

**U.S. Fixed Wireless  
Deployment  
Forecast, 2017-  
2027: *Riding the  
Waves***

Market Study  
2Q 2018





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# **U.S. Fixed Wireless Deployment Forecast, 2017 - 2027: *Riding the Waves***

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## Market Study

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## Abstract

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Wireless Internet service providers (WISPs) have been providing Fixed Wireless Access (FWA) services to rural households for a long time. These providers use a mix of licensed and unlicensed spectrum bands along with a mix of technologies – everything from WiMax to LTE to proprietary versions of Wi-Fi. Generally speaking, these technologies only provide fixed wireless access with no path to mobility. This is what *iGR* calls the “traditional” FWA market.

New entrants to the traditional fixed wireless market include companies such as AT&T and Verizon. These companies have entered this market with mmWave-based fixed wireless systems that use 5G New Radio (5G NR). Their ultimate goal is to transition these fixed wireless networks to being capable of providing mobile 5G NR services. *iGR* refers to this segment of the market as mmWave-based FWA.

This report, which builds off the methodology *iGR* used in its fixed wireless access costs report, sizes the fixed wireless market, both traditional and mmWave, with both a total addressable market (TAM) and an “actuals” forecast (i.e., the estimated number of actual subscribing households). It also forecasts the potential revenues to be generated by both traditional and mmWave FWA in the U.S. between 2017 and 2027.

Key questions addressed:

- What is the traditional fixed wireless access market?
- What is millimeter wave and how will it be used? Why is millimeter wave important?
- What is mid-band spectrum and how will it be used?
- What is the goal of 5G NR-based mmWave solutions as deployed by some of the new market entrants?
- What are the pros and cons to deploying mmWave? What are the challenges?
- How big is the traditional fixed wireless access market? How many households use that service?
- How big is the mmWave-based fixed wireless access market? How many households will use that service?
- How much revenue is expected to be generated by both traditional and mmWave-based fixed wireless access over 10 years?

Who should read this report?

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- Mobile operators
- Microwave spectrum holders and operators
- Fixed wireless solution vendors
- Financial analysts and investors.

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