Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q3 2025

Information Notice

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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 July 2025 to 30th September 2025. The report is based on submissions from 55 active operators.

The report contains the following key charts/data:

- Overview of Markets
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- Fixed Voice
    - Figure 2 – Retail Fixed Voice Subscriber lines
- Retail Broadband Market
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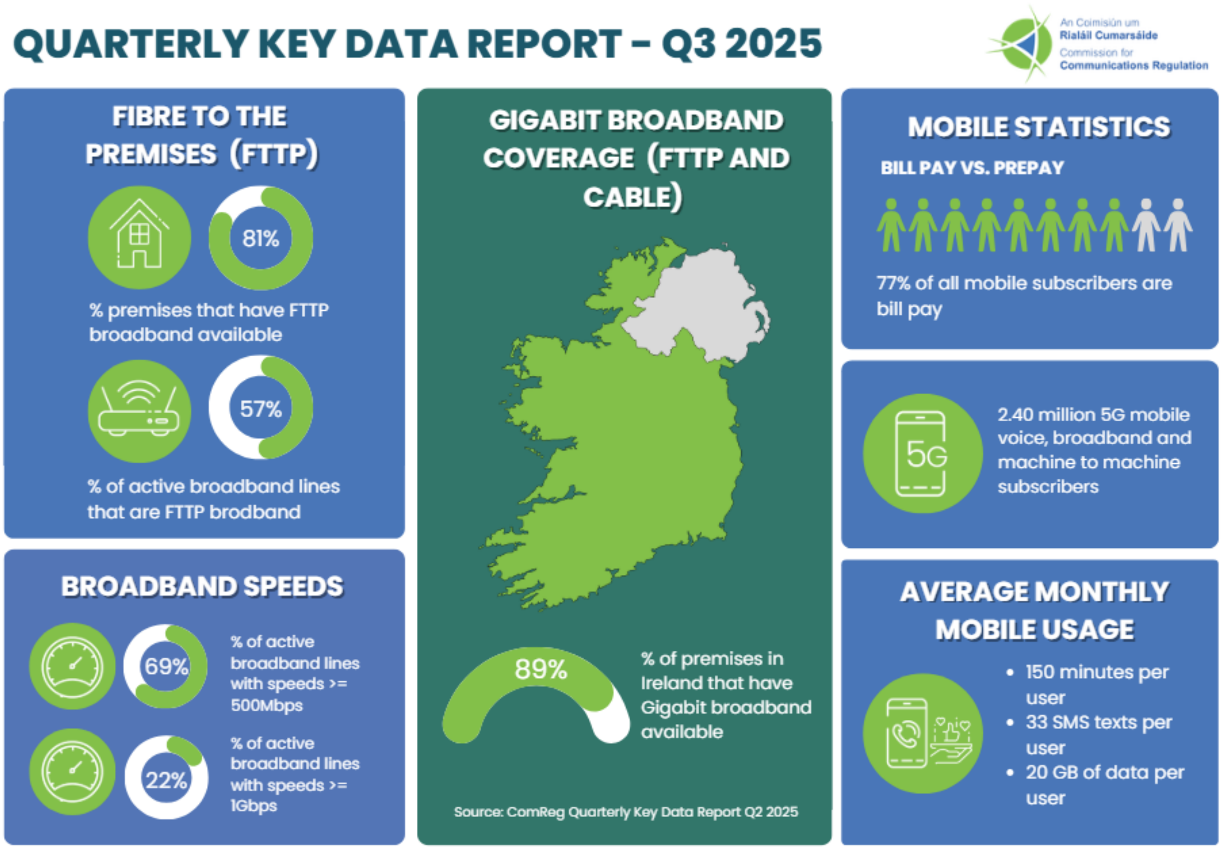
1 Q3 2025 Infographic



2. Overview of Irish Communications Market Q3 2025

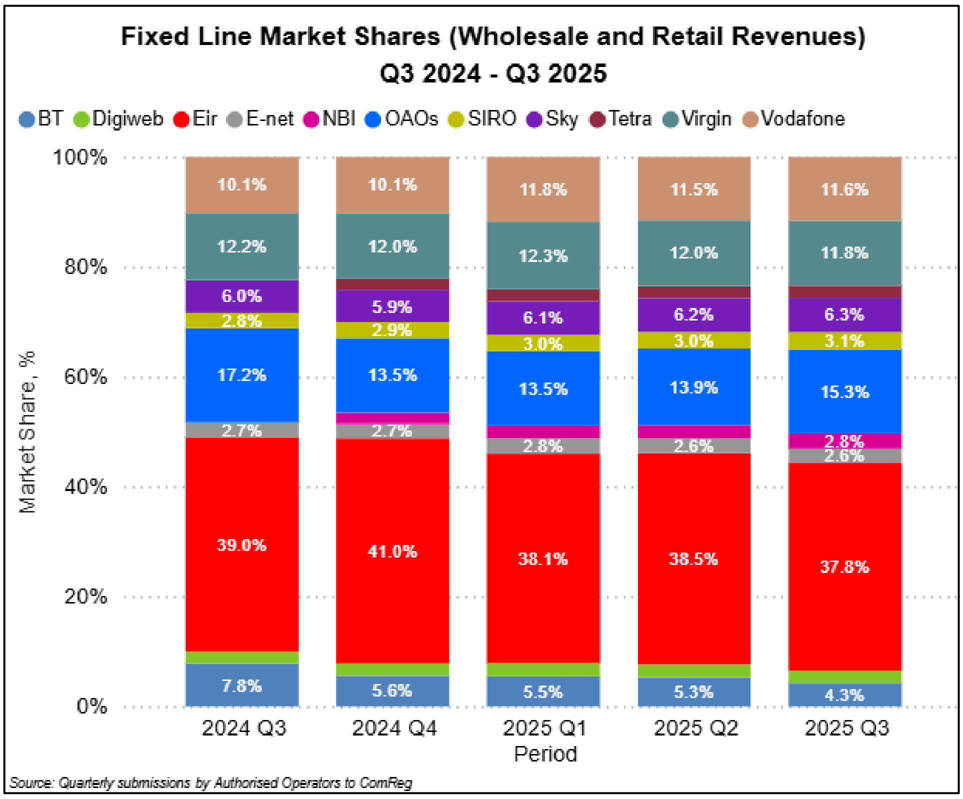
Table 1 - Communications Summary

Revenues	2024 Q4	2025 Q1	2025 Q2	2025 Q3
Total Retail Market Revenues (000s)	€929,204	€906,227	€921,811	€922,885
Total Fixed Line Wholesale Revenues (000s)	€165,591	€150,117	€151,734	€155,233
Total Mobile Wholesale revenues (000s)	€30,654	€29,631	€30,108	€32,294
Total FTTP and Cable Coverage (By Eircodes)	**2024 Q4**	**2025 Q1**	**2025 Q2**	**2025 Q3**
Percentage Premises with FTTP Broadband Available	73.6%	75.7%	78.5%	81.0%
Percentage Premises with Gigabit Broadband (FTTP or Cable) Available	84.6%	86.0%	87.7%	88.9%
FTTP and Cable Take Up Rate	**2024 Q4**	**2025 Q1**	**2025 Q2**	**2025 Q3**
FTTP Take Up Rate	48.8%	49.6%	50.2%	50.6%
FTTP & Cable Take Up Rate	57.3%	57.9%	58.4%	58.9%
Subscriber Lines	**2024 Q4**	**2025 Q1**	**2025 Q2**	**2025 Q3**
Total Fixed Broadband Subscriber Lines	1,697,495	1,703,577	1,716,609	1,757,461
Total Fixed Voice (PSTN, ISDN and VOIP) Subscriber lines	1,078,038	1,051,412	1,032,148	1,009,554
Mobile Subscriptions inc. MBB and M2M - Total	10,295,164	10,418,806	10,561,301	10,732,236
Machine to Machine (M2M) Subscriptions	3,984,713	4,073,487	4,179,852	4,276,911
Mobile Broadband (MBB) Subscriptions	391,262	393,913	393,253	394,084
Mobile Subscriptions exc. MBB and M2M - Total	5,919,189	5,951,406	5,988,196	6,061,241
Voice Traffic	**2024 Q4**	**2025 Q1**	**2025 Q2**	**2025 Q3**
Total Voice Traffic Minutes (000s)	3,031,773	3,007,905	2,943,592	2,931,126
Total Fixed Voice Minutes (000s)	225,345	228,294	215,252	212,185
Total Mobile Voice Minutes (000s)	2,806,428	2,779,611	2,728,340	2,718,942

Fixed Market

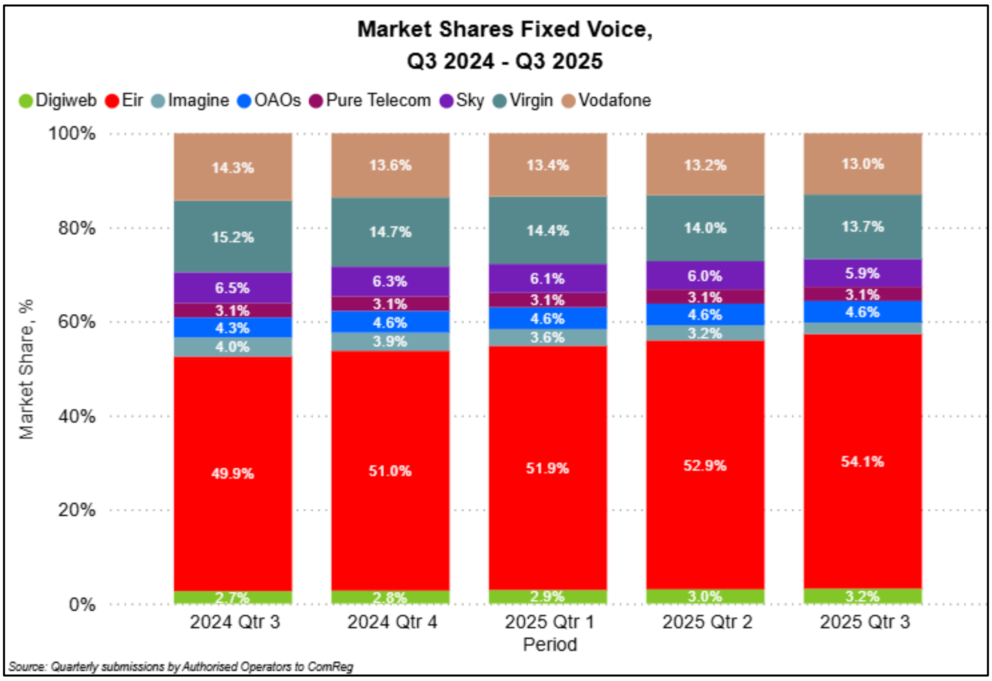
- In Q3 2025, Eir had the highest revenue share (retail and wholesale) in the fixed market at 37.8%.
- ComReg estimates that the next nine largest operators (Virgin Media Ireland, Vodafone (fixed only), Sky Ireland, BT Ireland, SIRO, E-Net, National Broadband Ireland, Digiweb and Tetra) contribute a further 46.9% share of total industry revenue.
- Remaining other authorised operators (OAOs) account for the residual 15.3% share.

Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Retail Fixed Voice Market

Figure 2 – Retail Fixed Voice Subscriber Lines



- Fixed voice traffic in Q3 2025 was approximately 212 million minutes, which was a 1.43% decrease on Q2 2025 and a decrease of 14.4% since Q3 2024.

- At the end of Q3 2025, there were 1,009,554 fixed voice subscriber lines, a decrease of 2% since Q2 2025 and a decrease of 9% since Q3 2024.

- As of Q3 2025, Eir had 54.1% of all fixed voice subscriber lines followed by Virgin Media (13.7%), Vodafone (13.0%), Sky Ireland (5.9%), Imagine Telecommunications Limited (2.4%), Pure Telecom (3.1%) and Digiweb (3.2%). Other operators accounted for the remaining 4.6% of fixed voice subscriber lines.

3. Retail Broadband Market

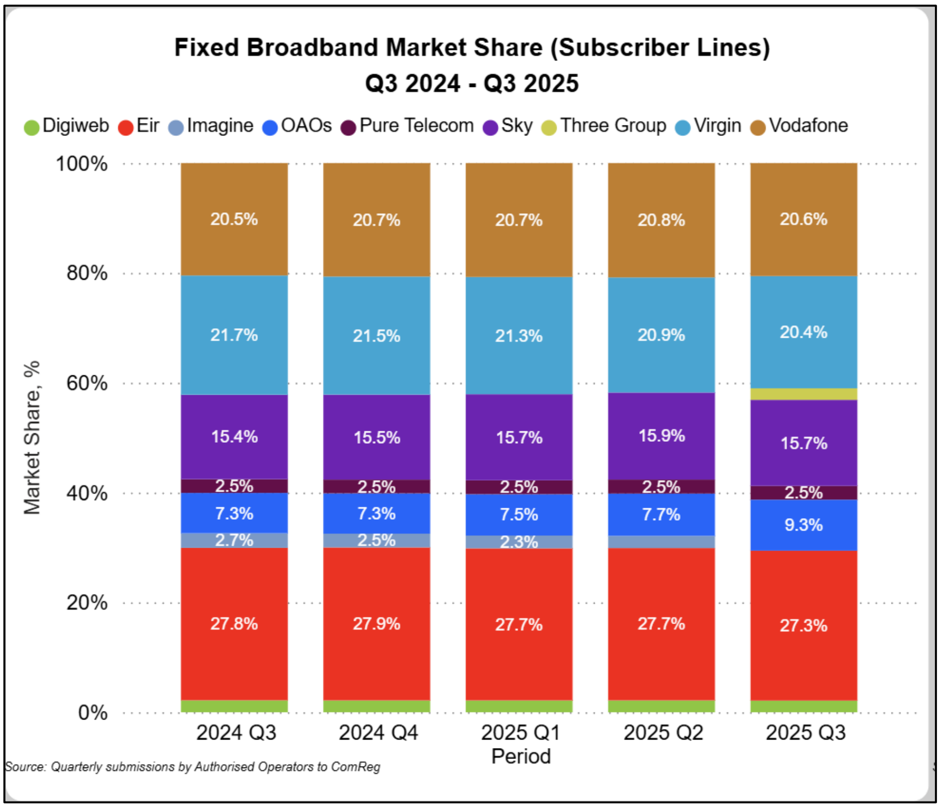
At the end of September 2025, there were over 2.15 million active total Broadband subscriber lines in Ireland. This is a 2% increase from the previous quarter and a 3.6% increase on Q3 2024. Looking at total Fixed Broadband lines only, these increased by 2.4% since Q2 2025, with a 4.4% annual increase on Q3 2024. FTTP subscriber lines surpassed 1 million for the first time in Q3 2025.

Table 2 - Total Number of Active Broadband Subscriber Lines

Line Type	Q3 2025	Quarterly Change Q2’25 – Q3’25	Annual Change Q3’24 – Q3’25
Cable Broadband	292,607	-2.74%	-10.20%
DSL Broadband	46,101	-7.76%	-31.43%
VDSL Broadband	297,997	-6.27%	-20.52%
FTTP Broadband	1,004,388	4.85%	22.93%
Satellite Broadband	26,902	35.34%	102.68%
FWA Broadband	89,466	27.82%	5.38%
Total Fixed Broadband	**1,757,461**	2.38%	4.41%
Mobile Broadband	394,084	0.21%	-0.08%
Total Broadband	**2,151,545**	**1.98%**	**3.56%**

FTTP[1] (+4.8%), Satellite (+35.3%), FWA[2] (+27.8%) and Mobile Broadband (0.2%) broadband subscriber lines showed positive growth this quarter. VDSL (-6.3%), DSL (-7.8%) and Cable (-2.8%) subscriber lines fell this quarter.

Figure 3 – Retail Fixed Broadband Market Shares based on Subscriber Lines



- In Q3 2025, Eir had 27.3% of total retail fixed broadband subscriber lines, followed by Vodafone at 20.6%, Virgin Media at 20.4%, Sky Ireland at 15.7%, Pure Telecom at 2.5%, Digiweb at 2.1% and Three Group at 2.1%

- All other authorised operators (OAOs) combined accounted for the remaining 9.3% share of retail fixed broadband subscriber lines.

[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

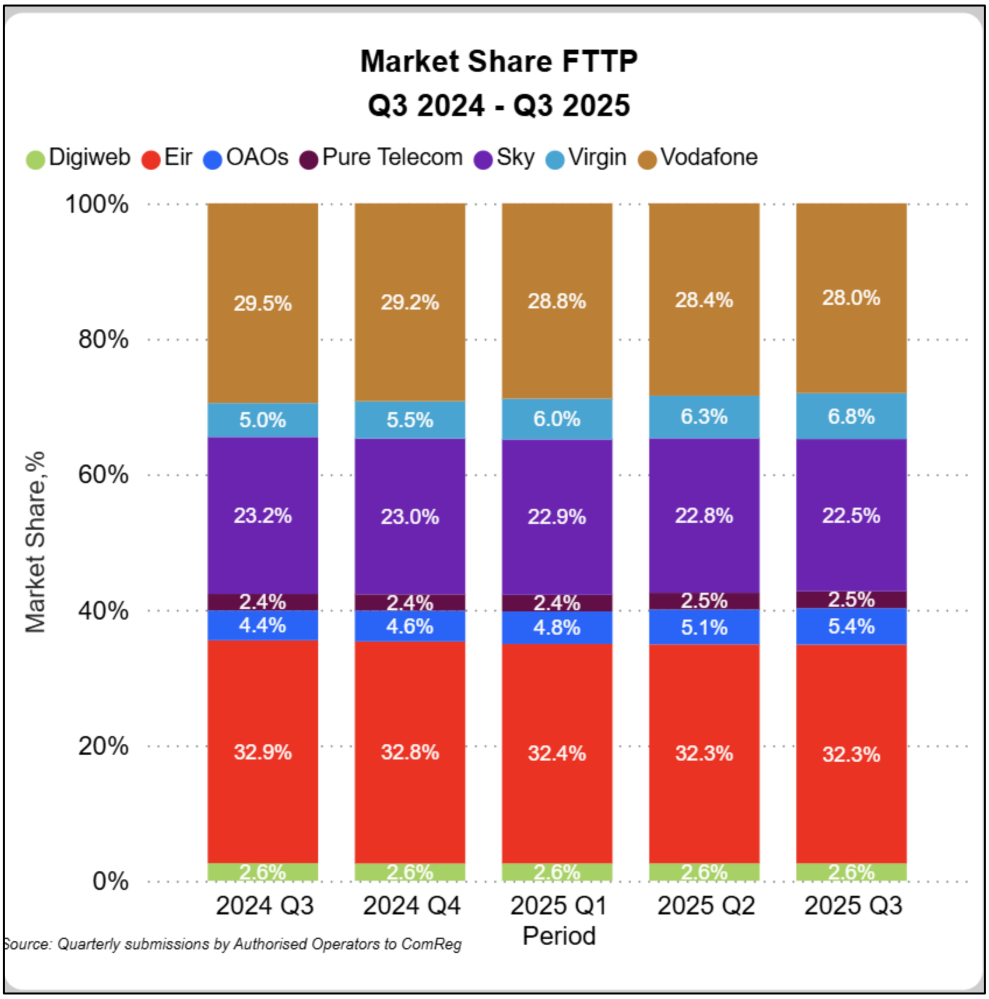
Table 3 - Retail Fixed Broadband Subscriber Lines by Sold Download Speed

Fixed Broadband Subscriber Lines by Sold Speed	Q2 2025	Q3 2025	Quarterly Change
<2Mbps - 9.99Mbps	1.91%	1.76%	-0.15%
=10Mbps - 29.99Mbps	2.97%	2.72%	-0.25%
=30Mbps - 99.99Mbps	18.55%	16.96%	-1.59%
=100Mbps - 499.99Mbps	7.74%	9.43%	1.69%
=500Mbps - 999.99Mbps	47.72%	46.86%	-0.86%
>=1GB	21.12%	-	-
>=1GB – 1.99GB[3]	-	21.22%	-
>=2GB – 4.99GB	-	0.50%	-
>=5GB – 10GB	-	0.55%	-

- In Q3 2025, 78.6% of all fixed broadband subscriber lines had sold download speeds which were equal to or greater than 100Mbps, with 69.1% having sold download speeds equal to or greater than 500Mbps. Those having sold download speeds equal to or greater than 1GB increased by 1.2 percentage point quarter on quarter and stood at 22.3%.

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

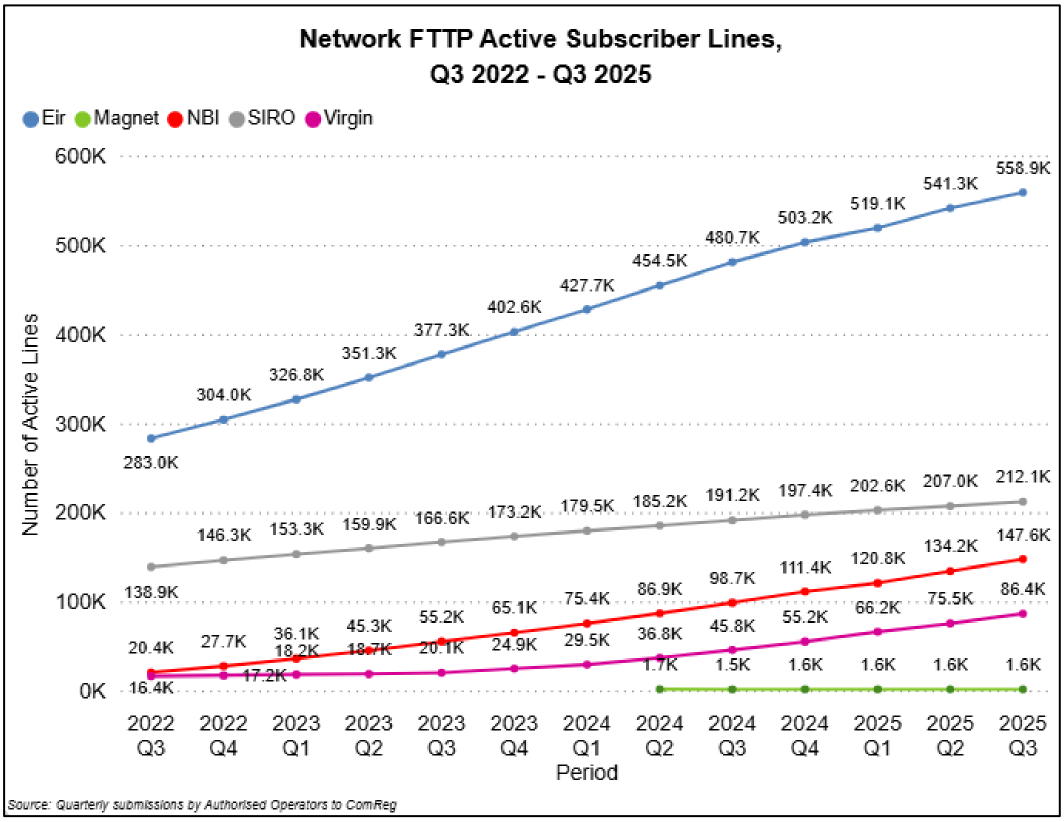
Figure 4 - FTTP Subscriber Line Market Share



- In Q3 2025, Eir had 32.3% of retail Fibre to the Premises (FTTP) subscriber lines, followed by Vodafone at 28.0%, Sky Ireland at 22.5%, Virgin Media at 6.8%, Digiweb at 2.6% and Pure Telecom at 2.5%. Other operators accounted for the remaining 5.4%.

4. Broadband Market - Networks

Figure 5 – Network FTTP Active Subscriber Lines by Quarter

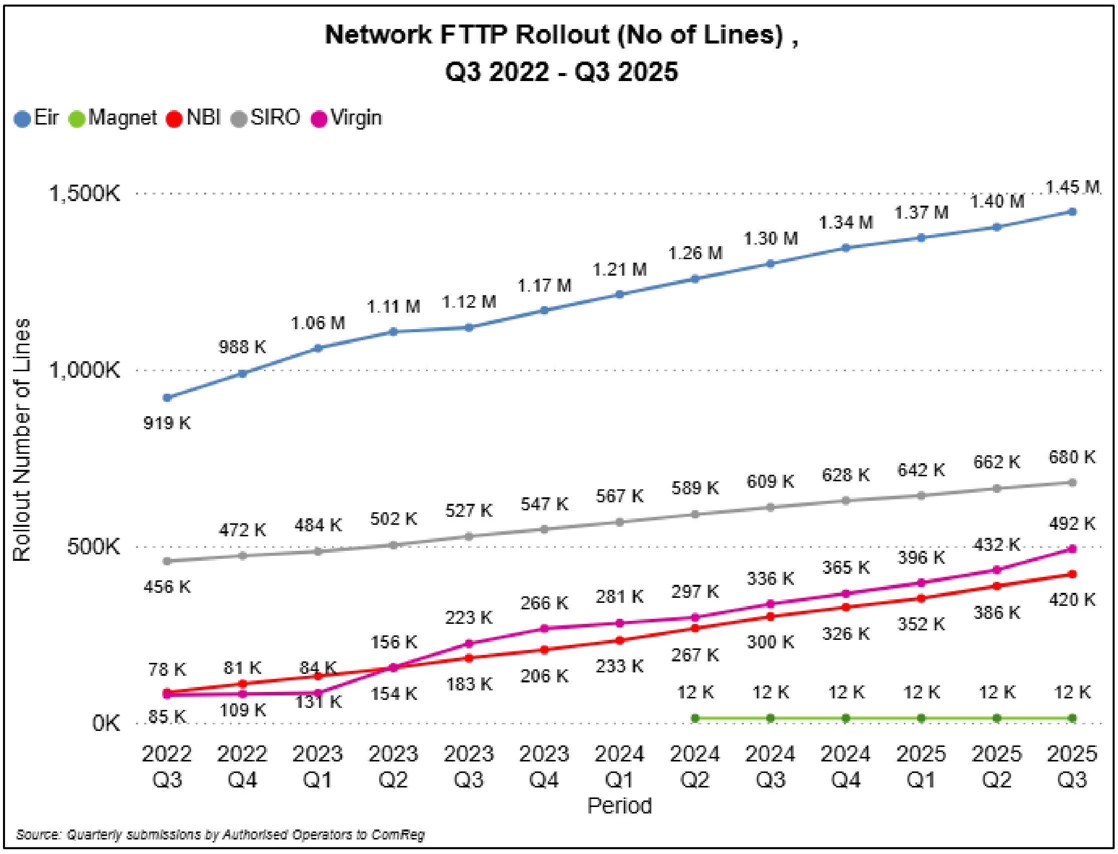


Source: Quarterly submissions by Authorised Operators to ComReg

- In Q3 2025, based on the underlying network, 559k (up 3% QoQ) of the active FTTP subscriber lines were sold on the Eir network, 212k (up 2% QoQ) were on the Siro network, 148k (up 10% QoQ) were on the NBI network, 86k (up 14% QoQ) were on the Virgin Media network and 1.6k 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 Q3 2025, Eir reported having rolled out 1.45m (up 3% QoQ) FTTP broadband lines[5], followed by Siro with 680k (up 3% QoQ), Virgin Media Ireland with 492k (up 14% QoQ), NBI with 420k (up 9% QoQ), with Magnet having rolled out 12k[6] lines and Crossan 63 lines.

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.

- 81% (up 2.5 percentage points QoQ) of all premises (as measured by Eircodes) in Ireland[7] had FTTP broadband available at the end of Q3 2025.

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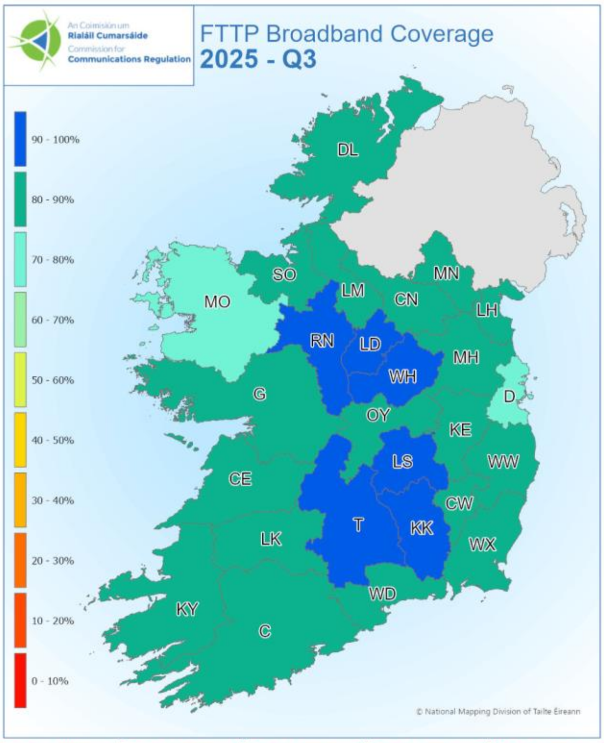
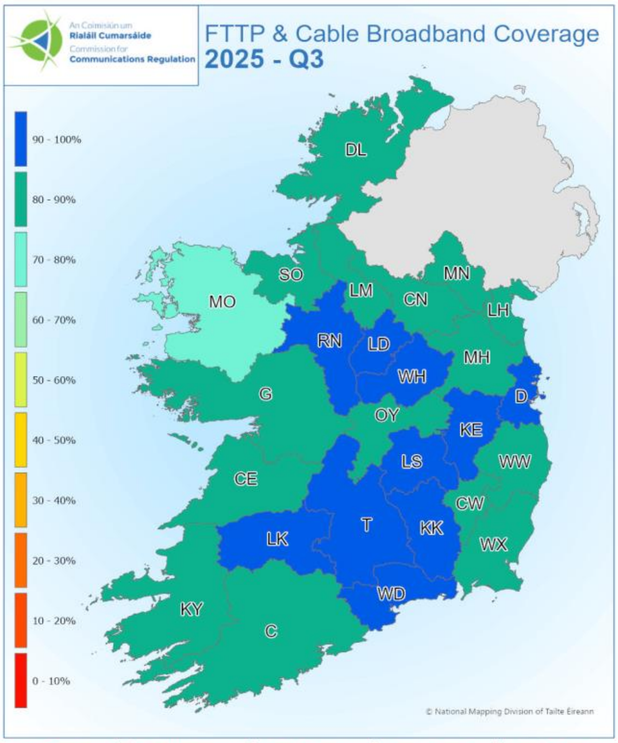
[5] The Network Operators Eir, NBI, SIRO, Virgin Media, Magnet and Crossan each provide information on total FTTP broadband lines rolled out. This metric is based on the total number of FTTP lines, with a premises potentially having more than one FTTP broadband line. For example, a business premises 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.

[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

- 88.9% (up 1.2 percentage points QoQ) of all premises (as measured by Eircodes) in Ireland had Gigabit broadband available at the end of Q3 2025.
- The Counties with the highest level of FTTP coverage are Longford and Westmeath at 94%. Westmeath has the highest level of Gigabit coverage at 96%. Every county had a minimum of 70% FTTP coverage at the end of Q3.
- Leitrim has the fastest growing FTTP coverage within the last year, with a 24-percentage point annual increase in FTTP coverage to now stand at 83% coverage.
- ComReg's Open Data Map Hub includes additional geographic units including Local Electoral Area, Electoral Division and Small Area.





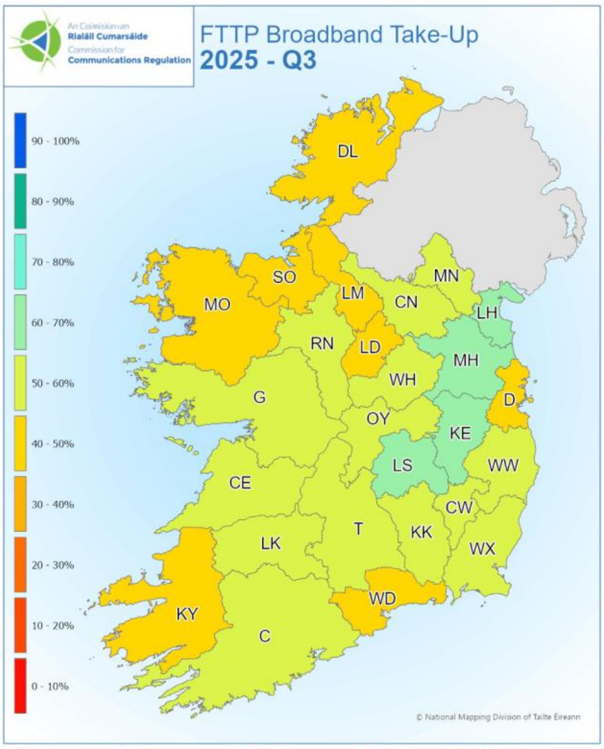
Code	County	Code	County	Code	County	Code	County	Code	County
C	Cork	G	Galway	LK	Limerick	OY	Offaly	WW	Wicklow
CE	Clare	KE	Kildare	LM	Leitrim	RN	Roscommon	WX	Wexford
CN	Cavan	KK	Kilkenny	LS	Laois	SO	Sligo		
CW	Carlow	KY	Kerry	MH	Meath	T	Tipperary		
D	Dublin	LD	Longford	MN	Monaghan	WD	Waterford		
DL	Donegal	LH	Louth	MO	Mayo	WH	Westmeath		

Code	County	Code	County	Code	County	Code	County	Code	County
C	Cork	G	Galway	LK	Limerick	OY	Offaly	WW	Wicklow
CE	Clare	KE	Kildare	LM	Leitrim	RN	Roscommon	WX	Wexford
CN	Cavan	KK	Kilkenny	LS	Laois	SO	Sligo		
CW	Carlow	KY	Kerry	MH	Meath	T	Tipperary		
D	Dublin	LD	Longford	MN	Monaghan	WD	Waterford		
DL	Donegal	LH	Louth	MO	Mayo	WH	Westmeath		

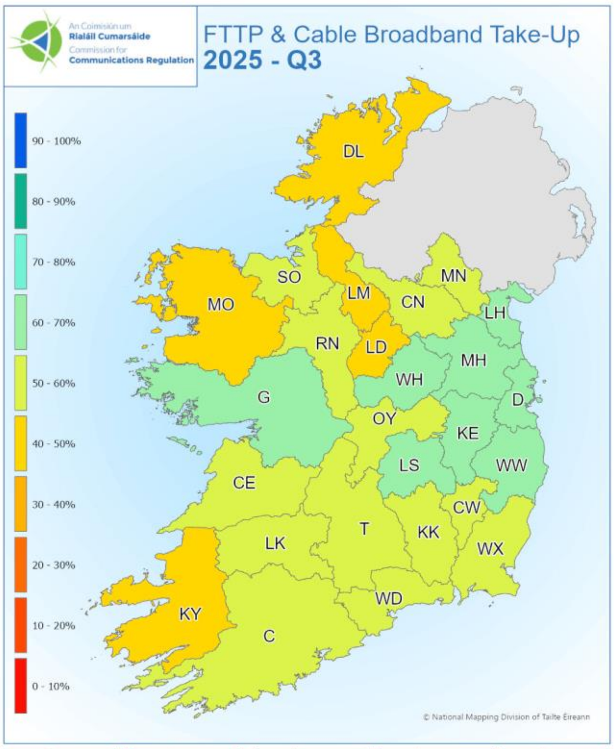
premises (Eircode). This total premises (Eircodes) passed figure is then divided by the total Eircodes for Ireland, which is taken from the 'Postal Address' field of the Eircode database.

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), 50.6% of all premises (up 3 percentage points YoY) with FTTP broadband available had an active FTTP service at the end of Q3 2025.
- 59% of premises with FTTP or Cable available had an active FTTP or Cable service at the end of Q3 2025.
- The maps set out below show County level 'FTTP' and 'Gigabit' take-up rate by County for Q3 2025.
- The counties with the highest level of FTTP take-up are Meath and Kildare at 63%. Monaghan had the fastest growing FTTP take-up rate within the last year, with an 8-percentage point increase in take-up compared to Q3 2024.
- See ComReg's Open Data Map Hub for further map visualisations on Gigabit broadband. For example, 75% of premises in the Electoral Division of Castlebar in Mayo had Gigabit broadband available at the end of Q3 2025.



Code	County	Code	County	Code	County	Code	County	Code	County
C	Cork	G	Galway	LK	Limerick	OY	Offaly	WW	Wicklow
CE	Clare	KE	Kildare	LM	Leitrim	RN	Roscommon	WX	Wexford
CN	Cavan	KK	Kilkenny	LS	Laois	SO	Sligo		
CW	Carlow	KY	Kerry	MH	Meath	T	Tipperary		
D	Dublin	LD	Longford	MN	Monaghan	WD	Waterford		
DL	Donegal	LH	Louth	MO	Mayo	WH	Westmeath		



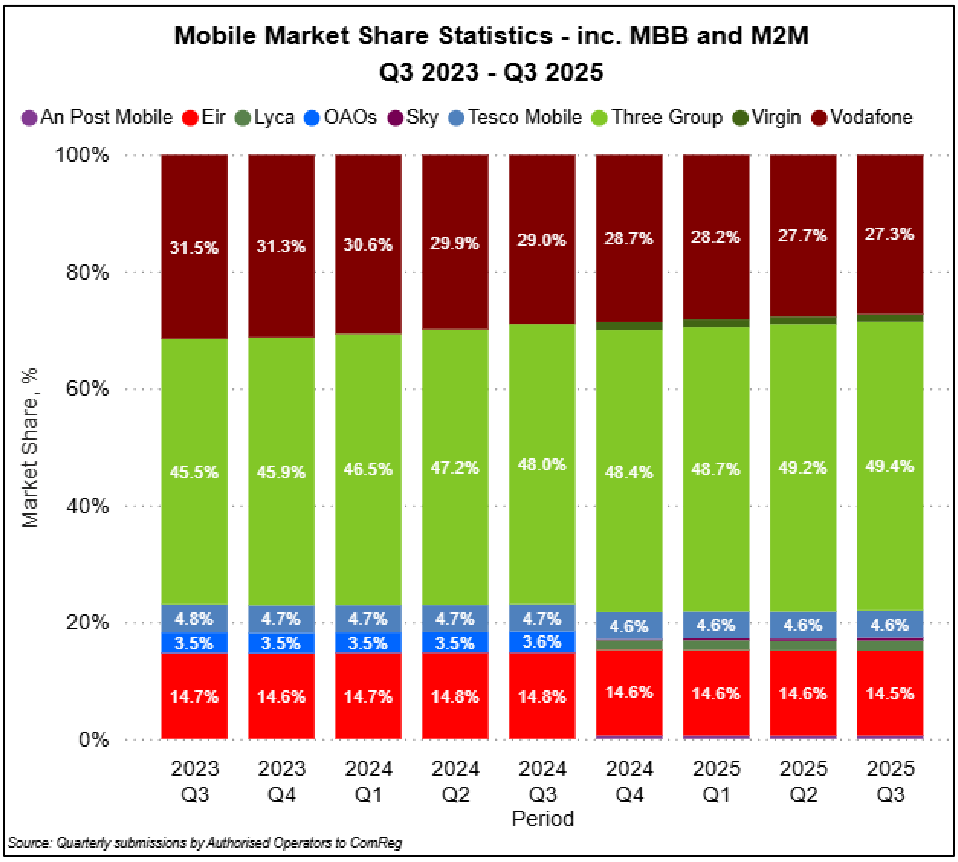
Code	County	Code	County	Code	County	Code	County	Code	County
C	Cork	G	Galway	LK	Limerick	OY	Offaly	WW	Wicklow
CE	Clare	KE	Kildare	LM	Leitrim	RN	Roscommon	WX	Wexford
CN	Cavan	KK	Kilkenny	LS	Laois	SO	Sligo		
CW	Carlow	KY	Kerry	MH	Meath	T	Tipperary		
D	Dublin	LD	Longford	MN	Monaghan	WD	Waterford		
DL	Donegal	LH	Louth	MO	Mayo	WH	Westmeath		

[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'.

5. Mobile Market

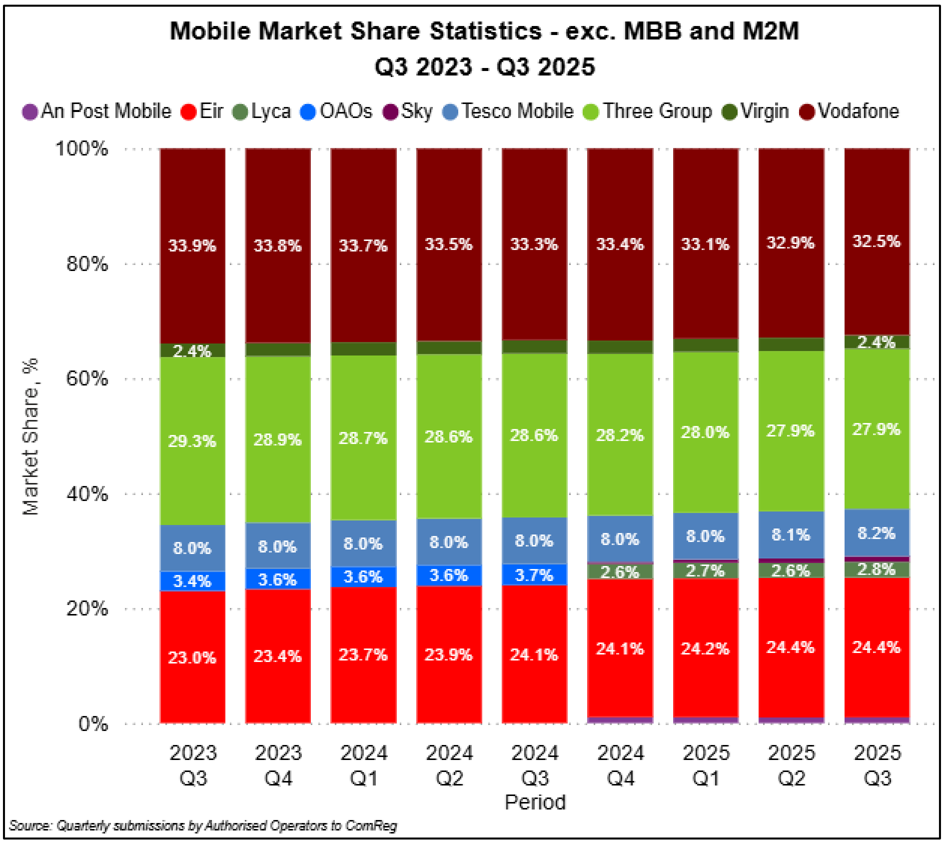
At the end of Q3 2025 there were 10,732,236 mobile subscriptions in Ireland, including mobile broadband (MBB) and Machine to Machine (M2M). If mobile broadband subscriptions (394,084) and M2M subscriptions (4,276,911) are excluded, the total number of mobile voice subscriptions was 6,061,241.

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



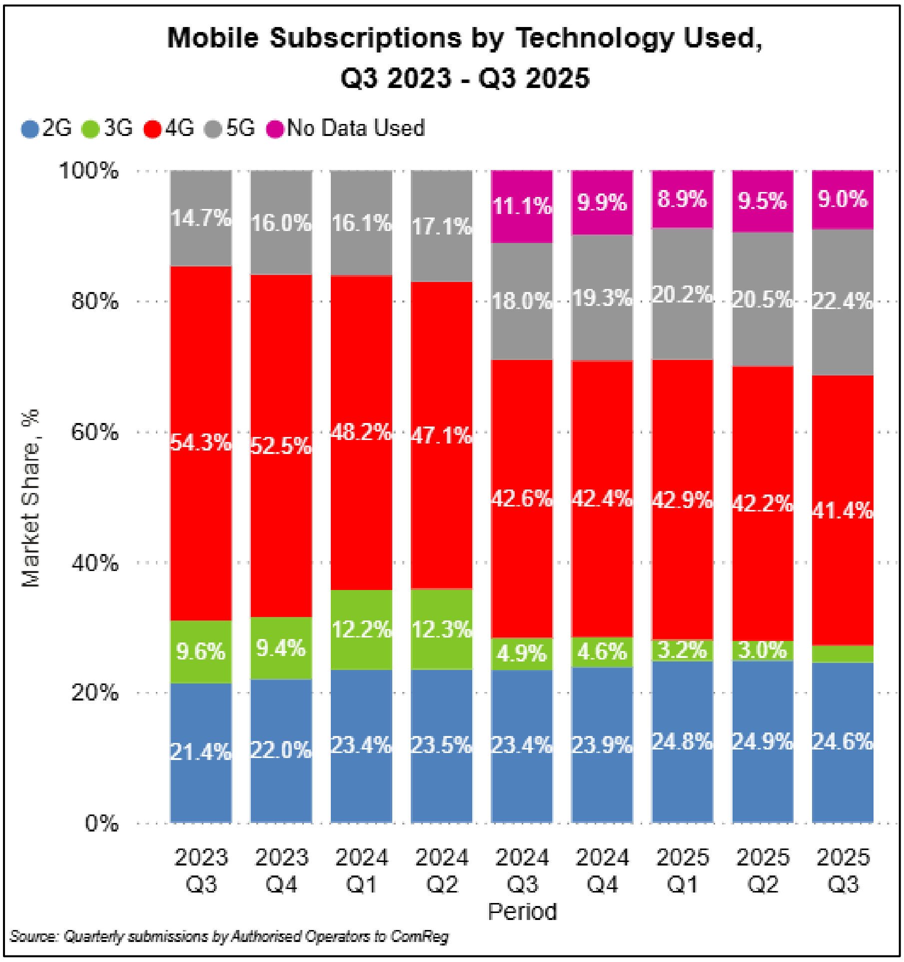
- In Q3 2025 Three had the largest share of mobile subscriptions including MBB and M2M at 49.4%. This was followed by Vodafone with 27.3%, Eir with 14.5%, Tesco Mobile at 4.6%, Lyca Mobile at 1.7%, Virgin Mobile at 1.3%, An Post Mobile at 0.6% and Sky Mobile at 0.5%.

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



- In Q3 2025 Vodafone had the highest market share excluding mobile broadband and M2M (32.5%), followed by Three (27.9%), Eir (24.4%), Tesco Mobile (8.2%), Lyca (2.8%), Virgin Mobile (2.4%), An Post Mobile (1.0%) and Sky Mobile (1.0%).

Figure 9 – Mobile Subscriptions by Technology



- There were 2,635,132 2G (24.55%), 278,334 3G (2.59%), 4,443,603 4G (41.40%) and 2,408,170 5G (22.44%) mobile subscriptions in Q3 2025. 966,997 (9.0%) mobile subscriptions did not record any use of data in Q3 2025.

6. Revisions

Note 1: Lyca Mobile revised porting figures for Q2 2025.
Note 2: IFA Telecom revised FTTH speeds for Q2 2025.
Note 3: Ivertec revised VOIP national minutes for Q4 2024 to Q2 2025.
Note 4: Orange Business revised Call Origin International (excluding EEA) VOIP minutes for Q2 2025.
Note 5: Three revised residential VOIP figures for Q2 2025.

7. 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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