





Vodafone Germany
The Gigabit Company

May 2019



We are a global player and one of the world's largest telecoms operators.

2019

Vodafone Group: founded 1984 in Newbury, UK



OpCos



Partner Markets/Enterprise only



Mobile network provider in **24 countries**; partnering in **42 more nations**



One of the **40 most valuable companies** worldwide*



More than **100.000 employees** worldwide



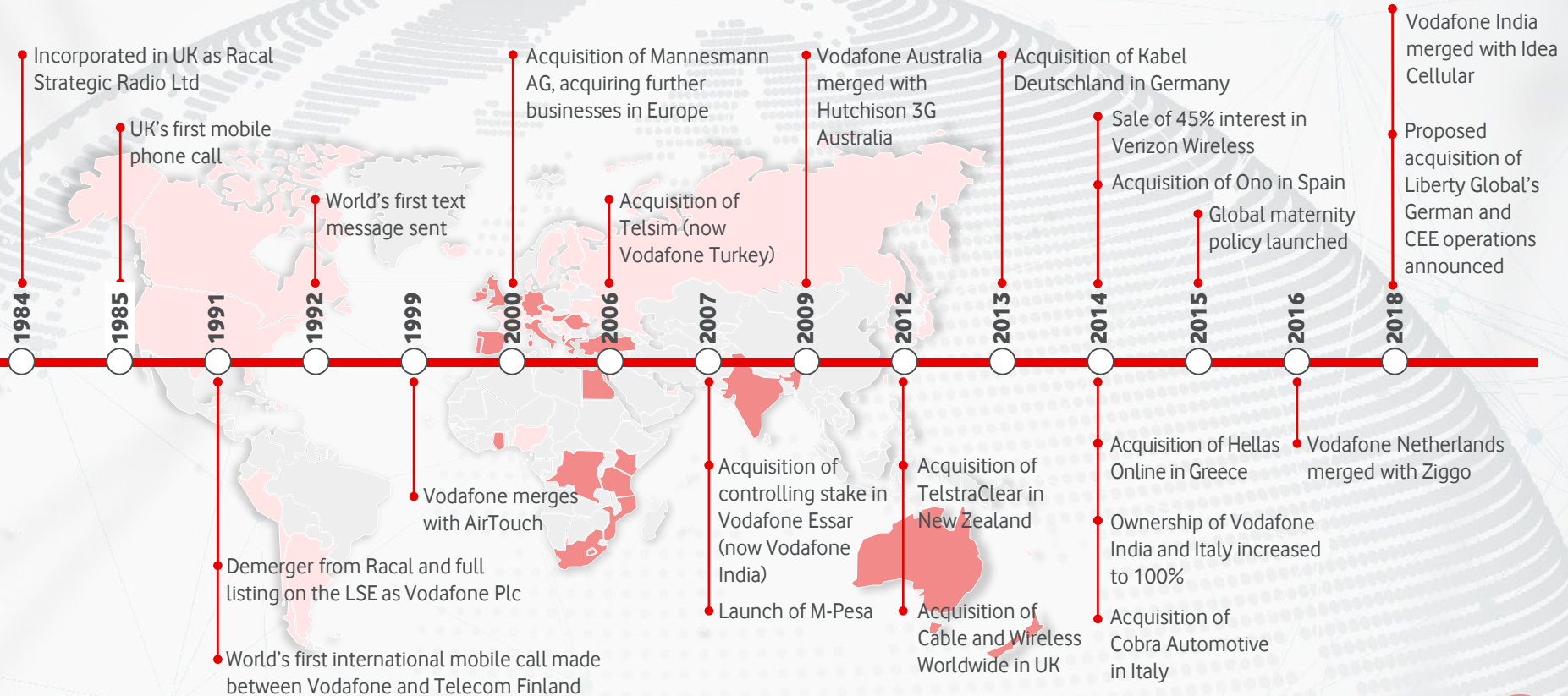
43.7bn€ revenue* worldwide



*Fiscal year 2018/19

*Source: Millward Brown BrandZ 2018 Global Top 100 most valuable brands

The milestones of our brand define our success story.



A man, a woman, and another man are sitting on a dark couch in a dimly lit room. They are all laughing and looking towards the left side of the frame, presumably at a television screen. The man on the left has dark hair and a beard, wearing a black sweater. The woman in the middle has long brown hair and is wearing a red top. The man on the right has dark hair and a beard, wearing a light blue button-down shirt. The background is dark and out of focus, showing a white door and a wooden chair.

A brand based on a strong customer centric purpose.

BRAND PURPOSE

We connect for a better future

BRAND PROMISE

The future is exciting.
Ready?



That truly understands and serves the needs of our customers.



Every 24 hours,
our customers:



make **7.3bn minutes** of
mobile calls



stream the equivalent of
14.6bn songs on their phones



watch **1.8bn 3 minute HD
videos** over their fixed
broadband connections¹



make **30m financial
transactions** using M-Pesa

1) Europe only



Source: Annual Group Report 2018



This makes us a trusted brand and converged player in all relevant areas.



Mobile: 640m customers¹

The world's 2nd largest mobile network



Fixed: 21m customers²

Europe's fastest growing broadband provider



TV: 14m customers²

TV in 9 markets



IoT: 85m IoT connections

World market leader in IoT

1) includes all joint ventures

2) includes VodafoneZiggo



Source: Annual Group Report 2018 and KPI Q1 19/20

**And one of the most valuable brands
worldwide and in Europe.**



**Strong brand value
TOP 30 in Europe**



**Market capitalisation
TOP 50 in Europe**

Source:

* brandz.com/charting/54

** boersennews.de



Germany plays an important role in this success story of Vodafone.

2019

Vodafone Group: founded 1984 in Newbury, UK



13.500 employees in Germany



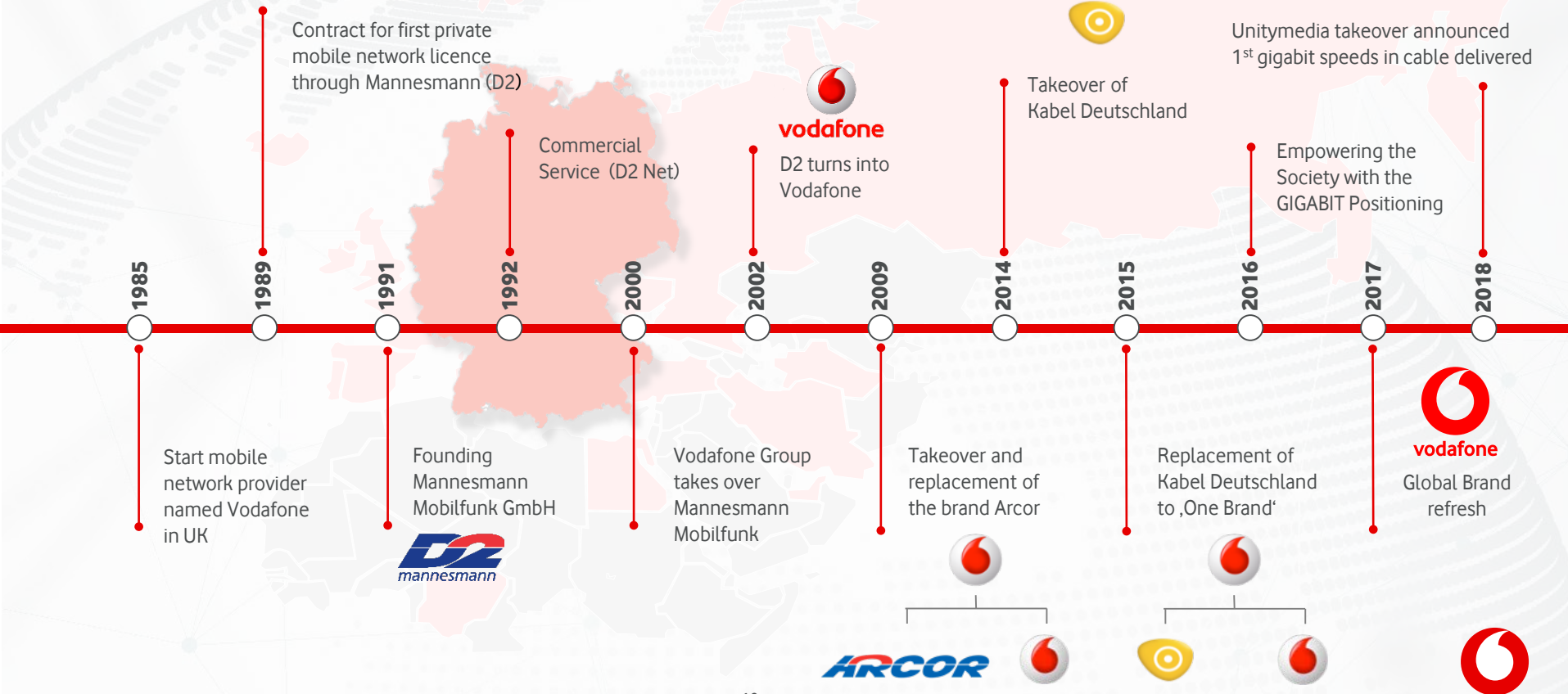
11 bn€ revenue in Germany



90% of DAX companies trust Vodafone



We are constantly developing for further growth.



With a unique interpretation of our global brand purpose.



The Gigabit Company

#1 in innovation, speed & power

We connect for a better future

For people with a progressive mindset, that are open to the digital future and want to go beyond the limits to leave their mark on this world.

The future is exciting. Ready?



A fully converged player in all areas.

**“Digital products and services
for an exciting future.”**



Mobile: 48.9m SIM cards

Market leader in mobile



Fixed: 6.9m broadband customers

**Largest cable-fiber
network**



TV: 7.6m TV customers

Biggest TV operator



IoT: 88.9m IoT connections 2019

World market leader in IoT



Winning customers hearts and heads.

#1



Modern



Innovative



Emotional



Relevant



2019 will be historical for the Gigabit Company and its GigaNetwork.

The next generation
in mobile

5G



The Vodafone
GigaNetwork



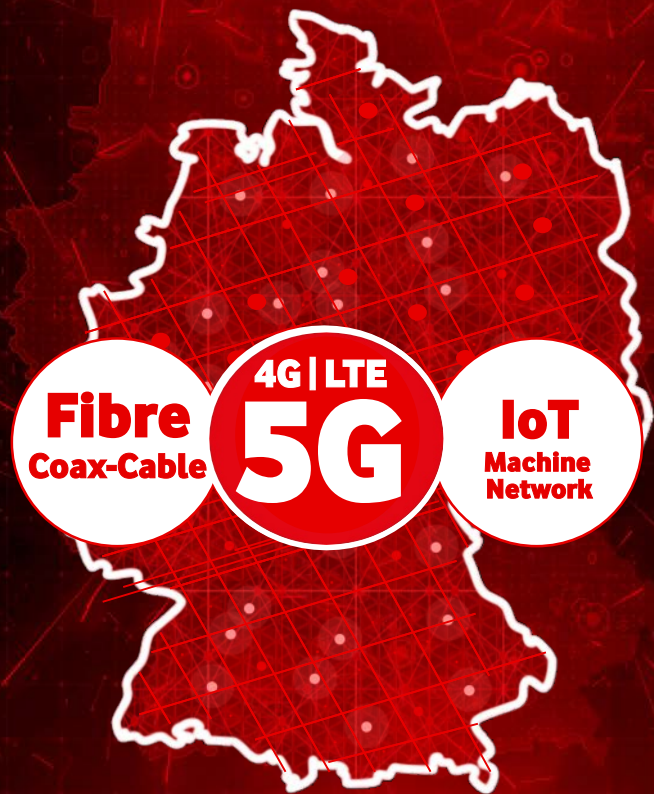
The missing piece
in fixed



+ DOCSIS 3.1



The GigaNetwork is our backbone to build an exciting future.



MOBILE NETWORK



First Free Roaming

LTE Network in Europe

Wi-Fi Calling

for better in-door connectivity

Top Coverage

99% GSM, 88% UMTS, 93% LTE

Top Availability

99,9% | leader in Europe

First Mover 500 Mbit/s

High-speed mobile in already more than 90 cities

Best Voice Quality

with Vodafone CrystalClear

FIXED NETWORK



12.7m households in cable fibre network

100 megabit/s 100%

200 megabit/s 98%

400 megabit/s 80%

500 megabit/s 75%

1,000 megabit/s 69%



Our Gigabit roadmap makes 'Ready' tangible.

GIGABIT OFFENSIVE



GIGA KABEL

Cable fibre speed for **12,7m. households** until 2021

Cable fibre speed for **25m. households** until 2022 through planned Unitymedia merger



GIGA GEMEINDE

Cable fibre speed for up to **1 Million households** in rural areas



GIGA GEWERBE

Cable fibre network for up to **100.000 companies** and up to **2.000 business parks**



**We are ready for the
best future ever.**





THANK YOU!

