesses succeed in a **digital world**



...by connecting **people, places** and **things**





# Our Executive Team



**Nick Read**  
Chief Executive Officer



**Margherita della Valle**  
Chief Financial Officer



**Hannes Ametsreiter**  
CEO  
Vodafone Germany



**Aldo Bisio**  
CEO  
Vodafone Italy



**António Coimbra**  
CEO  
Vodafone Spain



**Ahmed Essam**  
Chief Commercial  
Operations Officer



**Nick Jeffery**  
CEO  
Vodafone UK



**Shameel Joosub**  
CEO  
Vodacom Group



**Vinod Kumar**  
CEO  
Vodafone Business



**Rosemary Martin**  
Group General  
Counsel



**Joakim Reiter**  
Group External  
Affairs Director



**Serpil Timuray**  
CEO  
Europe Cluster



**Johan Wibergh**  
Chief Technology  
Officer



**Leanne Wood**  
Chief Human  
Resources Officer



**Vivek Badrinath**  
CEO,  
European TowerCo



# Group financial summary

12 months to 31 March 2020

**€37.9bn**

Revenue

**9c**

Dividend per share

**€4.09bn**

Operating profit

**€14.9bn**

Adjusted EBITDA

**£35bn**

Market capitalisation  
(29 May 2020)



# Our Purpose



**Digital Society**  
Investing in our  
Gigabit networks



**Inclusion for All**  
Embracing everyone  
on our journey to a  
digital society

**We connect  
for a better future**

Improving 1bn lives  
and halving our  
environmental  
impact by 2025



**Planet**  
Lowering our  
environmental  
impact





# Our aims: Digital Society



## Digital Society

5G

### Gigabit Networks

Connecting over  
350m people and  
businesses to make  
life better



### IoT Innovation

Connecting over  
150m vehicles to  
make travel smarter



### m-pesa

### Financial Services

Connecting 50m  
mobile money users  
to banking

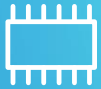


# Our aims: Inclusion for All

Connected

**She  
Can**

**Connected She Can**  
Connecting 50m  
additional women  
in developing  
markets



**Digital Skills**  
Connecting 10m young  
people to digital skills  
and upskilling the  
next generation



# Inclusion for all



**Best Employer  
for Women**  
Connecting thousands of  
skilled women to new  
opportunities





# Our aims: Planet

## Planet



**Renewable Electricity**  
Purchasing 100%  
renewable  
electricity



**Greenhouse Gas Emissions**  
Reducing our greenhouse  
gas emissions  
by 50%



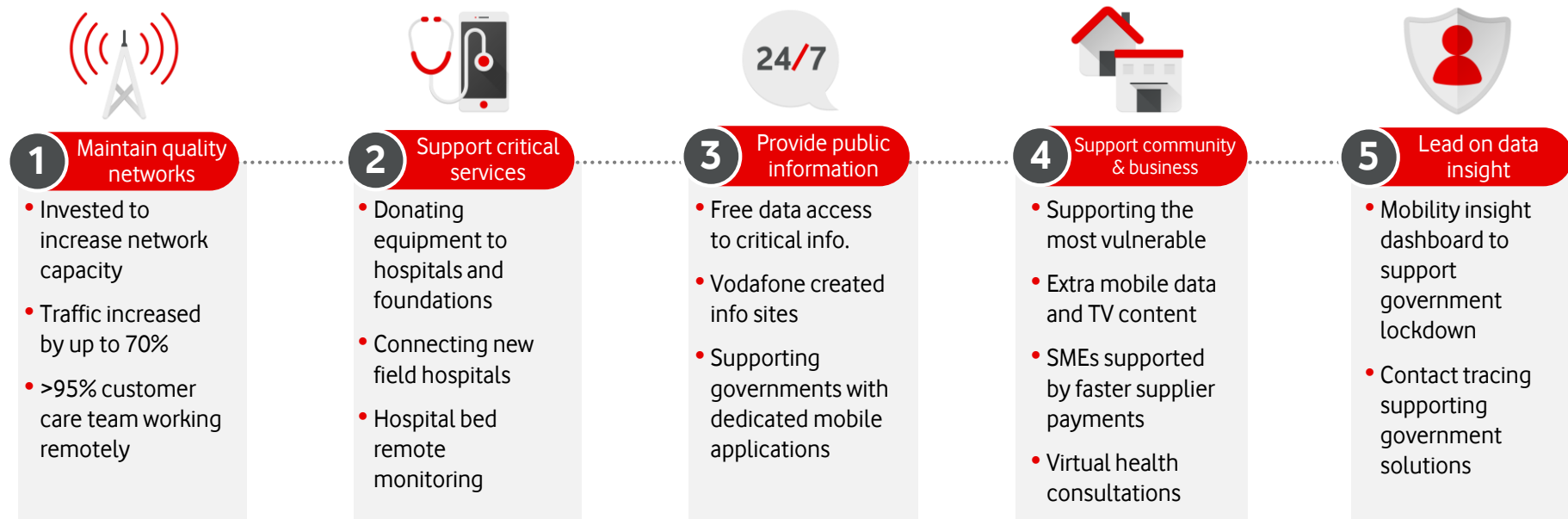
**Tackling e-Waste**  
Re-using, reselling  
or recycling 100%  
of our network  
waste





# COVID-19: comprehensive and coordinated external Vodafone response

Five-point plan to deliver critical national digital infrastructure to keep families connected, to enable business to operate, students to learn, health care to be delivered and governments to provide critical services

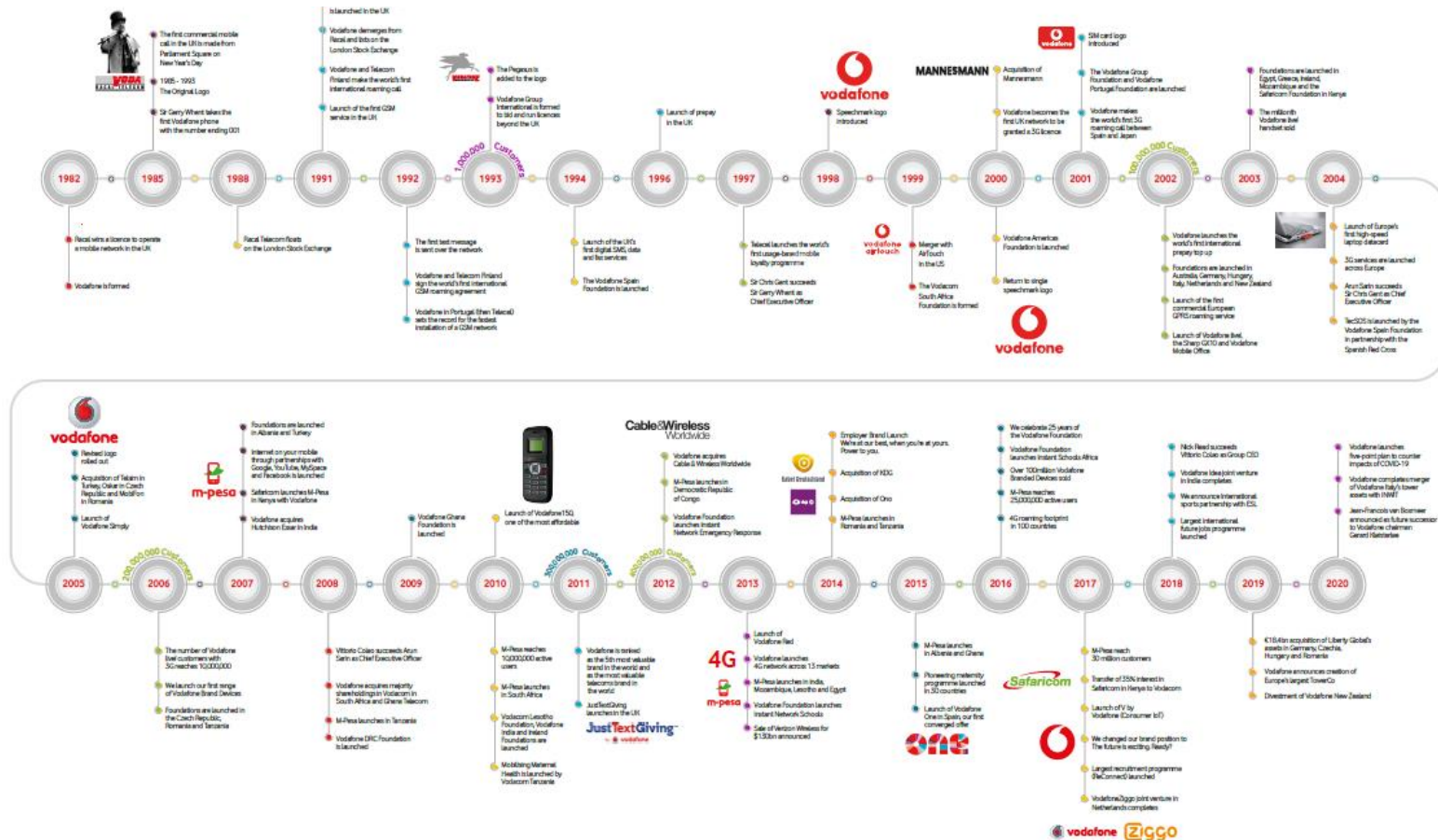


**Supporting response & recovery with total donations\* of ~€100 million reaching 78 million customers**

\*Direct contributions and services-in-kind



# History of Vodafone Group





The future is exciting.

**Ready?**

