

Extracted version



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Fixed Wireless Access handbook

# Insights

2024

Insight 1 of 6

**5G FWA momentum creating  
global economies of scale**

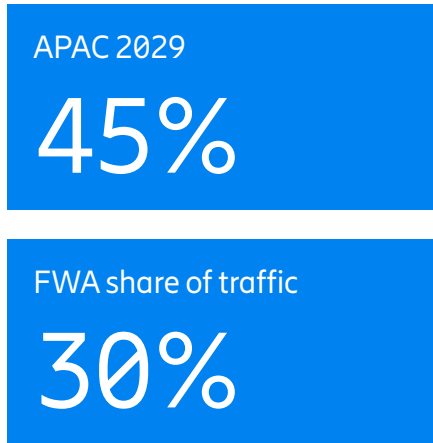
# FWA to reach 330 million connections by 2029

There will be more than 130 million FWA connections by the end of 2023. The number of FWA connections worldwide is forecasted to grow and reach 330 million by 2029, generating about USD 75 billion in service provider revenues. The 330 million connections represent 18 percent of all fixed broadband connections.

5G FWA connections are expected to grow to around 280 million by 2029, representing almost 85 percent of FWA connections. The forecast considers the high ambitions of 5G FWA in emerging markets, increasing the number of connections and the share of 5G FWA connections. Higher volumes of 5G FWA in large high-growth countries such as India can drive economies of scale for the overall 5G FWA ecosystem, resulting in affordable CPE that will positively impact low-income markets.

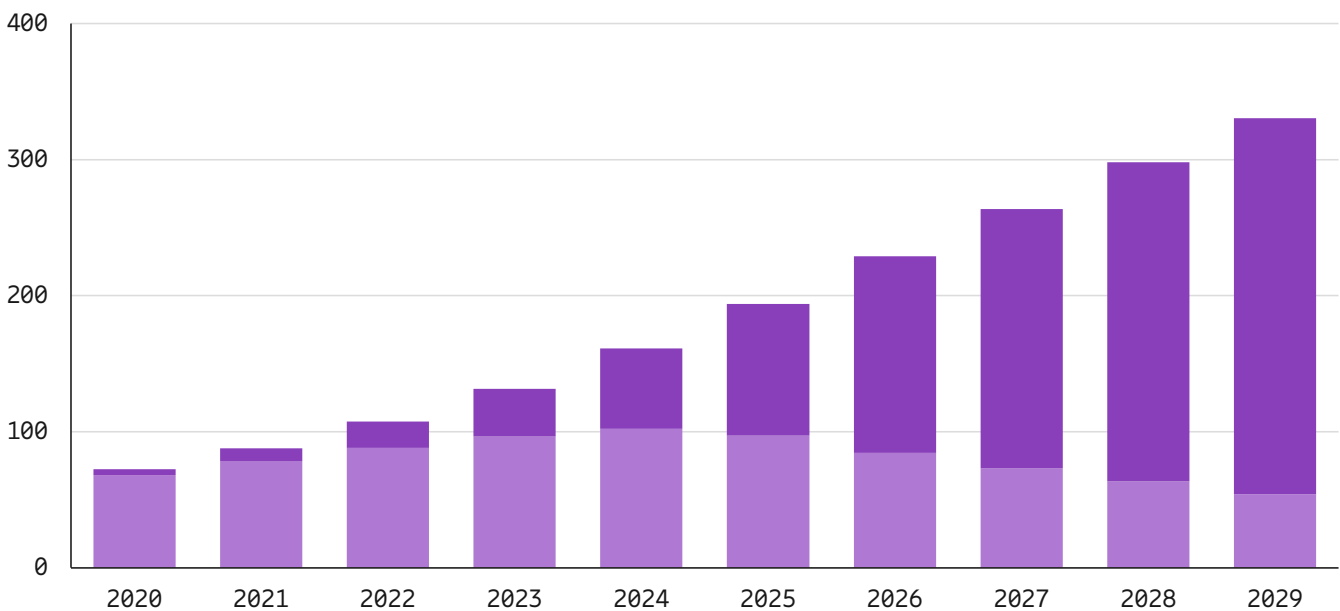
## FWA data traffic is projected to grow by more than five times

By the end of 2023, the FWA data traffic represented 19 percent of the global mobile network data traffic. The FWA data traffic is projected to grow more than five times to reach almost 159 EB in 2029, estimated to be close to 30 percent of total mobile network data traffic. The number of FWA connections in APAC is expected to triple, increasing its share of global FWA connections to above 45 percent by 2029.



## FWA connections (millions)

■ 5G FWA connections ■ 4G and other technology FWA connections



# 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.

In North America, Verizon and T-Mobile are reporting strong 5G FWA uptake, which has accelerated connection growth, adding around 900 thousand connections per quarter.

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

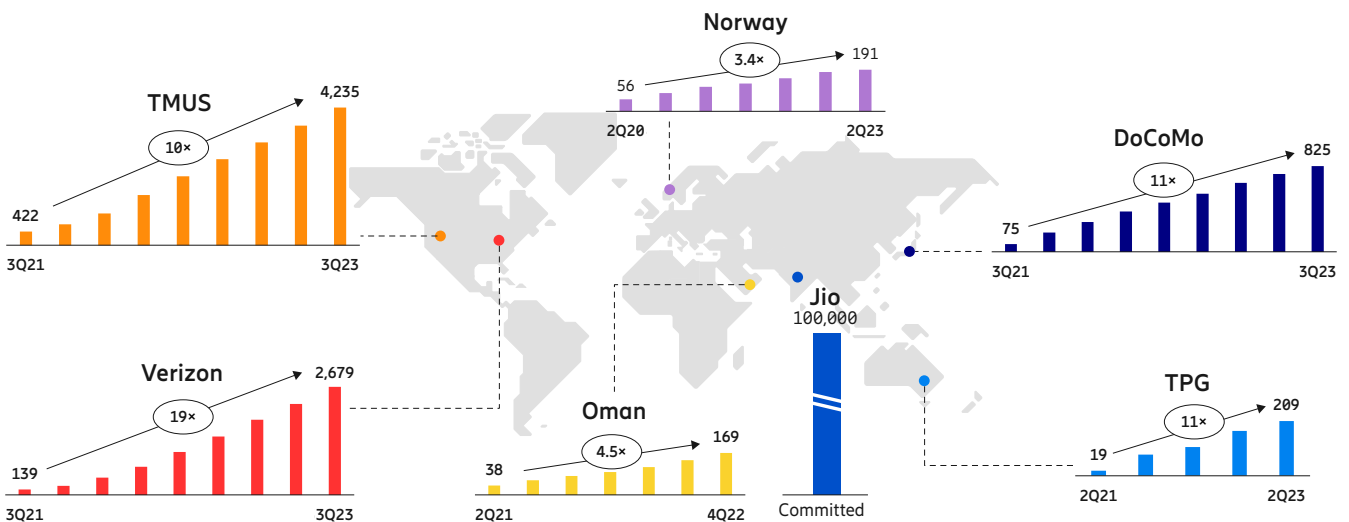
The Middle East has a strong 5G FWA momentum, particularly in Oman (5G FWA

connections reported by TRA, Oman’s national telecom regulator), Saudi Arabia, and the UAE. In some of these markets, service providers 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 strong 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 surpassing

200 thousand connections during 2023. There have been several 5G FWA launches in emerging markets – across Latin America, the Middle East and Africa, and Asia-Pacific – where many unconnected and underserved homes could benefit from fast, reliable FWA-delivered broadband. Among emerging markets with 5G FWA launches, India’s Reliance Jio recently committed to connecting 100 million homes and SMEs with 5G FWA. This latest announcement is important for India and the overall 5G FWA market as it brings scale to the ecosystem.

## Reported connections 000s

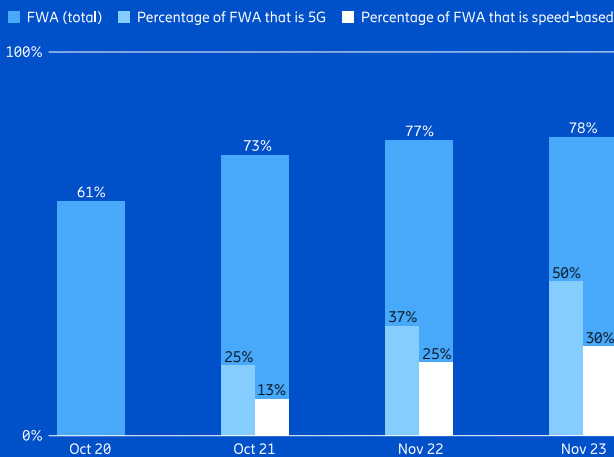


# Global 5G FWA adoption reaches 50 percent

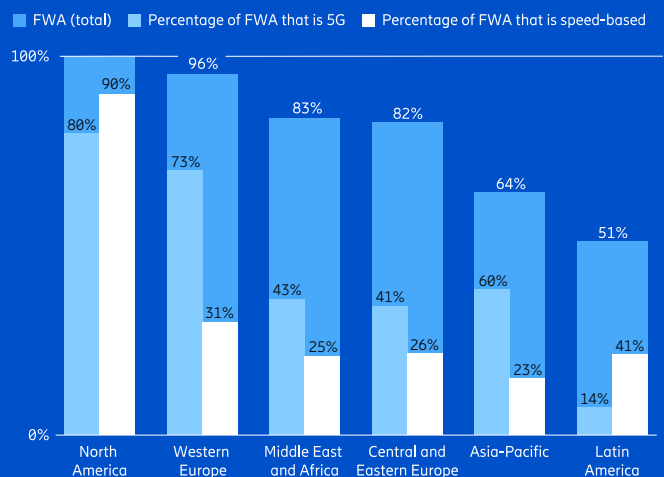
As seen in the past three years, the number of service providers offering FWA is growing. In 2023, the global FWA service provider adoption is almost 80 percent. The growth trend is also seen for both 5G FWA and when it comes to speed-based tariff plans. There are 121 service providers offering services over 5G, representing 50 percent of FWA service providers. About 30 percent of the FWA service providers also offer speed-based tariff plans. The remaining 70 percent are still best-effort with volume-based tariff plans.

Regarding regional variations, there is a difference in the proportion of service providers adopting FWA. In North America, Western Europe, Central and Eastern Europe, and Middle East and Africa regions, over 80 percent of service providers are offering FWA. In contrast, in other regions, such as Asia-Pacific and Latin America, the FWA service provider adoption is 64 percent and 51 percent, respectively. North America stands out with 100 percent FWA service provider adoption, 80 percent of services are over 5G, and 90 percent in terms of FWA speed-based offerings. Furthermore, Western Europe has the second highest FWA adoption at 96 percent, with 73 percent providing 5G FWA offerings and about 31 percent offering speed-based tier plans. As mentioned, Latin America has just over 50 percent of service providers offering FWA and quite a low percentage offering services over 5G. However, in terms of speed-based, Latin America has the second highest adoption, with over 40 percent offering speed-based tariff plans.

## Global FWA service provider adoption 2020–2023

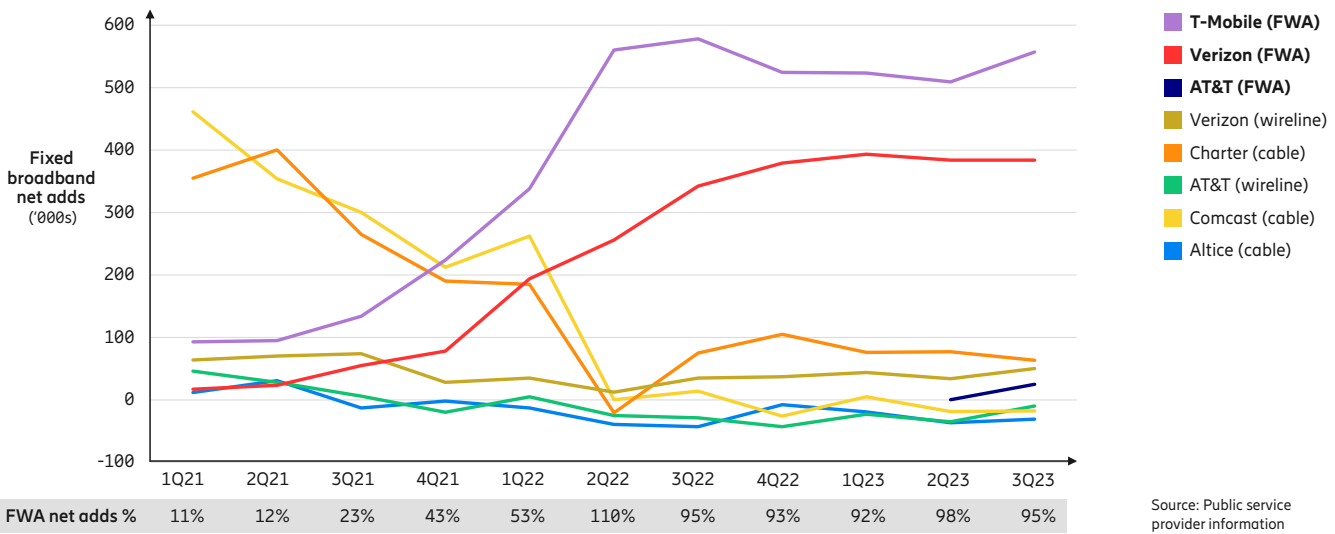


## Regional FWA service provider adoption 2023





# FWA capturing +90% of net adds in the US



Source: Public service provider information

FWA is capturing more than 90 percent of the fixed broadband net adds in the US since 2Q2022.

As of November 2023, AT&T, T-Mobile, and Verizon, the three largest mobile service providers in the US, are together capturing 95% of the broadband net adds. AT&T launched their FWA services in August

2023 and reported 25k FWA connections in Q3 2023. T-Mobile and Verizon have shown a growth trend in broadband net adds per quarter since Q1 2021.

Verizon and T-Mobile FWA net adds supporting 2025 FWA connection targets. T-Mobile has announced goals to reach 7-8 million FWA connections by 2025. As

of 3Q23, T-Mobile had 4.2 million FWA connections, with a 2.1 million connection growth compared to 3Q22. Verizon has a 2025 goal of 4-5 million FWA connections. As of 3Q23 it is at 2.7 million connections, of which more than 1 million for business internet connections, with a 1.6 million growth compared to 3Q22.

# 5G FWA adoption accelerating in emerging markets

## 51 commercial 5G FWA in emerging markets



In November 2022, there were 88 service providers with 5G FWA offerings, and 33 (38 percent) were in emerging markets. As of November 2023, the numbers have increased to 121 service providers worldwide with 5G FWA offerings, of which 51 (42 percent) are in emerging markets (as illustrated on the world map). A majority of these service providers are found in the Middle East, with 16 service providers offering 5G FWA services. Sub-Saharan Africa is the region coming in second place with 12 service providers offering 5G FWA services.

5G FWA adoption is accelerating in emerging markets, where, in the past 12 months, 55 percent of the new 5G FWA

launches came from emerging markets. This is an increase compared to the previous year, with 40 percent of 5G FWA launches coming from emerging markets.

During the last year, 18 service providers in emerging markets have launched FWA services over 5G. These launches have been made in highly populated countries such as India, Brazil, and Nigeria. The strongest growth is seen in Sub-Saharan Africa, with eight new 5G FWA launches in the past 12 months. In India, two major service providers have launched 5G FWA services and expressed very high ambitions of serving homes and businesses with 5G FWA services in the coming years.

**55%**  
of all new 5G FWA launches during the last year came from emerging markets

Learn more in six actionable  
insights on capturing the  
value of 5G FWA

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