UK Broadband Shake-Out: New Report Puts 68% Odds on Three National Platforms

Free 52 page report from BroadbandSwitch.uk forecasts the UK fibre shake-out, with the odds published in advance and scored in public in 2028.

Fibre ducting laid through a London street. The Great Consolidation (Report No. 27) forecasts the UK fibre shake-out, published by BroadbandSwitch.uk, final edition 13 July 2026.

LONDON, ENGLAND, UNITED KINGDOM, July 13, 2026 /EINPresswire.com/ -- Britain built more fibre broadband networks than it can pay for. A new report puts the odds on how that ends.

The Great Consolidation, published today by the independent comparison service BroadbandSwitch.uk, forecasts a 68% probability that the UK fibre market resolves to three national platforms plus a niche tail by the mid-2030s. It gives a 27% chance of a slower, messier shake-out, and just 5% that today's crowded market survives intact.

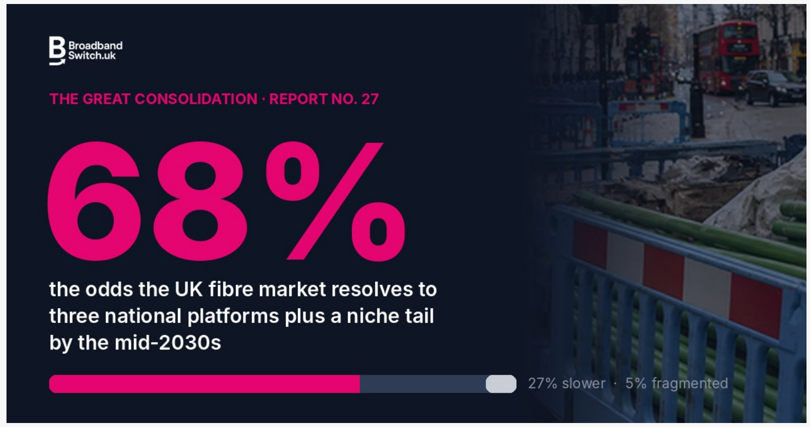
> “While consolidation brings new terms and administrative hurdles, the physical fibre remains secure. Ultimately, this transition means a new name on the bill, not a lost connection.”
>
> *Dr Alex J. Martin-Smith, Founder, BroadbandSwitch.uk*

The numbers behind the call are blunt. More than one hundred independent networks, known as altnets, raced to lay fibre after 2020. They now pass 19.7 million premises, but only 18% of the homes they reach actually take a service, against roughly 38% at Openreach. The sector carries more than £9bn of debt and lost £1.5bn in 2024 alone, according to Enders Analysis.

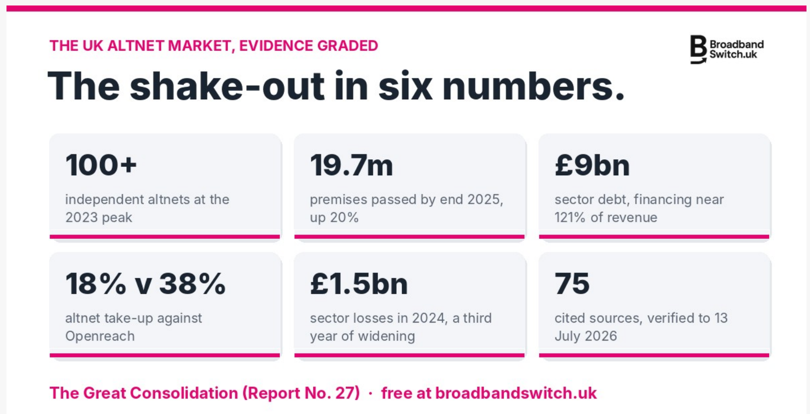
"Britain built one of the fastest broadband upgrades in the world, and more networks than the market can pay for," said Dr Alex J. Martin-Smith, the report's author and founder of BroadbandSwitch.uk. "The question was never whether the sector consolidates. It is how fast, who is left standing, and what it means for the household bill. We have put our numbers on the record so anyone can mark our homework in 2028."

The shake-out is already under way. In 2026 alone, London altnet G.Network passed through administration, lenders took control of rural provider Gigaclear, and Freedom Fibre merged with Truespeed. The biggest move is nexfibre's roughly £2bn deal for Netomnia, backed by the owners of Virgin Media O2. The Competition and Markets Authority has fast tracked that deal to an in-depth investigation, with a verdict due by 15 December 2026. The report calls that ruling the single biggest swing factor in how fast the market concentrates.

For households, the report's answer comes first: broadband almost never stops working when a provider is bought or fails. The fibre in the ground is a working asset that passes to new owners, and both of this year's distress cases kept customers connected throughout. The open question is price. Competition helped cut average broadband bills by around 6% in real terms in a recent year, and fewer rivals on the street means less of that pressure.



The forecast: 68% odds of three national platforms plus a niche tail by the mid-2030s, 27% a slower shake-out, 5% fragmented survival. Scored in public in 2028.



The UK altnet market in six numbers: 100+ networks at the 2023 peak, 19.7 million premises passed, £9bn of debt, 18% v 38% take-up, £1.5bn of losses in 2024, and 75 cited sources.

Unusually for market analysis, the forecast is designed to be marked. The probabilities were published on 12 June 2026, every figure in the report carries a date and a named source across 75 references, and the resolution criteria will be scored in public in 2028, whichever way events land.

The Great Consolidation is the twenty seventh research report from BroadbandSwitch.uk, following The Last Dial Tone, its June 2026 forecast of the analogue phone switch off. The full 52 page report is free to read and download, with no signup, at broadbandswitch.uk/reports/the-great-consolidation.

About BroadbandSwitch.uk: BroadbandSwitch.uk is an independent UK broadband comparison service and research publisher, part of the SearchSwitchSave Group. Households and businesses can compare broadband deals from more than 35 UK providers at their exact address in under a minute, free and with no signup. The service earns commission when readers switch through its links, which never influences its analysis or rankings, and it maintains a public corrections log.

Notes to editors: Dr Alex J. Martin-Smith is available for interview on UK fibre consolidation, the CMA review and the altnet funding environment. The full APA reference list, high resolution charts and the report PDF are at the report page. Every statistic in the report carries a value, a date, a scope and a named source.

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