



● UK NETWORK GUIDE · JUNE 2026

INFRASTRUCTURE EXPLAINER

Monday, 8 June 2026

Who Owns the Fibre?

The UK network matrix.

Most UK broadband brands do not own the cables they sell. This guide maps every major provider to the physical network it actually runs on, so you can see who really delivers your connection, and find the best live deal on it.

22.5M

OPENREACH FTTP PREMISES

*Ready for service,
thinkbroadband, April 2026*

9+

WHOLESALE NETWORKS

*Carrying 35+ retail brands we
track*

429

UK ISPS IN OUR DIRECTORY

*35+ surfaced live at any one
time*

Written by **Dr Alex J. Martin-Smith**

Reviewed by **Adrian James**

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THE SHORT ANSWER

Your provider rents the line. Here is who owns it.

QUICK ANSWER

Most UK broadband brands do not own the cables they sell. They rent space on a wholesale network. BT, EE, Sky, TalkTalk, Vodafone, Plusnet, NOW and Zen all ride Openreach. Sky, TalkTalk, Vodafone and Zen also sell on CityFibre. Virgin Media uses its own cable plus the nexfibre network, while altnets such as Hyperoptic and Community Fibre largely run fibre they built themselves.

There are two very different things behind the word "provider". The **retailer** is the brand you pay and that answers the phone. The **wholesale network** is the company that physically built the cable in your street. One network carries dozens of retailers, which is why the same speed can cost wildly different amounts depending on whose pipes it uses, and it shapes your real speed, your choice and how easily you can switch.

The UK wholesale network matrix

WHOLESALE NETWORK	TECHNOLOGY	PREMISES PASSED	RETAIL BRANDS THAT RIDE IT
Openreach (BT Group)	FTTP and FTTC; XGS-PON in trial	22.5m	BT, EE, Sky, TalkTalk, Vodafone, Plusnet, NOW, Zen, John Lewis and hundreds more
Virgin Media O2 (own)	Cable (DOCSIS 3.1) and XGS-PON	18.8m	Virgin Media, giffgaff
CityFibre	Full fibre (XGS-PON)	4.37m	Sky, TalkTalk, Vodafone, Zen, Cuckoo
Netomnia	XGS-PON and first UK 50G PON	3.1m	YouFibre (own brand), B2B partners
nexfibre	Full fibre (XGS-PON)	2.6m	Virgin Media, giffgaff
Community Fibre	Full fibre (XGS-PON)	1.3m	Community Fibre (own), Vodafone
Hyperoptic	Own full fibre	825k	Hyperoptic (own brand)
Gigaclear	Own full fibre (rural)	618k	Gigaclear (own) and small resellers

Premises figures use thinkbroadband's independently mapped "ready for service" counts (April to June 2026), the most conservative orderable benchmark. Operators' own press figures are often higher because they include premises built but not yet orderable. Openreach's own end-March 2026 footprint claim, for comparison, was 23 million.



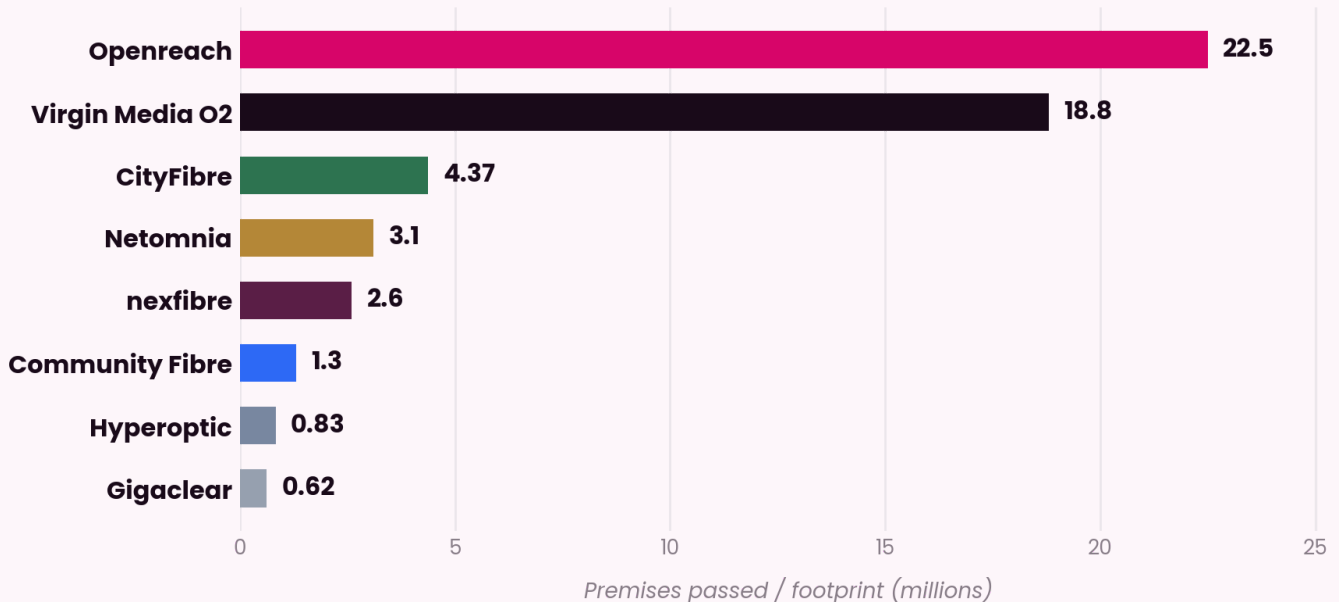





THE FOOTPRINT

How far each network actually reaches

Openreach is in a league of its own on scale, but the challengers are growing fast, and in many towns you now have three or four full-fibre networks competing for your custom. This is the single biggest reason broadband has become cheaper in real terms.



UK wholesale network reach, mid-2026. Openreach and Virgin Media O2 figures are total footprint; challengers show full-fibre premises ready for service. Sources: thinkbroadband, Virgin Media O2, operator reporting.

Why your network matters more than your brand

Two homes can buy "500 Mbit/s broadband" from the same retailer and get a very different experience, because one sits on full fibre and the other on part-fibre or cable. The network sets the ceiling; the brand just sells access to it. Three practical consequences:

- ✓ **Upload speed.** Altnet full fibre is often symmetric, so your upload matches your download. Cable and part-fibre uploads are capped far lower, which matters for video calls, cloud backups and creators.
- ✓ **Price competition.** Where two or more networks overlap, retail prices fall. A street with Openreach plus an altnet almost always beats a single-network street on value.
- ✓ **Switching friction.** Moving between retailers on the *same* network is usually seamless under One Touch Switch. Moving between networks, say Virgin cable to an Openreach line, can need a new installation.

Want to know which networks reach **your** street? A postcode check shows every network and the live deals on each.

[Compare now →](#)

THE BIG PICTURE

Consolidation is reshaping the map

The UK built a lot of competing fibre very quickly, and 2026 is the year the networks start to merge. The headline event is nexfibre's proposed acquisition of Netomnia, which would create a challenger of real scale alongside Openreach and Virgin Media O2.



If it clears, the combined nexfibre and Netomnia footprint is expected to reach around 8 million premises by the end of 2027. CityFibre has objected, citing roughly 80% network overlap concentrated in the North West and the risk of a market dominated by two large players. For now the deal is at an early pre-investigation stage, so nothing has changed for customers yet.

The jargon, in plain English

TERM	WHAT IT MEANS FOR YOU
FTTP	Fibre to the premises. A single optical fibre runs all the way into your home. Fastest and most reliable.
FTTC	Fibre to the cabinet. Fibre to the street box, then copper to your door, so speed falls with distance.
DOCSIS	The cable standard Virgin Media uses. Fast downloads, but uploads are capped by tier.
XGS-PON	The modern full-fibre standard most altnets use. Supports symmetric multi-gigabit speeds.
50G PON	Next-generation fibre. Netomnia ran the UK's first commercial deployment in 2025.

• FIND YOUR NETWORK AND YOUR DEAL

Your street decides your speed, price and choice.

Enter your postcode to see exactly which networks serve your address and the live deals on each, ranked by total contract cost. Independent, free, no signup.

[Compare live deals at your postcode →](#)

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SECTION · REFERENCES

References and sources



Written by **Dr Alex J. Martin-Smith** (CMgr, MBA, LL.M, DBA), Lead Editor. Reviewed by **Adrian James**.
Published 8 June 2026, next review within 90 days. Every figure is sourced below and logged in our public corrections process.

Every quantitative claim in this guide is backed by a publicly verifiable source. References are listed in APA 7th edition format. Network footprint figures use thinkbroadband's independently mapped data as the conservative benchmark, with operator reporting cited alongside.

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REMEMBER

Coverage figures are national. Your address is what counts, and full-fibre availability can change street by street. A 10-second postcode check at broadbandswitch.uk/compare shows the networks and live deals where you actually live.

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