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

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We connect for
a better future

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[1], Czech Republic, Germany, Greece, Hungary[1], 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[2], Ghana[2], Turkey, Vodacom Group (South Africa, Tanzania[2], Democratic Republic of Congo[2], Mozambique[2], Lesotho[2]).
Other: New Zealand, Australia (joint venture), India[2] (joint venture), Kenya[2] (associate).
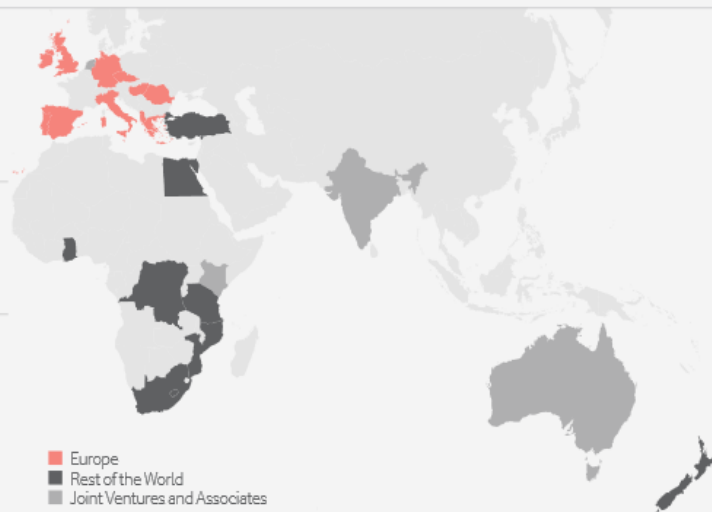
Notes:
1 Mobile services only. 2 M-Pesa services available.

■ Europe
■ Rest of the World
■ Joint Ventures and Associates

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.

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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

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Key dimensions and data types

Dimensions	Data Types		
Personal	Volunteered	Observed	Inferred
	Private		Public
	Identified		Pseudonymised
Non-Personal	Anonymous		Machine Data
Timeliness	Instant/Live		Historic
Format	Structured		Unstructured

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Internal data transformation

External data monetization

Data quality & analytics

ALL Data

Cloud Platform

AI / Advanced Analytics

360° view of customers

Enhanced core services

New digital data products

Big Data & AI

All Big Data processing and AI frameworks implemented to create value from
Consumer, Business, Network and IoT Data
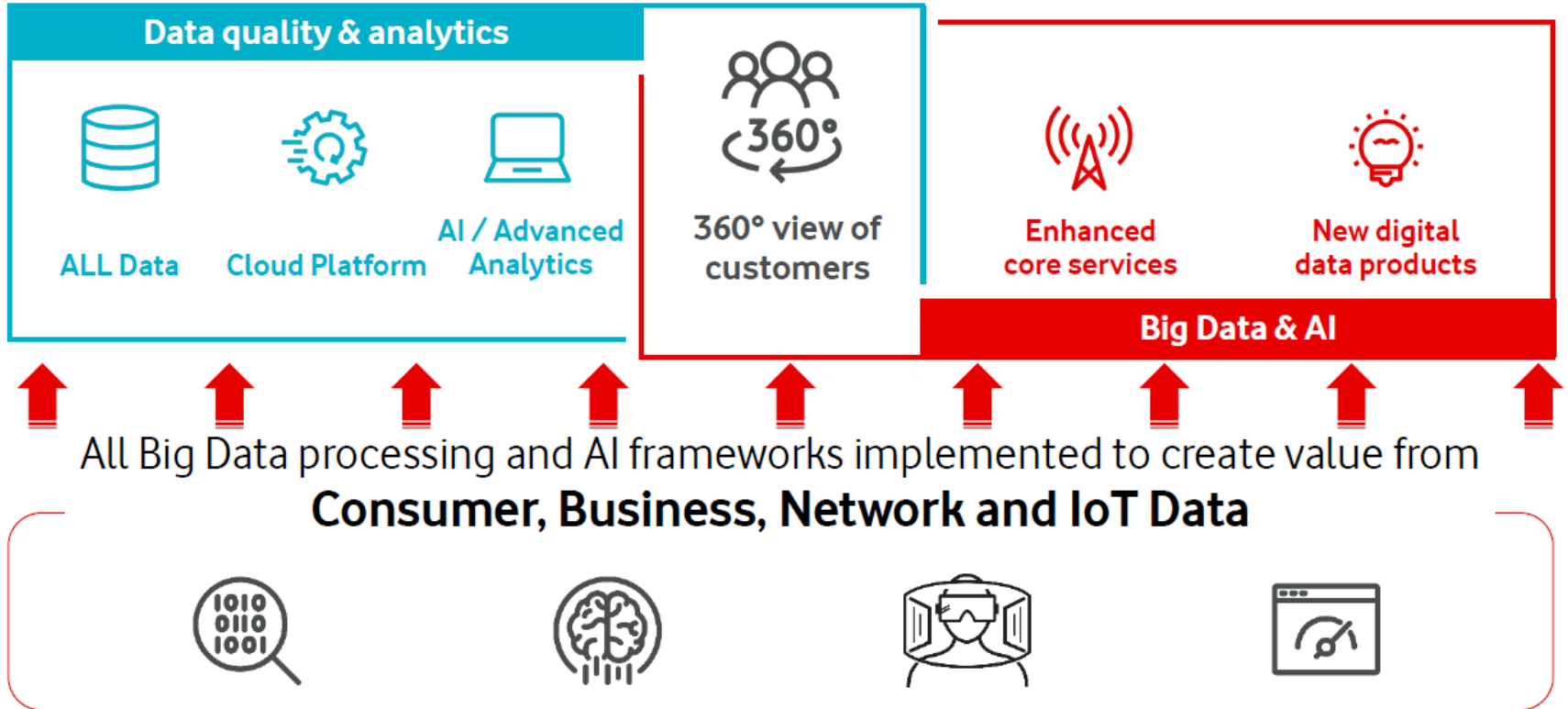
Our data principles

- 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 main 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?

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