



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

Student Name: Alexandra Georgiana Ivan

Student Number: 2330887

Course Name: Strategic Management for Business LCLM 6001

Lecturer Name: Dr. Faizu Edu

Vodafone UK in a Period of Strategic Transformation

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1. Executive Summary

Vodafone UK is entering a new phase following the Vodafone–Three merger in May 2025, creating VodafoneThree, the UK's largest mobile operator, and committing the business to an £11 billion network investment programme over ten years. The merger increases Vodafone's network scale, customer base and capacity to invest in next-generation connectivity. By May 2026, network integration had enabled up to 28.6 million customers to access the best available Vodafone or Three coverage, removing approximately 16,500 square kilometres of mobile “not-spots” (Vodafone, 2025a; Vodafone, 2026a). However, increased scale alone will not guarantee sustainable competitive advantage. The UK telecommunications market remains highly competitive and price sensitive, with major operators and MVNOs competing through price, coverage, broadband bundles and service quality. Strong growth in mobile data and 5G usage nevertheless demonstrates continued demand for connectivity (Ofcom, 2025a). This report therefore recommends a ****5G-Enabled Connected Enterprise Strategy****, combining VodafoneThree's enhanced network with Vodafone Business's IoT, cloud, cybersecurity and analytics capabilities. The strategy would target SMEs, large enterprises and public-sector organisations through integrated solutions across sectors including manufacturing, transport, healthcare, utilities and logistics. SWOT, PESTEL, Porter's Five Forces, Porter's Generic Strategies and the Ansoff Matrix indicate that differentiation through reliable, integrated and secure connectivity offers stronger long-term potential than competing primarily on price. Vodafone's existing capabilities, including 205 million IoT connections and its Microsoft partnership, provide a strong foundation for this strategy (Vodafone, 2025b). The strategy is evaluated using the SFA framework and is considered suitable, feasible and acceptable. It responds to growth in 5G, IoT, cloud and AI, while Vodafone possesses the technological and financial resources required for implementation. A phased three-year plan is recommended, focusing on sector-specific solutions, strategic partnerships, SME propositions, pilot projects and KPI monitoring. The strategy also supports Vodafone's purpose of “connecting everyone”, its priorities of Customers, Simplicity and Growth, and its ambition to become Europe's leading platform for business (Vodafone, 2025b).

2. Introduction to Vodafone

Vodafone Group Plc is a major telecommunications organisation operating across Europe and Africa, providing mobile, fixed-line, broadband, digital and business services. In FY25, Vodafone reported more than 275 million customers across its controlled operations, while Vodafone Business served 4.7 million customers within an addressable market of approximately €144 billion (Vodafone, 2025b). Its purpose is to “connect everyone”, supporting individuals, businesses and communities through digital connectivity. Vodafone's ambition is to become a leading telecommunications company in Europe and Africa and Europe's leading platform for business. Its strategy focuses on three priorities: Customers, Simplicity and Growth, with emphasis on

improving customer experience, reducing organisational complexity and expanding higher-growth services such as IoT and business solutions (Vodafone, 2025c).

Vision, mission and values

Vodafone's purpose centres on connecting people, businesses and societies through technology while supporting an inclusive, sustainable and trusted digital society. The organisation's Spirit of Vodafone promotes principles including customer focus, simplicity, inclusion, trust, responsible innovation and sustainability (Vodafone, 2025b). These values align with the proposed Connected Enterprise Strategy because business customers require reliable, secure and transparent digital solutions rather than simply low prices. Vodafone's sustainability ambitions also support the strategy, including its target to achieve net-zero emissions across its value chain by 2040 and help customers reduce emissions through digital technologies (Vodafone, 2025d). The Vodafone–Three merger further strengthens Vodafone's UK position by increasing network scale and investment capacity. Completed in May 2025, the merger initially gave Vodafone 51% ownership of VodafoneThree, with CK Hutchison holding 49% (Vodafone, 2025a). Vodafone's subsequent agreement to acquire the remaining stake in 2026 further strengthens its control of the UK business and provides a stronger platform for implementing its growth strategy.

3. Evaluation of the Current Market Situation

3.1 Strategic environment

Strategic analysis examines the relationship between an organisation's internal resources and the external environment in which it competes (Grant, 2022). For Vodafone, this requires analysis at both the macro level, through PESTEL, and the micro/industry level, through competitive analysis such as Porter's Five Forces. SWOT then integrates the internal and external findings into a strategic framework (Gürel and Tat, 2017). Vodafone operates in a market characterised by high infrastructure costs, strong regulation, rapid technological change and intense rivalry. The VodafoneThree merger reduces the number of major UK mobile network operators from four to three, increasing scale but also creating regulatory responsibilities and political scrutiny.

3.2 Micro-environment: Porter's Five Forces

Porter (1979; 1980) argues that industry profitability is influenced by five forces: rivalry, buyer power, supplier power, threat of new entrants and threat of substitutes.

Porter force	Assessment	Vodafone UK example
Competitive rivalry	High	VodafoneThree competes with BT/EE and Virgin Media O2, while MVNOs compete aggressively on price.
Buyer power	High	Consumers can compare tariffs and switch providers; business customers can negotiate contracts.
Supplier power	Medium–High	Telecommunications depends on network equipment, spectrum, cloud infrastructure and specialist technology suppliers.
Threat of new entrants	Medium	Infrastructure requirements are high, but MVNOs and digital brands can enter without owning a complete network.
Threat of substitutes	Medium	Wi-Fi, fixed broadband, satellite connectivity and alternative communications platforms can substitute for some mobile services.

Table 3.2.1. Porter’s Five Forces Analysis of VodafoneThree.

Framework interpretation: Vodafone should therefore avoid a strategy based mainly on price competition. Porter’s analysis indicates that rivalry and buyer power are sufficiently strong to place pressure on margins. Differentiated solutions that increase switching costs through integrated business services are more strategically attractive.

3.3 Macro-environment

The UK telecommunications environment is shaped by political regulation, economic uncertainty, changing consumer behaviour, technological development, environmental requirements and legal obligations. These factors influence both the attractiveness of the market and Vodafone’s ability to exploit its new network scale. Technologically, demand is particularly attractive. Ofcom reported that UK consumers used more than 1.2 billion GB of mobile data each month during 2025, with 5G data use growing by 53% year-on-year (Ofcom, 2025a). This supports the argument that network investment can generate additional value when combined with higher-value services. The infrastructure environment is also improving. Ofcom’s Spring 2026 Connected Nations update found that overall 5G coverage outside premises had increased to between 76% and 94% for individual mobile network operators, while 5G standalone coverage continued to expand (Ofcom, 2026a). VodafoneThree therefore enters an environment in which network quality increasingly becomes a competitive differentiator.

3.4 SWOT analysis

SWOT evaluates internal strengths and weaknesses and external opportunities and threats (Gürel and Tat, 2017). It does so through a framework model covering four main components: strengths, weaknesses, opportunities, and threats. Strengths and weaknesses represent internal factors that are largely within an organisation’s control,

such as resources, capabilities, brand reputation, and operational performance. In contrast, opportunities and threats reflect external conditions arising from the wider business environment, including market trends, technological developments, competition, and regulatory changes. By distinguishing between internal and external factors, SWOT provides a structured approach for assessing an organisation's strategic position and identifying factors that may influence its future performance and strategic decision-making.



Diagram 3.4.1. SWOT analysis framework guiding questions.

Strengths	Weaknesses
Large post-merger mobile customer base	Integration complexity following merger
£11bn network investment programme	Significant capital expenditure requirements
Enhanced 4G/5G network scale	Exposure to price competition
Strong Vodafone brand	Historical customer-service weaknesses
205m global IoT connections	Need to integrate Vodafone and Three cultures and systems
Vodafone Business expertise	Dependence on technology partners
Microsoft strategic partnership	Large organisational complexity remains
Strong European/African footprint	Regulatory scrutiny following market consolidation
Opportunities	Threats
5G standalone applications	EE and Virgin Media O2 investment
IoT and connected devices	Aggressive MVNO competition
AI and cloud services	Price-sensitive consumers
Smart cities	Cybersecurity threats
Connected transport	Rapid technological obsolescence
Smart manufacturing	Regulatory intervention
Public-sector digital infrastructure	Economic pressure on business customers
Direct-to-device satellite connectivity	Customer dissatisfaction during integration

Table 3.4.2. SWOT Analysis of VodafoneThree.

Vodafone's strengths are highly relevant to the proposed strategy. The company already has substantial IoT capabilities and a large business customer base. Its Microsoft partnership is also intended to expand enterprise services, AI, cloud and IoT (Vodafone, 2024). This means the recommended strategy does not require Vodafone to create an entirely new business model. The main weakness is execution. The merger creates significant opportunities for economies of scale, but integration may create disruption, employee uncertainty and customer-service problems. Therefore, the strategy should be implemented after establishing network reliability and integration quality.

3.5 Real-life example

A strong practical example is Vodafone's partnership with AST SpaceMobile. In January 2025, Vodafone achieved the world's first space-based mobile video call using an ordinary smartphone from an area without mobile coverage. The technology demonstrates how Vodafone can combine terrestrial networks with satellite technology to extend connectivity into areas that traditional infrastructure cannot economically reach (Vodafone, 2025e). This example illustrates a broader strategic principle: Vodafone should not compete only by selling SIM cards and data allowances. It should use connectivity as a platform for innovative digital solutions. The same principle can be applied to enterprise IoT, connected vehicles, rural connectivity and smart infrastructure.

4. Strategic Growth Options and Proposed Strategy

4.1 PESTEL framework

PESTEL analyses the macro-environment through six dimensions: Political, Economic, Social, Technological, Environmental and Legal factors (Aguilar, 1967; Johnson et al., 2017). The analysis demonstrates that the external environment supports technology-led growth but also creates significant regulatory and cybersecurity risks.

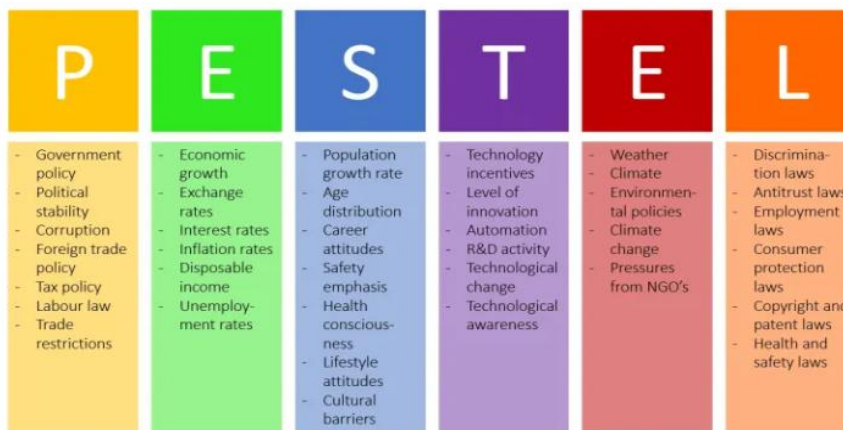


Fig 4.1.1. PESTEL analysis guiding model.

PESTEL factor	Current issue	Practical implication for Vodafone
Political	Government interest in digital infrastructure and national connectivity	Network investment can support UK digital infrastructure objectives.
Economic	Cost-of-living pressure and cautious business spending	Low-value consumer price competition should be avoided; business productivity solutions are attractive.
Social	Increasing dependence on mobile connectivity	Reliable connectivity becomes essential for work, healthcare and social participation.
Technological	5G SA, AI, cloud, IoT and satellite technology	Vodafone can develop integrated digital solutions rather than basic connectivity.
Environmental	Pressure to reduce emissions and energy consumption	IoT can optimise transport, energy and industrial processes.
Legal	Ofcom regulation, competition law, data protection and cybersecurity	New products must incorporate privacy, resilience and regulatory compliance.

Table 4.1.2. PESTEL analysis of VodafoneThree.

4.2 Strategic growth alternatives

The Ansoff Matrix provides four growth alternatives: market penetration, product development, market development and diversification (Ansoff, 1957). The preferred approach combines product development and market development.

Ansoff option	Vodafone application	Assessment
Market penetration	Sell more mobile/broadband services to existing customers	Low–medium growth potential
Product development	Add IoT, cybersecurity, cloud and AI services	High potential
Market development	Expand Vodafone Business solutions into new customer segments	High potential
Diversification	Enter unrelated digital industries	High risk

Table

4.2.1. Ansoff matrix of VodafoneThree.

4.3 Recommended strategy: 5G-Enabled Connected Enterprise

The proposed strategy is to develop a 5G-Enabled Connected Enterprise platform for UK businesses and public-sector organisations. Vodafone already provides IoT connectivity and analytics and supports more than 200 million IoT devices globally (Vodafone, 2025f). It also has a strategic relationship with Microsoft covering AI, cloud, IoT and enterprise services (Vodafone, 2024). The proposed strategy therefore leverages existing capabilities rather than requiring unrelated diversification. The platform would combine:

1. VodafoneThree 5G connectivity;
2. Managed IoT;
3. Cloud connectivity;
4. Cybersecurity;
5. AI-powered analytics;
6. Edge computing;
7. Connected devices;
8. Sector-specific digital solutions.

Porter's Generic Strategy

Porter (1980) identifies cost leadership, differentiation and focus as generic competitive strategies. Vodafone should adopt differentiation with a focused market approach. Rather than attempting to become the cheapest provider, Vodafone should differentiate through network reliability, integrated connectivity, cybersecurity, AI analytics, IoT, sector expertise and end-to-end service management. For example, a logistics company could purchase a single Vodafone solution connecting vehicles, warehouses and employees while providing location data, predictive maintenance, cybersecurity and analytics. This creates greater customer value than a conventional mobile contract.

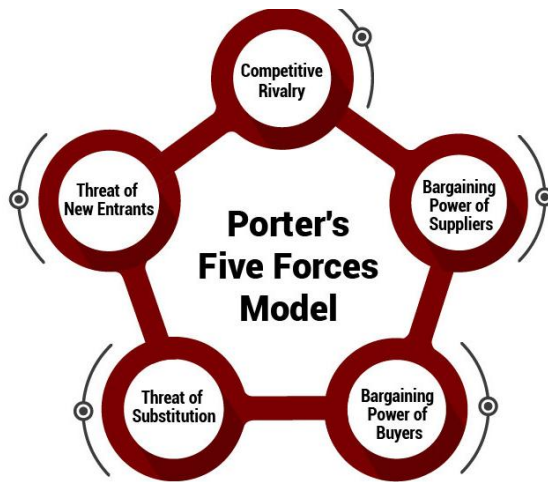


Fig. 4.3.1. Porter's five forces model guidance pattern.

Strategic alignment

The strategy directly supports Vodafone's ambition to become Europe's leading platform for business. It also supports all three corporate priorities: Customers: integrated solutions improve customer outcomes. Simplicity: one platform can reduce the complexity of managing different technology suppliers. Growth: B2B digital services provide higher-value revenue opportunities. The strategy also aligns with Vodafone's purpose of connecting everyone because business connectivity can improve productivity, healthcare, transport and public services.

Force	Factors That Increase Power	Factors That Decrease Power
Competitive Rivalry	Many competitors; Low product differentiation; Slow market growth; High fixed costs; Low switching costs	Few competitors; High differentiation; Strong brand loyalty; Fast market growth; High switching costs
Threat of New Entrants	Low startup costs; Few barriers; Easy distribution access; Low customer loyalty; Weak brand identity	High capital needs; Strong brand loyalty; Economies of scale; Regulations; Proprietary tech
Bargaining Power of Buyers	Few large buyers; Standard products; Easy switching; Informed buyers; Low switching costs	Many small buyers; Unique products; High switching costs; Limited alternatives; Fragmented buyers
Bargaining Power of Suppliers	Few suppliers; No substitutes; High switching costs; Forward integration; Critical input	Many suppliers; Substitute inputs; Low switching costs; Backward integration; Non-critical input
Threat of Substitutes	Many alternatives; Low switching costs; Better price/performance; Price-sensitive customers	Few substitutes; High switching costs; Inferior alternatives; Strong brand loyalty; Essential product

Fig.

4.3.1. Porter's five forces model applied to VodafoneThree.

5. Strategy Evaluation

5.1 Suitability, Feasibility and Acceptability

The SFA framework evaluates whether a strategy is Suitable, Feasible and Acceptable, providing a structured basis for assessing the overall viability of strategic options (Johnson et al., 2017). It is useful because a strategically attractive idea may still fail if the organisation lacks the resources and capabilities needed for implementation, or if stakeholders consider the associated risks and outcomes unacceptable.

SFA framework

Criterion	Assessment	Evidence
Suitability	High	Strong growth in data, 5G, IoT, AI and cloud; Vodafone has relevant capabilities.
Feasibility	High	£11bn UK network investment, existing IoT platform and Microsoft partnership provide resources.
Acceptability	Medium–High	Potential revenue and productivity benefits, although privacy, employment and regulatory risks must be managed.

Table

5.1.1. SFA framework for VodafoneThree.

Suitability

The strategy is highly suitable because the UK telecommunications market is becoming increasingly data intensive. Ofcom's finding of more than 1.2 billion GB of monthly mobile data consumption demonstrates that connectivity demand continues to grow (Ofcom, 2025a). However, basic mobile connectivity is increasingly commoditised. Vodafone therefore needs to capture additional value from the network. The strategy also fits the resource-based view. Barney (1991) argues that sustainable competitive advantage can emerge when organisations possess valuable, rare and difficult-to-imitate resources. Vodafone's combination of network infrastructure, brand, customer relationships, IoT capabilities, enterprise expertise and technology partnerships provides a potentially valuable resource bundle.

Feasibility

The strategy is financially and technologically feasible because VodafoneThree has committed £11 billion to UK network investment over ten years (Vodafone, 2025a). The company has also developed significant IoT capabilities and maintains partnerships with major technology companies. The strategy should nevertheless be implemented incrementally. Vodafone should initially develop pilots with selected sectors rather than attempting simultaneous national deployment.

Acceptability

The strategy offers benefits to several stakeholder groups. Shareholders could benefit from increased business-service revenue and stronger customer retention. Businesses receive productivity-enhancing connectivity. Government benefits from

stronger digital infrastructure. Employees can develop skills in AI, IoT and 5G. Society benefits from improved connectivity and smart infrastructure. However, risks include cybersecurity, data privacy, employment changes and regulatory scrutiny. Vodafone must therefore adopt “security by design”, transparent data governance and strong stakeholder engagement.

Strategic risk

The major strategic risk is that Vodafone invests heavily in technology without achieving sufficient customer adoption. To mitigate this, every investment should be linked to measurable customer and financial outcomes. Pilot projects should be used before large-scale capital deployment. A second risk is technological obsolescence. Vodafone should therefore maintain partnerships with technology providers rather than attempting to develop every technology internally. A third risk concerns customer trust. Vodafone’s own reporting identifies privacy, security and resilience as important risk areas (Vodafone, 2025b). Consequently, cybersecurity must be treated as part of the value proposition rather than merely a compliance requirement. Overall, the SFA assessment supports implementation because the strategy fits Vodafone’s resources, market conditions and corporate ambition.

6. Stakeholder Analysis

6.1 Stakeholder theory

Stakeholder theory argues that organisations should consider the interests of groups that affect or are affected by organisational decisions (Freeman, 1984). Donaldson and Preston (1995) further argue that stakeholder management has descriptive, instrumental and normative dimensions. Mitchell, Agle and Wood (1997) suggest that stakeholder importance can be assessed through power, legitimacy and urgency. For Vodafone, the proposed strategy affects customers, employees, shareholders, regulators, suppliers, technology partners, local communities and government.

Stakeholder engagement framework

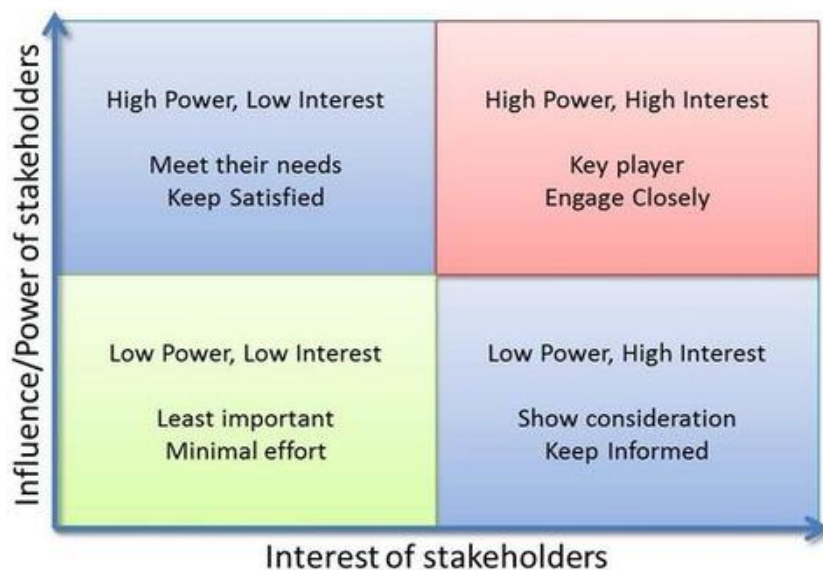


Fig 6.1.1.1. Stakeholder power-interest matrix guidance

Stakeholder	Power	Interest	Key impact	Engagement approach
Customers	High	High	Better connectivity and digital services	Surveys, account management, pilot projects
Business customers	High	High	Productivity and digital transformation	Co-development workshops
Employees	High	High	New skills and possible role changes	Training, consultation, communication
Shareholders	High	High	Growth and returns	Investor reporting
Ofcom/CMA	High	High	Competition and compliance	Formal regulatory engagement
Technology partners	Medium	High	Joint innovation	Strategic partnership governance
Government	High	Medium–High	Digital infrastructure	Public-policy engagement
Local communities	Medium	High	Network construction and connectivity	Community consultation
Suppliers	Medium	Medium	Equipment and service provision	Supplier governance

Table

6.1.1.1. Stakeholder engagement framework for VodafoneThree.

The highest-priority stakeholders are customers, regulators, employees and shareholders because they possess both significant power and interest. Vodafone should use regular stakeholder feedback to refine the strategy. For example, enterprise customers should participate in pilot programmes before products are commercialised. Employees should receive training in 5G, IoT, AI and cybersecurity because the strategy depends on new capabilities. Regulatory engagement is particularly important because the VodafoneThree merger was approved subject to

commitments designed to protect competition and customers. Vodafone must therefore demonstrate that growth does not result in anti-competitive behaviour. Stakeholder engagement should also support Vodafone's purpose. The strategy should not only generate commercial returns but also improve digital inclusion, accessibility, sustainability and community connectivity.

7. Implementation and Monitoring

7.1 Implementation approach

The strategy should be implemented over three years using phased delivery. Key Performance Indicators (KPIs) convert strategic objectives into measurable performance outcomes. Kaplan and Norton (1992) argue that organisations should balance financial and non-financial measures rather than relying exclusively on accounting outcomes.

KPI and implementation framework

Objective	Action	Timescale	KPI
Strengthen network proposition	Expand 5G SA and network-sharing capability	Year 1	5G coverage; network reliability; average speed
Build B2B proposition	Develop Connected Enterprise platform	Year 1	Number of enterprise pilots
Increase IoT revenue	Package IoT with connectivity and analytics	Years 1–2	IoT revenue growth; connected devices
Develop sector solutions	Target logistics, manufacturing, healthcare and utilities	Years 1–3	New contracts; sector revenue
Improve customer experience	Introduce dedicated digital enterprise support	Years 1–2	B2B NPS; resolution time
Scale partnerships	Expand Microsoft and technology partnerships	Years 1–3	Partnership-generated revenue
Improve profitability	Cross-sell digital services to existing customers	Years 2–3	ARPU; revenue per business customer
Maintain trust	Strengthen cybersecurity and data governance	Continuous	Security incidents; compliance performance

Table

7.1.1. Stakeholder engagement framework for VodafoneThree.

The diagram shown in fig. 7.1.2 illustrates Porter's Generic Competitive Strategies, which are based on two dimensions: competitive advantage and competitive scope. Competitive advantage can be achieved through lower costs or differentiation, while competitive scope can target either a broad or narrow market. This creates four strategies: cost leadership, which competes across a broad market through lower costs; differentiation, which offers unique value to a broad market; cost focus, which targets a narrow segment through cost advantages; and differentiation focus, which provides specialised value to a specific market segment. For Vodafone, differentiation

focus is particularly relevant, as it can target specific business sectors with specialised connectivity, IoT, cybersecurity and analytics solutions.

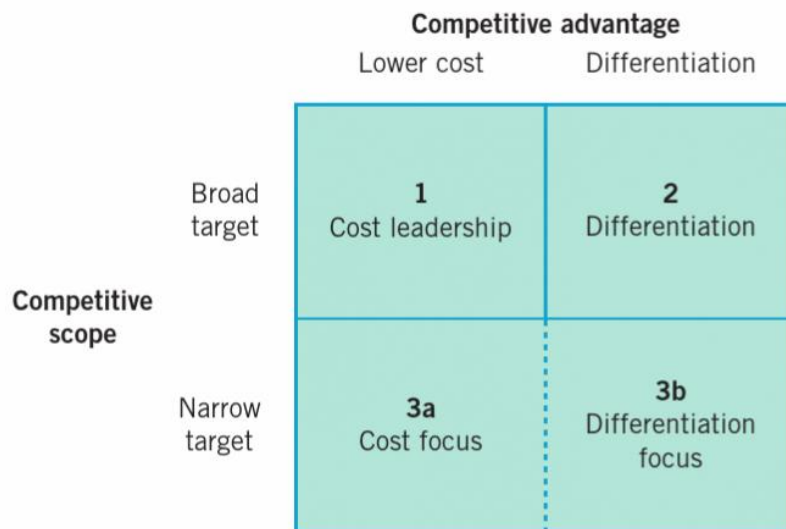


Fig 7.1.2. Porter's Generic Competitive Strategies

Vodafone should use a balanced scorecard containing four categories as illustrated in table 7.1.3 below.

KPI Category	Key Performance Indicators (KPIs)
Financial KPIs	B2B service revenue growth; Revenue per enterprise customer; Digital-service gross margin; Return on invested capital (ROIC); IoT revenue growth
Customer KPIs	Business Net Promoter Score (NPS); Customer retention; Complaint resolution time; Service availability; Enterprise customer satisfaction
Internal Process KPIs	5G availability; Network reliability; Number of IoT devices connected; Time required to launch new digital solutions; Number of cybersecurity incidents
Learning & Innovation KPIs	Employee training completion; Number of employees certified in AI/5G/IoT; Number of new digital products launched; Employee engagement; Number of innovation pilots converted into commercial products

Table

7.1.3. VodafoneThere KPIs.

7.2 Implementation phases

Phase 1: Foundation – Year 1

Vodafone should establish a Connected Enterprise business unit, identify priority industries, recruit or train specialist staff and launch pilot projects with selected customers. The company should focus initially on logistics, manufacturing, healthcare and utilities because these industries can generate measurable productivity benefits from IoT and 5G.

Phase 2: Scale – Year 2

Successful pilots should be commercialised nationally. Vodafone should integrate connectivity, IoT, cloud, cybersecurity and analytics into modular packages for SMEs and large organisations.

Phase 3: Expansion – Year 3

Vodafone should expand successful propositions into smart cities, connected transport, public-sector infrastructure and advanced industrial applications. Internationally proven solutions could subsequently be transferred into other Vodafone markets. Monitoring should occur monthly at operational level, quarterly at executive level and annually at Board level. A strategic dashboard should identify whether performance is moving towards targets. Where KPIs remain below target for two consecutive quarters, management should conduct a strategy review and either modify the proposition, adjust investment or terminate unsuccessful projects. This approach reflects Grant's (2022) argument that strategy requires continuous adaptation because competitive advantage depends not only on possessing resources but also on deploying them effectively.

8. Conclusion

Vodafone UK has a significant strategic opportunity following the Vodafone–Three merger. The enlarged VodafoneThree network, supported by an £11 billion investment programme, IoT capabilities and technology partnerships, provides a strong foundation for growth. However, scale alone will not create sustainable competitive advantage. The UK telecommunications market remains highly competitive, with strong rivalry, high buyer power and continued competition from MVNOs. Competing mainly through lower prices could reduce margins and increase price pressure, making differentiation a stronger strategic direction than cost leadership. The proposed 5G-Enabled Connected Enterprise Strategy provides a credible route to differentiation. By combining VodafoneThree's network with IoT, AI, cloud, cybersecurity and analytics, Vodafone can develop integrated solutions for businesses and public-sector organisations, moving beyond connectivity as a commodity and delivering measurable customer outcomes. Key opportunities exist in logistics, manufacturing, healthcare and utilities, where connected technologies can improve productivity, efficiency, monitoring and security. PESTEL and Ansoff analyses identify opportunities arising from 5G, IoT and digital transformation, while SWOT confirms that Vodafone possesses important resources, including network infrastructure,

technological expertise, an established customer base, investment capacity and technology partnerships. However, these strengths must be effectively integrated following the merger, as operational disruption, cybersecurity threats, regulatory requirements and uncertain customer adoption could limit success. SFA assessment indicates that the strategy is suitable, feasible and broadly acceptable because it responds to technological opportunities, reduces reliance on price competition and is supported by Vodafone's existing capabilities. However, customers will require evidence of financial and operational benefits, such as lower costs, increased productivity, improved efficiency and stronger security. A phased three-year implementation should therefore be adopted, beginning with pilot projects in selected sectors and using measures such as customer adoption, revenue growth, cost savings, productivity improvements and return on investment to assess performance. Successful solutions can then be refined and scaled, while underperforming projects should be modified or discontinued. Overall, Vodafone should use the merger to become not simply a larger telecommunications provider, but a more valuable digital infrastructure and business-solutions platform. Successful execution could reduce price dependence, increase higher-value B2B revenues and strengthen Vodafone's competitive advantage.

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