

How to break into the international market



Helping global enterprises thrive
in a hyperconnected world

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Vodafone Business

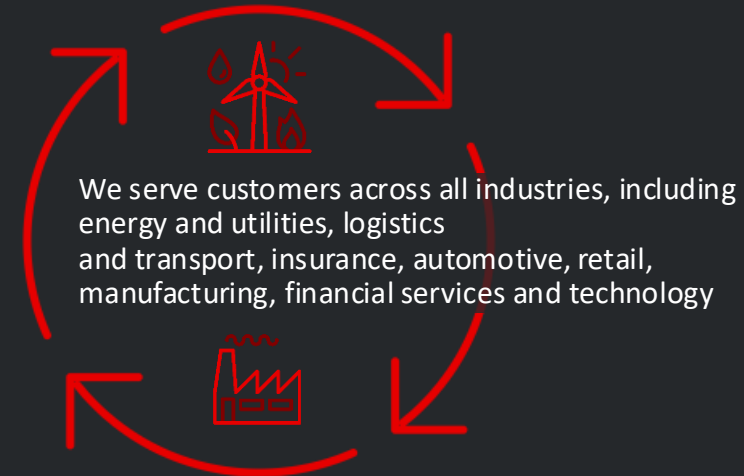


Vodafone Business at a glance

We are Vodafone Business, the enterprise division of Vodafone, the world's largest communication network:

- Vodafone Business is a leading technology communications company helping organisations succeed in a digital world and keeping society connected.
- We represent 28% of Vodafone group revenue* and we are the largest growing B2B telco globally.

Global leaders in business connectivity



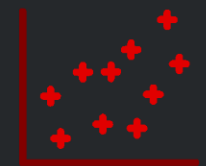
150m+ connections

We are trusted by more than **6 million enterprises** around the world,

Including **1,400 multinationals** in over **190 countries**



Over **580 networks** with 2/3/4/5G, LPWA satellite and fixed capability



€10bn service revenue in FY23



40M+ vehicles connected with Vodafone on the road today



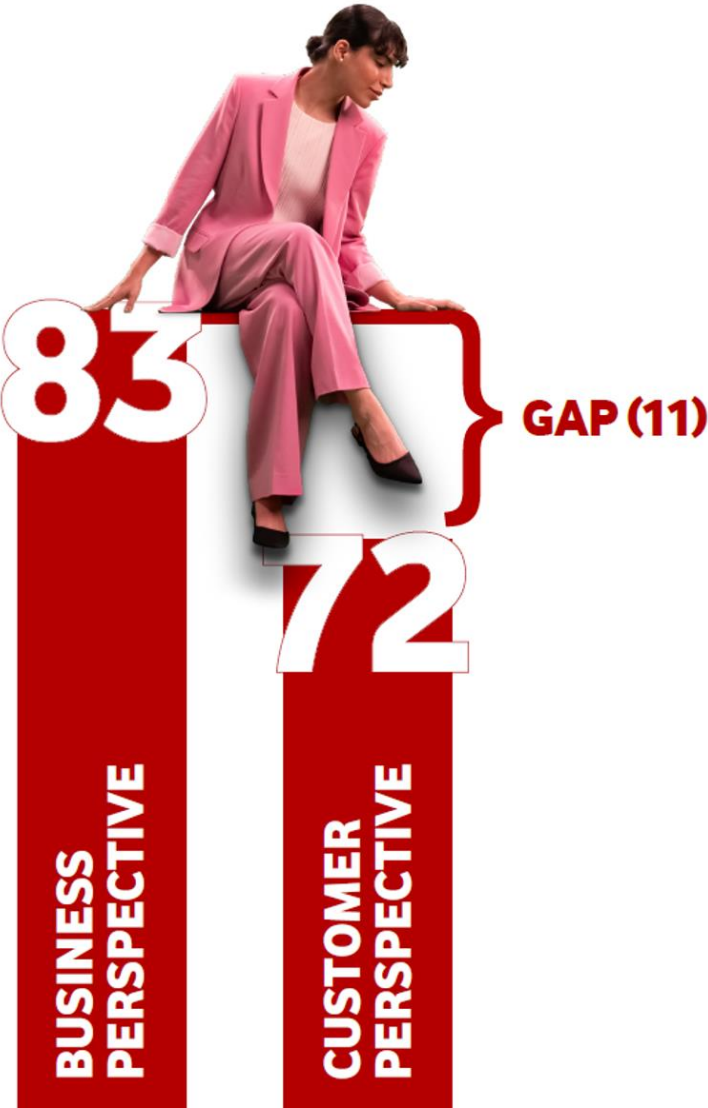
02

Global Trends





The Trust Gap



Some sectors have a larger Trust Gap with their customers than others



03

International Selling



International Customer Challenges



Adaptation & Localization

- Cultural differences
- Language
- Marketing campaigns
- Products & packaging
- Pricing
- Customer Service
- Understanding consumer behavior



Regulatory & Legal

- Trade regulations & tariffs
- Local Business laws
- Labor laws & employees safety
- Tax regulations
- Intellectual property protection
- Data Privacy regulations



Partnering & Networking

- Enter & integrate into the ecosystem
- Access market insights
- Leverage local expertise & resources
- Navigate regulatory requirements



Global Workforce

- Candidates hiring & relocation
- Payroll & benefits administration
- Manage remote teams effectively
- HR support & management
- Consider cultural sensitivity, diversity, and inclusion



International Operations

- Time zones
- Cultural norms
- Holidays & vacations differences
- Ways of working



Financial Planning & Risk Management

- Costs of market entry
- Manufacturing/production costs
- Operating expenses
- Revenue forecasts/ROI
- Travel expenses



Technology

- Identify & research opportunities
- Adapt & customize products/services
- Communicate with customers
- Manage operations & logistics
- Evaluate performance & feedback



Economic & political stability

- Political unrest
- Economic risks
- Currency exchange rate fluctuations
- Competitive landscape

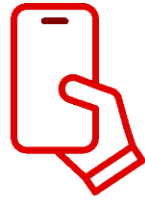


International Growth Areas

How do you engage?

- Leverage existing relationships
- Utilize expertise around you
- Move outside of IT/Procurement
- Understand growth ambition
- Market expansion & acquisition

Managed Devices



75% of our customers trust us with managing their mobile estate

Across **28 European countries** and **the US**

SAMSUNG



IoT



Over 580 networks

with 2/3/4/5G, LPWA satellite and fixed capability

Vodafone >1m connections per month

Smart buildings / Healthcare / Manufacturing
1.6bn connections over next 5 years

SD-WAN to SASE



Global \$7bn (2024) to \$25bn (2027)

US \$12bn and 25% Fully Managed
16 Single Vendor offerings by 2027

4 will be Hyperscalers

FORTINET



vmware



paloalto NETWORKS

UCaaS / CCaaS



UCaaS

\$33bn (2024) to \$40bn (2027)

\$18bn in US (stagnant) but
greatest growth in Europe +\$5bn
(by 2027)

Ring Central



Teams DR / Operator Connect

04

Customer Case



Global Healthcare Company

Customer Challenge

- 30 years of merger and acquisition activity
- Lack of technical voice expertise
- Need to consolidate supply chain
- Costly mixed voice estate
- Need to standardize and reduce costs

Why Vodafone?

- Footprint match
- Multi-category offering
- SIP and Internet in 90 countries
- Flexibility and engagement
- Cost savings

Benefits

- Global Portal
- Single global MSA contract
- Simple pricing plan
- SIP over DIA connectivity
- Operational savings

Global SIP Solution

Global US headquartered Healthcare company **operating in over 100 countries** with **88,000 employees**. 3 year contract to provide a global SIP platform and Internet in **90 countries initially**.



\$70k
MRR



Vodafone Business has the right set of technologies and solutions to help global enterprises thrive in a hyperconnected world

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Mobile connectivity, services & devices

- Tariffs (voice, data, roaming)
- Managed and value-added services (Telecoms Reporting, Usage Manager, employee self-serve, eSIM Manager)
- Device as a service (Device Lifecycle Management, managed devices and laptops)
- Devices (smartphones, tablets, laptops, modems, routers)



Fixed connectivity

- SD-Networking (SD-WAN, SD-LAN, SD-Branch)
- Secure Access Service Edge (SASE)
- Cloud connectivity
- Internet and ethernet
- IP-VPN & MPLS
- LAN
- Managed and professional services



IoT connectivity

- Managed IoT connectivity (cellular, LPWA, satellite)
- Global | local SIMs
- Internet in the car services
- Terminals and devices
- Device management services
- Analytics services
- Professional services



Security

- Cybersecurity-as-a-service
- Managed security services
- Security assessment services
- Authentication services
- Cloud security
- Endpoint security
- Network security



Unified Communications

- UC-as-a-service
- UC Voice services
- Contact centre-as-a-service
- UC hardware and terminals
- Managed and professional services
- Global SIP

Global strategic partners:

accenture



aws

ciena

CISCO

FORATINET

Google

IBM

JUNIPER
NETWORKS

Microsoft

paloalto
NETWORKS

RingCentral

vmware

zscaler

Globally in collaboration with:

commschoice
cloud communications for business

Deloitte.

Digital Barriers

EQUINIX

ERICSSON

EXCLUSIVE
NETWORKS

IN-CRAM

IoT.nxt
bridging the edge

NCR

NOKIA

northflow
SOLUTIONS

ORACLE
CLOUD

DELL

SAMSUNG

Westcon

World Wide Technology



05

Q&A



Can you imagine the benefits of combining everything – intelligently – for global enterprises to really work as one and grow securely?



Connect with us

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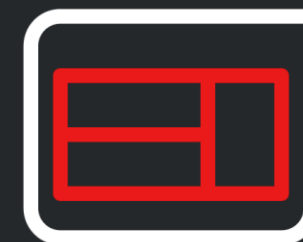
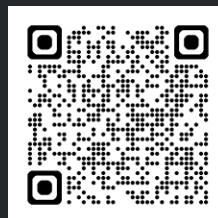
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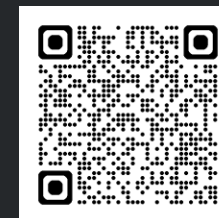
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business

Together we can

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Thank You

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