

Insight Highlights

Fixed broadband and 5G FWA: state of play and outlook, Q2 2024

DATE

July 2024

GSMA

The GSMA is a global organisation unifying the mobile ecosystem to discover, develop and deliver innovation foundational to positive business environments and societal change. Our vision is to unlock the full power of connectivity so that people, industry, and society thrive. Representing mobile operators and organisations across the mobile ecosystem and adjacent industries, the GSMA delivers for its members across three broad pillars: Connectivity for Good, Industry Services and Solutions, and Outreach. This activity includes advancing policy, tackling today's biggest societal challenges, underpinning the technology and interoperability that make mobile work, and providing the world's largest platform to convene the mobile ecosystem at the MWC and M360 series of events.

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GSMA Intelligence

GSMA Intelligence is the definitive source of global mobile operator data, analysis and forecasts, and publisher of authoritative industry reports and research. Our data covers every operator group, network and MVNO in every country worldwide – from Afghanistan to Zimbabwe. It is the most accurate and complete set of industry metrics available, comprising tens of millions of individual data points, updated daily.

GSMA Intelligence is relied on by leading operators, vendors, regulators, financial institutions and third-party industry players, to support strategic decision-making and long-term investment planning. The data is used as an industry reference point and is frequently cited by the media and by the industry itself.

Our team of analysts and experts produce regular thought-leading research reports across a range of industry topics.

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5G FWA commercialisation: state of play

5G FWA launches

As of Q1 2024:

- **131** fixed broadband service providers had launched commercial 5G-based fixed wireless services across 64 markets.
- **22** fixed broadband service providers had announced plans to launch 5G-based fixed wireless services.

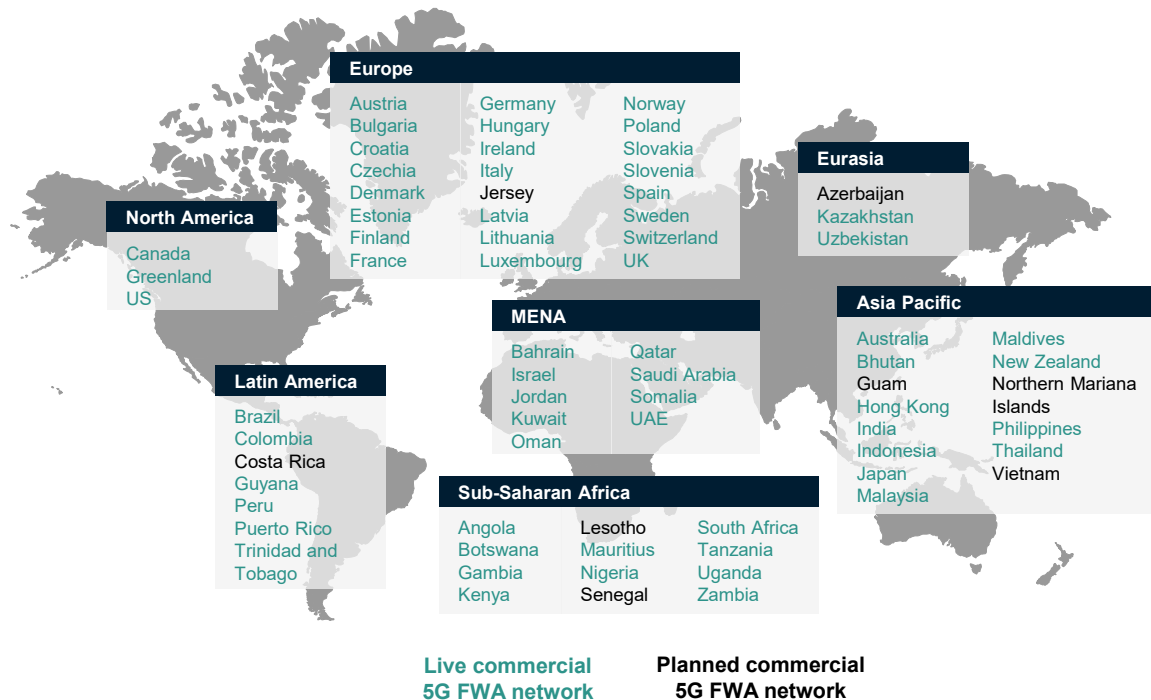
Total for live and planned

153

Fixed broadband service providers

72

Markets



Note: The map considers all countries beyond the 36 markets covered in the [GSMA Intelligence forecast](#). Status defined as live where at least one operator has commercially deployed a 5G FWA network

Source: GSMA Intelligence

Fixed broadband market by technology

Technology as a share of total fixed broadband connections in 2030:
top five countries

FTTP/B

1. China
2. Russia
3. Spain
4. South Korea
5. Indonesia

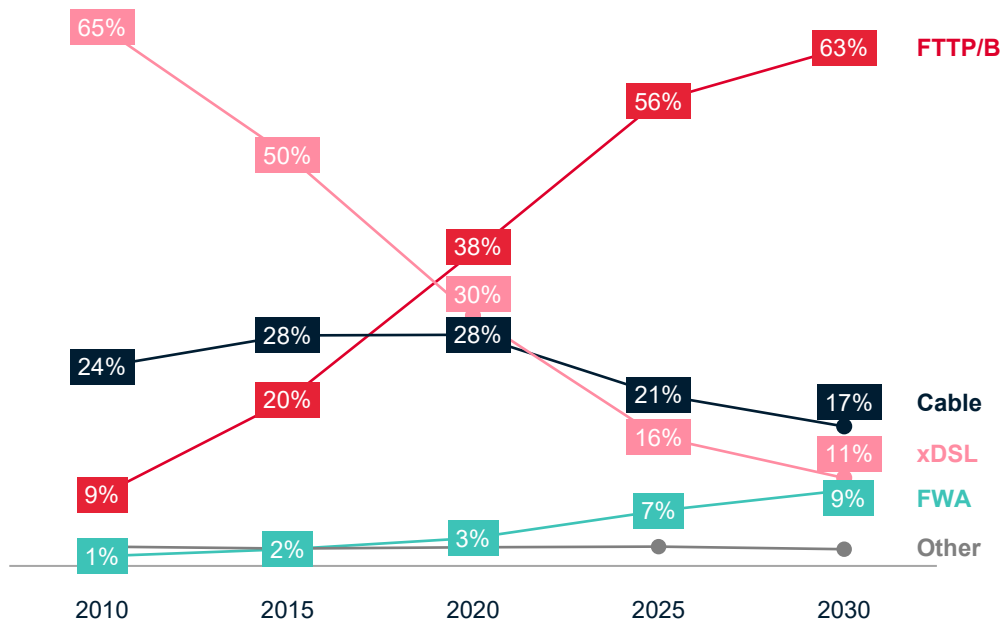
Cable

1. Belgium
2. US
3. Argentina
4. Colombia
5. Canada

FWA

1. Austria
2. Italy
3. Australia
4. Czechia
5. Poland

Share of total fixed broadband connections by technology*

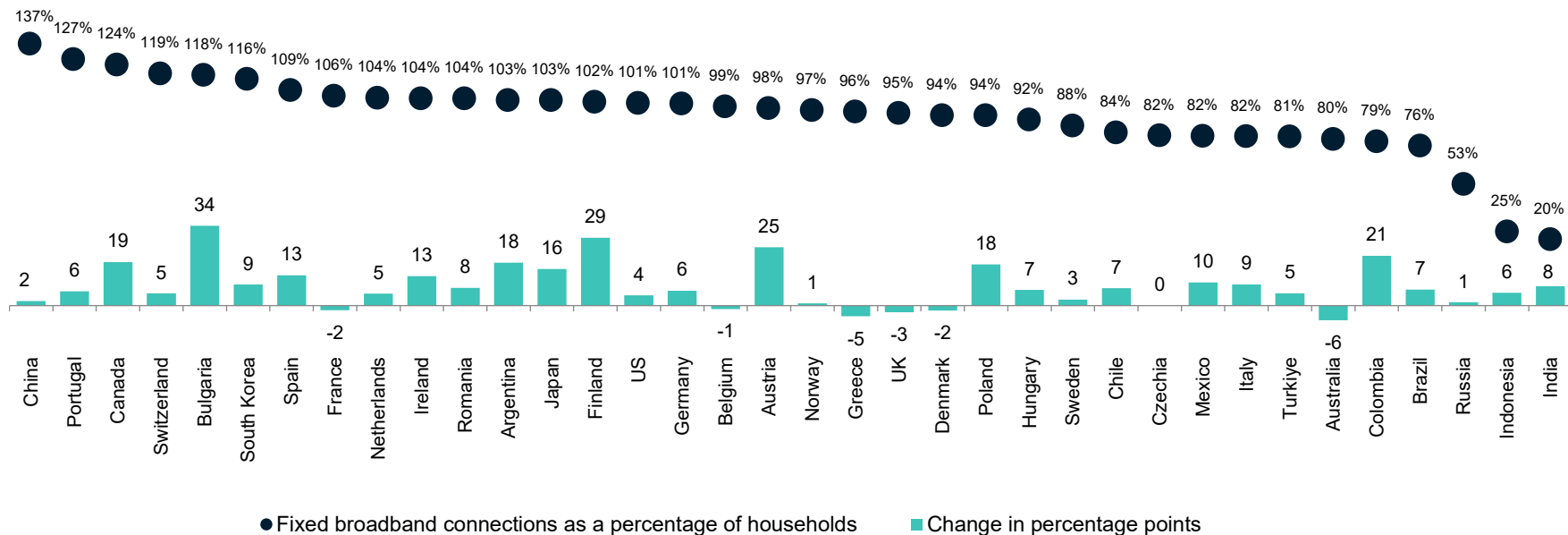


* Simple average of the 36 markets
Source: GSMA Intelligence

Fixed broadband outlook: penetration through to 2030

Nearly a third of the 36 markets studied will see double-digit growth in household penetration through to 2030.

Fixed broadband connections as a percentage of households (end of 2030) and percentage-point change (2023–2030)

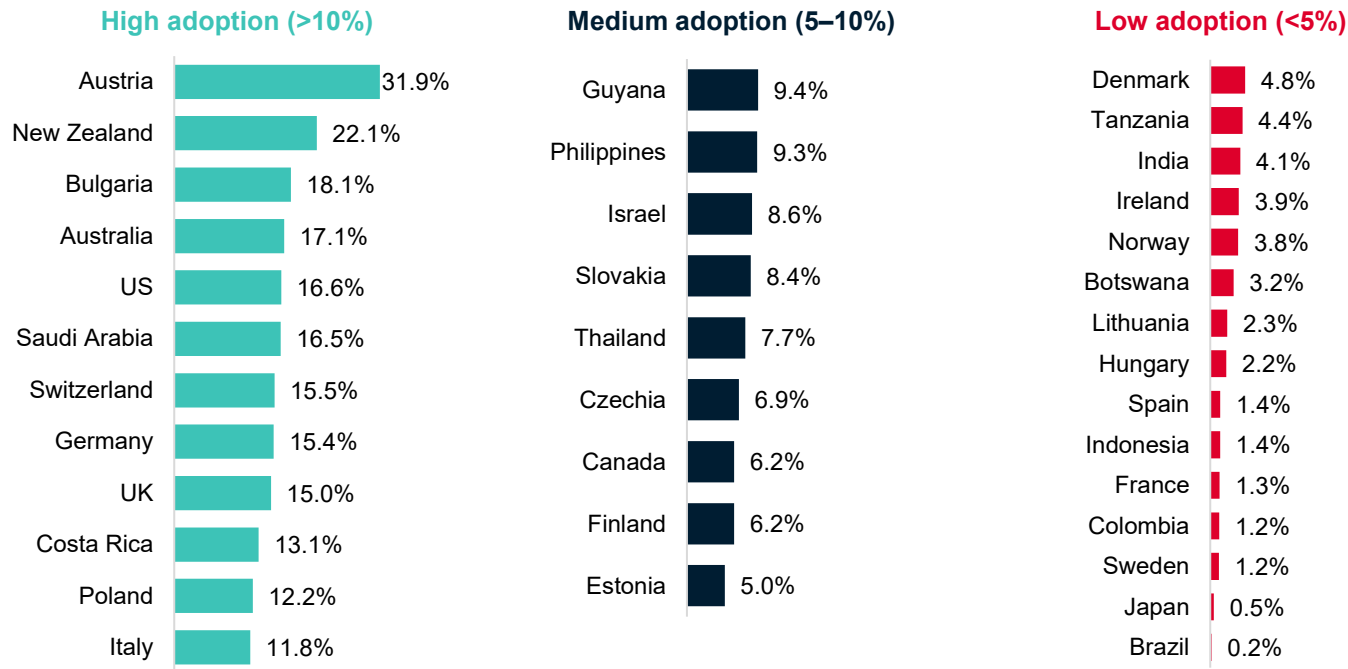


Note: Fixed broadband connections include residential and business.

Source: GSMA Intelligence

Outlook for 5G FWA penetration: a view to 2030

5G FWA connections as a percentage of households, end of 2030



Note: Only includes countries where GSMA Intelligence has data for both 5G FWA connections and household forecasts.

Source: GSMA Intelligence

Access GSMA Intelligence content on fixed broadband and 5G FWA

The GSMA Intelligence Fixed, TV and Convergence module provides exclusive data and research on the evolution of fixed & pay-TV markets and service convergence. It covers areas such as fixed networks and services, 5G FWA, pay TV (traditional and OTT), consumer behaviour for video services, and service bundling strategies. GSMA Intelligence regularly reviews the strategies and plans of players including operators and companies from the wider fixed and pay-TV ecosystems.

Data

GSMA Intelligence provides a comprehensive, interactive and user-friendly data platform. It enables custom searches across a range of fixed broadband and 5G FWA metrics (at the global, regional, country and operator levels), including:

- fixed broadband networks by access technology (e.g. FTTP/B, cable, xDSL, FWA and other)
- fixed broadband adoption: connections, connections growth rate, household penetration, operator market share and market share by type of technology
- 5G FWA: completed and planned launches, and customer adoption
- product/service tracker: fixed broadband services, bundling and more
- financial: ARPU, revenues, EBITDA, EBITDA margin and capex.

Research

Each year, GSMA Intelligence releases more than 40 publications for the module, including reports, dashboards and case studies, helping customers make better business decisions. Access to GSMA Intelligence analysts is also an important part of the proposition. Reports on fixed broadband and 5G FWA include the following:

- [The future of fixed broadband: trends and drivers disrupting the market](#)
- [5G FWA: state of the market, new trends and commercial practices shaping growth](#)
- [Fixed broadband markets: is there a link between levels of market concentration and connections growth?](#)
- [The rise of copper-based fixed network switch-offs: key factors to consider](#)
- [5G FWA resonates in the US but is its early success replicable elsewhere?](#)
- [FTTR: taking fixed broadband connectivity to the next level](#)
- [Fixed and Pay-TV Markets, Q1 2024: developments and outlook](#)

How to gain access

The GSMA Intelligence Fixed, TV and Convergence module is one of the five modules available to customers. If you already subscribe to it, you can access a range of data and reports on fixed broadband and 5G FWA. If you don't have a subscription, or if you cannot access some of the content, please contact our account managers to learn more.

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