

Vodafone Group comments to the draft BEREC Work Programme 2026



We appreciate the opportunity to comment on this consultation and trust that our comments are helpful to BEREC and National Regulatory Authorities (NRAs) as well as to other stakeholders. We remain at your disposal to discuss our submission to the draft work programme, or any other aspect relevant in the context of the latter.

To inquire about our response please contact:

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Vodafone is a member of the GSMA and fully endorses their submission to the draft Work Programme. However, we would like to provide further input on some topics not covered in the GSMA submission.

1.4 BEREC Opinion on the Recommendation on relevant markets susceptible to ex ante regulation

Vodafone is supportive on BEREC's efforts on the Recommendation of relevant markets and remains at BEREC's disposal for any data that you may consider of relevance for your opinion.

Vodafone's view is that despite technological progress, infrastructure competition in fixed broadband remains limited, with incumbents controlling most VHCN access and retail shares often exceeding 40%, enabling exclusionary practices. Removing Markets 1 and 2 from the Recommendation would be premature, as regulatory stability is critical to safeguard investment incentives and prevent re-monopolization during the transition to fibre networks. Past deregulation examples, such as Romania and the Czech Republic, show that eliminating SMP obligations can lead to higher prices, reduced service quality, and diminished competition. Most NRAs continue to support retaining these markets in the Recommendation, recognizing their importance for ensuring fair access and competitive outcomes.

1.5 External Workshop on migration and copper switch-off in light of the DNA

Vodafone has been supportive of BEREC's ongoing work on copper switch-off, which remains one of the most significant topics in today's telecommunications markets. Previous contributions by BEREC, such as the Report on Copper Switch-off, have been highly informative and provided a comprehensive overview of the diverse situations across Member States. Vodafone appreciates the fact that BEREC plans to organise an external workshop on migration and copper switch-off as per our suggestion in the contribution to BEREC's 2025 Work Programme. We would like to emphasize the importance of involving all relevant industry stakeholders in these discussions including access-seekers from different Member States and different sizes. The learnings from the workshop could feed into a toolbox of best practices.

1.6 BEREC Report on the application of fair and reasonable pricing within the SMP framework

Vodafone shares BEREC's preliminary assessment that a report providing a review of the interpretations and applications of fair and reasonable pricing obligations within the SMP framework across Europe might provide valuable insights.

Considering this, BEREC further points out that comparisons with other frameworks, such as GIA and BCRD, could also be included to explore potential differences of how fair and reasonable pricing is interpreted in other regulatory contexts. We want to highlight that symmetric regulation and ex-post competition enforcement are inadequate to tackle entrenched dominance. Only SMP-based regulation in conjunction with GIA can ensure fair access, confidence for investment, speed up infrastructure rollout, and competitive outcomes. Both approaches should therefore not be intertwined. We believe that a strict differentiation between symmetric regulation under GIA and ex-ante regulation under the SMP framework should be kept and BEREC should be very careful in extracting learnings on fair and reasonable pricing from one regime to the other.

1.7 BEREC Report on access conditions to state-aid funded networks

BEREC rightly points out the importance of terms and conditions on accessing state-aid funded FTTH/B networks for the future development of competition in these areas. In this context, BEREC will develop an overview of NRAs' approaches undertaken for the evaluation of the appropriate wholesale access conditions to fixed state-aid funded networks from an economical and technical perspective, accompanied by details on prices determination (active and passive services).

As a network operator that is active in 6 Member States, we remain at BEREC's disposal for any requests that you may consider of relevance to your report, as an industry consultation might be insightful.

8.1 Monitoring of IP interconnection issues

Vodafone takes note of BEREC's ongoing efforts regarding IP interconnection issues, which are critical for the telecommunications sector. However, Vodafone would like to suggest that any update to the existing reports on this matter should have a holistic ecosystem perspective and, unlike previous discussions, greater emphasis should be placed on fostering dialogue and industry collaboration.

8.2 Deepening BEREC's understanding on PIA regulation under symmetric and asymmetric regulatory regimes

Vodafone was supportive of BEREC's work to collect data for the last PIA report and supports deepening the understanding on PIA regulation. We believe that further guidance to NRAs that could be in the form of BEREC common approaches/positions, which have been used more often in the past. We highly appreciate the efforts undertaken to investigate the implementation of physical infrastructure access (PIA) in Europe because this rather low-tech access product is important for operators (by reducing deployment costs, ensuring faster deployment, etc.) and for the general public (less disturbance through civil works, faster network upgrades, etc.) alike. Additionally, PIA is prone to be further harmonized with regard to technical specificities of the relevant access product.