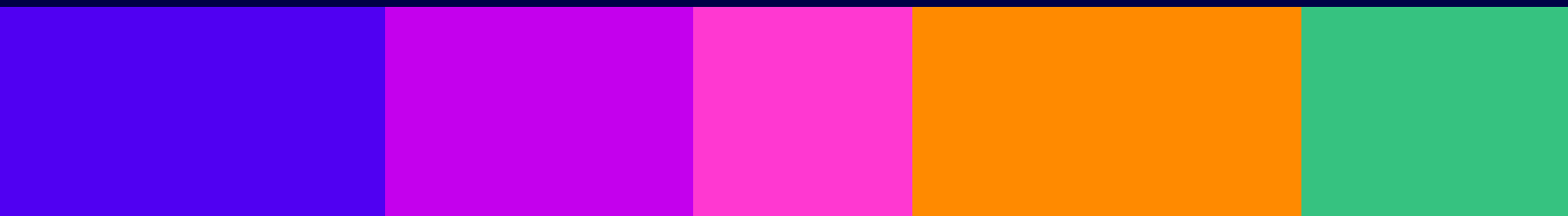
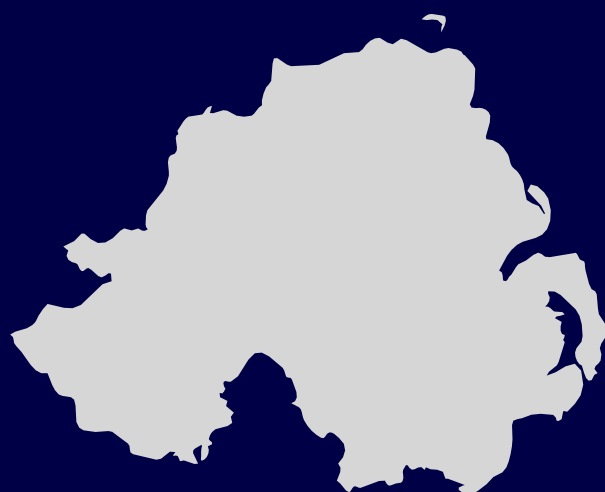




Connected Nations

Northern Ireland Report 2025

Published 19 November 2025



Contents

1. Overview	3
2. Fixed broadband and voice	5
3. Mobile, data and voice	12

1. Overview

Consumers and businesses rely on good connectivity – whether at home, at work or on the move. We want to ensure that UK consumers have access to high quality networks, to enable a wide range of digital services which drive economic growth. The Connected Nations reports, prepared and published under the Communications Act 2003, help us monitor the availability of these networks and provides data to help stakeholders understand the networks which are available in their area.¹

This year's Northern Ireland report provides an update on the continued rollout of gigabit-capable fixed networks and 5G mobile networks where both coverage and take up continues to increase. For the first time, it also includes 5G standalone coverage. The report also includes an update on the take-up of full fibre and gigabit-capable broadband services and low Earth orbit (LEO) satellite broadband services.

Alongside this Northern Ireland report, we are publishing separate reports on [broadband and mobile availability for the UK as a whole](#) and each of its other nations. More granular data is available through our : [interactive dashboards](#), allowing readers to explore coverage in their area and compare trends over time. In addition, coverage and take-up data are available for download as open data files.

Highlights

Broadband

- **Around 780,000 homes in Northern Ireland can now access full-fibre broadband.** At 95%, Northern Ireland has the highest availability of full-fibre networks among the four UK nations.
- **Superfast broadband is available to 99% of residential premises in Northern Ireland**, up one percentage point from 2024.
- **Where full fibre is available, 62% of premises are connected**, compared to 53% last year. Over 500,000 premises are now connected to services on full-fibre networks.
- **There has been a small reduction in the number of premises unable to access decent broadband.** Around 1,800 premises are unable to access connections with over 10 Mbit/s download speeds through fixed or fixed wireless technology, compared to just over 2,000 last year.
- **Average monthly broadband data use in Northern Ireland is now 551 GB per month.** This rises to 597 GB per month over full-fibre connections.

¹ Sections 134A to 134B.

Mobile

- **There has been a further increase in 5G coverage.** Outside premises coverage from at least one MNO now stands at 97% at the High Confidence level and 93% at Very High Confidence, up from 92% and 86% respectively in 2024.^{2, 3}
- **We report on 5G standalone (5G SA) for the first time this year,** and we found that outside premises coverage from at least one operator stands at 92% at the High Confidence level and 83% at the Very High Confidence level in Northern Ireland.
- **4G coverage continues to provide the backbone of mobile experience for consumers.** Individual MNOs provide good 4G coverage across Northern Ireland, with geographic mobile coverage ranging from 90-96%, depending on the MNO. Outside premises coverage from all four MNOs is available across 97% of Northern Ireland.

² Please refer to page 29 of the [Connected Nations: UK Report 2025](#) to learn more about our approach to mobile coverage reporting.

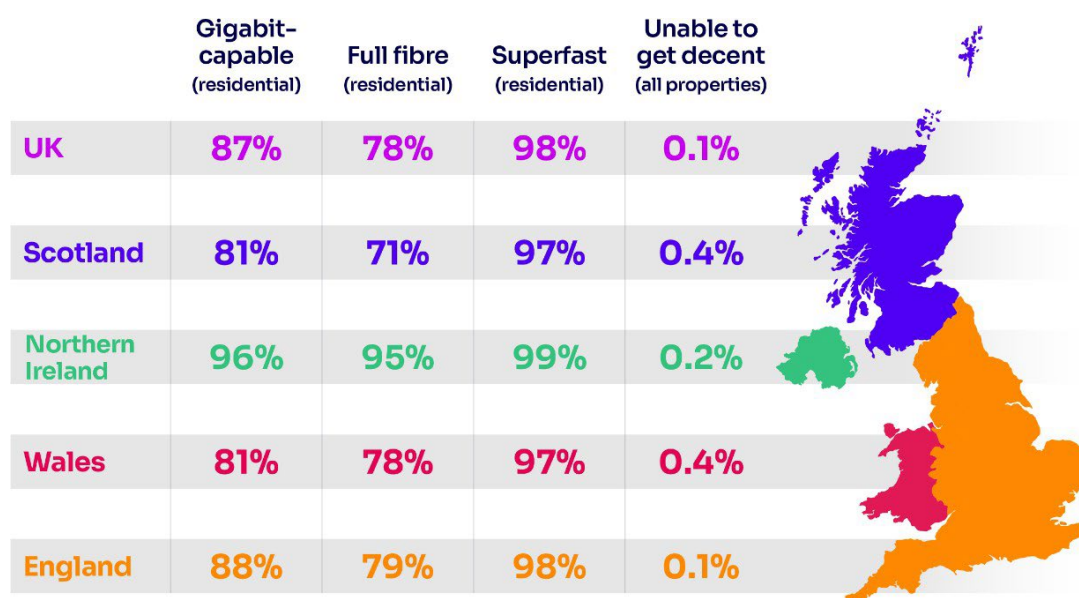
³ By 'At least one MNO', we mean the combined coverage that would be available if the total coverage of each MNO was included in an aggregated coverage footprint.

2. Fixed broadband and voice

Full-fibre fixed networks are available to most homes and businesses in Northern Ireland, delivering faster and more reliable broadband and voice services. This section provides an overview of the availability and take-up of fixed broadband services in NI.

Growing connectivity across Northern Ireland and the rest of the UK is taking place in the context of broader changes to the fixed telecoms sector, including the migration to digital voice technology from the legacy public switched telephone network (PSTN). For more information on these developments, please refer to our [Connected Nations: UK Report 2025](#) as whole, or our update on Planned Network Deployments for Very High Capacity networks in the UK for the next three years, published in May 2025.⁴

Figure 2.1: Summary of broadband coverage at a fixed location across the UK and nations



Source: Ofcom analysis of provider data (July 2025)

Northern Ireland full fibre availability increases further

The availability of high-speed broadband services in Northern Ireland was already at very high levels last year, but it has extended further in 2025. Full-fibre broadband coverage increased two percentage points from 93% in July 2024 to 95% in July 2025.

Public investment projects, coupled with further planned commercial deployments, mean that Northern Ireland is on course for near-ubiquitous full-fibre coverage by 2028. Ofcom's Planned

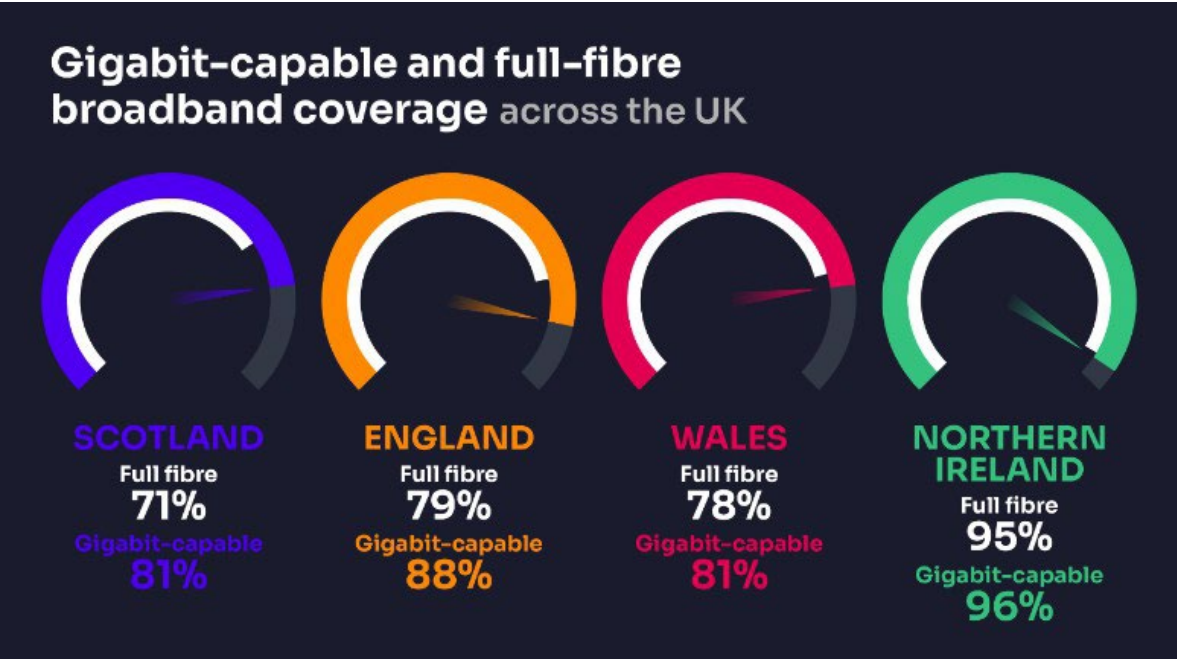
⁴ Ofcom, [Planned Network Deployments 2025](#).

Network Deployments Report 2025 estimates that, by January 2028, 99% of NI premises could have access to full-fibre services (99%+ in urban areas and 97% in rural).⁵

Full fibre availability in Northern Ireland remains the highest in the UK

Among the four UK nations, Northern Ireland continues to have the highest availability of full-fibre networks (95%), compared to England (79%), Wales (78%) and Scotland (71%).

Figure 2.1: Full Fibre and Gigabit Capable coverage across the UK



Source: Ofcom analysis of provider data (July 2025)

Table 2.1: Coverage of full-fibre networks by UK nation

Nation	% of premises (residential)	Percentage point change since 2024
England	79%	+10pp
Northern Ireland	95%	+2pp
Scotland	71%	+9pp
Wales	78%	+10pp
UK	78%	+9pp

Source: Ofcom analysis of provider data (July 2024, July 2025)

⁵ Ofcom, [Planned Network Deployments 2025](#).

Table 2.2: Residential full-fibre network coverage in Northern Ireland by rurality

	% of premises (residential)	Percentage point change since 2024
Urban	97%	+1pp
Rural	91%	+5pp

Source: Ofcom analysis of provider data (July 2024, July 2025)

Gigabit-capable networks are accessible by more than nine in ten residential premises

Gigabit-capable networks were available to 96% of residential premises in Northern Ireland in July 2025. This is the highest of the UK nations and two percentage points higher than a year ago.

Table 2.3: Coverage of gigabit-capable networks by UK nation

Nation	% of premises (residential)	Percentage point change since 2024
England	88%	+4pp
Northern Ireland	96%	+2pp
Scotland	81%	+4pp
Wales	81%	+7pp
UK	87%	+4pp

Source: Ofcom analysis of provider data (July 2024, July 2025)

Table 2.4: Residential gigabit-capable network coverage in Northern Ireland by rurality

	% of premises (residential)	Percentage point change since 2024
Urban	98%	+1pp
Rural	91%	+5pp

Source: Ofcom analysis of provider data (July 2024, July 2025)

Superfast broadband is available to 99% of residential premises

Superfast broadband services, defined as a minimum of 30 Mbit/s download speed, are available to 99% of premises in Northern Ireland – up one percentage point from 2024.

Table 2.5: Residential superfast coverage by nation

Nation	% of premises (residential)	Percentage point change since 2024
England	98%	Unchanged
Northern Ireland	99%	+1pp
Scotland	97%	+1pp

Nation	% of premises (residential)	Percentage point change since 2024
Wales	97%	+1pp
UK	98%	Unchanged

Source: Ofcom analysis of provider data (July 2024, July 2025)

Table 2.6: Residential superfast coverage in Northern Ireland by rurality

	% of premises (residential)	Percentage point change since 2024
NI urban	99%+	Unchanged
NI rural	96%	+1pp

Source: Ofcom analysis of provider data (July 2024, July 2025)

Take-up of services on full-fibre networks

We estimate that take-up of services on full-fibre networks in Northern Ireland is around 62% of all premises (residential and business) where those services are available, a rise of nine percentage points on 2024 and significantly above the UK average of 42%.

Table 2.7: Estimated take-up of services on full-fibre networks as a percentage of residential premises where full-fibre networks are available: 2024 and 2025

Nation	2024	2025	Percentage point change since 2024
England	33%	41%	+8pp
Northern Ireland	53%	62%	+9pp
Scotland	35%	43%	+8pp
Wales	39%	49%	+10pp
UK average	35%	42%	+7pp

Source: Ofcom analysis of provider data (July 2024, July 2025)

Average download speeds are highest in Northern Ireland

Of the four UK nations, Northern Ireland has the highest average maximum download speed at 325 Mbit/s, compared to the UK average of 285 Mbit/s. This higher average is likely to reflect the greater availability and take-up of full-fibre services in Northern Ireland.

Meanwhile, average monthly data usage (the total amount of data downloaded and uploaded over the broadband connection) per fixed connection in Northern Ireland stands at 551 GB per month, rising to 597 GB per month over full-fibre connections.

Table 2.8: Average maximum download speeds in Northern Ireland

Nation	2023	2024	2025
England	173	225	288
Northern Ireland	191	259	325
Scotland	155	215	273
Wales	136	181	243
UK	170	223	285

Source: Ofcom analysis of provider data (May 2023, July 2024, July 2025)

Local authority coverage data

Coverage in each of Northern Ireland’s local authorities is high across the board, reflecting both commercial and public rollouts – particularly in rural areas. More detailed information on this, as well as Westminster and Northern Ireland Assembly constituency-level data, is available via the [interactive portal](#) on our website.

Table 2.9: Coverage of full-fibre broadband by local authority (as a percentage of residential premises)

Local authority	Full fibre	Change since 2024
Antrim and Newtownabbey	98%	+1pp
Ards and North Down	97%	+2pp
Armagh City, Banbridge and Craigavon	94%	+1pp
Belfast	94%	+1pp
Causeway Coast and Glens	93%	+4pp
Derry City and Strabane	95%	+2pp
Fermanagh and Omagh	90%	+3pp
Lisburn and Castlereagh	97%	+2pp
Mid And East Antrim	96%	+1pp
Mid Ulster	95%	+5pp
Newry, Mourne and Down	96%	+3pp

Source: Ofcom analysis of provider data (July 2025)

Satellite services

Satellite technologies continue to evolve, and Low Earth Orbit (LEO) satellite constellations particularly could potentially help to serve those areas of Northern Ireland that are harder to reach through other technologies. At present Starlink is the only LEO operator currently offering broadband coverage across the UK including in harder-to-reach areas. Take-up of Starlink in Northern Ireland has risen significantly since 2023 (under 1000 subscribers) to over 1,500 in 2025.

The number of premises unable to access decent broadband has continued to fall

Decent broadband is defined as a connection which provides at least 10 Mbit/s download speed and 1 Mbit/s upload speed. Even though Northern Ireland's full-fibre availability is the highest in the UK, there remains a small number of premises that are unable to access decent broadband over fixed-lines. Of those premises that do not have access to decent broadband via fixed lines, some will be able to access decent broadband via fixed wireless access (FWA) services offered by MNOs or wireless internet service providers (WISPs). More detailed description of these technologies is provided in the [Connected Nations: UK Report 2025](#).

We estimate that around 1,800 premises, both residential and commercial, in Northern Ireland do not have access to decent broadband from either a fixed-line or FWA network – a small reduction on last year's figure of just over 2,000.

Figure 2.2: Number of premises without a decent broadband connection



Source: Ofcom analysis of provider data (July 2025)

The broadband universal service obligation

The broadband universal service obligation (USO) provides the right to request a broadband connection with a download speed of at least 10 Mbit/s and an upload speed of 1 Mbit/s (as well as several other specific technical characteristics) to a home or business, subject to eligibility and affordability requirements.⁶

⁶ In particular, these characteristics are: (i) a contention ratio of no more than 50:1; (ii) latency which is capable of allowing the end user to make and receive voice calls effectively; and (iii) the capability to allow data usage of at least 100 GB a month.

BT is the universal service provider for the UK (excluding Hull), and KCOM for the Hull area. They are required to provide the USO and to report at six monthly intervals on delivery.⁷

As of September 2025, BT had received 94 orders in Northern Ireland. Each order may require network build that can serve multiple premises, and therefore, these orders have led to full-fibre connections being built that can serve 736 premises in Northern Ireland. Five of these orders have been placed since last year's report, passing 10 additional premises.

For more information on the broadband USO, please see page 18 of the [Connected Nations: UK Report 2025](#).

⁷ BT, [USO Reports](#). KCOM, [USO Reports](#). To date, we understand that KCOM has not received any eligible USO orders.

3. Mobile, data and voice

Introduction

In this section, we provide an update on the progress mobile network operators (MNOs) are making with their 5G rollout plans in Northern Ireland – including 5G standalone (5G SA) for the first time. We report on the availability of 4G mobile coverage across Northern Ireland – which continues to underpin the mobile experience for consumers – both outside and inside premises and across its landmass.

We also include selected statistics from our new consumer-facing web-based coverage checker tool, [Map Your Mobile](#), which provides local coverage information.

Please refer to the mobile chapter of the [Connected Nations UK report for 2025](#), where you will also find the latest information on 2G and 3G switch off.

Figure 3.1: Summary of mobile coverage across the UK and nations^{8, 9}

	5G outside premises (MNO range)	5G SA outside premises (MNO range)	4G outside premises (MNO range)	4G geographic (MNO range)	4G total not spots	Voice and text total not spots
UK	64–89%	47–65%	99–99%+	89–90%	4%	3%
Scotland	59–84%	40–64%	99–99%+	79–81%	10%	6%
Northern Ireland	38–95%	20–91%	98–99%	90–96%	2%	1%
Wales	23–89%	12–57%	99%	84–90%	3%	2%
England	67–91%	47–67%	99%+	95–96%	1%	1%



Source: Ofcom analysis of MNO data (July 2025)

⁸ The MNO ranges in this figure refer to the span between the MNO with the least coverage and that with the most coverage on a given measure. For 5G and 5G SA outside premises the MNO range is based on our ‘High Confidence’ measure, rather than the ‘Very High Confidence’ measure which we also use in this report. Note that only three MNOs have deployed 5G SA services. References to 5G SA in this report therefore reflect the coverage and traffic reported by these operators only. Three does not currently deploy 5G SA services.

⁹ Further information on how we define and measure coverage can be found in our [Connected Nations Methodology](#)

5G coverage

MNOs are continuing to roll out 5G services across the UK and this year has seen further increases in the availability of 5G in Northern Ireland.

Outside premises coverage from at least one MNO now stands at 97% (High Confidence) and 93% (Very High Confidence), up from 92% and 86%, respectively, in 2024.¹⁰ Coverage levels in Northern Ireland are generally below the UK figures – outside premises coverage from all MNOs stands at just 25% in NI compared to the UK figure of 47%.

Table 3.1: 5G coverage outside premises across the UK

Nation	High Confidence		Very High Confidence	
	At least one MNO	All MNOs	At least one MNO	All MNOs
England	98%	50%	95%	26%
Northern Ireland	97%	25%	93%	11%
Scotland	93%	40%	89%	20%
Wales	91%	19%	86%	14%
UK	97%	47%	94%	24%

Source: Ofcom analysis of MNO data (July 2025)

Coverage varies across MNOs

At the High Confidence level, outside premises 5G coverage across the four MNOs ranges from 38%-95% at the High Confidence level, and 20%-88% at the Very High Confidence level in Northern Ireland.

Figure 2.2: MNO 5G coverage range for outside premises



¹⁰ By 'coverage outside premises', we mean coverage that is predicted in a 100x100m area in which a dwelling is located, which can be considered as a proxy for outdoor coverage of populated areas.

Source: Ofcom analysis of MNO data (July 2025)

Table 3.2: MNO 5G coverage outside of premises, at Very High and High Confidence levels in Northern Ireland

	Very High Confidence	High Confidence
BT/EE	59%	63%
Three	20%	38%
VMO2	88%	95%
Vodafone	28%	39%

Source: Ofcom analysis of MNO data (July 2025)

5G standalone

The transition to 5G SA is now well underway, and we are reporting on this coverage for the first time in this report. 5G SA uses a new 5G core network, which could better enable new use cases of high-speed, low latency 5G connectivity. This differs to 5G non-standalone, which involves deploying 5G radio equipment alongside existing 4G with services delivered over the 4G core network. Further information on how we define and measure 5G coverage can be found in our [Connected Nations: UK Report 2025](#).

5G SA coverage from at least one MNO reaches 92% at the High Confidence level and 83% at the Very High Confidence level outside of premises across Northern Ireland. This is nine percentage points above the UK average of 83%.

Table 3.3: 5G SA coverage outside premises across the UK from at least one MNO

Nation	Very High Confidence	High Confidence
England	75%	85%
Northern Ireland	83%	92%
Scotland	66%	77%
Wales	56%	59%
UK	74%	83%

Source: Ofcom analysis of MNO data (July 2025)

Local authority 5G coverage

Across Northern Ireland's 11 local councils, outside premises coverage for 5G SA from at least one operator varies from 77-99%+ at High Confidence and 59-99% at Very High Confidence. Coverage is lower in more rural and sparsely populated local authority areas.

Table 3.4: 5G and 5G SA outside premises coverage from at least one MNO by local authority

Local authority	5G		5G Standalone	
	High Confidence	Very High Confidence	High Confidence	Very High Confidence
Antrim and Newtownabbey	99%+	98%	88%	81%
Ards and North Down	99%	95%	96%	85%
Armagh City, Banbridge and Craigavon	99%	96%	94%	86%
Belfast	99%+	99%+	99%+	99%
Causeway Coast and Glens	98%	94%	90%	74%
Derry City and Strabane	94%	90%	87%	79%
Fermanagh and Omagh	85%	73%	77%	59%
Lisburn and Castlereagh	99%	95%	97%	90%
Mid and East Antrim	99%	96%	94%	86%
Mid Ulster	96%	90%	87%	72%
Newry, Mourne and Down	92%	86%	83%	72%

Source: Ofcom analysis of MNO data (July 2025)

4G and voice coverage

Whilst 5G coverage becomes more widely available, voice and data services continue to be most available (and accessed) through older and more established technologies – particularly 4G.¹¹ The 4G services offered by MNOs continue to provide the backbone of most consumers’ experience.

Outdoor premises coverage remains high in Northern Ireland

Outdoor 4G coverage is available at almost all premises in Northern Ireland, at 99%+ from at least one operator. Furthermore, 97% of premises have outside 4G coverage from all four MNOs (a slight increase on 96% in 2024).

Table 3.5: Outside premises 4G coverage by UK nation

Nation	At least one MNO	All MNOs
England	99%+	99%
Scotland	99%+	99%
Wales	99%+	97%

¹¹ Mobile voice services through 2G, 3G and 4G.

Nation	At least one MNO	All MNOs
Northern Ireland	99%+	97%
UK	99%+	99%

Source: Ofcom analysis of MNO data (July 2025)

Table 3.6: Outside premises 4G coverage in Northern Ireland by rurality

	At least one MNO	All MNOs
NI urban	99%+	99%+
NI rural	99%+	91%

Source: Ofcom analysis of MNO data (July 2025)

Indoor mobile coverage is widely available, but is highest in urban areas

Indoor mobile coverage can vary depending on factors such as wall thickness, building materials used in construction and where in a building people are using their phone. Consequently, there may be differences between MNOs' predicted indoor coverage data and the actual indoor experience.

For indoor 4G coverage in Northern Ireland the percentage of premises served ranges from 88-93% across individual MNOs, a slight increase on 2024 (87-93%).¹²

The availability of indoor voice calls ranges from 88-99% across individual MNOs, a one percentage point increase at the bottom of the range compared to last year (87-99% across individual MNOs in 2024).

Table 3.7: Indoor 4G coverage by UK nation

Nation	At least one MNO	All MNOs
England	99%+	89%
Northern Ireland	99%	75%
Scotland	99%+	89%
Wales	99%	82%
UK	99%+	88%

Source: Ofcom analysis of MNO data (July 2025)

¹² For Connected Nations reporting, indoor coverage by applying an average building entry loss of 10dB across buildings. This approach provides only a simplified view of indoor coverage and the real experience depends heavily on the types of building material and insulation in a specific building.

Table 3.8: Indoor 4G coverage in Northern Ireland by rurality

	At least one MNO	All MNOs
NI urban	99%+	85%
NI rural	96%	50%

Source: Ofcom analysis of MNO data (July 2025)

4G geographic coverage levels remain high

Overall, 4G geographic coverage across Northern Ireland is widely available. Landmass covered by individual MNOs ranges from 90-96% - a one percentage point increase on the higher and lower ends of the range from last year.

Table 3.9: 4G geographic coverage by UK nation

Nation	Operator coverage range
England	95-96%
Northern Ireland	90-96%
Scotland	79-81%
Wales	84-90%
UK	89-90%

Source: Ofcom analysis of MNO data (July 2025)

Table 3.10: 4G geographic coverage in Northern Ireland by rurality

	Operator coverage range
NI urban	98-99%
NI rural	89-95%

Source: Ofcom analysis of MNO data (July 2025)

Voice coverage

Voice coverage from all four MNOs is available outside 98% of premises in NI, although this is slightly lower in rural areas.

Table 3.11: Outdoor voice coverage in Northern Ireland

	At least one MNO	All MNOs
Northern Ireland	99%+	98%
NI urban	99%+	99%+
NI rural	99%+	93%

Source: Ofcom analysis of MNO data (July 2025)

Mobile coverage in Northern Ireland by MNO

The table below shows a summary of coverage across Northern Ireland by MNO.

Table 3.12: 4G and voice coverage by operator in Northern Ireland

	BT/EE	Three	VMO2	Vodafone
Geographic – 4G	90%	96%	93%	94%
Geographic – voice	90%	96%	99%	95%
Indoor premises – 4G	88%	88%	92%	93%
Indoor premises – voice	88%	88%	99%	93%
Outside premises – 4G	98%	99%	99%	99%
Outside premises - voice	98%	99%	99%+	99%

Source: Ofcom analysis of MNO data (July 2025)

Map Your Mobile coverage checker

As mentioned earlier in this section, we have made changes to our web-based coverage checker with the introduction of Map Your Mobile (MYM). These changes included using higher signal strength thresholds, incorporating crowdsourced performance data and providing clearer explanations of the tool's purpose. The MYM aim is to give consumers better insight into the availability of services at a local level, helping them make informed choices about providers.

In determining coverage MYM applies outdoor thresholds of -95dBm and -105dBm, offering a technology-neutral approach to local predictions and using coverage data at a finer granularity of 50m x 50m pixels.¹³ These thresholds were not intended to replace those used in Connected Nations, but rather to address known uncertainties in local-level predictions and reflect the requirements of the more demanding services used today.¹⁴

The tables below show MYM data at nations and UK level. More granular data (constituency, local authority, and Westminster constituency) is available in our [interactive report](#).

¹³ The technology-neutral approach currently reports coverage using the combined footprint of 4G and 5G networks, simplifying the presentation of information and focusing on user experience rather than technology.

¹⁴ MYM uses a performance level defined as: ≥ 5 Mbit/s download, ≥ 1.5 Mbit/s upload, and ≤ 50 ms latency. There is no signal strength within a reasonable range above which performance is guaranteed or below which performance is zero. This highlights the need for exercising judgement in setting thresholds for our coverage reporting, including judgement about how consumers will interpret what is being portrayed.

Table 3.13: Geographic coverage using MYM thresholds

Nation	From at least one MNO		From all MNOs	
	-105dBm	-95dBm	-105dBm	-95dBm
England	99%	94%	91%	59%
Northern Ireland	98%	92%	86%	51%
Scotland	90%	78%	67%	39%
Wales	97%	87%	77%	47%
UK	96%	88%	82%	51%

Source: Ofcom analysis of MNO data (July 2025)

Table 3.14: Outdoor premises coverage using MYM thresholds

Nation	From at least one MNO		From all MNOs	
	-105dBm	-95dBm	-105dBm	-95dBm
England	99%+	99%+	99%	90%
Northern Ireland	99%+	99%	97%	77%
Scotland	99%+	99%+	99%	90%
Wales	99%+	99%	97%	83%
UK	99%+	99%+	99%	89%

Source: Ofcom analysis of MNO data (July 2025)