

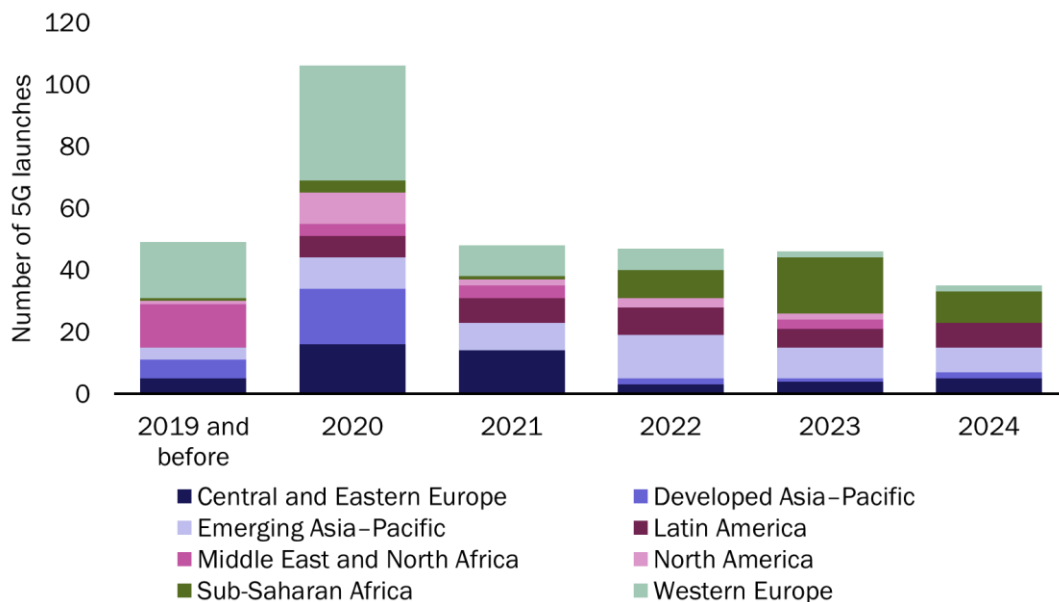
# Operators in emerging regions continued to deploy 5G NSA in 2024, while 5G SA launches slowed worldwide

February 2025

Stephen Burton

The 2H 2024 edition of Analysys Mason’s *5G deployment tracker* shows that 35 new 5G networks were launched in 25 countries in 2024 (Figure 1).

**Figure 1: 5G network launches, by geographical region, worldwide**



Source: Analysys Mason

Sub-Saharan Africa (SSA) continued to lead in 2024 in terms of the number of 5G networks launched; ten 5G networks were launched in seven countries in the region. The number of new 5G launches in Latin America (LATAM) increased from six in 2023 to eight in 2024 to match the previous peak seen in 2022. Operators in emerging Asia-Pacific (EMAP) also recorded eight new 5G launches across six countries. Five new 5G networks were launched in Central and Eastern Europe (CEE) in 2024, while two new networks were launched in both developed Asia-Pacific (DVAP) and Western Europe (WE). There were no new 5G launches in either the Middle East and North Africa (MENA) or North America (NA) in 2024.

Our *5G deployment tracker* includes 381 entries from January 2018 to December 2024. It lists 331 confirmed commercial launches of 5G non-standalone (NSA) networks, 63 confirmed commercial launches of 5G standalone (SA) networks and an additional 50 networks that are planned or in deployment, worldwide.<sup>1</sup>

<sup>1</sup> We include 5G SA networks that have been launched for commercial fixed-wireless access (FWA) services.

## Operators in emerging regions such as EMAP, LATAM and SSA continue to deploy 5G non-standalone networks

Operators in the emerging regions of EMAP, LATAM and SSA continued to invest in 5G NSA networks in 2024. Indeed, these operators accounted for 74% of all 5G NSA launches in 2024. Operators in SSA have launched the most 5G networks since the beginning of 2022; they have accounted for 29% of all launches worldwide in the past 3 years. SSA now has a total of 43 active 5G networks in 23 different countries.

5G NSA networks were launched for the first time in several countries in SSA in 2024.

- **Congo.** MTN Congo launched Congo's first 5G network in October 2024. MTN has already launched 5G networks in Nigeria, South Africa, Uganda and Zambia.
- **Ghana.** Ghana's Next-Gen InfraCo launched its national 5G wholesale network in November 2024, with initial coverage in Accra, Kumasi and Takoradi. However, operators have yet to lease capacity from the 5G infrastructure as of January 2025.
- **Lesotho.** Econet Telecom launched Lesotho's first 5G network in March 2024, with initial coverage in Maseru's central business district.
- **Somalia.** Somtel International and Telesom launched 5G networks in January 2024 and Hormudd Telecom launched a 5G network in March 2024.

However, operators in EMAP led in terms of the number of 5G NSA launches in 2H 2024, with six new launches in four different countries. The total number of operational 5G networks in EMAP has more than doubled since 2021; there are now 55 active 5G networks in the region.

The following 5G NSA networks were launched in EMAP in 2H 2024.

- **Georgia.** MagtiCom became the third operator in Georgia to launch 5G services, following Cellfie Mobile and SilkNet in December 2023. MagtiCom offers coverage in areas including Batumi, Kutaisi and Tbilisi.
- **Samoa.** Digicel became the first operator to launch 5G in Samoa in July 2024; services are currently available in Apia Central Business District. Vodafone Samoa launched Samoa's second 5G network in September 2024.
- **Tonga.** Digicel was also the first operator to launch 5G in Tonga in November 2024, with initial coverage in Kolomotu'a, Fanga, Pili, Kologo'ou and Ma'ufanga. Tonga Communications became the second operator to launch 5G in December 2024.
- **Vietnam.** Viettel became the first operator to launch 5G in Vietnam in October 2024. The operator has reported achieving 100% coverage of the capitals of all 63 provinces.

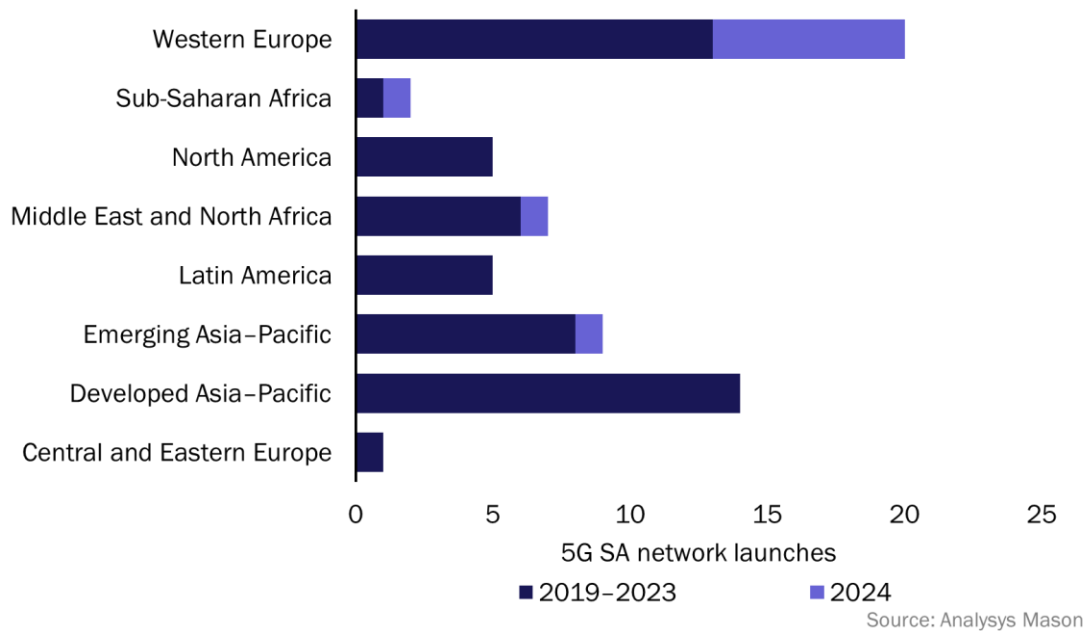
## The number of 5G standalone networks increased slowly in 2024, mostly due to roll-outs in Western Europe

The number of new 5G SA networks launched fell in 2024; 10 5G SA networks were launched worldwide, compared to 14 in 2023 and 18 in 2022. Major operators such as EE (BT), MasOrange and Virgin Media O2 are

continuing to expand their coverage of 5G SA, but others remain hesitant to deploy 5G SA due to concerns about its business case and the potential for a limited return on investment (as was the case for 5G NSA). However, the business case for the cloud-based 5G core is growing because the first iteration of 3GPP's 5G Advanced standards is now frozen, and developments in network AI and automation are continuing to improve the business case for cloud-native networks.

Operators in Western Europe have led in terms of the number of 5G SA networks launched since the beginning of 2023, and there were seven new 5G SA launches in the region in 2024 (Figure 2). These launches were in Finland, France, Germany, Greece and the UK. Western Europe now accounts for 31% of the 63 operational 5G SA networks worldwide.

**Figure 2: 5G SA network launches, worldwide**



Notable 5G SA network launches in 2H 2024 include the following.

- **France.** Free Mobile became the first operator in France to commercially launch 5G SA for mobile customers in September 2024. The operator gave subscribers to the 5G Free Mobile Plan access to 5G SA at no extra cost. Orange also launched 5G SA for FWA customers in September 2024.
- **Germany.** Deutsche Telekom became the third operator in Germany to launch 5G SA services, following Vodafone's launch in 2021 and Telefónica's launch in October 2023. Deutsche Telekom launched 5G SA as part of its '5G+ Gaming' package; it uses network slicing to provide an optimised service for customers.
- **Philippines.** DITO Telecommunity launched a 5G SA FWA service in October 2024. DITO Telecommunity was the second operator to launch 5G SA in the Philippines following Smart's launch in Makati City in October 2021.
- **UK.** BT (EE) launched the UK's third 5G SA network in September 2024, with coverage in 15 major cities including Cardiff, Edinburgh, Glasgow and London. Vodafone was the first operator to launch 5G SA in the UK in June 2023, and Virgin Media O2 launched services in February 2024.