WTO webinar
International trade
and cross-border data exchange
Agenda

• Who we are
• Vodafone’s data value chain
• The data opportunity
• Our data principles
• Policy interventions to enable cross-border data flows
• Visions of the future
We connect for a better future
We manage our business across two geographic regions — Europe, and Rest of the World (RoW).

**Operations in 25 countries**

We are the number one or two mobile operator in most of our operations and we are Europe’s largest NGN provider.

**Europe**
Fixed and mobile in 11 out of 13 markets:
- Albania
- Czech Republic
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Malta
- Netherlands (joint venture)
- Portugal
- Romania
- Spain
- UK

**Rest of the world**
- 4G in all markets
- M-Pesa in 8 out of 12 markets

*Emerging: Egypt, Ghana, Turkey, Vodacom Group (South Africa, Tanzania, Democratic Republic of Congo, Mozambique, Lesotho)*

*Other: New Zealand, Australia (joint venture), India (joint venture), Kenya (associate)*

Notes:
1. Mobile services only
2. M-Pesa services available

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**Worldwide service reach**

**41 partner markets**
To extend our reach beyond the companies we own, we have partnership agreements with local operators in 41 countries.

**74 countries with IP-VPN**
We are among the top five internet providers globally and one of the largest operators of submarine cables.

**168 countries with 4G roaming coverage**
Our leading global 4G roaming footprint serves twice as many destinations as the next best local competitor in most of our markets.
**Strategic highlights**

**Deepening customer engagement**

**Europe**
- 6th consecutive quarter of improved customer loyalty, churn down 1pp year-on-year in mobile contract
- +1.4 million NGN broadband net additions
- 7.2 million Converged consumer customers

**Africa**
- +7.0 million Data users
- 2.0GB Average smartphone data usage
- +4.4 million M-Pesa customers (44% of mobile customers using M-Pesa)

**Business**
- +3.3% Fixed-line service revenue growth
- 103 million IoT SIMs +23% year-on-year
- Amazon Web Services agreement, first mover for mobile edge computing in Europe
### Key dimensions and data types

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Internal data transformation

Data quality & analytics

- ALL Data
- Cloud Platform
- AI / Advanced Analytics

360° view of customers

External data monetization

Big Data & AI

- Enhanced core services
- New digital data products

All Big Data processing and AI frameworks implemented to create value from Consumer, Business, Network and IoT Data
In November 2019, Vodafone published a set of Data Principles, that we believe should underpin data sharing and reuse and thereby stimulate the European data economy. The principles were based around the Finnish Council presidency Data Principles and comprised the following elements:

- Presumption of access on sustainable terms
- Voluntary measures to incentivise sharing
- Consumer-centric policy to put users in charge of their data
- Innovation first approach to policy and regulation
- Trustworthy by design technology platforms
Visions of the future

• A more fragmented/balkanised global data landscape with three main spheres of influence (EU, US, China): What does this mean for global technology supply chains that have come to depend on the seamless international transfer of data?

• Will we witness greater localisation of data, further data sovereignty mandates and how will this be managed by international firms?

• What assistance will be put in place for private companies being asked to arbitrate between international data jurisdictions. Are we witnessing the privatisation of data governance?

• What role for international institutions such as the WTO, OECD and UN to act as a bulwark against increased fragmentation? Will this give eCommerce negotiations renewed impetus and precipitate a global treaty underpinning cross border data transfer?