

Vodafone UK in a period of Strategic Transformation

Introduction to Vodafone

Vodafone Group Plc is one of the world's largest telecommunications providers, delivering mobile, broadband, fixed-line, Internet of Things (IoT), cloud and digital services across Europe and Africa. Since its establishment in 1984, the organisation has evolved from a mobile network operator into a technology-enabled communications company that supports businesses, governments and consumers through digital connectivity. According to Vodafone Group Plc (2025), the Group serves more than 340 million mobile customers worldwide and has increasingly focused on simplifying operations, improving customer experience and investing in high-growth digital services.

The UK business is currently undergoing one of the most significant strategic transformations in its history following the merger between Vodafone UK and Three UK, completed on 31 May 2025. The merger created VodafoneThree, the UK's largest mobile operator, serving approximately 27 million customers. Vodafone holds a 51% ownership stake in the new entity, while CK Hutchison owns the remaining 49%. The transaction is expected to transform competition within the UK telecommunications market through an investment programme of approximately £11 billion over the next decade to create the country's leading standalone 5G network (Vodafone Group Plc, 2025).

Vodafone's corporate purpose, "Connecting for a Better Future," underpins its long-term strategy by emphasising digital inclusion, sustainability and technological innovation. Rather than competing solely on price, the organisation seeks to differentiate itself through superior customer experience, network quality and digital solutions. Its strategic priorities are centred on customers, simplicity and growth, reflecting management's ambition to restore sustainable profitability while creating value for customers, shareholders and society (Vodafone Group Plc, 2025).

Despite the strategic opportunities created by the merger, VodafoneThree continues to operate within an intensely competitive market characterised by rapid technological change, regulatory oversight and increasing customer expectations. Consequently, selecting an appropriate growth strategy is essential to ensuring that the company capitalises on its enhanced capabilities while maintaining long-term competitive advantage. This report evaluates VodafoneThree's internal and external business environment before recommending a strategic growth option supported by recognised strategic management frameworks.

Evaluation of the current market situation

VodafoneThree operates in one of the UK's most competitive and technologically dynamic industries. While the merger significantly strengthens the organisation's market position, external environmental factors continue to create both opportunities and strategic challenges. To evaluate Vodafone's current position, this section applies the PESTEL framework, Porter's Five Forces and SWOT analysis.

Evaluation of Current Market Situation

Political Factors

Political and regulatory decisions have a substantial influence on the telecommunications sector because governments increasingly regard digital infrastructure as critical national infrastructure. In the UK, Ofcom regulates spectrum allocation, consumer protection and market competition, while the Competition and Markets Authority (CMA) monitors mergers to ensure that competition is not significantly reduced.

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Although regulators approved the Vodafone–Three merger, approval was conditional upon legally binding commitments relating to investment, pricing and network quality. VodafoneThree has committed to investing £11 billion over the next ten years to accelerate standalone 5G deployment, improve rural coverage and enhance network resilience (Vodafone Group Plc, 2025). This demonstrates how political regulation can both constrain and enable corporate strategy.

Geopolitical tensions also influence Vodafone's supply chain. Restrictions affecting global technology manufacturers have encouraged operators to diversify suppliers and strengthen cybersecurity resilience to reduce operational risk.

Economic Factors

The UK economy continues to experience relatively high inflation, rising operating costs and ongoing pressure on household disposable income. These conditions increase Vodafone's expenditure while simultaneously encouraging customers to seek lower-cost mobile contracts.

However, telecommunications services have become essential rather than discretionary. Demand for reliable broadband, cloud services and mobile connectivity has continued to increase because of hybrid working, digital commerce and enterprise digital transformation.

The merger is expected to generate approximately £700 million in annual cost synergies through infrastructure consolidation, operational efficiencies and reduced duplication of resources (Vodafone Group Plc, 2025). These savings will improve profitability while providing additional financial capacity for investment in innovation.

Social Factors

Consumer expectations have evolved significantly. Customers now prioritise network reliability, high-speed connectivity, personalised digital experiences and responsive customer support rather than simply low prices.

The increasing adoption of streaming services, remote working, online education and connected devices has intensified demand for high-capacity mobile networks. Businesses also require secure digital infrastructure to support cloud computing and data-driven operations.

Social awareness surrounding environmental sustainability has increased stakeholder expectations regarding corporate responsibility. Vodafone has responded by investing in renewable energy, improving digital inclusion and supporting programmes that reduce digital inequality across society (Vodafone Group Plc, 2025).

Technological Factors

Technology remains the primary driver of competitive advantage within telecommunications. The rollout of standalone 5G enables new commercial opportunities including smart manufacturing, autonomous transport, healthcare innovation, industrial automation and smart city infrastructure.

Vodafone has identified business connectivity, IoT and digital services as major growth areas. Following the merger, customers have already begun benefiting from shared network infrastructure, resulting in improved mobile performance and expanded geographical coverage (Vodafone UK, 2025).

Artificial intelligence is also reshaping customer service through predictive analytics, automated support and intelligent network management. Companies that successfully integrate these technologies are likely to achieve sustainable competitive advantage.

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Environmental Factors

Environmental sustainability has become increasingly important within corporate strategy. Telecommunications networks require substantial energy consumption through data centres, mobile towers and transmission equipment. Vodafone has therefore committed to reducing operational emissions, increasing renewable electricity usage and improving energy efficiency across its network infrastructure (Vodafone Group Plc, 2025).

These initiatives support the organisation's Environmental, Social and Governance (ESG) objectives while strengthening corporate reputation among customers, investors and regulators.

Legal Factors

Vodafone must comply with extensive legal obligations including UK GDPR, competition law, consumer protection legislation and cybersecurity regulations. Compliance has become even more important following the merger because VodafoneThree must satisfy legally enforceable commitments agreed with the CMA regarding investment and service quality. Failure to comply with legal requirements could lead to significant financial penalties, reputational damage and restrictions on future strategic initiatives.

Critical Evaluation of the PESTEL Analysis

The PESTEL analysis demonstrates that although external pressures increase operational complexity, they also create substantial opportunities for organisations capable of leveraging technological innovation. VodafoneThree's ability to respond effectively to regulatory requirements, technological disruption and changing customer expectations will largely determine its long-term competitive success.

Porter's Five Forces

Porter's Five Forces framework evaluates the attractiveness of the UK telecommunications industry by analysing the intensity of competition.

Competitive Rivalry – Very High

Competitive rivalry is the strongest force affecting VodafoneThree. Major competitors including BT/EE, Virgin Media O2 and numerous Mobile Virtual Network Operators (MVNOs) compete aggressively through pricing, bundled services, network quality and customer experience.

Although the merger strengthens Vodafone's market position, competitive intensity remains high because customers can switch providers relatively easily.

Threat of New Entrants – Low

The telecommunications industry has exceptionally high barriers to entry due to substantial infrastructure investment, regulatory requirements and spectrum licensing costs.

Consequently, entirely new network operators are unlikely to enter the UK market successfully.

Bargaining Power of Buyers – High

Customers possess considerable bargaining power because switching costs are relatively low and pricing information is highly transparent.

Consumers increasingly compare contracts using digital comparison websites, forcing operators to compete aggressively on value and service quality.

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Bargaining Power of Suppliers – Moderate

Vodafone depends on specialist suppliers providing network infrastructure, software platforms and smartphones. However, Vodafone's international scale provides significant purchasing power, reducing supplier influence through long-term procurement agreements.

Threat of Substitutes – Moderate

Applications such as WhatsApp, Microsoft Teams, Zoom and FaceTime reduce demand for traditional voice calls and SMS services. Nevertheless, these services still depend upon mobile and broadband connectivity, meaning telecommunications operators continue to occupy an essential position within the digital economy.

Critical Evaluation

Overall, Porter's analysis indicates that VodafoneThree operates within a highly competitive market where sustainable competitive advantage depends upon innovation, operational efficiency and superior customer experience rather than price competition alone.

SWOT Analysis

The SWOT framework provides an overview of VodafoneThree's internal strengths and weaknesses alongside the external opportunities and threats influencing future strategic decisions.

SWOT Analysis of VodafoneThree

Strengths	Weaknesses
Largest mobile operator in the UK following the merger, serving approximately 27 million customers (Vodafone Group Plc, 2025).	Complex integration of two organisations with different cultures, systems and operating processes.
Planned £11 billion investment in the UK's standalone 5G network, improving coverage and network quality (Vodafone Group Plc, 2025).	High capital expenditure requirements to maintain technological leadership.
Strong international brand with expertise in IoT, cloud computing, cybersecurity and enterprise connectivity.	Historical customer satisfaction challenges compared with some competitors.
Expected annual cost synergies of approximately £700 million through operational integration (Vodafone Group Plc, 2025).	Dependence on regulatory compliance following the merger approval.
Strong financial resources and economies of scale created through the merger.	Integration risks could temporarily affect customer experience if not managed effectively.

Opportunities	Threats
Expansion of 5G-enabled services including IoT, artificial intelligence (AI) and cloud computing.	Aggressive competition from BT/EE, Virgin Media O2 and low-cost MVNOs.
Growth in enterprise digital transformation and private 5G solutions.	Rapid technological developments requiring continual investment.
Increasing demand for cybersecurity and managed digital services.	Cybersecurity threats and increasing data privacy risks.

Name: Ricardo Fino
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Government investment in digital infrastructure and smart cities.	Inflation and economic uncertainty reducing consumer spending.
Expansion into underserved rural markets using improved network coverage.	Regulatory changes that may affect pricing or competition.

Critical Evaluation of the SWOT Analysis

The SWOT analysis highlights that VodafoneThree possesses substantial strategic strengths arising from its enhanced scale, technological capability and financial resources following the merger. These strengths provide the company with an opportunity to shift its competitive focus away from price competition towards higher-value digital services.

However, the analysis also identifies important strategic challenges. Although the merger creates opportunities for cost savings and network improvements, integration failures could negatively affect customer satisfaction and operational performance. Likewise, rapid technological change means that competitive advantage cannot be sustained solely through infrastructure investment. Continuous innovation and service differentiation will therefore remain essential.

The findings suggest that VodafoneThree should pursue a growth strategy that capitalises on its technological expertise while creating innovative services that increase customer value and strengthen long-term profitability.

Strategic Growth Options and Proposed Strategy

Following the successful merger with Three UK, VodafoneThree possesses greater network capacity, a larger customer base and stronger financial resources than at any point in its recent history. However, sustaining competitive advantage requires the organisation to move beyond traditional telecommunications services and respond proactively to evolving customer needs. This section evaluates VodafoneThree's strategic growth options using the Ansoff Matrix before recommending the most appropriate strategy.

The Ansoff Matrix (1957) identifies four strategic growth strategies: market penetration, market development, product development and diversification. Each option involves a different balance of risk and reward. Market penetration focuses on increasing sales of existing products to existing customers. VodafoneThree could pursue this strategy by improving customer retention, strengthening loyalty programmes and expanding bundled offerings that combine mobile, broadband and entertainment services.

The merger has enhanced network quality and coverage, allowing VodafoneThree to compete more effectively with BT/EE and Virgin Media O2. Marketing campaigns promoting improved network performance could encourage customers to switch providers.

However, the UK telecommunications market is mature and highly saturated. Most consumers already own mobile devices and have access to broadband services, limiting opportunities for significant organic growth. Consequently, market penetration is likely to deliver only incremental improvements rather than transformational growth.

Market development involves introducing existing services into new markets or customer segments. VodafoneThree could increase its presence within the business market by targeting small and medium-sized enterprises (SMEs), public sector organisations and rural communities that require improved digital connectivity. Enhanced 5G coverage also creates opportunities to expand connectivity in areas that previously experienced poor mobile service. Although this strategy could

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increase market share, competitive pressures within enterprise telecommunications remain strong, and regulatory requirements may limit pricing flexibility.

Product development involves introducing new products or services to existing customers. This strategy aligns closely with VodafoneThree's strengths and current market trends.

Building upon its nationwide 5G infrastructure, VodafoneThree can expand its portfolio of digital solutions, including:

- Internet of Things (IoT) platforms for manufacturing, healthcare and logistics.
- Managed cybersecurity services for businesses.
- Cloud computing and edge computing solutions.
- Artificial intelligence (AI)-powered customer support.
- Private 5G networks for enterprise customers.
- Smart home technologies and connected consumer devices.

Demand for these services is expected to increase significantly as organisations continue digital transformation and consumers adopt increasingly connected lifestyles (GSMA, 2025). Unlike traditional mobile services, these digital solutions offer higher profit margins, stronger customer relationships and greater opportunities for long-term contractual revenue.

Diversification involves introducing entirely new products into entirely new markets. Potential opportunities include digital healthcare, fintech, smart energy management and autonomous transport infrastructure.

Although diversification offers long-term growth potential, it represents the highest strategic risk because it requires significant investment in unfamiliar markets and capabilities. Given the complexity of integrating Vodafone and Three UK, diversification is unlikely to be the most appropriate short-term strategy.

Based on the Ansoff Matrix analysis, product development is the most appropriate strategic growth strategy for VodafoneThree.

The organisation should leverage its enhanced network infrastructure to develop high-value digital services for both consumer and enterprise markets. Rather than relying primarily on revenue from traditional mobile contracts, VodafoneThree should position itself as an integrated digital technology provider.

Key strategic initiatives should include:

- Expanding enterprise IoT solutions.
- Developing AI-powered customer support and predictive network management.
- Growing managed cybersecurity services.
- Increasing investment in cloud and edge computing.
- Developing private 5G networks for industry.
- Expanding smart home and connected device ecosystems.

This strategy allows VodafoneThree to exploit existing customer relationships while generating new revenue streams with higher long-term profitability.

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The proposed strategy aligns strongly with Vodafone's corporate purpose of "Connecting for a Better Future." By investing in advanced digital services, the organisation enables businesses and communities to benefit from secure, high-speed connectivity while supporting wider economic growth.

The strategy also reflects Vodafone's strategic priorities of customers, simplicity and growth (Vodafone Group Plc, 2025). Customers receive innovative digital solutions rather than simply faster mobile services, while the organisation benefits from increased differentiation within an increasingly competitive marketplace.

Furthermore, product development maximises the benefits of the VodafoneThree merger. The enlarged network, expanded spectrum holdings and projected £700 million annual cost synergies provide both the infrastructure and financial capacity required to support digital innovation. Compared with diversification, product development presents significantly lower risk because Vodafone already possesses extensive expertise in cloud computing, IoT and enterprise connectivity. Consequently, implementation is likely to be faster, more cost-effective and more closely aligned with existing organisational capabilities.

Overall, product development represents the strategy that best balances growth potential, implementation risk and strategic fit, making it the most suitable option for VodafoneThree's next phase of development.

Strategy Evaluation

To determine whether the proposed product development strategy is appropriate for VodafoneThree, this section evaluates the recommendation using the SAF Framework developed by Johnson, Scholes and Whittington. The framework assesses the Suitability, Acceptability and Feasibility of the proposed strategy, providing a structured justification for its adoption.

Suitability considers whether the strategy addresses the opportunities and challenges identified during the environmental analysis. The PESTEL analysis highlighted increasing demand for digital connectivity, artificial intelligence (AI), cloud computing and Internet of Things (IoT) services, alongside continued investment in 5G infrastructure. Similarly, the SWOT analysis identified VodafoneThree's expanded customer base, enhanced network capacity and expertise in enterprise connectivity as key strengths that can be leveraged to create competitive advantage.

The proposed product development strategy directly responds to these opportunities by expanding VodafoneThree's portfolio of digital services rather than relying solely on traditional voice and mobile data revenues. This is particularly important because the UK telecommunications market has reached maturity, making customer acquisition through price competition increasingly difficult (Ofcom, 2025).

The strategy also aligns with Vodafone Group's FY25 strategic priorities of Customers, Simplicity and Growth. Investment in AI-enabled customer support, IoT platforms, cybersecurity and cloud services strengthens customer value while improving operational efficiency (Vodafone Group Plc, 2025). Furthermore, the strategy supports the company's purpose of "Connecting for a Better Future" by enabling businesses and communities to benefit from faster, more secure and more intelligent digital connectivity.

Name: Ricardo Fino
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Overall, the strategy demonstrates a strong fit with VodafoneThree's external environment, internal capabilities and long-term strategic direction.

Acceptability evaluates whether the proposed strategy is likely to satisfy the expectations of key stakeholders while delivering an acceptable balance between risk and return. From a shareholder perspective, expanding digital services provides opportunities to diversify revenue streams and increase profitability. Enterprise services such as managed cybersecurity, cloud computing and private 5G networks generally deliver higher margins and longer-term customer contracts than traditional mobile services.

Customers are expected to benefit through improved network reliability, innovative digital products and enhanced customer experiences. As customer expectations continue to evolve, offering integrated digital solutions is likely to improve customer satisfaction and reduce churn. Employees are also likely to benefit from increased investment in digital skills, leadership development and career progression. However, some employees may experience uncertainty during organisational restructuring associated with the merger. VodafoneThree should therefore implement comprehensive change management and training programmes to maintain engagement.

The primary risks associated with the strategy include delays in network integration, cybersecurity threats, rapid technological change and slower-than-expected customer adoption of new services. Nevertheless, these risks can be mitigated through phased implementation, robust governance, continuous innovation and effective project management. Overall, the expected strategic benefits outweigh the associated risks, making the strategy acceptable to the majority of stakeholders.

Feasibility considers whether VodafoneThree possesses the resources and capabilities required to implement the proposed strategy successfully. The merger has significantly strengthened VodafoneThree's resource base. The company now serves approximately 27 million customers, possesses expanded spectrum holdings and operates one of the UK's largest mobile infrastructures (Vodafone Group Plc, 2025).

Financially, Vodafone expects approximately £700 million in annual cost synergies arising from operational integration. These savings provide additional funding for research and development, digital innovation and continued expansion of the 5G network.

The organisation also benefits from established expertise in IoT, cloud computing, cybersecurity and enterprise connectivity. Existing customer relationships with businesses provide an opportunity to cross-sell higher-value digital services without incurring substantial customer acquisition costs. Although implementation will require significant investment in technology, employee capability and organisational change, VodafoneThree possesses the financial, technological and managerial resources necessary to deliver the proposed strategy successfully.

The evaluation presented in this report is based on the following assumptions:

- VodafoneThree completes operational and network integration within the planned timeframe.
- Demand for AI, cloud computing, IoT and cybersecurity services continues to increase over the next five years.
- The UK regulatory environment remains supportive of investment in digital infrastructure.
- Vodafone achieves the projected operational cost synergies identified following the merger.

Name: Ricardo Fino
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- No significant economic downturn substantially reduces enterprise investment in digital technologies.

The SAF analysis demonstrates that the proposed product development strategy is suitable, acceptable and feasible. It effectively addresses changing market conditions, aligns with VodafoneThree's strategic priorities and can be implemented using the organisation's existing capabilities and financial resources. Consequently, the strategy provides a robust platform for sustainable growth and long-term competitive advantage.

Stakeholder Analysis

Successful implementation of VodafoneThree's strategy depends upon effective stakeholder management. According to Freeman's Stakeholder Theory (1984), organisations achieve sustainable success by creating value for all stakeholders rather than focusing exclusively on shareholder returns. Following the Vodafone–Three merger, maintaining positive stakeholder relationships is particularly important because organisational change affects multiple groups with different interests and levels of influence.

The proposed strategy will have significant implications for shareholders, employees, customers, regulators, suppliers and local communities. Shareholders are highly influential because they provide financial investment and expect improved profitability, sustainable growth and efficient integration of the merged organisation. Customers are central to the strategy because the success of new digital products depends on customer adoption, satisfaction and loyalty. They expect improved network performance, reliable cybersecurity and innovative digital services.

Employees are responsible for delivering the strategy and supporting organisational change. Investment in training and digital capability development will therefore be essential.

Regulators, including Ofcom and the Competition and Markets Authority (CMA), possess considerable influence because they oversee competition, consumer protection and VodafoneThree's compliance with merger commitments. Technology suppliers and strategic partners provide network infrastructure, software platforms and digital technologies that support innovation. Local communities benefit from improved digital connectivity, employment opportunities and wider access to high-speed communications infrastructure.

Mendelow's Stakeholder Matrix

Stakeholder	Power	Interest	Management Approach
Shareholders	High	High	Manage closely through quarterly reporting, financial updates and strategic communication.
Ofcom and CMA	High	High	Maintain continuous regulatory compliance and transparent engagement.
Customers	Medium	High	Regular communication, customer feedback surveys and service improvements.
Employees	Medium	High	Training programmes, internal communication and change management initiatives.
Technology Suppliers	Medium	Medium	Collaborative partnerships and long-term innovation agreements.

Name: Ricardo Fino
Student N°: 2333039

Local Communities	Low	Medium	Community engagement, sustainability initiatives and digital inclusion programmes.
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Stakeholder Engagement Plan

VodafoneThree should adopt a structured stakeholder engagement programme throughout implementation. Shareholders should receive regular progress reports outlining financial performance, merger integration and digital growth initiatives. Employees should participate in continuous learning programmes focusing on digital technologies, customer service and organisational change. Customers should be engaged through targeted marketing campaigns, mobile applications, customer feedback systems and proactive communication regarding new products and network improvements.

Regulators should receive regular compliance updates demonstrating that VodafoneThree continues to satisfy merger conditions and consumer protection obligations. Technology suppliers should be involved in collaborative innovation projects to accelerate product development and strengthen cybersecurity capabilities. Effective stakeholder engagement will reduce resistance to organisational change, strengthen trust and improve the likelihood of successful strategy implementation.

Implementation and Monitoring

The successful delivery of VodafoneThree's strategy requires clear objectives, defined responsibilities and measurable performance indicators. A phased implementation approach will minimise disruption while ensuring that investment is focused on activities that generate long-term strategic value.

Implementation Plan

Strategic Objective	Key Actions	Responsibility	Timeline	KPI
Complete network integration	Integrate Vodafone and Three infrastructure and optimise spectrum	Chief Technology Officer	Year 1–2	95% UK population covered by standalone 5G
Launch digital services	Introduce AI, IoT, cybersecurity and cloud solutions	Chief Digital Officer	Year 1–3	Five new digital services launched and 20% growth in digital revenue
Improve customer experience	Enhance customer service and digital platforms	Chief Customer Officer	Year 1–3	Customer Satisfaction above 90%; NPS improvement of 15 points
Develop workforce capability	Deliver technical and leadership training	HR Director	Year 1–2	95% employee training completion rate
Improve operational efficiency	Consolidate systems and remove duplication	Chief Operating Officer	Year 1–3	£700 million annual cost synergies achieved

Performance should be reviewed quarterly using a strategic performance dashboard incorporating financial and non-financial indicators. Financial measures should include revenue growth, operating profit and digital service sales. Customer measures should include Customer Satisfaction (CSAT), Net

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Promoter Score (NPS), customer retention and complaint levels. Internal measures should assess employee engagement, project delivery and training completion, while operational indicators should evaluate network reliability, service availability and 5G coverage.

Risk management should form part of the monitoring process. Key risks include delays in merger integration, cybersecurity breaches, regulatory changes and slower-than-expected customer adoption of digital services. Each risk should be assigned to a senior manager, monitored through a corporate risk register and reviewed regularly by the executive leadership team. By combining disciplined implementation with continuous performance monitoring, VodafoneThree will maximise the strategic benefits of the merger while supporting sustainable long-term growth.

Conclusion

VodafoneThree is entering a transformative period following the merger of Vodafone UK and Three UK. The environmental analysis demonstrates that while the UK telecommunications market remains highly competitive, the organisation possesses significant strengths, including expanded network infrastructure, a larger customer base and substantial investment capacity. These strengths provide a strong platform for future growth.

The application of the Ansoff Matrix identified product development as the most appropriate strategic option because it enables VodafoneThree to leverage its enhanced 5G network to deliver innovative services such as IoT, AI, cloud computing and cybersecurity solutions. The SAF analysis confirmed that the strategy is suitable, acceptable and feasible, while the stakeholder analysis emphasised the importance of effective engagement with shareholders, employees, customers, regulators and strategic partners.

The implementation plan provides a practical roadmap supported by measurable KPIs that will enable VodafoneThree to monitor progress and manage risk effectively. By successfully executing this strategy, the organisation will strengthen its competitive advantage, diversify revenue streams and support its corporate purpose of "Connecting for a Better Future."

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Name: Ricardo Fino
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