



Offers notified by Openreach 1 June 2026

On 1 June 2026 Openreach announced a set of FTTP pricing offers designed to give our CP customers a range of tools to meet the intensifying competition in the UK broadband market. These offers will help providers pass on better value and help end customers in the transition to full fibre.

The new FTTP offers are:

- **FTTP Frontbook ARPU Share offer** to start 1 July 2026 for 12 months

- **2.5gb ONT Box Swap offer for regrades to 1.8Gb FTTP** to start 1 July 2026 for 12 months

- **Incremental New Openreach Customer Offer** to start 1 October 2026, initially for 6 months with the option to extend for a further 6 months

- **Incremental New Openreach Customer Offer in VMO2 Areas** to start 1 October 2026, initially for 6 months with the option to extend for a further 6 months

An overview of these can be found in a set of slides which can be found here [🔗](#)
These slides include links to the price notifications and customer briefings. Terms to all FTTP offers can be found here [🔗](#) under the heading 1 June 2026 Offers.

The incremental offers for FTTP provide discounts for incremental new end customer wins above CPs' baselines and are therefore conditional on volume of services purchased. As a result, these offers are required to be notified with 120 days' notice under the regulatory framework set out by Ofcom in the Telecoms Access Review (TAR). Ofcom will assess whether the conditions in these offers raise potential competition concerns during the 120-day period before the offers take effect. In addition, the Incremental New Openreach Customer offer in VMO2 areas is geographic in scope, and under the TAR we are required to seek consent from Ofcom before this can come into effect. Ofcom will therefore also need to consider whether the VMO2 offer is consistent with the TAR framework under its guidance on geographic offers.

Our position is that these offers for FTTP are consistent with TAR framework:

- **The structure of the conditional offers does not create barriers to using rival networks.** The structure of the offers provides discounts on incremental volumes above a pre-set baseline linked to the current trading performance of each CP. CPs would not risk paying higher prices on baseline volumes if they used alternative suppliers; there are no disincentives to using those suppliers where available.

- **The discounted price levels available on incremental volumes will not undermine efficient long-term network competition.** Discounted prices will apply to the incremental FTTP orders above the baseline for new customers to Openreach only. Competition for FTTP services extends to a much wider range of end customers and our analysis shows that average prices for rivals matching Openreach's terms will remain consistent with long-term cost recovery.

- **The geographic FTTP offer is aligned with the established VMO2 network footprint.** While there is some overlap between this area and alternative network footprints, the incremental discounts available will not undermine competition. We therefore believe Ofcom should grant consent for the geographic element of the offer under the TAR framework.

- **There are clear benefits to CPs and end customers in introducing these offers.** The offers are designed to drive genuine growth and encourage new end customers to full fibre broadband, through lower prices.

In addition to the new offers above, we have also notified a six-month extension to two elements of the Equinox offer previously reviewed by Ofcom in 2021:

→ 10 Gigabit GEA Cablelink to start 1 October 2026

→ New to Network Rental for 550Mb FTTP to start 1 October 2026

The price notification [\[link\]](#) and customer briefing [\[link\]](#) have been published on the Openreach website.

Finally, we note that for business customers we have notified:

→ Ethernet Incremental offer to start 1 October 2026

The price notification [\[link\]](#) and customer briefing [\[link\]](#) have been published on the Openreach website. See terms [\[link\]](#)

We again believe the structure and discounted price levels within this conditional offer are **consistent with Ofcom's TAR framework** and raise no competition concerns.

Frequently asked questions

- 1. Are rebates paid separately or offset against future invoices?** Rebates are calculated by Openreach in arrears for each Contract Quarter and, if applicable, applied as a credit on the CP's invoice in the next Contract Quarter
- 2. For the Frontbook ARPU share offer, over what period is the ARPU measured?** Frontbook ARPU Share is calculated on a quarterly basis. The benefit of the offer runs from the date the Frontbook circuit is connected during the Offer Period and ends 30 June 2029 unless an exclusion applies in which case the benefit ends on the date of the exclusion applying. This could be for example where a Frontbook circuit is subsequently ceased, downward modified, transferred or migrated to another CP.
- 3. For the National Incremental FTTP New to Openreach offer, how exactly is the baseline calculated (including the application of seasonal variations)?** We have selected April 2026 NTN and Subsequent Provide volumes and the resulting run rate (i.e. NTN and Subsequent provides monthly completions divided by FTTP footprint available in that month), based on Openreach's cumulative FTTP footprint, as the common starting point. These baselines are then adjusted for estimated growth in Openreach's FTTP footprint and CP-specific seasonality based on each CP's individual month-on-month change in NTN and Subsequent Provide run rate between October 2024 and March 2025. The resulting monthly values are aggregated into quarterly benchmarks. These quarterly benchmarks will then be used to compare to actual volumes to calculate the increment.

Seasonality adjustments are made to reflect the fact that some months see stronger or weaker trading. Trading strength can vary due to factors that might affect all CPs – such as bank holidays and reduced trading over Christmas – or those that may be specific to certain CPs – such as pushing to increase volumes at certain times of year as the CP chooses. As there are some CP specific factors, the seasonality adjustment is CP specific (albeit the methodology applied is uniform across CPs and is simply run over individual CP's own figures).

Note:

- The baseline applies only to CPs with more than 1,000 FTTP orders in April 2026.
- For CPs with fewer than 1,000 FTTP orders in the month of April 2026, the discount will apply to all NTN and Subsequent Provide volumes regardless of performance. The first 5% of volumes will receive a 18-month rental rebate, the next 5% a 24-month rebate, and the remaining 90% a 30-month rebate. The £35 connection discount will apply across all volumes.

Frequently asked questions

4. **For the Incremental New Openreach Customer Offer in VMO2 Areas offer, do the VMO2 areas include or exclude Nexfibre build areas?** The offer applies in postcodes where we understand VMO2 network to be present based on the estimate available to Openreach. The postcodes have not been selected with the intent of capturing nexfibre build locations.
5. **For the Incremental New Openreach Customer Offer in VMO2 Areas offer, how exactly is the baseline calculated (including the application of seasonal variations)?** We have selected April 2026 NTN and Subsequent Provide volumes in the VMO2 areas and the resulting run rate (i.e. NTN and Subsequent provides monthly completions in the VMO2 areas divided by FTTP footprint available in that month in the VMO2 areas), based on Openreach's cumulative FTTP footprint in the VMO2 areas, as the common starting point. These baselines are then adjusted for estimated growth in Openreach's FTTP footprint in the VMO2 areas and CP-specific seasonality based on each CP's individual month-on-month change in NTN and Subsequent Provide run rate between October 2024 and March 2025 in the VMO2 areas. The resulting monthly values are aggregated into quarterly benchmarks. These quarterly benchmarks will then be used to compare to actual volumes to calculate the increment.

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Note:

- The baseline applies only to CPs with more than 1,000 FTTP orders nationwide in April 2026.
 - For CPs with fewer than 1,000 FTTP orders in the month of April 2026, the £50 rebate will apply to all NTN and Subsequent Provide volumes regardless of performance.
6. **For the Incremental New Openreach Customer Offer and the Incremental New Openreach Customer Offer in VMO2 Areas, what is the definition of 'Subsequent Provides'?** A subsequent provide is an order journey where there is an existing Openreach ONT that can be reactivated.