

VODAFONE GROUP PLC

Company Profile & Executive Summary

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Executive Summary

Vodafone Group Plc stands as one of the world's leading telecommunications companies, connecting over 275 million customers across 15 countries through mobile and fixed services, with an additional 66 million customers served through joint ventures and associates[1]. Headquartered in Newbury, Berkshire, United Kingdom, Vodafone has established itself as a major force in the global telecommunications landscape, with operations spanning Europe, Africa, and strategic partnerships extending across Asia and Oceania[2].

Founded in 1984 as Racal Telecom and rebranded as Vodafone in 1991, the company has evolved from a small UK operator into a multinational telecommunications powerhouse through strategic mergers, acquisitions, and organic growth[3]. With approximately 93,000 employees worldwide and annual revenues of €37.4 billion (fiscal year 2025), Vodafone continues to shape the digital transformation of societies and businesses across its footprint[4].

The company's portfolio extends beyond traditional mobile services to encompass fixed-line broadband, television services, Internet of Things (IoT) connectivity with over 205 million connections, and innovative financial technology (FinTech) services reaching 88 million users globally[1]. Through Vodafone Business, the company serves 4.7 million enterprise customers with a 26% share of group service revenue, addressing a €144 billion addressable market[1].

Mission Statement

"We connect for a better future."[5]

Vodafone's mission statement reflects the company's fundamental purpose of leveraging technology and connectivity to improve the world. This concise articulation emphasizes three core commitments:

- **Connecting people and businesses globally** – Facilitating communication and collaboration across geographical boundaries through seamless connectivity solutions
- **Driving digital inclusion and sustainable practices** – Making technology accessible to underserved communities while pursuing environmental sustainability with a net-zero emissions target by 2040[6]
- **Delivering superior customer experiences through technological innovation** – Investing in cutting-edge technologies including 5G, artificial intelligence, and IoT to provide faster, more reliable, and personalized services

This mission guides Vodafone's strategic decisions and operational priorities, ensuring alignment with its vision of creating positive societal impact through connectivity.

Vision Statement

"To become a new generation connectivity and digital services provider for Europe and Africa, enabling an inclusive and sustainable digital society."[7]

Vodafone's forward-looking vision positions the company at the forefront of the digital revolution, extending beyond traditional telecommunications to establish leadership in advanced digital services. The vision encompasses:

- Development of next-generation networks with significant investments in 5G infrastructure across key markets
- Creation of an inclusive digital ecosystem that bridges the digital divide, particularly in underserved rural communities

- Environmental sustainability through renewable energy adoption and carbon emission reduction initiatives
- Innovation in digital services including cloud computing, IoT platforms, cybersecurity, and unified communications
- Financial inclusion through mobile payment solutions, notably M-Pesa, which has transformed financial access in emerging markets[8]

Company Size & Scale

Global Footprint

Metric	Value (2025)
Total Customers (Owned Networks)	275 million
Total Customers (Including JVs)	341 million
Countries with Owned Operations	15
Countries with Partner Networks	46
FinTech Users	88 million
Business Customers	4.7 million
IoT Connections	205 million
Employees	~93,000

Table 1: Vodafone Global Operations Overview

Financial Performance

Fiscal Year	Total Revenue (€ billion)	Market Position	Capital Expenditure (€ billion)
2025	37.4	FTSE 100 constituent	~8.0
2024	36.7	27th global market cap	8.0
2023	45.7	Leading European operator	-

Table 2: Vodafone Financial Performance

Key Markets by Revenue (FY 2024)[9]

1. **Germany** – €11.8 billion (largest market)
 2. **United Kingdom** – €7.4 billion (5.2% growth)
 3. **Italy** – €4.8 billion
 4. **Spain** – €3.9 billion
 5. **Other Europe and Africa** – Combined significant contribution
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Industry Classification

Primary Industry: Telecommunications Services

Sub-Sectors:

- Mobile telecommunications (voice, data, messaging)
- Fixed-line broadband and television services
- Internet of Things (IoT) connectivity and platforms
- Cloud computing and enterprise digital services
- Financial technology (mobile payments and banking)
- Cybersecurity and unified communications

Stock Exchange Listings:

- Primary Listing: London Stock Exchange (FTSE 100 Index)
 - Secondary Listing: NASDAQ (American Depositary Receipts)
-

Company History

Foundation Era (1984-1991)

Vodafone's journey began in 1984 when it was established as **Racal Telecom**, a subsidiary of Racal Electronics Plc. The company was awarded one of two UK cellular telephone network licenses, marking the beginning of mobile telecommunications in Britain[3]. On January 1, 1985, Vodafone made the first-ever mobile phone call in the UK, establishing itself as a pioneer in mobile communications.

In 1991, Racal Telecom was fully demerged from its parent company and rebranded as **Vodafone Group Plc**, becoming an independent

publicly-traded company on the London Stock Exchange.

Expansion and Global Transformation (1997-2010)

Under the leadership of **Sir Christopher Gent** (CEO from 1997), Vodafone transformed from a small UK operator into a global telecommunications giant through aggressive expansion:

- **1999** – Merger with AirTouch Communications (USA), creating a transatlantic telecommunications powerhouse
- **2000** – Acquisition of Mannesmann AG (Germany) for £112 billion, at the time the largest corporate takeover in history[10]
- **2007** – Establishment of Vodafone Global Enterprise to serve multinational corporate clients across 65 countries[2]

Arun Sarin (CEO 2003-2008) drove Vodafone's expansion into emerging markets:

- Strategic acquisitions in Turkey (Telsim)
- Majority stake in Hutchison Essar (India)
- Expansion across Africa and Asia-Pacific regions

Infrastructure and Digital Services Era (2011-2020)

Vodafone expanded beyond mobile services into converged telecommunications:

- **2012** – Acquisition of Cable & Wireless Worldwide for £1 billion, providing access to fixed-line network infrastructure[11]
- **2011** – Acquisition of Bluefish Communications, forming the nucleus of Unified Communications and Collaboration practice[2]
- Massive investments in 4G/LTE network rollout across European markets
- Launch and expansion of M-Pesa mobile money platform, transforming financial inclusion in Africa

5G and Digital Transformation (2020-Present)

The current era focuses on next-generation connectivity and digital services:

- Investment of €8 billion annually in capital expenditure, primarily for 5G network deployment[12]
 - Strategic partnerships with Microsoft, Google, and Accenture for cloud and AI-powered services[1]
 - **2023** – Announcement of merger between Vodafone UK and Three UK (approved December 2024, completed May 2025)[13]
 - Expansion of IoT services to 205 million connections, serving enterprise and industrial customers
 - Development of FinTech services reaching 88 million users globally
 - Investment of £200 million in digital skills programs (2024)[6]
-

Corporate Structure

Business Divisions

1. **Vodafone Business** – Enterprise and corporate services division serving 4.7 million business customers globally with cloud, IoT, security, unified communications, and managed services[1]
2. **Consumer Services** – Mobile and fixed services for residential customers across Europe and Africa, including voice, data, broadband, and television
3. **FinTech Services** – Mobile financial services including M-Pesa, serving 88 million users with mobile money, payments, and banking solutions
4. **Vodafone Global Enterprise** – Specialized division serving multinational corporations including Deutsche Post, The Linde Group, Unilever, and Volkswagen Group[2]

Geographical Operations

Controlled Operations (15 markets): Direct network ownership and operations in Europe and Africa

Joint Ventures & Associates (5 markets): Collaborative partnerships serving 66 million customers

Partner Networks (46 markets): Roaming and service partnerships extending global reach

Core Values

Vodafone's organizational culture is guided by core values that shape decision-making and stakeholder interactions:

- **Digital Society** – Commitment to creating a connected digital society where data flows rapidly, connecting people, communities, and devices through innovations like 5G and IoT[5]
 - **Customer Centricity** – Dedication to delivering superior customer experiences through reliable network services, cutting-edge technology, and responsive support
 - **Innovation** – Continuous investment in research and development (£1.5 billion in FY 2024) to stay ahead of technological trends and develop new products[6]
 - **Sustainability** – Environmental commitment with net-zero emissions target by 2040, 30% carbon emission reduction achieved by 2024 compared to 2020 baseline[6]
 - **Inclusion** – Digital inclusion initiatives connecting 2 million rural households to high-speed internet in FY 2024, with ongoing programs to bridge the digital divide[12]
 - **Integrity** – Ethical business practices and transparent governance aligned with international standards and regulatory requirements
-

Strategic Priorities (2025-2027)

1. **5G Network Leadership** – Accelerated deployment of 5G infrastructure across all major markets to enable new applications in smart cities, autonomous vehicles, remote healthcare, and enhanced education
2. **Digital Services Growth** – Expansion of B2B digital services (26.1% growth over last 2 years) including cloud computing, IoT

- platforms, cybersecurity, and AI-powered solutions[1]
3. **Financial Technology Expansion** – Growth of FinTech user base beyond 88 million, particularly in African markets where mobile money transforms financial access
 4. **Operational Efficiency** – Portfolio optimization, asset streamlining, and operational standardization to improve financial performance and shareholder value
 5. **Sustainability Leadership** – Continued progress toward net-zero emissions by 2040 through renewable energy investments and energy efficiency measures
 6. **Customer Experience Enhancement** – Deployment of AI-powered customer service solutions (50 million queries handled by AI chatbots in 2024) to improve response times and satisfaction[6]
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Key Achievements & Milestones

- **First UK Mobile Call** – January 1, 1985, establishing Vodafone as a mobile communications pioneer
 - **Global Expansion** – Growth from single-country operator to 15 owned markets plus 46 partner countries
 - **IoT Leadership** – 205 million connected devices globally, enabling smart city solutions such as 68% energy reduction in street lighting in Guadalajara, Spain[5]
 - **Financial Inclusion** – M-Pesa serving millions of unbanked customers, transforming economic participation in emerging markets
 - **Healthcare Innovation** – Remote patient monitoring programs reaching 500,000 patients, achieving 15% reduction in hospital readmissions and £25 million cost savings (FY 2024)[12]
 - **Digital Education** – £10 million investment benefiting over 1 million students through connectivity, learning platforms, and teacher training (FY 2024)[12]
 - **VodafoneThree Merger** – Creation of Britain's largest mobile network (completed May 2025), enhancing network capacity and competition[13]
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Contact Information

Global Headquarters

Vodafone Group Plc

Vodafone House
The Connection
Newbury, Berkshire RG14 2FN
United Kingdom

Registered Office:

Vodafone House, The Connection, Newbury, Berkshire RG14 2FN,
United Kingdom

Corporate Communications

Website: www.vodafone.com

Investor Relations: investors.vodafone.com

Media Inquiries: press.office@vodafone.com

Customer Service: Available through regional customer care centers
in each operating market

Stock Information

London Stock Exchange (Primary Listing): VOD

NASDAQ (ADR): VOD

ISIN: GB00BH4HKS39

Regional Headquarters

Region	Location
Northern Europe	London, United Kingdom
Central Europe	Düsseldorf, Germany
Southern Europe & Africa	Multiple regional offices
Asia Pacific & Sub-Saharan Africa	Singapore
Americas Division	Various locations

Table 3: Vodafone Regional Operations Centers

Competitive Position

Vodafone maintains strong competitive positions across its markets:

- **United Kingdom** – Third-largest mobile operator with 18.3 million subscribers (February 2025); post-merger with Three, becomes largest network[13]
- **Germany** – Market leader with significant revenue share
- **Europe Overall** – Major player in the €398 billion European consumer communications industry[14]
- **IoT Market** – Global leadership with 205 million connections serving enterprise and industrial sectors
- **Emerging Markets** – Strong presence in Africa and strategic positions in Asia through partnerships and joint ventures

Future Outlook

Vodafone is positioned for continued growth and transformation as a next-generation connectivity and digital services provider. Key focus areas include:

1. Completion of 5G rollout across all major markets, enabling new revenue streams from enterprise IoT, smart cities, and industrial applications
2. Acceleration of digital services revenue, particularly in cloud computing, cybersecurity, and AI-powered business solutions
3. Expansion of FinTech services in high-growth African and Asian markets
4. Achievement of sustainability targets with continued investment in renewable energy and carbon reduction
5. Integration of VodafoneThree merger to create enhanced network capabilities and market leadership in the UK
6. Strategic partnerships with technology leaders (Microsoft, Google, Accenture) to deliver innovative digital solutions
7. Continued investment in digital inclusion initiatives to connect underserved communities

With a strong foundation built over four decades, significant scale across 15 markets, and clear strategic direction, Vodafone is well-

positioned to lead the telecommunications industry into the next era of digital connectivity and innovation.

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Corporate Structure

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Strategic Priorities (2025-2027)

1. **5G Network Leadership** – Accelerated deployment of 5G infrastructure across all major markets to enable new applications in smart cities, autonomous vehicles, remote healthcare, and enhanced education
2. **Digital Services Growth** – Expansion of B2B digital services (26.1% growth over last 2 years) including cloud computing, IoT platforms, cybersecurity, and AI-powered solutions[1]
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Global Headquarters

Vodafone Group Plc

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Corporate Communications

Website: www.vodafone.com

Investor Relations: investors.vodafone.com

Media Inquiries: press.office@vodafone.com

Customer Service: Available through regional customer care centers in each operating market

Stock Information

London Stock Exchange (Primary Listing): VOD

NASDAQ (ADR): VOD

ISIN: GB00BH4HKS39

Regional Headquarters

Region	Location
Northern Europe	London, United Kingdom
Central Europe	Düsseldorf, Germany
Southern Europe & Africa	Multiple regional offices
Asia Pacific & Sub-Saharan Africa	Singapore
Americas Division	Various locations

Table 6: Vodafone Regional Operations Centers

Competitive Position

Vodafone maintains strong competitive positions across its markets:

- **United Kingdom** – Third-largest mobile operator with 18.3 million subscribers (February 2025); post-merger with Three, becomes largest network[13]
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- **IoT Market** – Global leadership with 205 million connections serving enterprise and industrial sectors
- **Emerging Markets** – Strong presence in Africa and strategic positions in Asia through partnerships and joint ventures

Future Outlook

Vodafone is positioned for continued growth and transformation as a next-generation connectivity and digital services provider. Key focus areas include:

1. Completion of 5G rollout across all major markets, enabling new revenue streams from enterprise IoT, smart cities, and industrial applications
2. Acceleration of digital services revenue, particularly in cloud computing, cybersecurity, and AI-powered business solutions
3. Expansion of FinTech services in high-growth African and Asian markets

4. Achievement of sustainability targets with continued investment in renewable energy and carbon reduction
5. Integration of VodafoneThree merger to create enhanced network capabilities and market leadership in the UK
6. Strategic partnerships with technology leaders (Microsoft, Google, Accenture) to deliver innovative digital solutions
7. Continued investment in digital inclusion initiatives to connect underserved communities

With a strong foundation built over four decades, significant scale across 15 markets, and clear strategic direction, Vodafone is well-positioned to lead the telecommunications industry into the next era of digital connectivity and innovation.

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