
Dear Inquiry Group,

Given references made to Google in the Provisional Findings in the CMA's ongoing inquiry into the Vodafone / Three transaction, we wanted to share the following observations:

- **We appreciate the CMA's references to Google's technological developments.** As [previously noted](#), the CMA's mobile ecosystems market study found that our innovations in creating and developing the Android ecosystem have benefited UK consumers. Such innovations include facilitating eSIM implementation within the Android framework, making it easier for consumers to switch mobile providers. (We introduced standard APIs for accessing eSIM and managing subscription profiles on the eSIM from Android 9 in 2018 - see [here](#) for more information). We have also made significant R&D investments in next-generation 5G technology more broadly. For example, as noted by the [Government's Wireless Infrastructure Policy Paper](#), we partnered with Nokia to trial a 5G slicing solution, connecting a single smartphone to multiple network slices simultaneously.
- **We agree with the CMA's observations that continued innovation in mobile will be necessary to enable new applications.** These include advanced / standalone 5G technologies as well as the roll-out of network infrastructure that offers broader capabilities such as ultra-low latency, network slicing functions and improved coverage. A solid mobile network architecture will unlock the benefits of not only the advanced AR/VR and robotic applications outlined in the Provisional Findings, but also other emerging technologies like Generative AI. As the CMA recognised in its FM Initial Review, these technologies offer great potential benefits for UK businesses, consumers and society.
- **We support the new Government's [commitment](#) to boosting private sector investment and its renewed push to fulfil the ambition of full gigabit and national 5G coverage.** We recognise the Main Parties' observations that UK 5G network quality and roll-out still lags behind other countries, and we support efforts to unlock private sector and foreign inbound investments to ensure that the UK 5G network is robust and fit for purpose. We welcome investment that delivers material improvements to UK mobile network quality and performance. Google is also committed to investing in the UK. In addition to our long-standing investment in UK cloud infrastructure, we've also long [supported mobile network providers such as Vodafone](#) to help them enhance mobile connectivity in the UK. We announced recently an expansion of our relationship to help Vodafone and its customers in the UK and beyond enjoy the benefit of the latest innovations in digital transformation and security.

We hope this additional perspective is of assistance to the Inquiry Group.

Kind regards,