FWA growth cycle: Network capabilities and offering advancements driving momentum

Fixed Wireless Access handbook 2026

ERICSSON 150 years

Insight

FWA and fiber drive most growth by 2031

The global fixed broadband market is set for growth, driven by demand for high-speed internet. 5G Fixed Wireless Access (FWA) and fiber are anticipated to account for the majority of the growth.

Global fixed broadband connections are projected to grow from 1.7 billion to 2 billion by 2031, with 450 million additional new connections in fiber, FWA and satellite. Notably, almost a quarter of this increase is expected to stem from legacy modernization as consumers transition from DSL and cable to faster broadband options, resulting in a decline of approximately 100 million DSL and cable connections. The remaining three-quarters are anticipated to come from new connections, fueled by population expansion and initiatives to connect previously unconnected households. There is a projected decline for unconnected households, to roughly 565 million, which represents approximately 20 percent of global households.

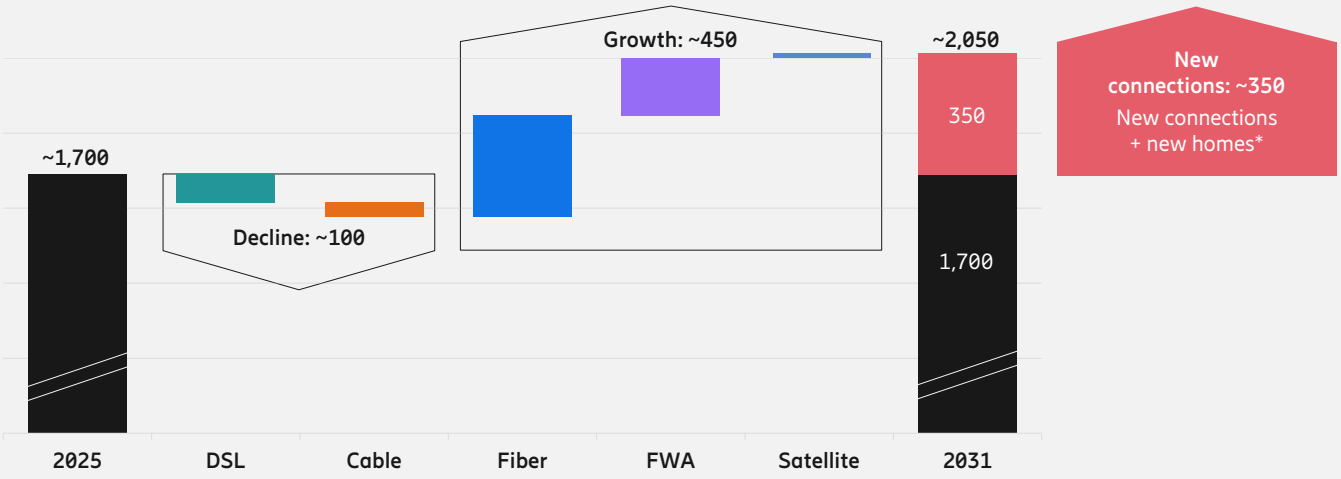
FWA capturing over one-third of connections

FWA is projected to account for more than 35 percent of new connections, with an expected increase to 350 million by 2031, representing almost double the current connections. 5G FWA plays a crucial role in expanding broadband access, especially in areas where traditional wired infrastructure may be less feasible. 5G FWA offers a rapid deployment advantage compared to other technologies by utilizing existing mobile infrastructure, which already covers 90 percent of the world's population.

Need for investments

The projected increase in global fixed broadband connections reflects ongoing technological development and investment. As we approach 2031, the mix of fiber, 5G FWA and satellite technologies will be crucial in meeting the connectivity needs of an increasingly digital world. Continued investment and innovation, along with technology-agnostic support from governments and regulators, is essential for ensuring that global infrastructure can support this anticipated demand, while fostering economic growth, closing the digital divide, and improving quality of life. The growth potential extends beyond these numbers, encompassing additional secondary homes and small-to-medium-sized businesses, underscoring the continuous demand for fast and reliable broadband connectivity. By 2031, there will still be opportunities for modernization and to connect the remaining unconnected.

Global fixed broadband connections
(millions)



*New homes driven by population growth. Unconnected decline to ~565m in the period.

Source: Ericsson analysis

FWA is set to reach 350 million connections by 2031

At the end of 2025 the number of FWA connections was about 185 million and the number of FWA connections worldwide is forecasted to grow and reach 350 million by 2031, generating about USD 75 billion in service provider annual revenues. The 350 million connections represent 17 percent of all fixed broadband connections.

Of these over 350 million connections, the number of 5G FWA connections is expected to be around 310 million by 2030, representing almost 90 percent of the total FWA connections. The forecast includes the high ambitions of 5G FWA in emerging markets, increasing the number of connections as well as the share of 5G FWA connections. Higher volumes of 5G FWA in large high-growth countries such as India have the potential to drive economies of scale for the overall 5G FWA ecosystem, resulting in affordable CPE that will have a positive impact across low-income markets.

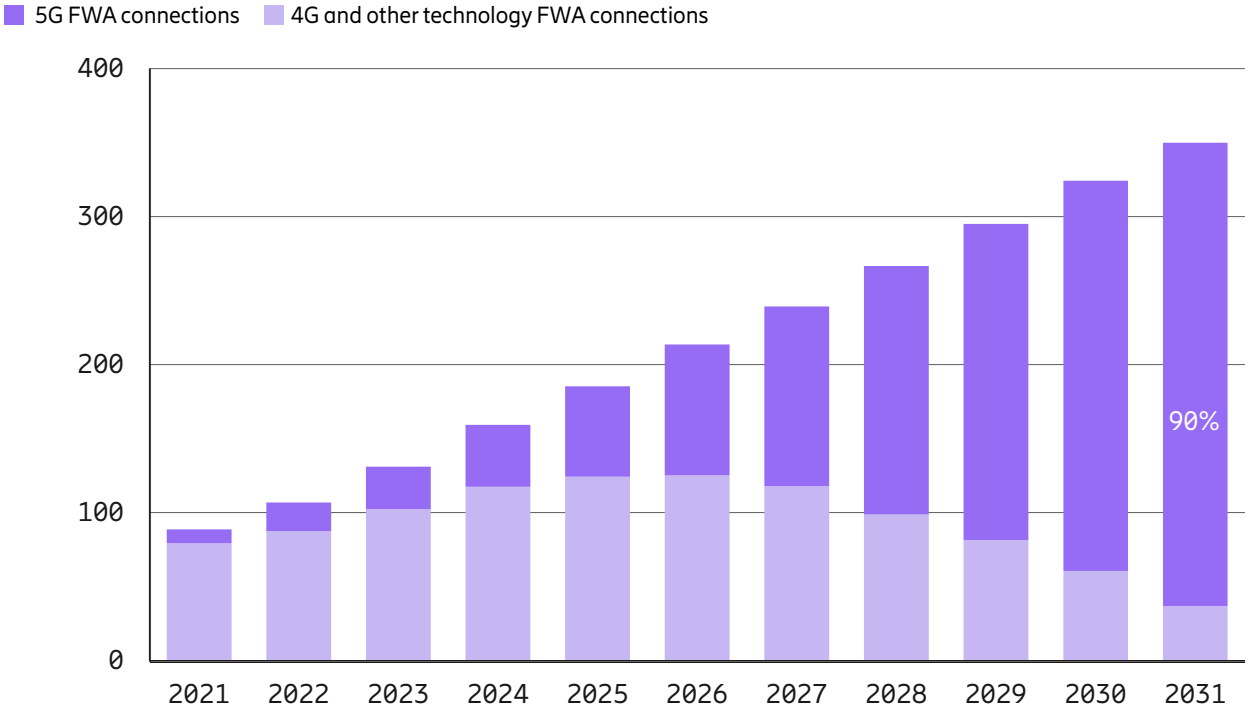
FWA data traffic is projected to grow by more than three times

At the end of 2025, FWA data traffic is set to represent 27 percent of global mobile data traffic and is projected to grow by a factor of over 3 to reach around 174 EB per month by the end of 2031. This will represent 36 percent of total mobile network data traffic. Asia-Pacific's share of global FWA connections is expected to increase from just over 40 percent in 2025 to 50 percent by 2031.

Market drivers for FWA

- Large addressable market
- 5G enables high speed FWA
- Low carbon footprint broadband
- Fast time to market
- NPS on par with fiber
- Affordability with global scale
- Innovation path towards 6G

5G FWA connections



Source: Ericsson, 2025

Continued global FWA momentum

Continued global FWA momentum an updated Ericsson study 1 of retail packages offered by service providers reveals that 81 percent have an FWA offering. There are 159 service providers offering FWA services over 5G, representing 65 percent of all FWA service providers.

Over half of FWA service providers now offer speed-based tariff plans

Speed-based tariff plans are commonly offered for fixed broadband services, such as those delivered over fiber or cable.

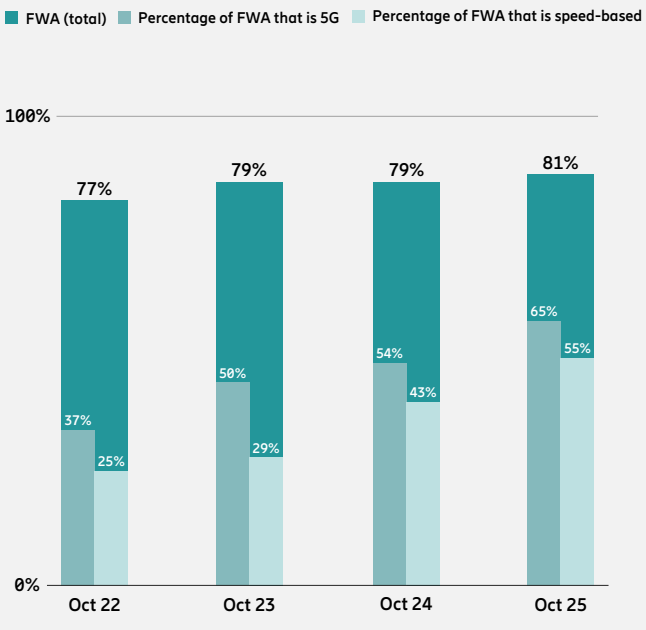
Consumers understand this type of plan well, enabling service providers to monetize FWA as a broadband alternative. Speed-based tariff plans are now offered by 54 percent of FWA service providers, up from 43 percent a year ago. The remaining 46 percent offer only volume-based tariff plans (buckets of GB per month). Taking into account only the service providers that offer 5G FWA services, 70 percent offer speed-based tariff plans.

Regional variations

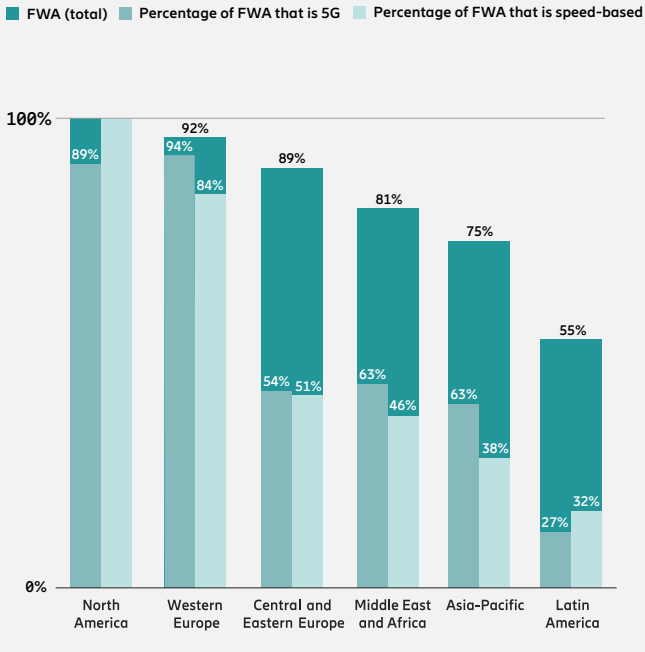
There are large regional variations in the proportion of service providers adopting FWA:

- FWA adoption is widespread globally. In five out of six regions, 75 percent or more service providers are offering FWA.
- In the past year, there has been continuous growth in the number of service providers offering speed-based plans, driven primarily by Western Europe.
- Latin America has the most potential to increase the number of service providers that offer FWA over 5G and speed-based tariff plans.

Global FWA service provider adoption 2022–2025



Regional FWA service provider adoption 2025



Source: Ericsson Mobility Report Nov 2025

Strong 5G FWA traction across all continents

5G FWA is being launched across all continents and is the most popular 5G use case after MBB. There are regional variations in 5G FWA uptake driven by CSP positioning and market situation.

In North America, Verizon and T-Mobile are reporting strong 5G FWA uptake, which has delivered accelerated connection growth with them adding around 800 thousand connections per quarter. T-Mobile and Verizon set a goal to achieve 7-8 million and 4-5 million FWA connections by 2025 respectively. After reaching this target ahead of schedule, T-Mobile has now revised its goal to reach 15 million connections by 2030 and Verizon to reach 8-9 million connections by 2028.

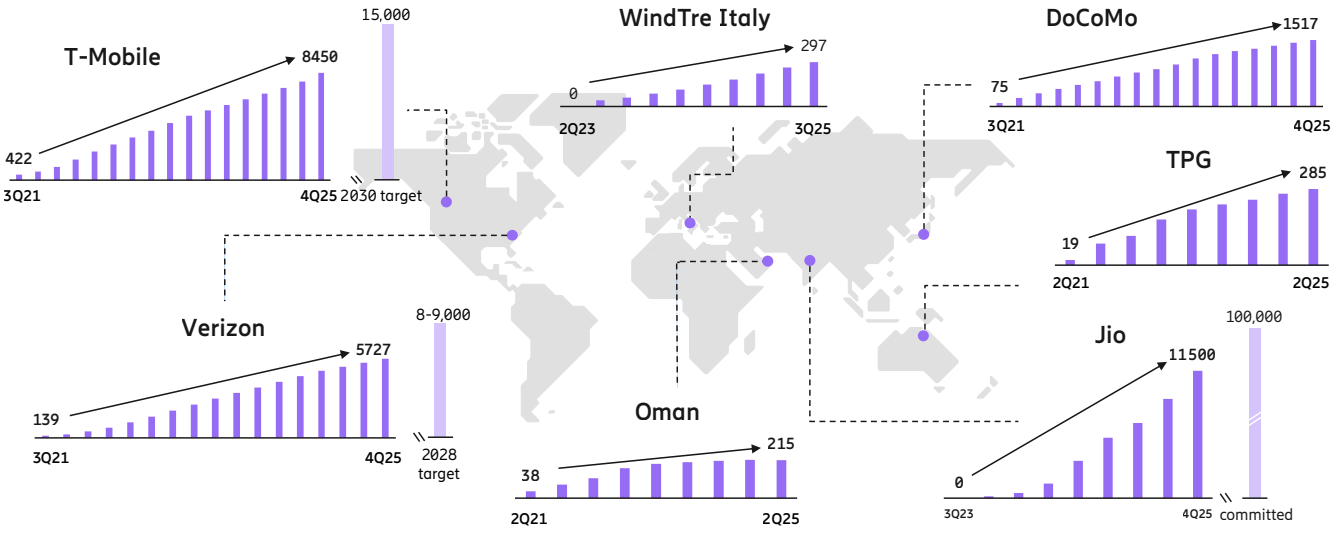
Although many service providers are launching 5G FWA in Europe, market uptake has been concentrated in certain regions (such as the Nordics, Italy, and UK). Some operator groups, including Telenor Norway leveraged 5G FWA to decommission their copper networks.

There is a strong 5G FWA momentum in the Middle East, in particular UAE, Oman (5G FWA connections reported by TRA, Oman's national telecom regulator) and Saudi Arabia. In some of these markets, operators are actively marketing home Internet solutions based on either fiber or 5G FWA as well as migrating 4G FWA connections to 5G FWA.

There is also strong 5G FWA traction in Japan, with DoCoMo reporting solid 5G FWA connection growth since launching services in late 2021. In Australia, strong 5G FWA growth is being reported by all service providers, including Telstra, Optus, NBN and TPG, with the latter set to reach 300 thousand connections by end of 2025.

There have been several 5G FWA launches in emerging markets – across Latin America, Middle East and Africa and Asia-Pacific – where a large number of unconnected and underserved homes could benefit from fast, reliable FWA-delivered broadband. Among the emerging markets with recent 5G FWA launches, India's Reliance Jio has the ambition to connect 1 million homes every month with 5G FWA AirFiber and it has also committed to connect 100 million homes and SMEs with 5G FWA. This latest announcement is not only important to India, but also to the overall 5G FWA market as it brings scale to the ecosystem.

Reported connections (thousands)



Source: latest service provider and regulator publicly reported data

FWA growth strategies

In previous versions of the FWA Handbook we studied different FWA growth strategies based on operator positioning and market situation. These strategies were categorized into three major types:

Modernizer: converged operators with legacy xDSL networks migrate these users to FWA, reducing OPEX and retaining customers, and upselling on higher speeds. It could also include migration of 4G FWA to 5G FWA.

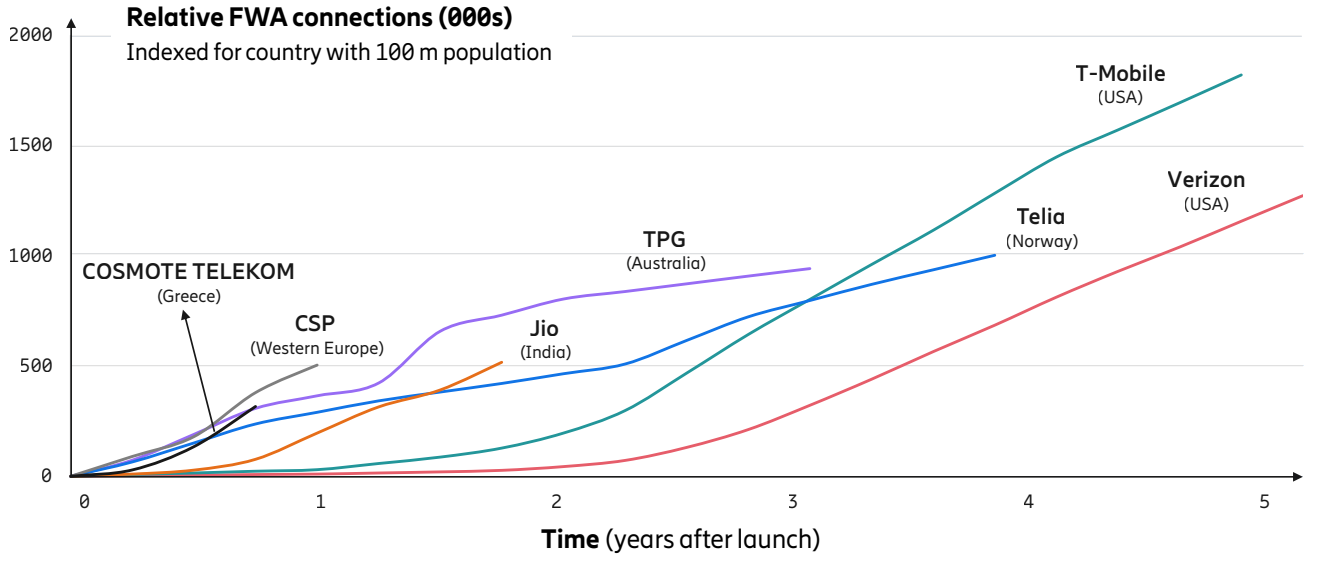
Challenger: typically, mobile-only service providers or converged operators that are challenging the fixed broadband incumbents. These service providers focus primarily on upgrading users with slow-speed broadband to high-speed 5G FWA. It is also common for these service providers to target areas with only one fixed broadband, bringing competition with lower prices.

Digital divide closer: service providers that bring high-speed broadband primarily to rural areas. It may include FWA-only providers in addition to mobile and converged operators.

Benchmarking of FWA growth and uptake

In this chart, we show the uptake curves for the leading 5G FWA providers across various regions. In this analysis, we focus on the relative uptake curve, based on adoption rates and FWA connection growth, indexed by population size (all service providers are rebased to countries with 100 million inhabitants). Based on this, growth of FWA among American CSPs accelerated once wider 5G coverage was available 1-2 year after initial launch. On a similar note, Jio uptake was faster because it launched 5G FWA once a significant share of homes were already covered by 5G.

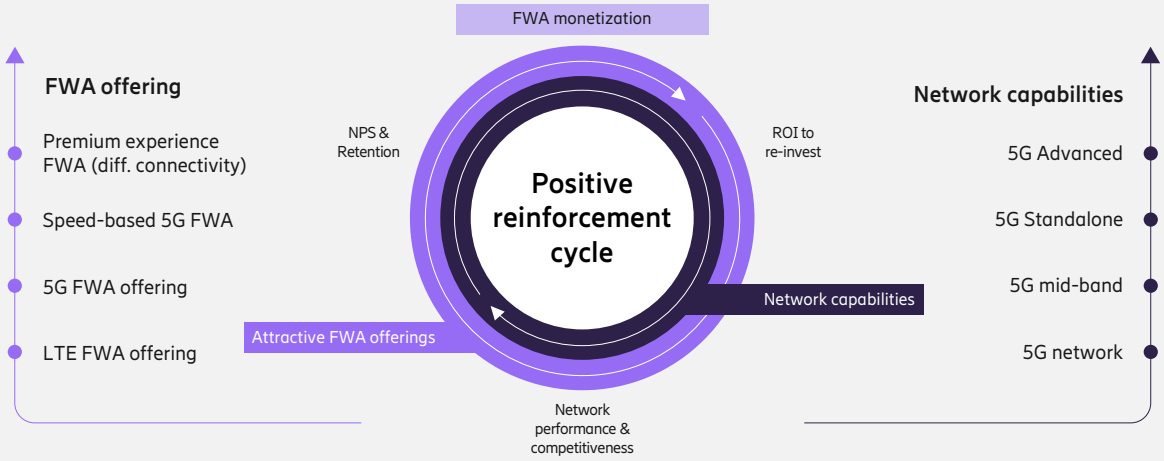
5G FWA "relative" connection uptake



Source: Ericsson analysis based on service providers data.

FWA monetization driven by network maturity

Global benchmarking FWA maturity - 2025



While 5G FWA adoption is strong in many markets, there is a large variation among regions. Demand for fixed broadband services and the status of the fixed broadband market plays a key role, including dimensions such as penetration of high speed broadband (e.g., fiber), affordability (and ARPU levels) and competitive environment. There are CSPs succeeding with FWA even in markets with high fiber penetration as well as in markets with low ARPU.

When comparing the progress of 5G FWA across various markets, our research shows that markets with strong 5G FWA growth excel in maturity in two dimensions: network capabilities and FWA offering.

Network Capability maturity

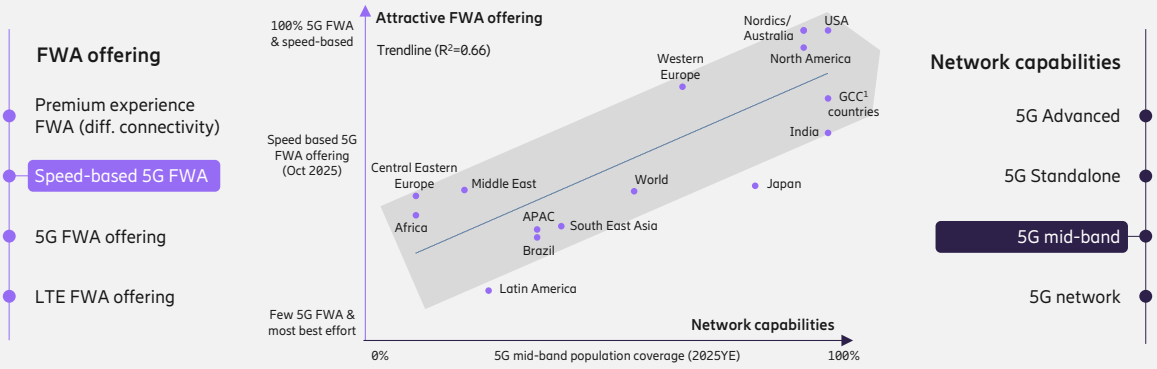
In this dimension, we measure the evolution of the 5G deployments, starting with basic 5G coverage. At a second step, 5G mid-band coverage based on high-capacity TDD spectrum (often with MU-MIMO technology) enables a step change to end-user performance. On a third stage, CSPs deploy 5G Standalone, most successfully when combining mid-band and lower bands, enabling extended coverage, high performance, as well as differentiation capabilities such as end-to-end network slicing. After that, CSPs can implement 5G Advanced, which brings additional capabilities to enhance 5G network performance and experience.

FWA offering maturity

This dimension refers to a variety of FWA offerings, starting with the launch of 5G FWA. Some operators start with best effort FWA services, sometimes replicating existing offerings in 4G. Others leverage 5G to launch speed-based FWA such as tiered speed plans. More advanced service providers are offering a premium experience FWA based on differentiated connectivity. Some operators may have a variety of these offerings, targeting multiple segments.

Fastest-growing FWA markets are highly mature

Global benchmarking FWA maturity - 2025



While 5G FWA adoption is good in many markets, uptake has been strong in certain regions in particular North America, Nordics GCC countries and parts of Asia. These can include countries with over 95% of fiber homes passed as in the Nordic countries and Japan. It also includes countries with low ARPU levels as India.

At the same time the 5G FWA growth in other regions, in particularly Latin America, Africa and parts of South East Asia, remains comparatively limited despite substantial underlying demand and long-term growth potential as consumers want high-speed, reliable broadband services.

Global benchmarking assessing 5G FWA maturity

There is a large variation of service provider maturity in terms of network capabilities. Some are still pending to launch 5G services as spectrum is not yet awarded. Others have already deployed nationwide 5G standalone and are starting to deploy 5G Advanced capabilities. For this assessment, we utilize the population coverage for 5G mid-band, which brings step change to the network performance, bringing fiber-like experience for 5G FWA.

For the FWA offerings, over the last 5 years we evaluate the maturity level of FWA offerings, focusing on launch of 5G FWA as well as level of speed based offerings based on 5G FWA.

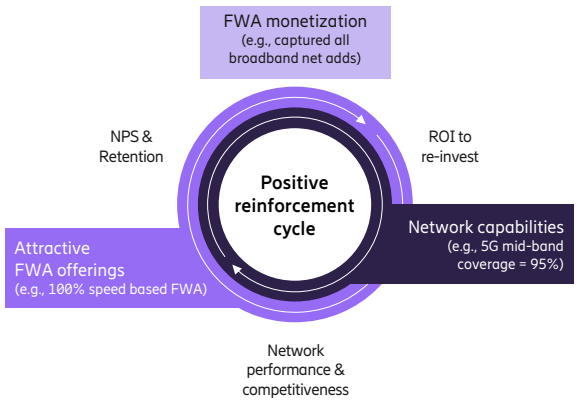
Markets that have experienced strong FWA growth excel in both of these dimensions. Conversely, regions with slower growth in FWA connections typically have limited 5G deployment and monetization maturity.

1) Gulf Cooperating Council countries.

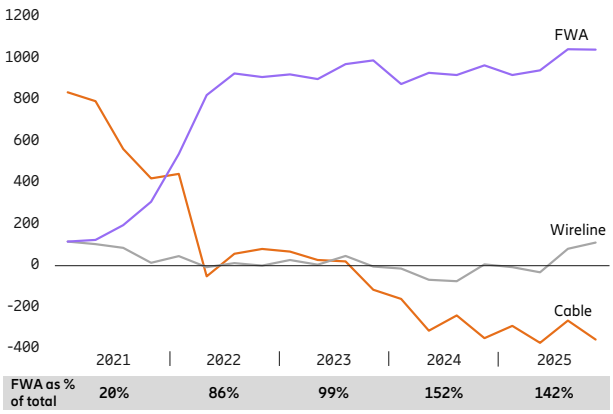
Source: Ericsson analysis

FWA success in the US, capturing all broadband net adds in the past 4 years

FWA monetization maturity in the US



Fixed broadband net adds per quarter in the US
(thousands)



For the past 5 years, FWA has been the main growth segment in the US fixed broadband market, capturing all the net additions. As of December 2025, AT&T, T-Mobile, and Verizon, three largest mobile service providers in the US have together added about 15.2 million connections in the past 5 years. T-Mobile and Verizon added most of the FWA connections, with their FWA connection base representing 90% of the total by 4Q25.

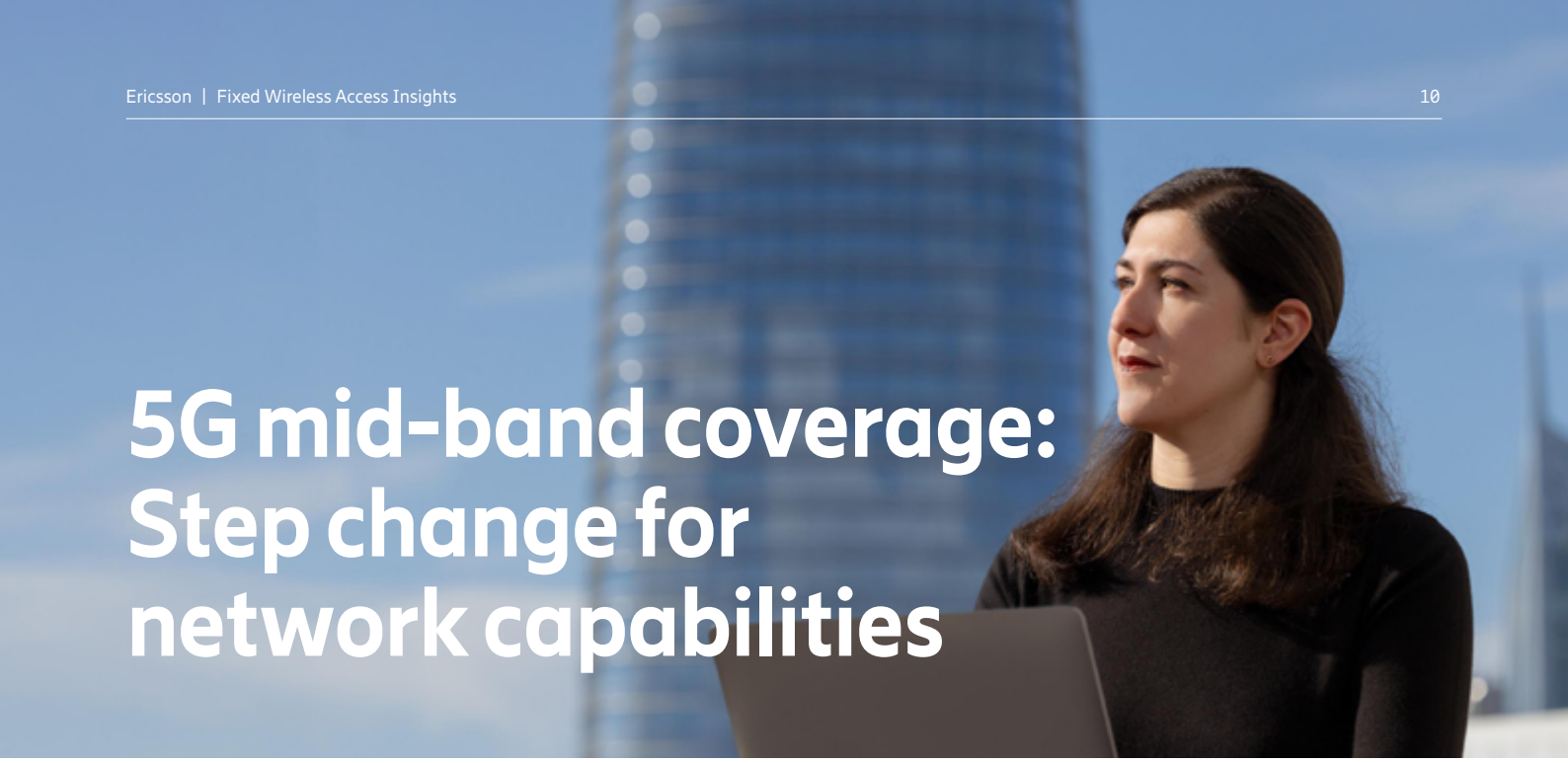
The cable providers have experienced a significant change in broadband net adds in the past four years. From positive broadband net additions in 2021, the segment reached a steep decline in broadband net additions until mid-2022. By late 2023, the largest cable providers (Comcast, Charter, and Altice) began to experience declines in broadband customers, although they remain the largest broadband segment in America.

The wireline segment has been characterised by the transition of copper-based broadband connections to fibre-based connections. Until 2023, the transition results in a small positive additional benefit for the wireline segments of AT&T and Verizon, while in 2024, it showed a decline, primarily driven by AT&T.

Underlying drivers: 5G Network Capabilities and Attractive FWA offers

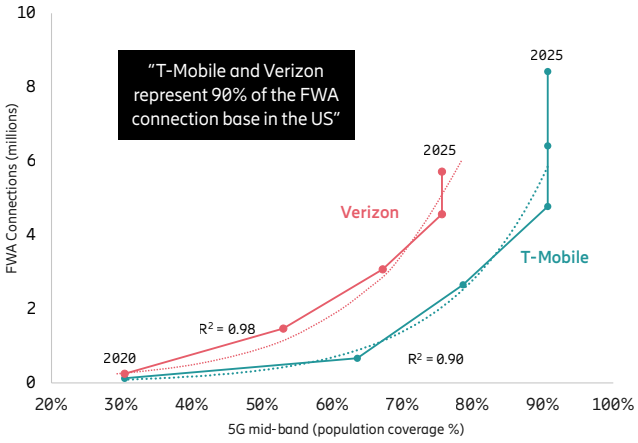
The FWA connection growth in the US coincides with the 5G C-band deployments that started after the spectrum award in 2021. Together with spectrum, service providers built network capabilities with high-capacity 5G mid-band coverage, opening up for eligible FWA areas for sale. These network capabilities also enabled CSPs to develop attractive FWA offers based on speed, offering great network performance as well as a buying experience with fast time to market (from order to delivery), leveraging self-install CPEs.

Source: Public information shared in company reports

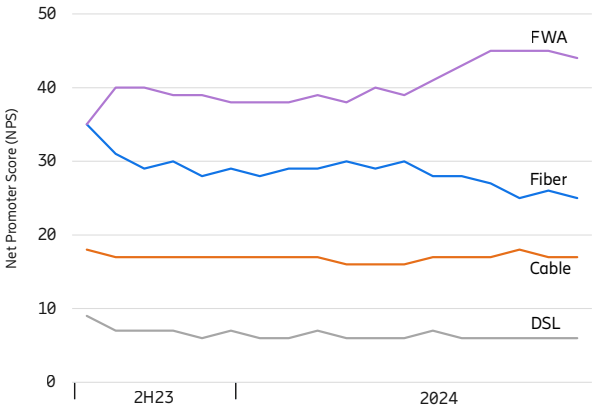


5G mid-band coverage: Step change for network capabilities

5G mid-band coverage and 5G FWA connection growth



Network performance and attractive offering driving superior NPS



5G FWA connection growth is clearly correlated with 5G mid-band coverage. T-Mobile and Verizon have actively communicated the population coverage for 5G mid-band throughout their 5G build out cycle. In addition of the population coverage, both companies also increase the bandwidth of spectrum deployed during this period. It is possible to see for both operators that the 5G FWA connection growth follows closely the 5G mid-band coverage, as it opened more eligible areas for FWA but also enabled higher speeds making FWA a competitive offering.

Americas love 5G FWA

Since the launch of 5G FWA, there have been multiple measurements for customer satisfaction and Net Promoter Score. It is clear that consumers loved the new service, driven by multiple reasons. Some of that are related to the attractive offerings, including free-trial period, no commitments or hidden fees as well as attractive pricing. In many cases, FWA was the first alternative to consumers in locations with only one high-speed broadband provider. Self-installation and fast delivery also increase the sense of control and deliver on the promise of a smooth service. Combined with that, brand new 5G network enabled fast and reliable speeds on par or better than existing broadband alternatives.

Recon analytics research based on interviews with almost 300 thousand Americans shows that 44% of Americans would choose FWA as their next provider if they would have to make a choice other than their existing provider. There is also an increasing number of customers switching from one FWA provider to another, indicating both a preference for FWA and a strong aversion to the available wired solutions.

Source: Company reports, Recon Analytics.

Read all nine insights on capturing the value of 5G FWA

ericsson.com/fwa-insights

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