We connect people all over the world

21 countries in which we have mobile and fixed networks

17 countries in which we have fixed operations

48 Partner Markets

- OpCos
- Partner Markets / Vodafone Americas / Vodafone Business only
One of the world's leading converged operators

**Mobile**
One of the world's largest mobile networks

**300m+ customers**

**Fixed**
Our NGN network is Europe's largest

**27m+ customers**

**TV**
Europe's second largest TV platform

**22m customers**

1. Includes Vodafone Ziggo
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
Europe’s largest 5G network

Commercial services in 9 European markets

Roaming available in 5 markets

Services live in 127 major cities

4100 5G cell sites

7 5G-compatible handsets available
Europe’s fastest growing superfast network

32m
households can access Vodafone’s superfast Gigabit broadband¹

139m
households, when wholesale agreements are taken into account¹

¹ Includes VodafoneZiggo
Delivering content for customers across Europe

22m
TV customers in 11 markets¹

Cloud-based IPTV platform powered by AI

Voice-activated TV rolling out across Europe

¹ Includes VodafoneZiggo
Connecting millions across Africa

**Mobile**
>170 million customers across 8 countries

**Data customers**
84.5 million

**4G data penetration**
22% of our African data customers use 4G today

**Digital lifestyle**
40 million purchases from VideoPlay streaming service in South Africa in 2019
M-Pesa: Africa’s largest payments platform

Launched in Kenya, now available in 7 countries

432,000
Agents employed

42m
active customers

13bn
Transactions per annum
Africa’s FinTech leader

M-Shwari and KCB M-Pesa – savings and loan accounts (Kenya)

Fuliza/Songesha – overdraft facilities (Kenya/Tanzania)

Halal-Pesa – Sharia-compliant savings account for religious and social activities (Tanzania)

M-Koba – save money, access loans and share earnings with groups like family and friends (Tanzania)

Digifarm – financial, credit services and information for farmers (Kenya)

M-Pawa – savings, loans and commercial services for entrepreneurs (Tanzania)

M-Tiba – an inclusive platform to save for healthcare costs and manage insurance (Kenya)

Super-app – single platform to manage money and pay for services. Launching in 2021 (South Africa)
World leading IoT platform

112m connected SIMs

8 ‘V by Vodafone’ consumer IoT markets

39 countries covered by our IoT platform

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.
Europe’s largest tower business

- Separate entity from Vodafone since March 2020
- Leading in scale and positioning
- 68,000 macro sites across 9 countries with
  #1 or #2 tower market position in 8 of these markets
- Dedicated management team to drive business efficiently
  and maximise monetisation of assets
- Realise value for Vodafone shareholders
  through targeted portfolio action
Our Executive Team

Nick Read
Chief Executive Officer

Margherita della Valle
Chief Financial Officer

Hannes Ametsreiter
CEO
Vodafone Germany

Aldo Bisio
CEO
Vodafone Italy

Colman Deegan
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, Vantage Towers

C2 General
## Group financial summary
12 months to 31 March 2020

<table>
<thead>
<tr>
<th>Revenue</th>
<th>€37.9bn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dividend per share</td>
<td>9c</td>
</tr>
<tr>
<td>Operating profit</td>
<td>€4.09bn</td>
</tr>
<tr>
<td>Adjusted EBITDA</td>
<td>€14.9bn</td>
</tr>
<tr>
<td>Market capitalisation (29 May 2020)</td>
<td>£35bn</td>
</tr>
</tbody>
</table>
Our Purpose

We connect for a better future

Improving millions of lives and halving our environmental impact by 2025

Digital Society
Investing in our Gigabit networks

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

Planet
Lowering our environmental impact
Our aims: Digital Society

- **Gigabit Networks**
  Connecting over 350m people and businesses to make life better

- **IoT Innovation**
  Connecting over 150m vehicles to make travel smarter

- **SMEs**
  More than 500,000 small and medium enterprises supported with connectivity

- **Financial Services**
  Connecting 50m mobile money users to banking
Our aims: Inclusion for All

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

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

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

**Inclusion for all**
Our aims: Planet

Greenhouse Gas Emissions
Reducing our greenhouse gas emissions by 50%

Renewable Electricity
Purchasing 100% renewable electricity

Tackling e-Waste
Re-using, reselling or recycling 100% of our network waste
COVID-19: Social Contract 5-point plan in Phase 1 proved very successful - Vodafone’s contribution in Europe has been considerable

1. 5G in 127 cities
   - €400m additional investment
   - Net Zero announcement
   - Green Gigabit Network

2. 1.5m healthcare workers supported
   - €6m in donations (devices/funds) to hospitals/health
   - 15m people supported through zero rating health sites
   - 250m SMS sent

3. 5.2m students helped
   - 18.4k devices donated for education
   - 5.6m consumers helped

4. 4.3m business customers helped

5. €600k+ in mobility insights donated to track the virus (Europe)
   - Removal of transaction fees for mobile money ~€4.8m (Africa)

Helped over 100m people, and made over €150m contributions in kind

Values are estimates based on information from local markets
History of Vodafone Group

- 1865: Sir Henry Harwood wins a licence to operate a mobile network in the UK.
- 1984: The Vodafone Foundation is launched in the UK.
- 1985: Digitel moves from Parliament Square on New Year's Day.
- 1990: The first commercial mobile call in the UK is made from Parliament Square on New Year's Day.
- 1991: Sir Gerry Wheret takes the first Vodafone phone with the number ending 001.
- 1993: The world's first International roaming call between UK and France.
- 1995: The first text message is sent over the network.
- 1996: Vodafone and Telecom Finland sign the world's first international GSM roaming agreement.
- 2000: Vodafone Group International is formed to bid and run licences beyond the UK.
- 2001: Vodafone becomes the first UK network to be granted a 3G licence.
- 2002: The Vodafone Group Foundation and Vodafone Portugal Foundation are launched.
- 2003: Vodafone makes the world's first 3G roaming call between Spain and Japan.
- 2004: The number of Vodafone live customers with 3G reaches 10,000,000.
- 2005: We launch our first range of Vodafone Brand Devices.
- 2006: Foundations are launched in Egypt, Greece, Ireland, Mozambique, and the Safaricom Foundation in Kenya.
- 2007: Vodafone Idea joint venture in India completes.
- 2008: Vodafone launches Gigabit Vodafone.
- 2009: Internet on your mobile through partnerships with Google, YouTube, MySpace and Facebook is launched.
- 2010: Safaricom launches M-Pesa in Kenya with Vodafone.
- 2011: M-Pesa reaches 10,000,000 active users.
- 2012: Vodafone acquires Cable & Wireless Worldwide.
- 2013: Vodafone Foundation launches the Instant Network Emergency Response.
- 2014: We celebrate 25 years of the Vodafone Foundation.
- 2015: Vodafone Foundation launches Instant Schools Africa.
- 2016: Over 100 million Vodafone Branded Devices sold.
- 2017: M-Pesa reaches 250,000,000 active users.
- 2018: 4G roaming footprint in 100 countries.
- 2019: Vodafone reaches 30 million customers.
- 2020: Vodafone acquires Liberty Global's assets in Germany, Czechia, Hungary and Romania.
- 2021: Zong, Zong, and Vodacom.”
The future is exciting. Ready?