Together We Can

Vodafone is optimistic about how technology and connectivity can enhance the future and improve people’s lives. Through our business, we aim to build a digital society that enhances socio-economic progress, embraces everyone and does not come at the cost of our planet.
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
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

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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 10 European markets

- 5G markets with roaming
- 5G markets
- 5G trials
Europe’s fastest growing superfast network

55m households can access Vodafone’s superfast Gigabit broadband

140m households, when wholesale agreements are taken into account

1. Includes VodafoneZiggo
Delivering content for customers across Europe

22m
TV customers in 10 markets

Next-generation cloud-based IPTV platform powered by AI

Voice activated TV rolling out across Europe

1. Includes VodafoneZiggo
Connecting millions across Africa

Mobile
>228 million customers across 8 countries

Data customers
82.6 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

12.2bn
Transactions per annum
World leading IoT platform

- 118m Connected SIMs
- 8 ‘V by Vodafone’ consumer IoT markets
- 39 Countries covered by our IoT platform
- 2.9 tonnes CO₂ saved per tone generated by Vodafone IoT customers
Vodafone Business

Helping businesses succeed in a digital world

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

...by connecting people, places and things
Europe’s largest tower business

- Separate entity from Vodafone since March 2020
- Leading in scale and positioning, dedicated to becoming a 5G superhost and enabling a better-connected, digital Europe.
- 82,000 macro sites across 10 countries with #1 or #2 tower market position in 9 of these markets
- Commanding portfolio of assets matched by next-generation approach to network sharing.

Asset utilisation and structural resilience driving growth and success for our own business, mobile network operators and mobile customers alike.
<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>€37.9bn</td>
</tr>
<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>
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Our Purpose

- **Digital Society**
  Investing in our Gigabit networks

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

- **Planet**
  Lowering our environmental impact

**We connect for a better future**

Improving millions of lives and halving our environmental impact by 2025
Our aims: Digital Society

- **IoT Innovation**: Connecting over 150m vehicles to make travel smarter
- **Gigabit Networks**: Connecting over 350m people and businesses to make life better
- **Financial Services**: Connecting 50m mobile money users to banking
Our aims: Inclusion for All

Connected She Can
Connecting 50m additional women in developing markets

Inclusion for all

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
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

1984: Racal wins license to operate mobile network in the UK
1985: Vodafone is formed
1986: First commercial mobile call in UK made on New Year's Day

Vodafone Foundation launched in the UK
Vodafone lists on the London Stock Exchange
Vodafone and Telecom Finland make world's first international roaming call
Launch of first GSM service in UK

Vodafone Group

International is formed to bid and run licences beyond the UK

Vodafone becomes the first UK network to be granted a 3G licence

Foundations are launched in Egypt, Greece, Ireland, Mozambique and the Safaricom Foundation in Kenya

3G Vodafone Live customers reach ten thousand

First range of Vodafone Brand Devices

Foundations launched in Czech Republic, Romania and Tanzania

Telesim in Turkey, Oskar in Czech Republic, Mobilin in Romania acquired

3G

Internet on your mobile through partnerships with Google, YouTube, MySpace and Facebook is launched

Safaricom launches M-Pesa in Kenya with Vodafone

M-Pesa reaches 10,000,000 active users
M-Pesa launches in South Africa

We celebrate 25 years of the Vodafone Foundation
Vodafone Foundation launches Instant Schools Africa
Over 100 million Vodafone Branded Devices sold
M-Pesa reaches 25,000,000 active users
4G roaming footprint in 100 countries

Vodafone acquires majority shareholdings in Vodafone in South Africa and Ghana Telecom
M-Pesa launches in Tanzania
Vodafone reaches world’s 5th most valuable brand and most valuable telecoms brand

Launch of Vodafone Foundation
Vodafone launches 4G network across 13 markets
M-Pesa launches in India, Mozambique, Lesotho and Egypt
Sale of Verizon Wireless for $130bn announced

M-Pesa reach 30 million customers
Transfer of 55% interest in Safaricom in Kenya to Vodafone
Launch of V by Vodafone (Consumer IoT)
We changed our brand position to ‘The future is exciting. Ready/ VodafoneZiggo joint venture in Netherlands completes

€18.4bn acquisition of Liberty Global’s assets in Germany, Czechia, Hungary and Romania

Divestment of Vodafone New Zealand

Vodafone launches five-point plan to counter impacts of COVID-19
Jean-Francois van Boxmeer succeeds Gerard Kleisterlee as Vodafone chairman.

Vantage Towers announced as Europe’s largest towers company
Together we can