

Latin America led 5G launches in 1H 2025, while 5G SA deployments showed progress in Europe

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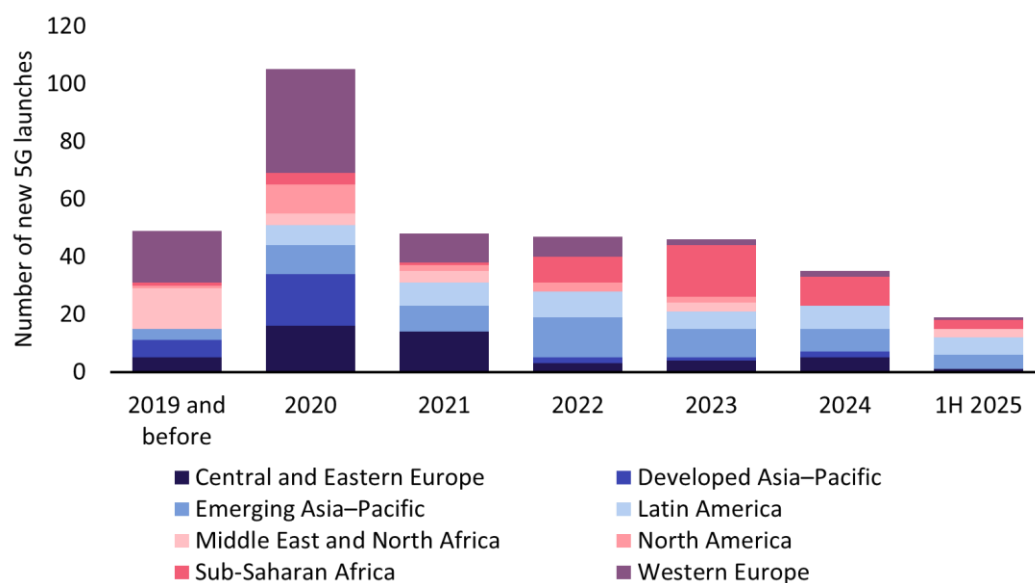
Stephen Burton

The latest edition of Analysys Mason's *5G deployment tracker* shows that 19 new 5G networks were launched in 13 different countries during 1H 2025 (Figure 1).¹

Operators in Latin America (LATAM) launched the most new 5G networks in 1H 2025, with a total of six networks launched in four different countries. Emerging Asia-Pacific (EMAP) recorded the second-most 5G network launches in 1H 2025, with four launches. There were three new 5G launches in both Sub-Saharan Africa (SSA) and the Middle East and North Africa (MENA). Western Europe (WE) and Central and Eastern Europe (CEE) each recorded one 5G launch in 1H 2025, with no new launches recorded in North America (NA) or developed Asia-Pacific (DVAP).

Our *5G deployment tracker* has 396 entries from January 2018 to December 2024. It lists 349 confirmed commercial launches of non-standalone (NSA) 5G networks, 70 confirmed commercial launches of 5G standalone (SA) networks and an additional 47 networks that are planned or in deployment, worldwide.² The tracker also includes details on nine launches of 5G Advanced networks.

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



Source: Analysys Mason

¹ The majority of new 5G launches are non-standalone (NSA), although some operators transitioned directly to 5G Standalone (SA) from 4G.

² We include 5G SA networks that have been launched for commercial fixed-wireless access (FWA) services.

Emerging regions accounted for 74% of all new 5G launches in 1H 2025, with launch figures led by operators in LATAM

Operators in LATAM launched the most new 5G networks of any region in 1H 2025, accounting for 32% of all launches across this period. There have now been 44 launches of 5G networks in LATAM since 2019, including 14 launched since the beginning of 2024.³

Launches in LATAM in 1H 2025 are as follows.

- **Argentina:** Claro launched 5G services in 2025, with initial coverage in areas including Buenos Aires, Cordoba and Rosario. Claro became the third operator to launch 5G services in Argentina, following Telecom Personal's 5G launch in February 2021 (and subsequent launch of 5G SA in December 2023), and Telefónica Argentina's (Movistar) launch in 2024.
- **Guadeloupe:** Orange Caraibe and SFR Caraibe both launched the country's first 5G networks in February 2025.
- **Martinique:** Orange Caraibe and SFR Caraibe also launched Martinique's first 5G networks in February 2025. Both operators launched services in multiple locations including Fort-de-France, Le Lamentin and Schoelcher.
- **Peru:** Bitel (Viettel) launched a 5G network in Peru in January 2025. Initial coverage was available in selected areas of Lima. Bitel became the fourth operator to launch 5G services in Peru, following launches from Claro and Entel in 2021 and Telefónica del Perú (Movistar) in 2022.

Operators in other emerging regions also continued to launch 5G networks in 1H 2025. In 1H 2025, LATAM, EMAP and SSA accounted for 74% of all new 5G launches worldwide. Operators in EMAP launched a total of five new 5G networks in 1H 2025. In total, there have been 60 5G launches in EMAP, the second-highest of any region behind WE (76).

5G networks launched in EMAP in 1H 2025 are as follows.

- **India:** Vodafone Idea (Vi) became the third operator to launch 5G services in India in March 2025, with coverage in Chandigarh, Delhi, Mumbai and Patna as of May 2025. Reliance Jio and Bharti Airtel launched 5G networks in 2022, with the former also launching 5G SA in the same year.
- **Mongolia:** Mongolia recorded its first three 5G networks in 1H 2025, as MobiCom (MobiNet), Skytel and Unitel all launched 5G services in May 2025. All operators initially launched services in parts of central Ulaanbaatar.
- **Vietnam:** MobiFone became the second operator to launch 5G services in Vietnam in March 2025, following Viettel's launch in October 2024. MobiFone launched both 5G NSA and 5G SA services simultaneously.

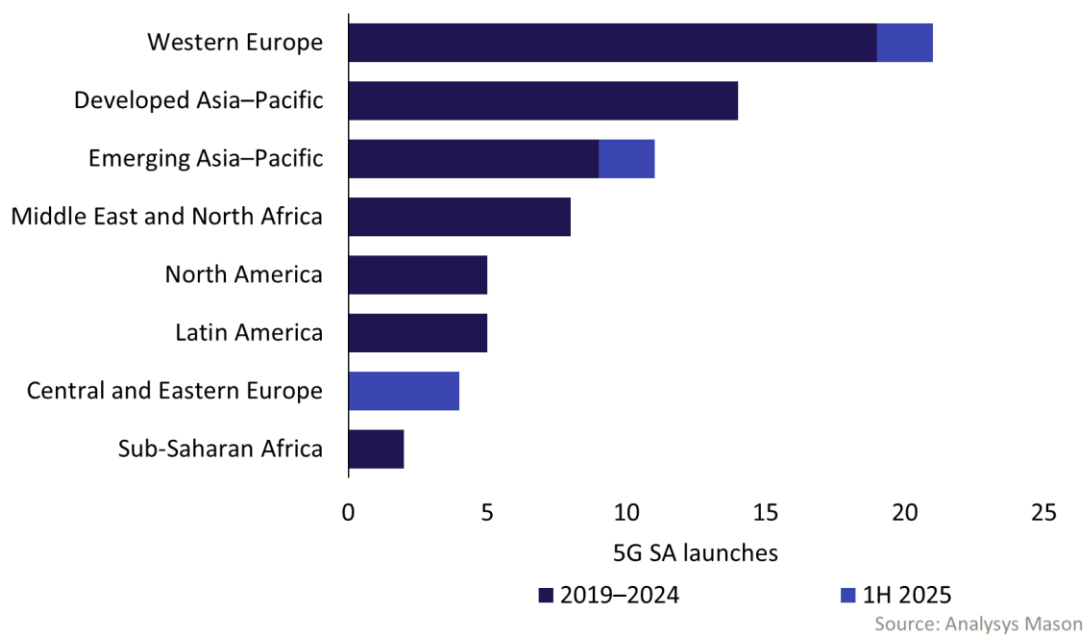
³ Emerging regions include Latin America, emerging Asia-Pacific and Sub-Saharan Africa.

Operators in CEE led a rebound in 5G SA launches in 1H 2025 as a total of eight 5G SA networks became operational worldwide

The number of 5G SA launches rebounded in 1H 2025, with a total of eight new 5G SA networks launched compared to only five in 1H 2024 and ten throughout the entirety of 2024. Despite the slow roll-out of 5G SA in many regions over recent years, 2025 is demonstrating positive signs for increased investment. Examples of successful operator migrations, and growing interest in network AI and automation, are continuing to build confidence in the business case for the cloud-native 5G core. Progress in 5G Advanced launches, as well as renewed interest in network slicing, are also adding to operators' reasons to begin 5G SA migrations. By the end of 1H 2025, a total of nine operators had launched **5G Advanced** networks across eight different countries.

Operators in Europe continued to lead 5G SA launch figures in 1H 2025, with a total of six launches across CEE and WE. Operators in CEE launched the region's first 5G SA networks in 1H 2025, with a total of four launches in Estonia, Hungary, Romania and Slovakia. In WE, two new 5G SA networks were launched in France and Sweden. WE continues to have the most active 5G SA networks of any region, and now accounts for 30% of all 5G SA launches worldwide (Figure 2).

Figure 2: 5G SA network launches, worldwide



Notable 5G SA launches in 1H 2025 include the following.

- **Malaysia:** Digital Nasional Berhad (DNB) became the first operator in Malaysia to launch 5G SA in February 2025. The operator simultaneously launched its 5G Advanced network
- **France:** Orange soft-launched 5G SA for FWA customers in September 2024, before the full commercial launch of the network in March 2025. Orange became the second operator to commercially launch 5G SA in France following Free Mobile's launch in September 2024.

- **Estonia:** Elisa became the first operator to launch 5G SA in CEE following its launch in Estonia in February 2025. The operator claimed coverage of its 5G SA was available across all of its 5G sites upon launch.
- **Hungary:** Telenor Hungary (Yettel) launched commercial 5G SA services in March 2025. 5G SA was initially launched for customers using its FWA for home and office connections in November 2024, but commercial launch for consumers was announced in March 2025.

This article outlines global trends in the 5G launch market and is the latest in a series of articles published every 6 months aimed at recording and understanding the developments in the 5G market worldwide. These articles are part of Analysys Mason's *Wireless Technologies* programme, which provides data and strategic analysis on wireless network technologies, economics and migration options that are enabling operators to reduce costs and serve new use cases. Our programme provides detailed annual market forecasts for RAN and core as well as a broad range of strategic reports focused on the implications of emerging trends in 5G architectures. For further information, please get in touch with [Stephen Burton](#) or [James Kirby](#).