An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q1 2026

Information Notice

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Contents

1 Background

ComReg collects statistical data from authorised operators on a quarterly basis. Not all such operators are included in this data collection (based on minimum revenue levels), but ComReg aims to represent 95% of the total markets. This data includes information on subscriptions, lines, revenues, broadband speeds, minutes and data usage for both fixed and mobile voice and broadband. The data and charts included below are a subset of the information collected. The detailed presentations of data are available on the ComReg data portal www.comreg.ie/industry/electronic-communications/data-portal.

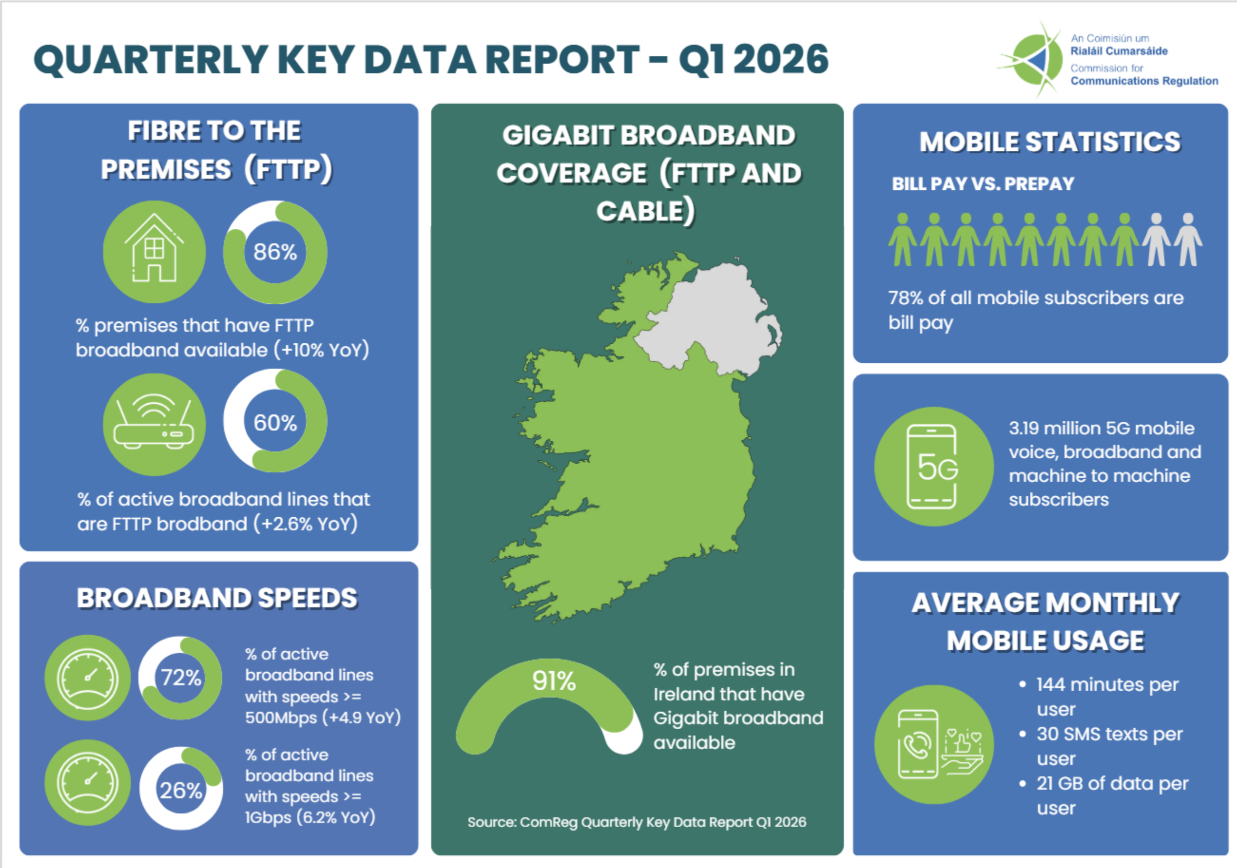
Map visualisations for 'FTTP' and 'Gigabit' Coverage and Take-Up statistics by County, Local Electoral Area, Electoral Division and other Geographic units can be found at ComReg's Open Data Map Hub.

Data presented in this Summary of the Quarterly Key Data is based on questionnaires completed by certain authorised operators for the period from 1st January 2026 to 31st March 2026. The report is based on submissions from 55 active operators.

The report contains the following key charts/data:

- Overview of Markets
    - Table 1 – Communications Summary
- Fixed Markets
    - Figure 1 – Fixed Line Market Shares based on Wholesale and Retail Revenue
- Fixed Voice
    - Figure 2 – Retail Fixed Voice Subscriber lines
- Retail Broadband Market
    - Table 2 – Total Number of Active Subscriber Broadband Lines
    - Figure 3 – Retail Fixed Broadband Market Shares based on Subscriber Lines
    - Table 3 – Retail Fixed Broadband Subscriber Lines by Sold Download Speed
    - Figure 4 – Retail FTTP Subscriber Lines Market Shares
- Broadband Market – Networks
    - Figure 5 – Network FTTP Active Subscriber Lines by Quarter
    - Figure 6 - Network FTTP Lines Broadband Rollout (No of Lines)
    - Table 4 – Take Up Rate by Years FTTP Available
- Mobile Market
    - Figure 7 – Retail Market Shares by Subscription including Mobile Broadband (MBB) and Machine to Machine (M2M)
    - Figure 8 – Retail Market Shares by Subscription excluding Mobile Broadband (MBB) and Machine to Machine (M2M)
    - Figure 9 – Mobile Subscriptions by Technology
- Revisions
- Appendix

2 Q1 2026 Infographic



3 Overview of Irish Communications Market Q1 2026

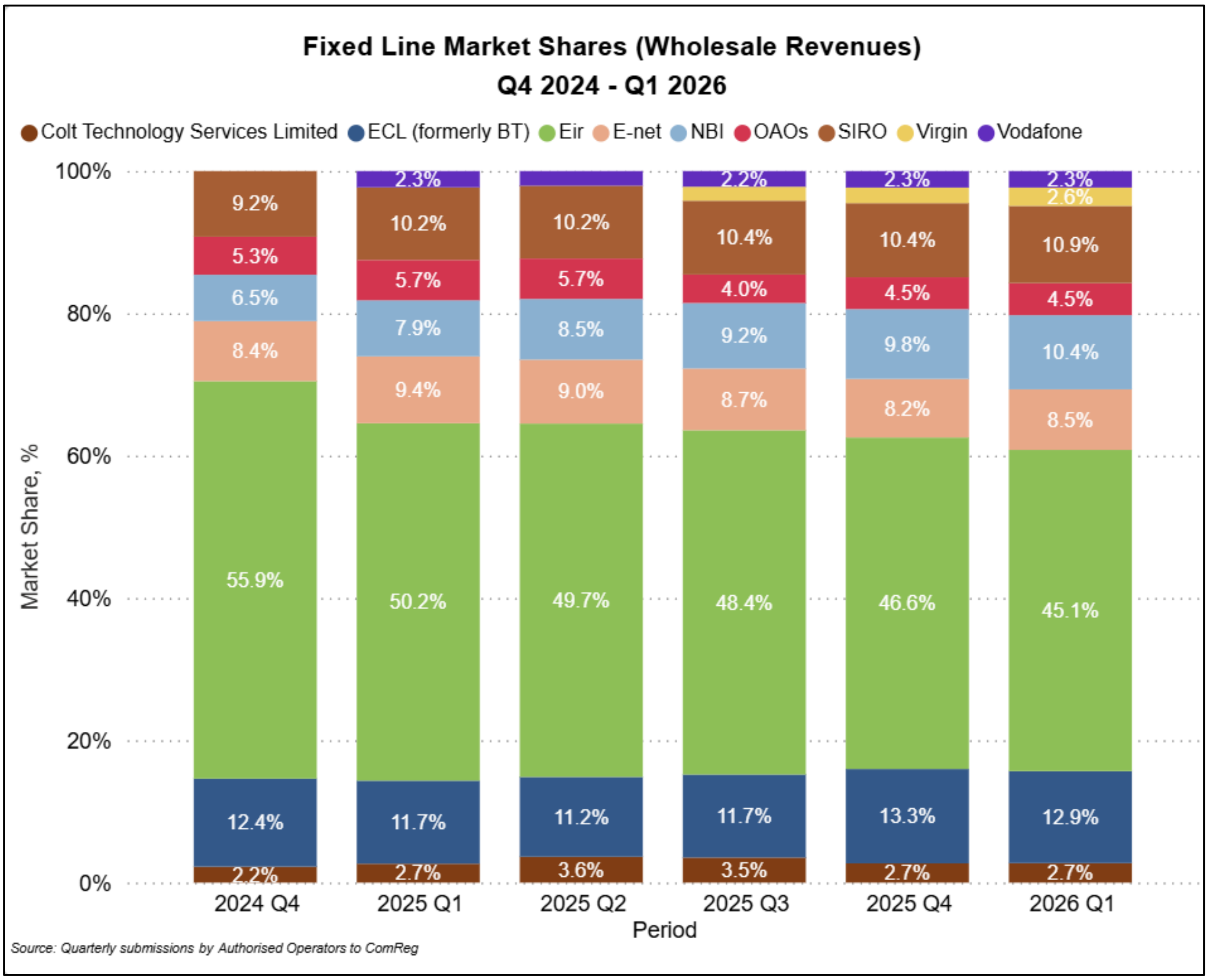
Table 1 - Communications Summary

Revenues	2025 Q1	2025 Q2	2025 Q3	2025 Q4	2026 Q1
Total Retail Market Revenues (000s)	€906,227	€921,811	€922,885	€949,743	€914,576
Total Fixed Line Wholesale Revenues (000s)	€150,117	€151,734	€155,233	€161,204	€156,774
Total Mobile Wholesale revenues (000s)	€29,631	€30,108	€32,294	€31,352	€29,517
Total FTTP and Cable Coverage (By Eircodes)	**2025 Q1**	**2025 Q2**	**2025 Q3**	**2025 Q4**	**2026 Q1**
Percentage Premises with FTTP Broadband Available	75.7%	78.5%	81.0%	84.3%	85.7%
Percentage Premises with Gigabit Broadband (FTTP or Cable) Available	86.0%	87.7%	88.9%	90.0%	91.1%
FTTP and Cable Take Up Rate	**2025 Q1**	**2025 Q2**	**2025 Q3**	**2025 Q4**	**2026 Q1**
FTTP Take Up Rate	49.6%	50.2%	50.6%	50.7%	51.9%
FTTP & Cable Take Up Rate	57.9%	58.4%	58.9%	59.7%	60.5%
Subscriber Lines	**2025 Q1**	**2025 Q2**	**2025 Q3**	**2025 Q4**	**2026 Q1**
Total Fixed Broadband Subscriber Lines	1,704,023	1,716,609	1,757,462	1,765,075	1,775,490
Total Fixed Voice (PSTN, ISDN and VOIP) Subscriber lines	1,051,542	1,032,148	1,009,554	995,826	989,867
Mobile Subscriptions inc. MBB and M2M - Total	10,418,806	10,561,301	10,732,236	10,844,594	10,920,348
Machine to Machine (M2M) Subscriptions	4,073,487	4,179,852	4,276,911	4,367,068	4,427,745
Mobile Broadband (MBB) Subscriptions	393,913	393,253	394,084	393,979	393,356
Mobile Subscriptions exc. MBB and M2M - Total	5,951,406	5,988,196	6,061,241	6,083,547	6,099,247
Voice Traffic	**2025 Q1**	**2025 Q2**	**2025 Q3**	**2025 Q4**	**2026 Q1**
Total Voice Traffic Minutes (000s)	3,008,256	2,943,972	2,930,822	2,950,700	2,845,107
Total Fixed Voice Minutes (000s)	228,645	215,632	211,880	206,315	208,705
Total Mobile Voice Minutes (000s)	2,779,611	2,728,340	2,718,942	2,744,385	2,636,402

Fixed Market

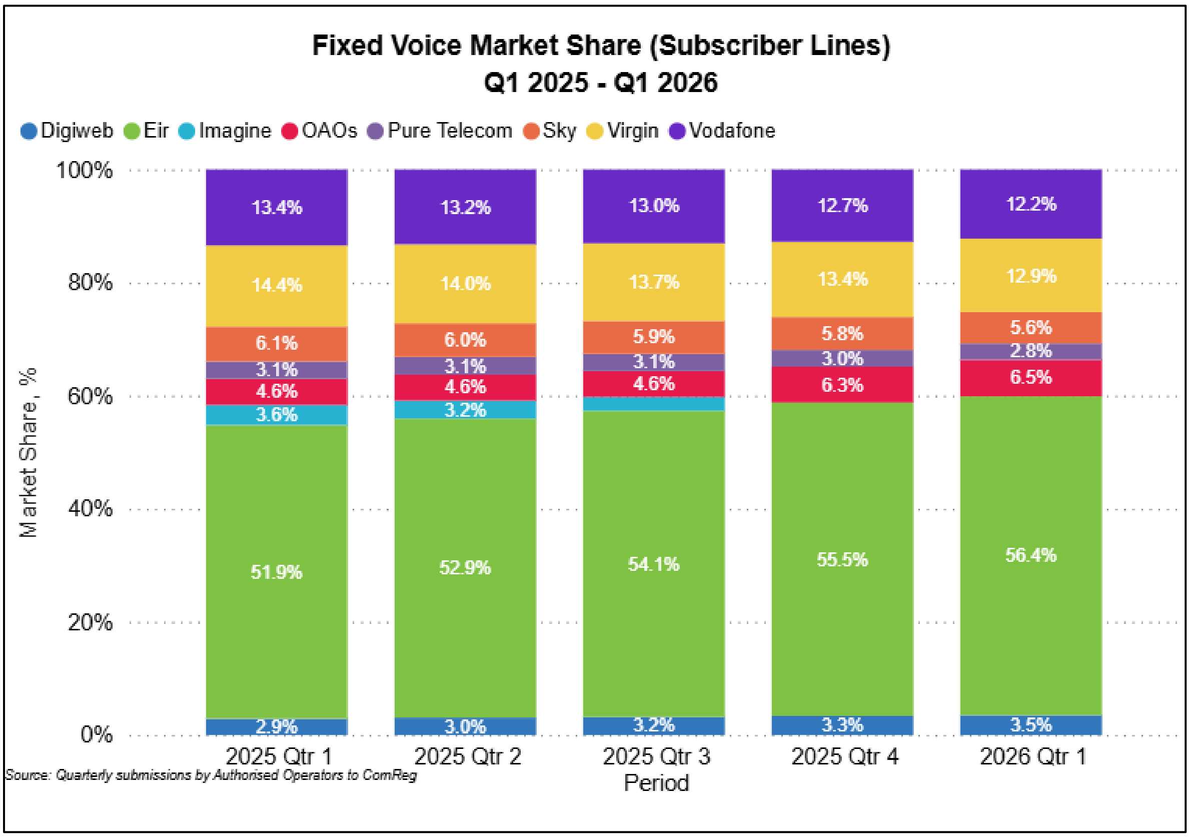
- In Q1 2026, Eir had the highest wholesale revenue share in the fixed line market at 45.1%.
- ComReg estimates that the next seven largest operators (ECL (formerly BT), NBI, SIRO, Virgin Media Ireland, Vodafone, E-Net and Colt Technologies) contribute a further 50.4% share of fixed line retail market revenue.
- Remaining other authorised operators (OAOs) account for the residual 4.5% share.

Figure 1 - Fixed Line Market Shares based on Wholesale Revenues



Retail Fixed Voice Market

Figure 2 – Retail Fixed Voice Subscriber Lines



- Fixed voice traffic in Q1 2026 was approximately 208 million minutes, which was a 1.2% increase on Q4 2025 and a decrease of 8.7% since Q1 2025.
- At the end of Q1 2026, there were 989,867 fixed voice subscriber lines, a decrease of 0.6% since Q4 2025 and a decrease of 5.9% since Q1 2025.
- As of Q1 2026, Eir had 56.4% of all fixed voice subscriber lines followed by Virgin Media (12.9%), Vodafone (12.2%), Sky Ireland (5.6%), Pure Telecom (2.8%) and Digiweb (3.5%). Other operators accounted for the remaining 6.5% of fixed voice subscriber lines.

4 Retail Broadband Market

At the end of March 2026, there were almost 2.17 million active total Broadband subscriber lines in Ireland. This is a 0.4% increase from the previous quarter and a 3.4% increase on Q1 2025. Looking at total Fixed Broadband lines only, these increased by 0.6% since Q4 2025, with a 4.2% annual increase on Q1 2025.

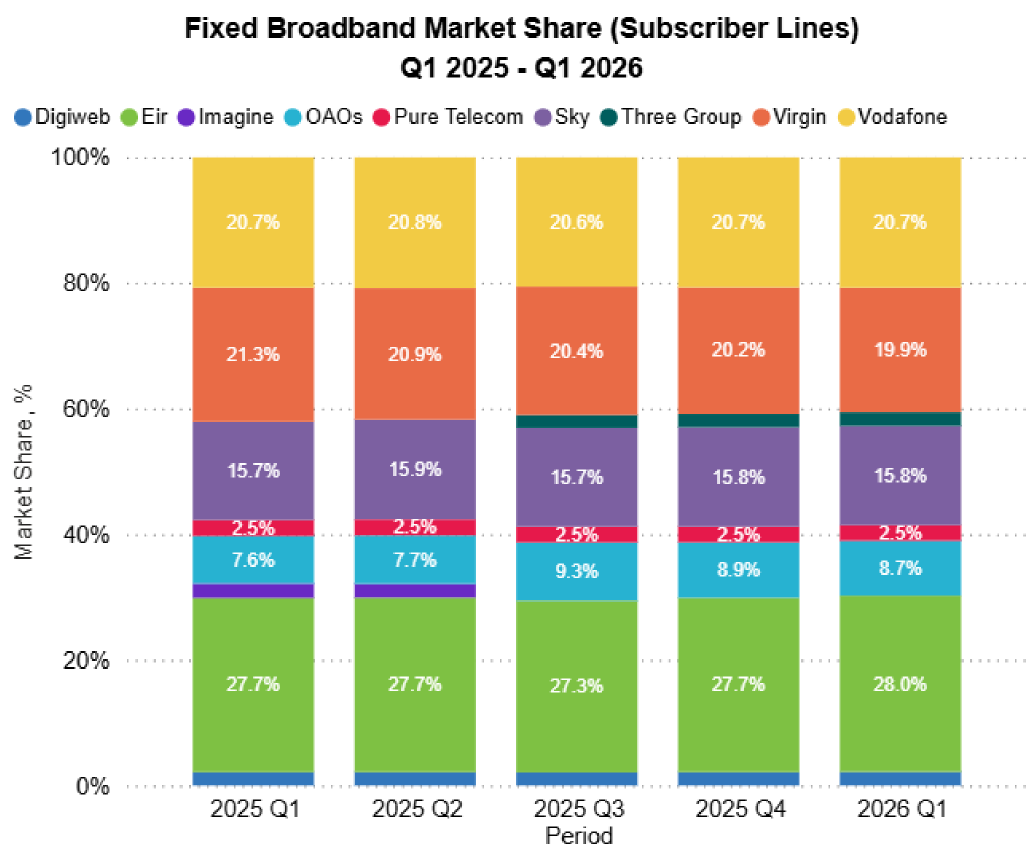
Table 2 - Total Number of Active Broadband Subscriber Lines

Line Type	Q1 2026	Quarterly Change Q4’25 – Q1’26	Annual Change Q1’25 – Q1’26
Cable Broadband	274,259	-3.46%	-11.94%
DSL Broadband	39,513	-7.74%	-26.94%
VDSL Broadband	263,948	-5.96%	-21.97%
FTTP Broadband	1,093,776	4.16%	20.45%
Satellite Broadband	28,366	10.92%	73.12%
FWA Broadband	75,628	-7.55%	-0.17%
Total Fixed Broadband	**1,775,490**	**0.59%**	**4.19%**
Mobile Broadband	393,356	-0.16%	-0.14%
Total Broadband	**2,168,846**	**0.45%**	**3.38%**

FTTP[1] (+4.1%) and Satellite (+10.9%) broadband subscriber lines showed positive growth this quarter. VDSL (-5.9%), DSL (-7.7%), Cable (-3.4%), FWA[2] (-7.5%) and Mobile Broadband (-0.16%) subscriber lines fell this quarter.

[1] Fibre to the Premises
[2] Fixed Wireless Access. FWA now includes fixed wireless broadband connections provided to a fixed location over 4G and 5G mobile networks

Figure 2 – Retail Fixed Broadband Market Shares based on Subscriber Lines



Source: Quarterly submissions by Authorised Operators to ComReg

- In Q1 2026, Eir had 28.0% of total retail fixed broadband subscriber lines, followed by Vodafone at 20.7%, Virgin Media at 19.9%, Sky Ireland at 15.8%, Pure Telecom at 2.5%, Digiweb at 2.2% and Three Group at 2.2%. All other authorised operators (OAOs) combined accounted for the remaining 8.7% share of retail fixed broadband subscriber lines.

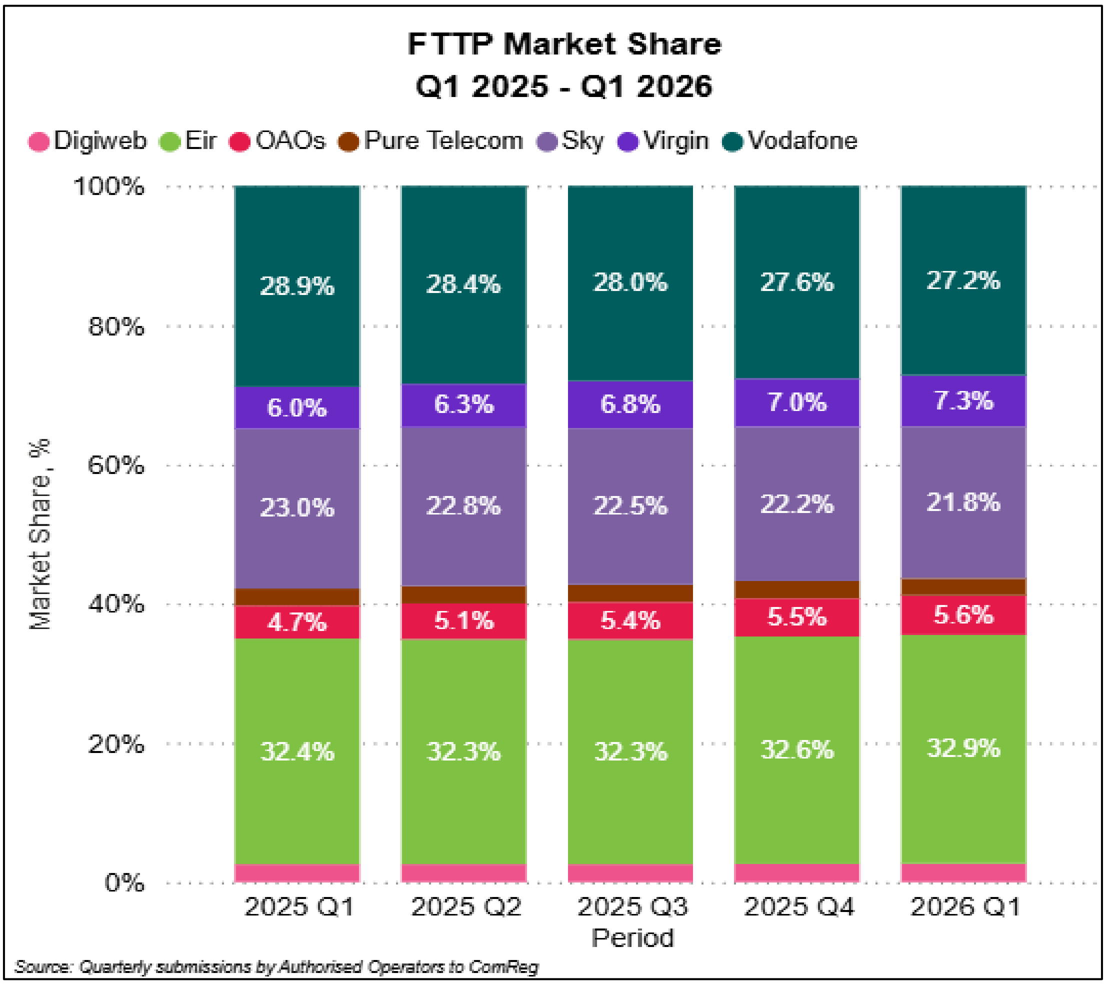
Table 3 - Retail Fixed Broadband Subscriber Lines by Sold Download Speed

Fixed Broadband Subscriber Lines by Sold Speed	Q4 2025	Q1 2026	Quarterly Change
<2Mbps - 9.99Mbps	1.62%	1.50%	-0.12%
=10Mbps - 29.99Mbps	2.54%	2.36%	-0.18%
=30Mbps - 99.99Mbps	15.94%	14.91%	-1.03%
=100Mbps - 499.99Mbps	9.19%	9.11%	-0.08%
=500Mbps - 999.99Mbps	46.83%	46.25%	-0.58%
>=1GB – 1.99GB[3]	22.56%	24.25%	1.69%
>=2GB – 4.99GB	0.55%	0.61%	0.06%
>=5GB – 10GB	0.78%	1.00%	0.22%

[3] From Q3 2025, the >=1GB Speed category has been further split into new speed categories.

- In Q1 2026, 81.2% of all fixed broadband subscriber lines had sold download speeds which were equal to or greater than 100Mbps, with 72.1% having sold download speeds equal to or greater than 500Mbps. Those having sold download speeds equal to or greater than 1GB increased by 2.0 percentage points quarter on quarter and stood at 25.9%.

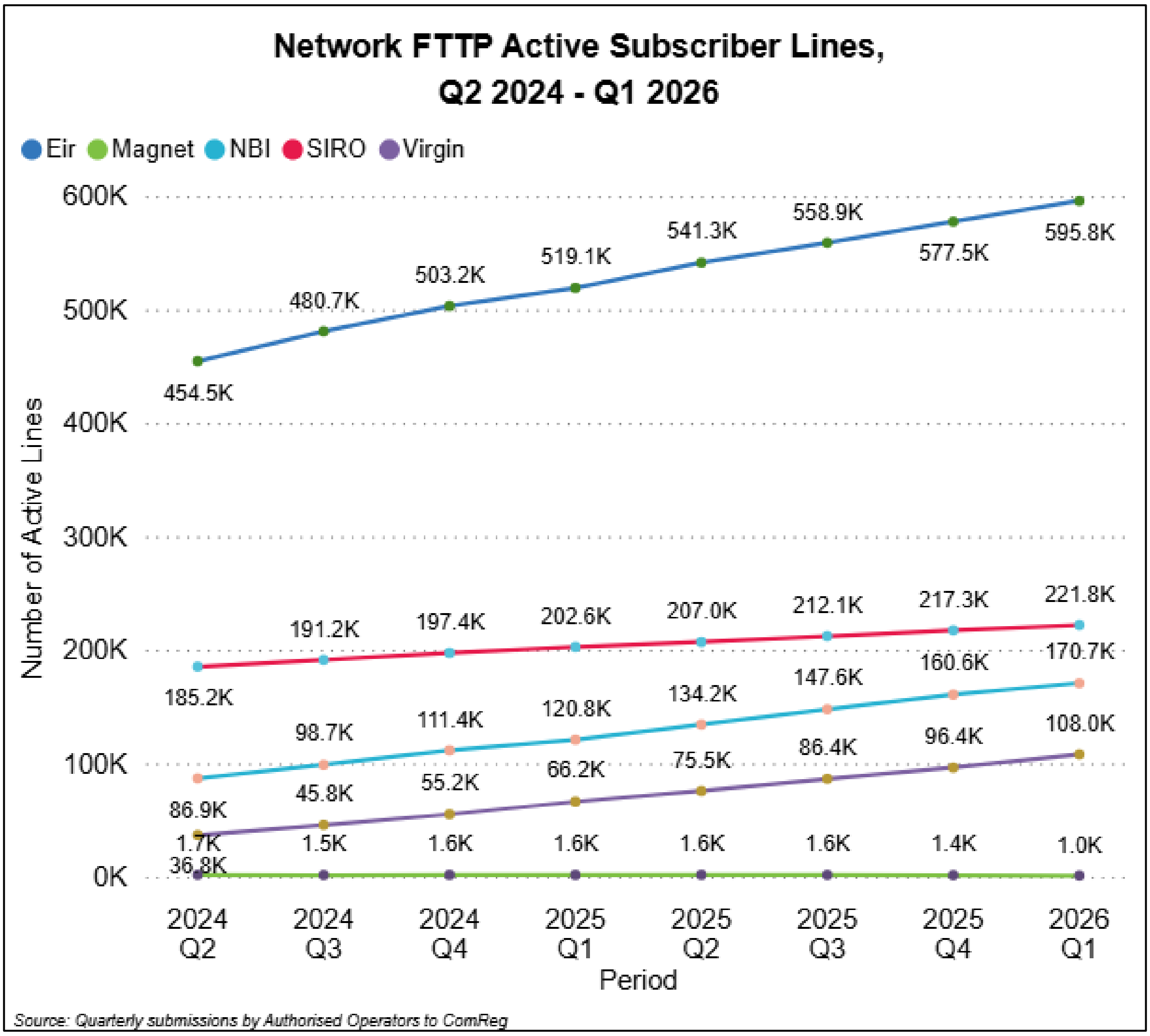
Figure 4 – FTTP Subscriber Line Market Share



- In Q1 2026, Eir had 32.9% of retail Fibre to the Premises (FTTP) subscriber lines, followed by Vodafone at 27.2%, Sky Ireland at 21.8%, Virgin Media at 7.3%, Digiweb at 2.6% and Pure Telecom at 2.5%. Other operators accounted for the remaining 5.6%.

5 Broadband Market - Networks

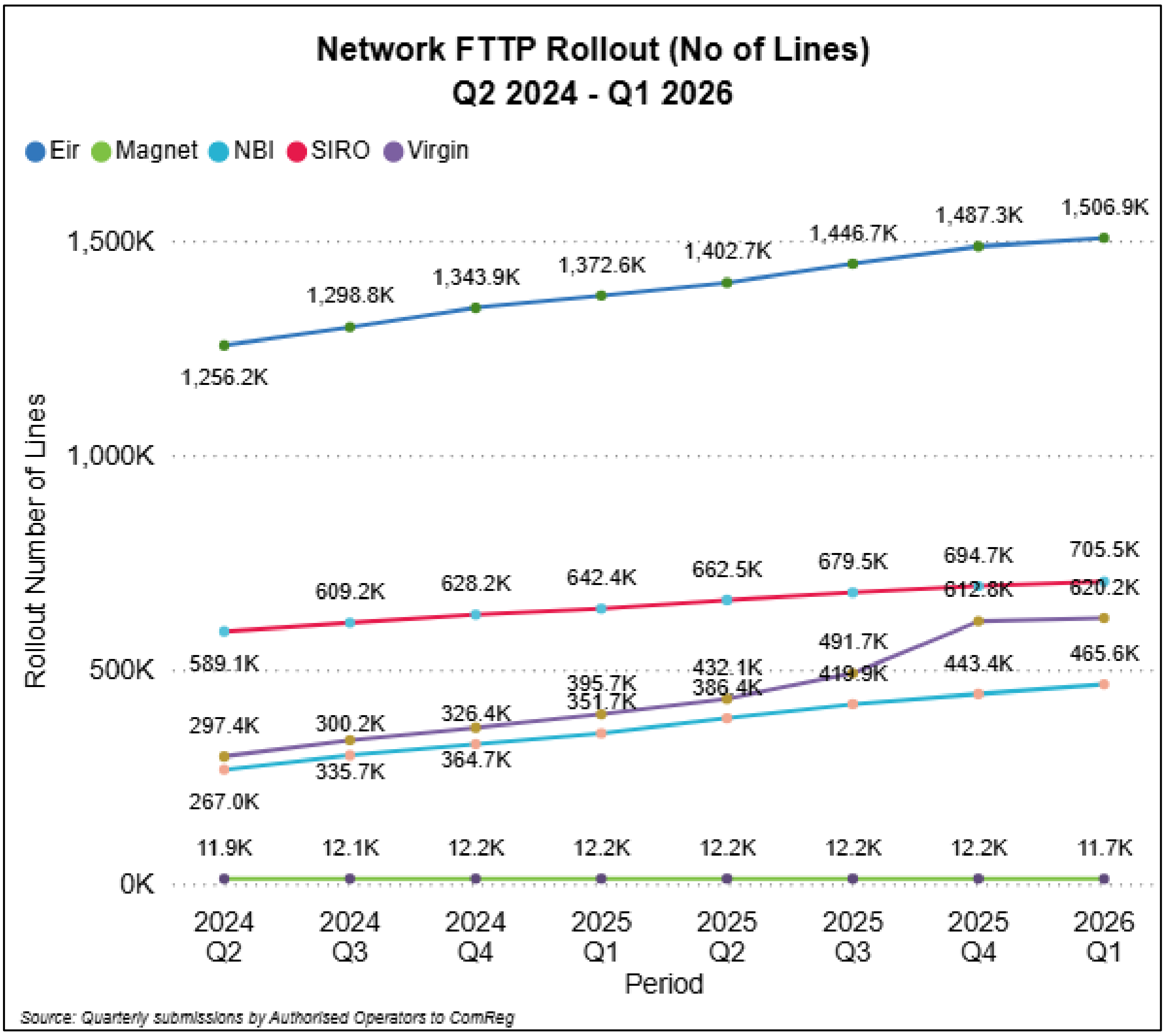
Figure 5 – Network FTTP Active Subscriber Lines by Quarter



- In Q1 2026, based on the underlying network, 595k (up 3% QoQ) of the active FTTP subscriber lines were sold on the Eir network, 221k (up 2% QoQ) were on the Siro network, 170k (up 6% QoQ) were on the NBI network, 108k (up 12% QoQ) were on the Virgin Media network and 1k were on the Magnet Network[4].

[4] Magnet began reporting Network FTTP lines in Q2 2024, the number of lines at the end of Q2 would be broadly similar to the lines present in the previous years.

Figure 6 – Network FTTP Broadband Rollout (No. of Lines) by Quarter



- In Q1 2026, Eir reported having rolled out 1.50m (up 1.3% QoQ) FTTP broadband lines[5], followed by Siro with 705k (up 1.5% QoQ), Virgin Media Ireland with 620k (up 1.2% QoQ), NBI with 465k (up 5% QoQ), with Magnet having rolled out 11.7k[6] lines and Crossan 63 lines.

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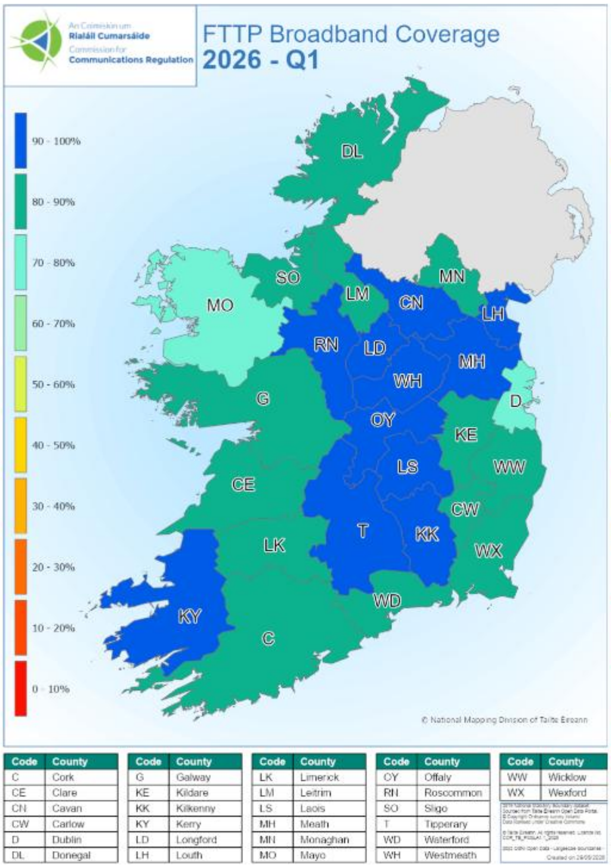
[5] The Network Operators Eir, NBI, SIRO, Virgin Media, Magnet and Crossan each provide information on total FTTP broadband lines rolled out. This metric is based on the total number of FTTP lines, with a premises potentially having more than one FTTP broadband line. For example, a business premises may have multiple FTTP broadband lines. Individual Network Operators may also have FTTP broadband lines at the same premises. Therefore, adding the operators figures together does not indicate unique premises coverage. This coverage is captured as part of the Total FTTP and Cable Coverage.

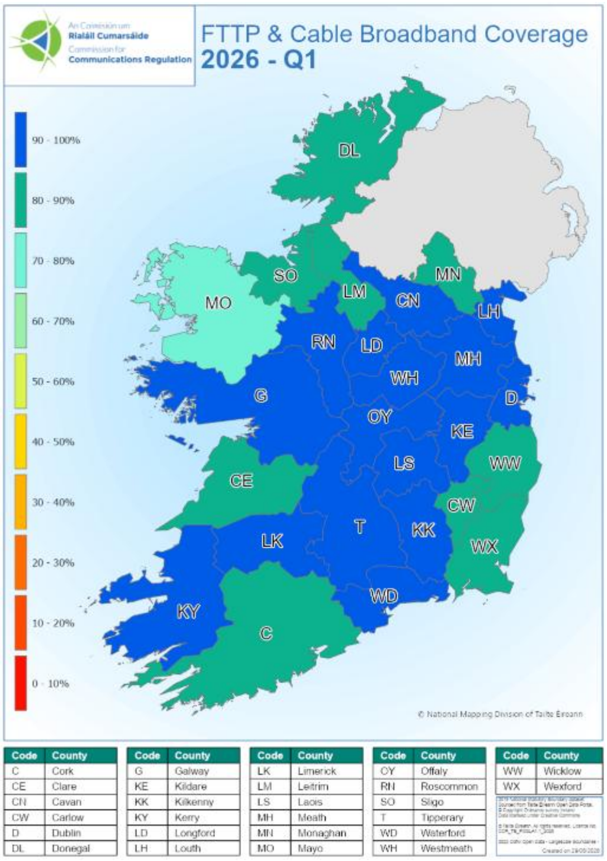
[6] Magnet began reporting Network FTTP lines in Q2 2024, the number of lines at the end of Q2 would be broadly similar to the lines present in previous years.

Total Gigabit (FTTP and Cable) Coverage

- Map visualisations for Gigabit Coverage and Take-Up statistics by County, Local Electoral Area, Electoral Division and other geographic units can be found at ComReg's Open Data Map Hub.
- 86% (up 1.4 percentage points QoQ) of all premises (as measured by Eircodes) in Ireland[7] had FTTP broadband available at the end of Q1 2026.
- 91.1% (up 1.1 percentage points QoQ) of all premises (as measured by Eircodes) in Ireland had Gigabit broadband available at the end of Q1 2026.
- The county with the highest level of FTTP coverage is Westmeath at 95%. Westmeath and Longford have the highest level of Gigabit coverage at 96%. Every county had a minimum of 77% FTTP coverage at the end of Q1.
- Leitrim has the fastest growing FTTP coverage within the last year, with a 20-percentage point annual increase in FTTP coverage to now stand at 88% coverage.
- Leitrim shows the highest quarter-on-quarter increase in FTTP coverage, rising by 4-percentage points compared with the previous quarter.
- ComReg's Open Data Map Hub includes additional geographic units including Local Electoral Area, Electoral Division and Small Area.

[7] Each Network Operator provides a list of Eircodes associated with each broadband line. ComReg combines all Eircodes and derives a unique coverage figure for each premises by removing instances where Eircodes are passed by more than one network. Each premises (Eircode) which has FTTP and/or Cable is only counted once regardless of how many lines are present at the premises (Eircode). This total premises (Eircodes) passed figure is then divided by the total Eircodes for Ireland, which is taken from the 'Postal Address' field of the Eircode database.

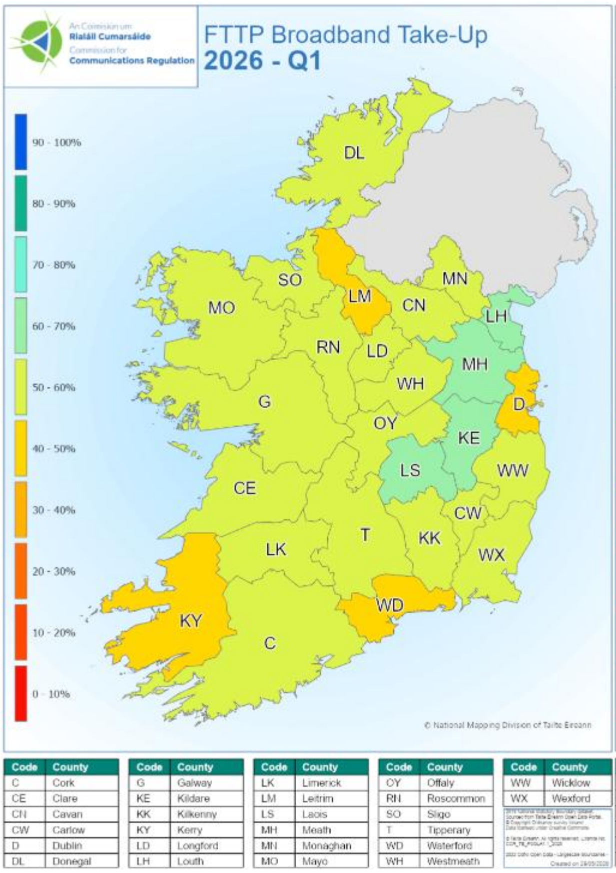


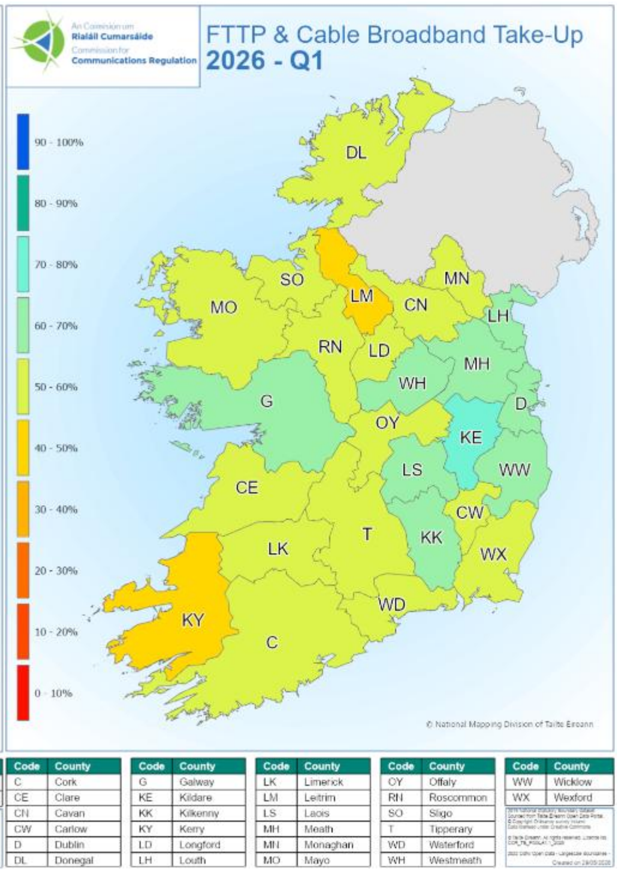


Total Gigabit (FTTP and Cable) Take-Up[8]

- In terms of FTTP take-up (active FTTP broadband premises divided by premises where FTTP is available), 51.9% of all premises (up 2 percentage points YoY) with FTTP broadband available had an active FTTP service at the end of Q1 2026.
- 60.5% of premises with FTTP or Cable available had an active FTTP or Cable service at the end of Q1 2026.
- The maps set out below show County level 'FTTP' and 'Gigabit' take-up rate by County for Q1 2026.
- The county with the highest level of FTTP take-up is Meath at 65%. Longford had the fastest growing FTTP take-up rate within the last year, with a 6.5-percentage point increase in take-up compared to Q1 2025.
- See ComReg's [Open Data Map Hub] for further map visualisations on Gigabit broadband.

[8] This metric is based on the total number of active FTTP premises where a unique active figure is derived for each premises (as measured by Eircodes). This removes instances where a single premises (e.g. a business) has multiple lines at the premises. This active FTTP premises figure is then divided by the total unique premises passed figure as calculated under 'Total FTTP and Cable Coverage'.





FTTP Take-Up Based on Year of Rollout

- Each row in this table shows the take up rate as at Q1 2026 of a different batch of premises, with the batches set according to specific yearly 12-month periods within which FTTP was rolled out.

- Each yearly batch captures roll-out occurring over 4 quarters (Q2, Q3, Q4 and Q1) for the relevant year.

- For example, premises which were passed with FTTP greater than 6 years ago and up to 7 years ago (i.e. between Q2 2019 and Q1 2020 inclusive) had a 60% take up as at Q1 2026. Similarly, premises passed with FTTP greater than 2 years ago and up to 3 years ago had a 51% take up as at Q1 2026.

- The trend amongst the Q1 2026 take-up rates of each of the batches highlights that older FTTP deployments have higher take-up than newer FTTP deployments.

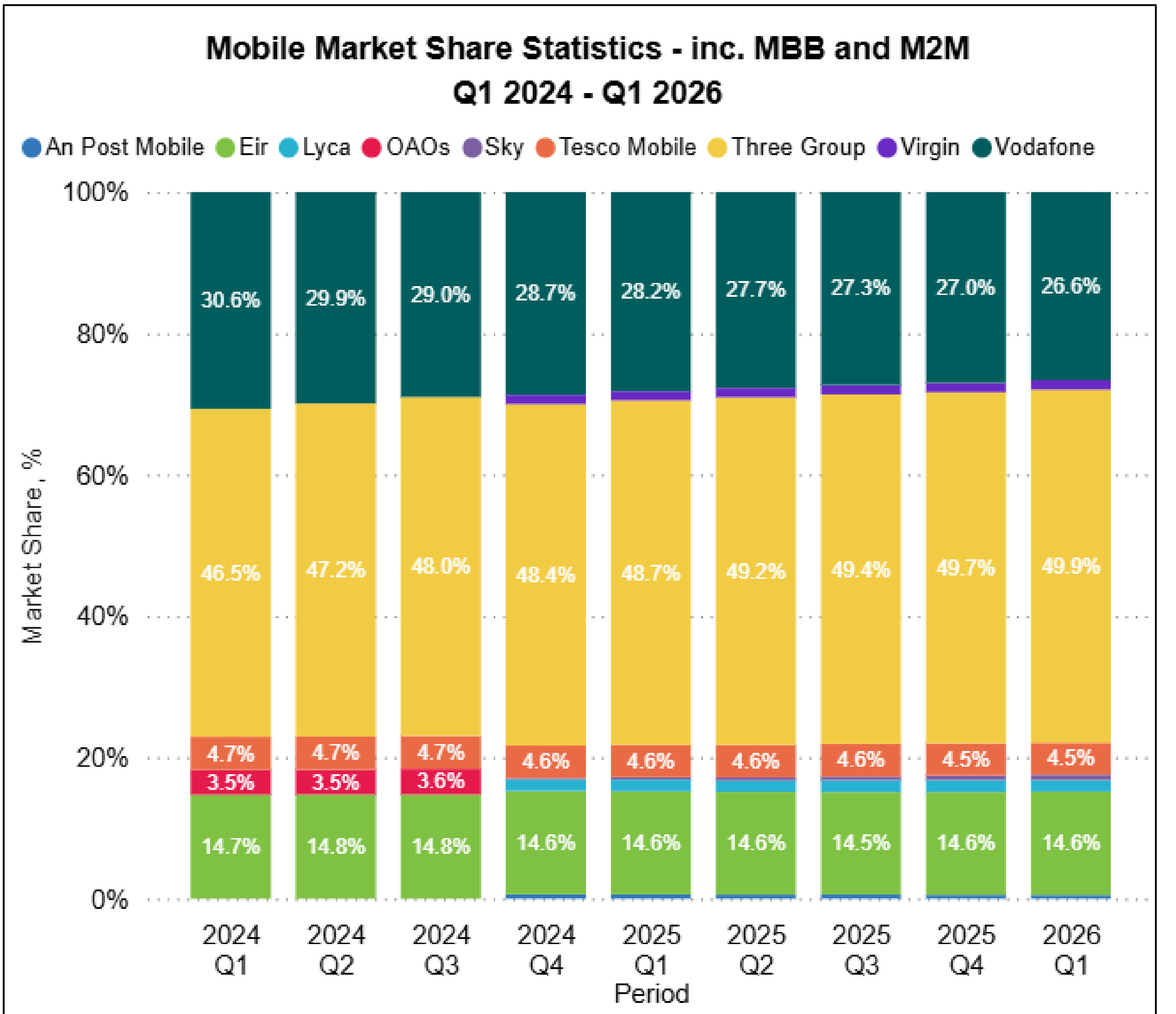
Table 4 – Take Up Rate by Years FTTP Available

Take Up Rate by Years FTTP Available	
Years FTTP Available (As at Q1 2026)	**Take Up Rate by Years FTTP Available**
Greater than 6 years, up to 7 years	60%
Greater than 5 years, up to 6 years	57%
Greater than 4 years, up to 5 years	55%
Greater than 3 years, up to 4 years	55%
Greater than 2 years, up to 3 years	51%
Greater than one year, up to 2 years	43%
Less than one year	23%

6 Mobile Market

At the end of Q1 2026 there were 10,920,348 mobile subscriptions in Ireland, including mobile broadband (MBB) and Machine to Machine (M2M). If mobile broadband subscriptions (393,356) and M2M subscriptions (4,427,745) are excluded, the total number of mobile voice subscriptions was 6,099,247.

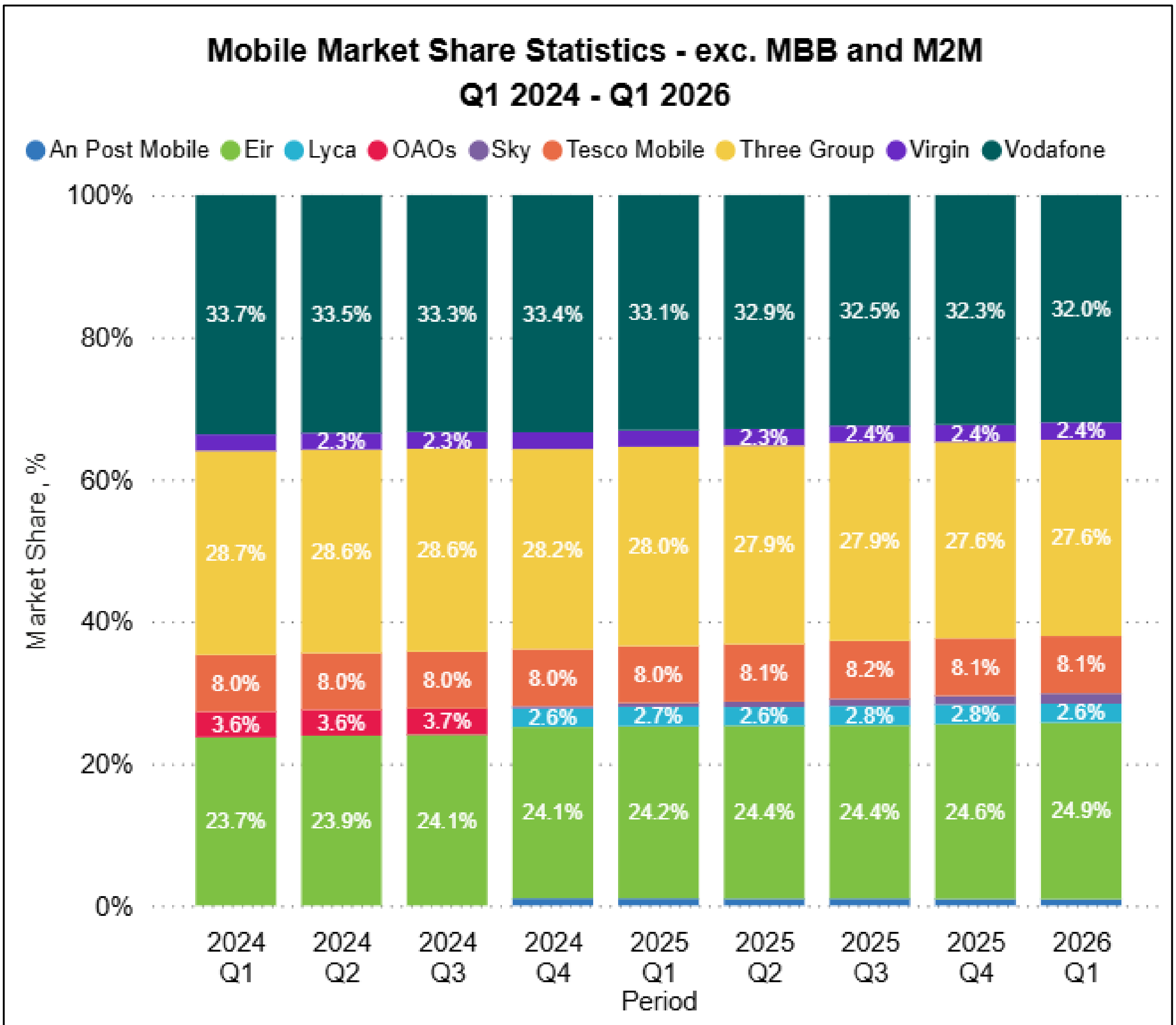
Figure 7 – Market Shares by Subscription including Mobile Broadband and Machine to Machine



Source: Quarterly submissions by Authorised Operators to ComReg

- In Q1 2026 Three had the largest share of mobile subscriptions including MBB and M2M at 49.9%. This was followed by Vodafone with 26.6%, Eir with 14.6%, Tesco Mobile at 4.5%, Lyca Mobile at 1.6%, Virgin Mobile at 1.4%, Sky Mobile at 0.8% and An Post Mobile at 0.5%.

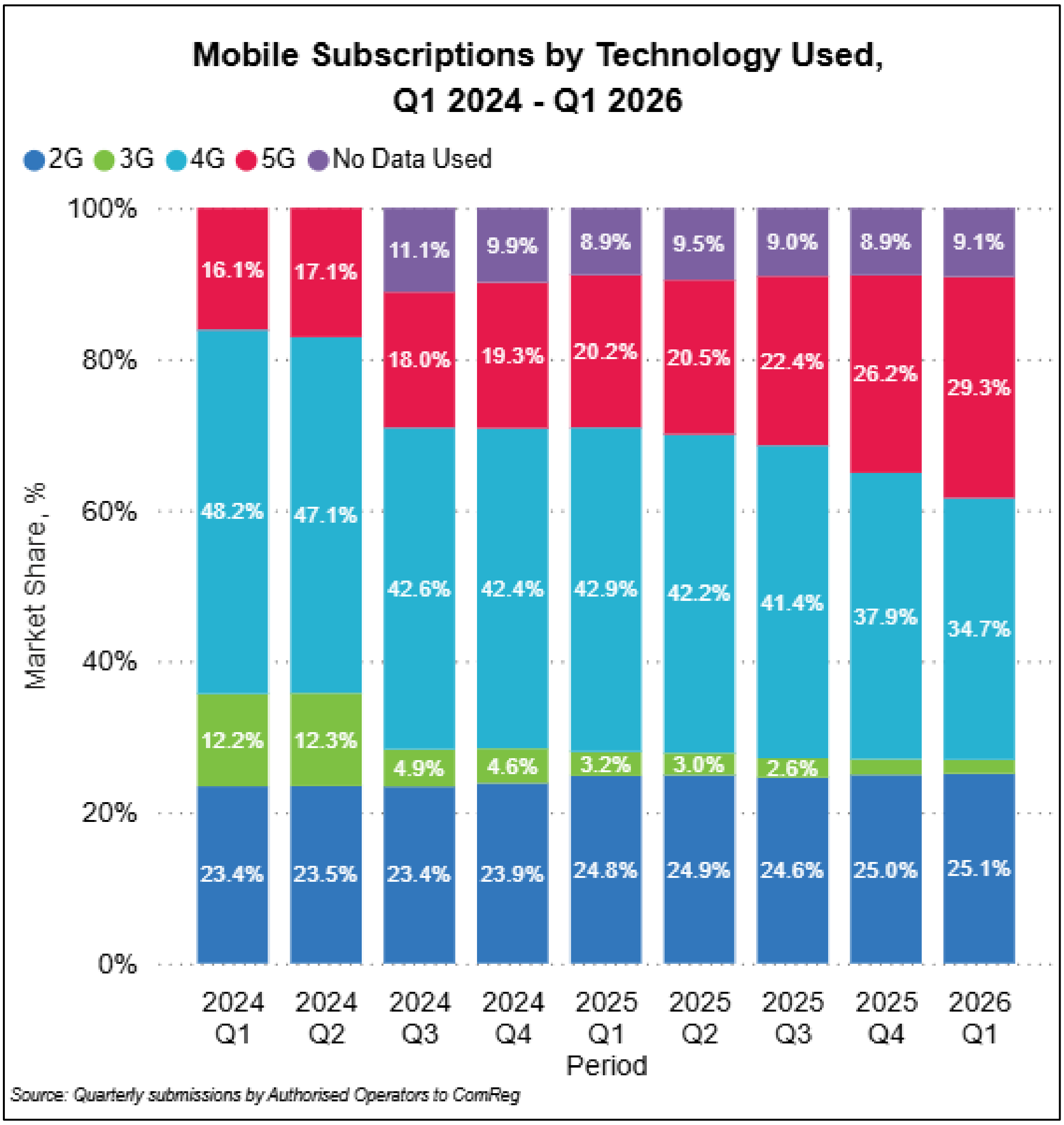
Figure 8 – Market Shares by Subscription excluding Mobile Broadband and Machine to Machine



Source: Quarterly submissions by Authorised Operators to ComReg

- In Q1 2026 Vodafone had the highest market share excluding mobile broadband and M2M (32.0%), followed by Three (27.6%), Eir (24.9%), Tesco Mobile (8.1%), Lyca (2.6%), Virgin Mobile (2.4%), Sky Mobile (1.4%) and An Post Mobile (0.9%).

Figure 9 – Mobile Subscriptions by Technology



- There were 2,740,046 2G (25.09%), 200,993 3G (1.84%), 3,786,156 4G (34.67%) and 3,197,334 5G (29.28%) mobile subscriptions in Q1 2026. 995,818 (9.1%) mobile subscriptions did not record any use of data in Q1 2026.

7 Revisions

Note 1: BTBTIL revised revenue and voice line subscribers for Q4 2025.
Note 2: ECL (formerly BT) revised revenue for Q4 2025.
Note 3: Telcom revised revenue breakdown between Q2 - Q4 2025.
Note 4: Centurylink (Lumen Technologies) revised revenue for Q4 2025.
Note 5: Lyca Mobile revised revenue for Q4 2025.

8 Appendix 1: Legal Disclaimer

The information and statistics contained within this document are derived from a variety of sources, but it is mostly reliant on data obtained from authorised operators.

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