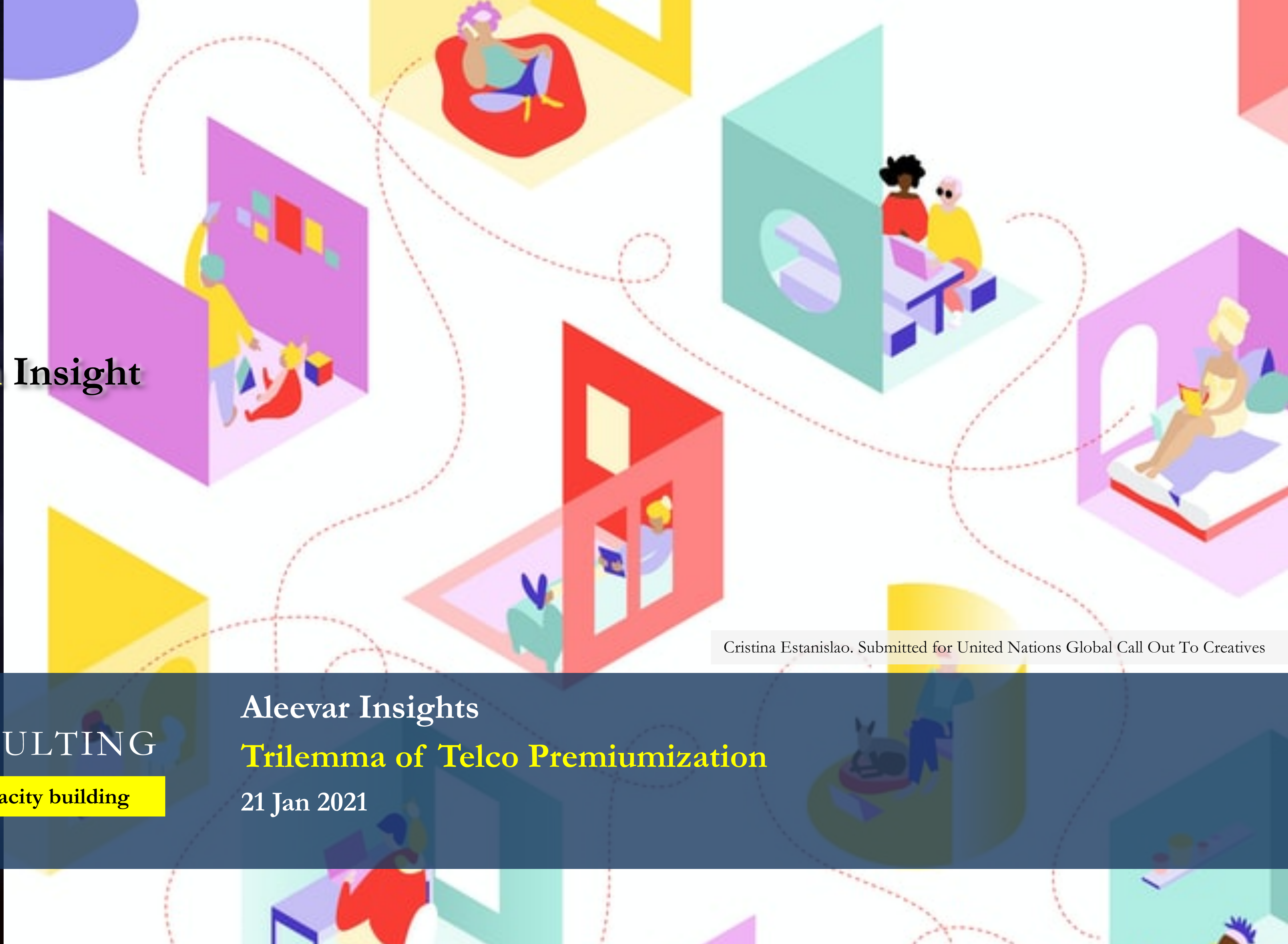
Photo by Adli Wahid on Unsplash



Cristina Estanislao. Submitted for United Nations Global Call Out To Creatives

The Asian Telecom Insight

ALEEVAR CONSULTING

Elevating business, enabling capacity building

Aleevar Insights

Trilemma of Telco Premiumization

21 Jan 2021

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Asian Telecom Insight

Table of content

Glossary

Abbreviation	Terminology	Notes relevant to the study
A&P	Advertising and promotion	
BB	Broadband	
Cable.co.uk	Cable.co.uk	2 reports (i.e. worldwide mobile data pricing and worldwide broadband price) sourced from www.cable.co.uk/mobiles/worldwide-data-pricing/ serving as reference to Aleevar separately collecting price data from telco's official site
CAPEX	Capital Expenditure	
COVID-19	Coronavirus disease	www.who.int/health-topics/coronavirus#tab=tab_1
CSR	Corporate social responsibility	
FBB	Fixed Broadband	Bare minimum lowest entry quota in and naked fixed broadband namely fibre to home are without bundling of phone, voice or SMS or TV or OTT services. However, some telco may offer minimum bundling as lowest entry will be considered
FMCG	Fast-moving consumer goods	
GB	Gigabyte	Refer as 1,000 Megabyte of data based on quota or volume
GDP	Gross domestic product	
IA	Industry Average	Introduced and modeled by Aleevar with reference to Cable.co.uk. Average price calculated from services selected are based bare minimum and naked (i.e. without bundling) broadband from lowest entry onwards (i.e. by quota for MD, by pricing and by speed for FBB and 30 days validity period
ICT	Information and Communication Technology	
ICT PB	Information and Communication Technology Price Basket	ITU Measuring Digital Development ICT Price Trends 2019 monitors the affordability of ICT services by analysing and comparing price data for mobile-voice services, mobile data and fixed broadband. www.itu.int/en/ITU-D/Statistics/Pages/ICTprices/
ITU	International Telecommunication Union	www.itu.int/
KPI	Key Performance Indicator	
MD	Mobile Data	Bare minimum lowest entry quota in and naked mobile broadband are without bundling of voice or SMS or mobile phone or TV or OTT services. However, some telco may offer minimum bundling as lowest entry will be considered
OPEX	Operational Expenditure	
OTT	Over the top	OTT services examples are Youtube, Facebook, Twitter, TikTok, etc.
QOS	Quality of Service	Mobile networks based on measurements of real user experience from opensignal.com
SIM	Subscriber Identity Module	
Telco	Telecommunication Company	A substitute to true experience consumers receive on wireless networks indicator for this study from global report published by www.opensignal.com/market-insights
UN	United Nations	
WFH	Working From Home	

Methodology

Photo by Aaron Burden on Unsplash

Select what are the services

Bare minimum and naked broadband, 30 days period of telco offerings in comparison to international report

2 international reports on global pricing from **ITU** and **Cable.co.uk** for **mobile data (MD)** and **fixed broadband (FBB)** were reviewed.

Services are selected based on **bare minimum and naked broadband** with conditions:

a. Lowest entry (i.e. by quota in GB, by pricing and by speed in Mbps)
b. 30 days period
c. Industry Average pricing
    i. By country (i.e. telco offerings)
    ii. By telco (i.e. packages)
    iii. By industry standard (averaging by top 3 telcos)

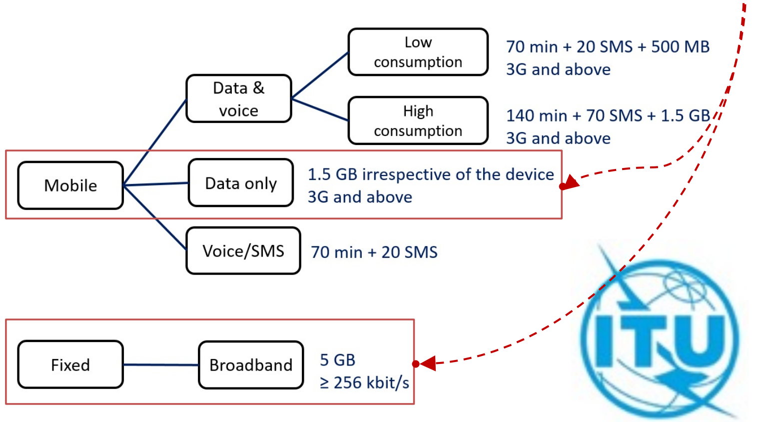
Telco pricing are collected where top 3 (or more) telco pricing in each based on 1.a. and 1.b. for current 2020 price.

This report review in MD related product and services only.

ITU Information and Communication Technology Price Basket (ICT PB)

1. Out of 4 price baskets (PB), 2 PBs were taken as reference for the study
    a. Mobile data (MD) only
    b. Fixed broadband (FBB) only

$\left.\begin{array}{l}\text{a. Mobile data (MD) only}\\ \text{b. Fixed broadband (FBB) only}\end{array}\right\}$ Naked broadband



Cable.co.uk median price at country level

1. All prices were for SIM-only mobile plans
2. Averages are calculated as the MEDIAN of all recorded package prices/ data limits
3. Data sorting: By average cost of a gigabyte of data per month (this is the default), by the cost of the cheapest gigabyte of data in each country per month, and by the most expensive gigabyte of data available
4. The average monthly cost of 1GB of data for each country as a whole is calculated as the MEDIAN of every plan recorded
5. Most expensive package – it is the most expensive means of obtaining 1GB of data, not the cost of the most expensive package itself

Methodology

Aleevar's Industry Average (IA) at telco level

1. Introduced and modeled by Aleevar with reference to Cable.co.uk data pricing model
2. Aleevar collected 6 countries' price data from telco's official site
3. Average price calculated in USD per GB quota for MD
    a. Services selected are bare minimum and naked (i.e. without bundling) broadband
    b. Lowest entry onwards
    c. 30 days validity period

Source:
https://www.itu.int/en/ITU-D/Statistics/Documents/publications/prices2019/ITU_ICTpriceTrends_2019.pdf, https://www.itu.int/net4/ITU-D/ipb/
https://s3-eu-west-1.amazonaws.com/assets.cable.co.uk/global-broadband-pricing/global-broadband-pricing+study-2020-methodology.pdf
https://www.cable.co.uk/broadband/pricing/worldwide-comparison/#highlights

Define what are paths of premiumization

Definition of **Premiumization** and **De-premiumization** in **FMCG** are raising / decreasing price with **perceived value** that customers are **willing to pay**.

Generally, there are 6 paths to premiumization encompasses providing a **safer, more innovative, a better experience, easier to be used, social image** and **more exclusive** product or services.

For telcos, Aleevar suggests to consider the approach from **5 dimensions of Customer Profiling** before **deciding to shift** towards Premiumization and De-premiumization separately.

Methodology

Path to premiumization (Examples)

Path → Why → Brands

- Safer → Trusted / Safe / Popular → Coke, McDonalds
- More innovative → Unique / Novel / Advanced → Apple, Gillette, Dyson
- Social image → Status / Aesthetic / Design → Nike, Tesla

5 dimensions of customer profiling (Macro factors)

1. Demographic
   (i.e. gender, age, ethnicity, occupation, income, etc.)
2. Geographic
   (i.e. location, street, city, state, etc.)
3. Sociographic
   (i.e. community, clubs, social media, etc.
4. Psychographic
   (i.e. personality, attitudes, ethic, interest, values, etc.)
5. Behaviour
   (i.e. shop location, purchase habits, degree of loyalty, usage, frequency, etc.)

Respondents profile

- **Gender**
- **Age**
- **Ethnicity**
- **Household income**
- **Personal income**
- **Occupation**

- **Residence states of the respondents**

- **Parents, children, relative or friends**
- **Cross-shopper, Cross-membership**

- **Need recognition**
- **Purchase factors**
- **Purchase criteria**
- **NPS**

- **Product categories**
- **Visit frequency, average spend (ABS), time spent**
- **Platform usage**
- **Purchase channel**

NPS - Net promoter score , ABS - Average basket size

Source: https://www.greenbook.org/mr/brand-impact/premiumization-the-key-to-brand-growth/

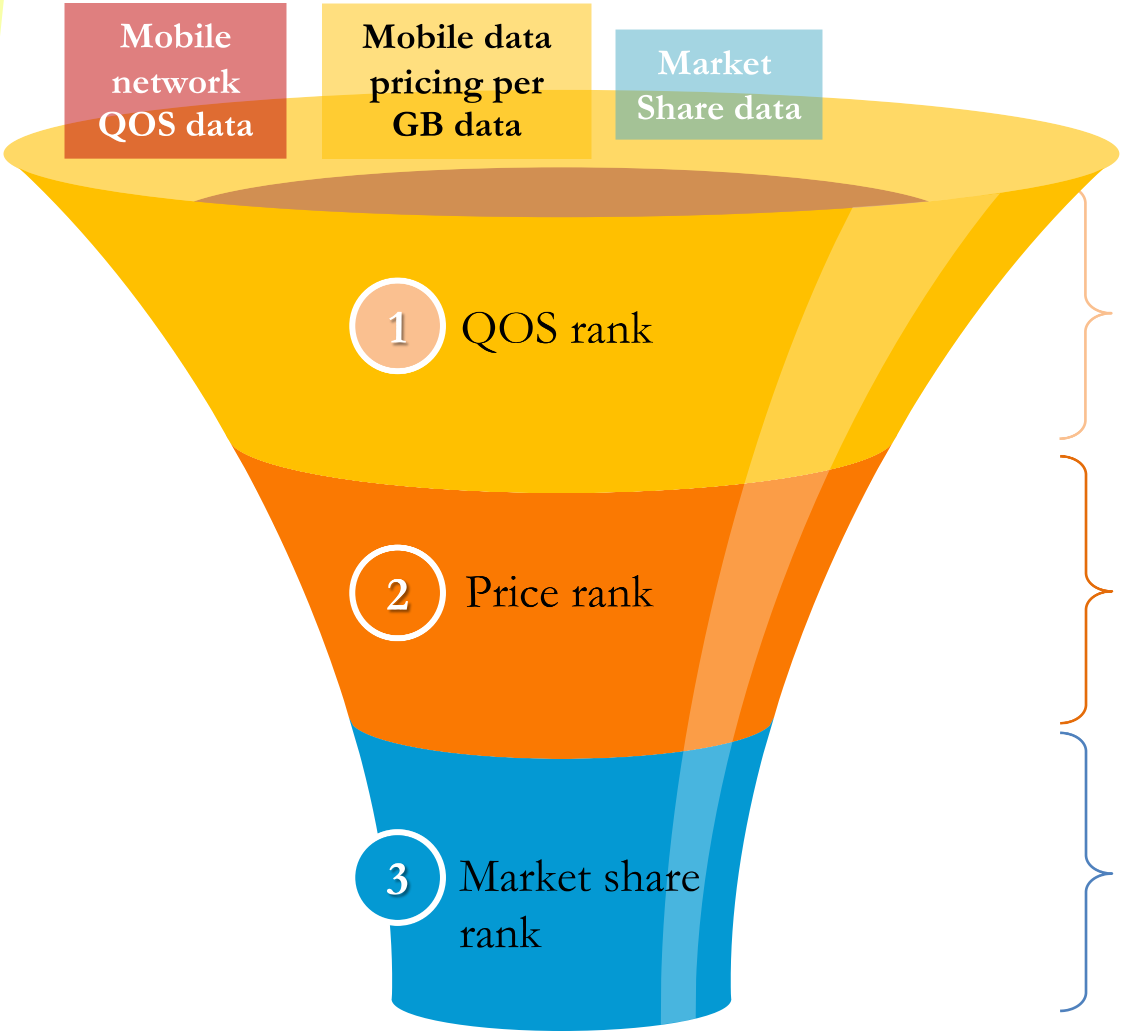
The approach

Trilemma path to Premiumization and De-premiumization exercise

Price is not the only measure as there are **three (3) measures of premiumization,** namely network **QOS**, **Price** and market **Share,** approach to be wholly considered.

1. Review the **rank** in mobile network QOS[1] and review KPI (to maintain or to improve) on network experience;
   a. Video
   b. Games
   c. Download Speed
   d. Upload Speed
   e. 4G Availability
   f. 4G Coverage
2. Review products **pricing**[2] (per GB for MD);
   a. Benchmark overall product pricing against country market Industry Average (IA) by Aleevar (and compared to Cable.co.uk Worldwide Data Pricing)
   b. Refer to premiumization path exercise
3. Consider the possible effects to market **share** (financial);
   a. Increase market share
   b. Decrease market share.

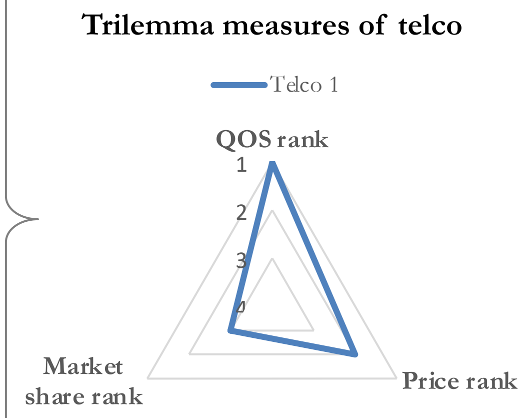
Methodology



Network **QOS rank** is sourced from **opensignal.com**

Price rank is sourced from **official website** and compared with cable.co.uk site

Market share rank is sourced from **multiple sites**, however, limited insight to model effect from premiumization or de-premiumization



MD – Mobile Data

Note 1- Due to limited information from country network authority on mobile QOS with different performance test KPI and different year and parameters, Opensignal.com was selected as comparison for this study

Note 2 - Service selected are based on bare (or naked) broadband lowest entry (i.e. by quota for MD, by pricing and by 30 days validity period collected from official telcos' website

Finding

https://www.freepik.com/

Finding

The region response from Government, consumer and telco

Across the region, **Governments have responded** with setting up of COVID-19 portal, introduce telco regulations to ease burden on utilities expenses, implementing contract tracing app and promote E-learning support to schools and university.

Consumers on utility are represented by the increased data consumption, changes in subscriber counts in MD and FBB, heightened broadband usage and only essential spend for both telecoms (i.e. infrastructure investment and operating expenses) and consumer (i.e. services that matters).

Telco prompt responses were seven (7) telco use cases categories offered in the market namely Free Data, Extra Quota, Discounts, COVID-19 Awareness & Information dissemination, Subscriber Benefits, E-learning and Repackaged Plans.

Three (3) emerging customer segments namely Frontliners & Medical Professionals, WFH Community and Students & Teachers.

Government / Consumer Response

Government

- COVID-19 portal (toll-free hotline, chatbots, inquiry platforms)
- Telco regulations (extended billing deadlines, waived penalties)
- Contact tracing app (big data analytics, digital map, self-assessment platform)
- E-learning support (free data, Internet discount, subsidy)

Consumer on utility

- Increased data consumption (consumers and businesses)
- Changes in subscriber count (mobile, fixed broadband)
- Heightened usage (online services, social media, video)
- Spending on telecoms services/devices (under pressure due to job losses, reduced income)

High Bandwidth Demand Cause & Effect

Network Effect

1. Growth in overall bandwidth demand
2. Network quality and user experience decline
3. Delay in 5G rollout

Economic impact causes

1. Unemployment
2. Reduced income
3. Lower projected GDP
4. Remittances affected

Telecommunication Response

Shift in use cases

- Free data
- Extra quota
- Discounts
- COVID-19 awareness & information
- Subscriber benefits
- E-learning
- Repackaged plans

Emerging customer segment

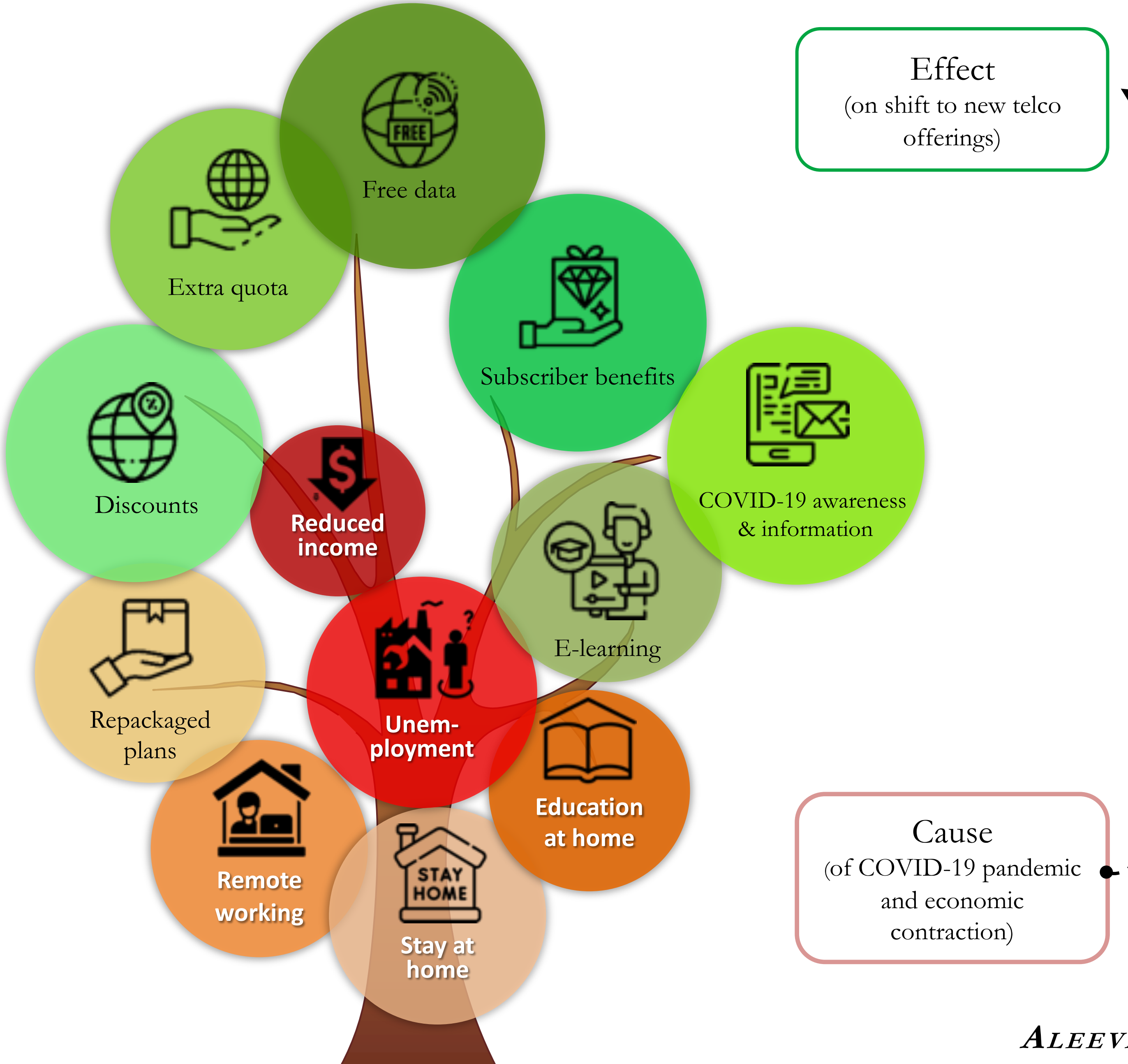
- Frontliners & medical professionals
- WFH community
- Students & teachers

Finding

MD – Mobile Data FBB – Fixed Broadband Source: Aleevar research, https://www.itu.int

Cause and effect of COVID-19 pandemic

The suggested **telco's relationship** with **path considerations** to Premiumization and De-premiumization are closely knitted with **Cause (of COVID-19 pandemic)** and **Effect (on shift to new offerings).**



Finding

Asian telco use cases response COVID-19 pandemic

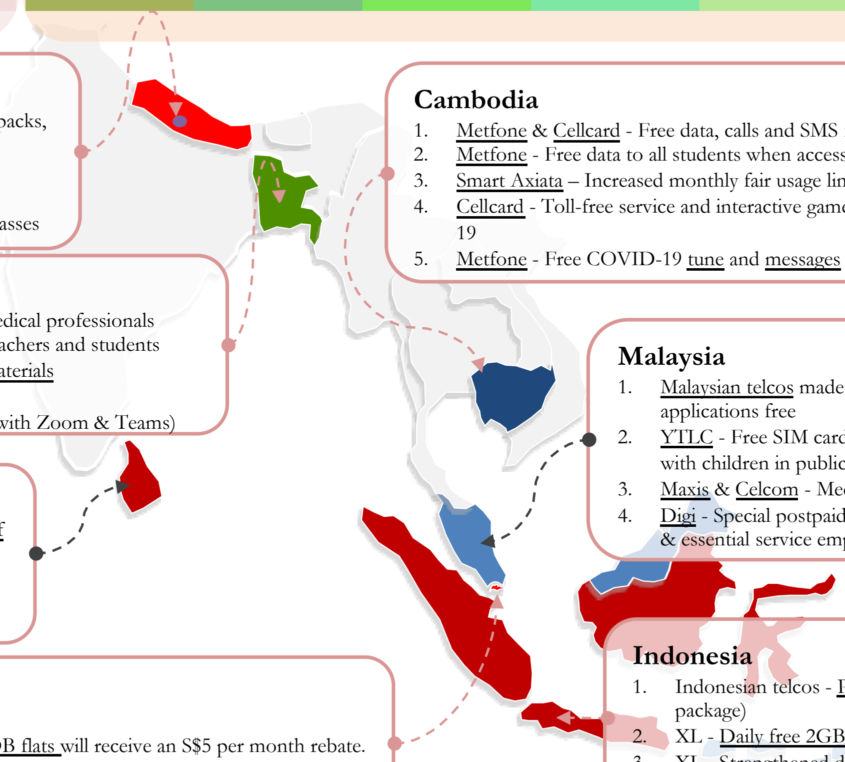
COVID-19 pandemic has resulted **three (3) emerging customer segments** namely Frontliners & Medical Professionals, WFH Community and Students & Teachers.

Seven (7) telco[1] use cases categories have been offered in the market namely Free Data, Extra Quota, Discounts, COVID-19 Awareness & Information dissemination, Subscriber Benefits, E-learning and Repackaged Plans.

3 Emerging Customer Segments		
Frontliners & medical professionals	WFH community	Students & teachers

7 Telco Use Cases						
Free data	Extra quota	Discounts	COVID-19 awareness & information	Subscriber benefits	E-learning	Repackaged plans

Finding



Nepal

1. Ncell - 25% discount on data, 120% bonus, voice packs, 15GB data packs for people to work from home
2. Ncell - 4G customers nonstop access to YouTube, TikTok and Facebook and 4GB bonus data
3. NTC - "Happy Leaning Pack" to manage online classes

Bangladesh

1. GP & Robi - Free up to 33GB internet data for medical professionals
2. GP & Robi - Low-priced internet for university teachers and students
3. Banglalink - Students free access to online study materials
4. GP & Robi - Awareness messages on COVID-19
5. GP & Robi - Work or class from home packages (with Zoom & Teams)

Sri Lanka

1. Dialog - Extra data for free, credit and Free Relief Data, Voice and SMS,
2. Sri Lanka Telecom - Discounts on data packages
3. Mobitel eLearning - Free Data Access for university

Singapore

1. Exclusive Seniors Go Digital Mobile Plans
2. M1 – Subscribers reside in 1-room or 2-room HDB flats will receive an S$5 per month rebate.
3. Singtel - SMEs WFH plans, 6 months of free usage on productivity, collaboration, and security tools

Cambodia

1. Metfone & Cellcard - Free data, calls and SMS for front-line medical staff
2. Metfone - Free data to all students when accessing e-Learning portals
3. Smart Axiata – Increased monthly fair usage limit to 2,000GB
4. Cellcard - Toll-free service and interactive game to spread information on COVID-19
5. Metfone - Free COVID-19 tune and messages to the public

Malaysia

1. Malaysian telcos made e-learning resources and applications free
2. YTLC - Free SIM cards with 160GB data to all parents with children in public schools
3. Maxis & Celcom - Medical staffs free SIM cards with data
4. Digi - Special postpaid bundle for frontliners (government & essential service employees)

Indonesia

1. Indonesian telcos - Product mix (e.g. daily or weekly package)
2. XL - Daily free 2GB to support work from home
3. XL - Strengthened data network prepares special Ramadan Program

WFH – Working From Home

Note 1: All product and company names are trademarks™ or registered® trademarks of their respective holders. The use of the names does not imply any affiliation with or endorsement by the brand.

Source: Aleevar Research, Opensignal.com, Official published product and services in the respective telcos

The Asian region use cases matrix

Market[1] offerings mapped to customer segment

Telcos[1] in the region have **responded** with providing **free data** (e.g. 30 GB for medical professional, free SIMs to parents with children in school, etc.), **discounts** (e.g. low-priced internet for universities lectures and students, postpaid bundle for frontliners, etc.) and **extra quota** (e.g. offered 999GB of data, 100% extra for weekly data packs, etc.).

E-learning related offerings (e.g. e-learning resources and applications free, free data access for university, etc.), **COVID-19 awareness & information** dissemination (e.g. "Stay Home" near signal bar, free call service providing COVID-19 information, etc.), **Repackaged plans** (e.g. Exclusive Seniors Go Digital Mobile Plans, product mix with daily or weekly package, etc.) and **Subscriber benefits** (e.g. extended postpaid bill payments, emergency data loan, etc.) are observed as telcos' responses in the region.

Finding

7 Use cases of Market Offerings

3 Emerging Customer Segments	Free data	Extra quota	Discounts	COVID-19 awareness & information	Subscriber benefits	E-learning	Repackaged plans
Frontliners & medical professionals	robi, grameenphone, maxis, celcom, cellcard, metfone: Free SIM cards/ data and/or calls		digi: Promo packages				Dialog: Free connectivity solutions
WFH community	XL axiata: Daily free	Dialog: Double data	Ncell: Stay Home Pack				robi, grameenphone: Zoom & Teams package
Students & teachers						banglalink, Nepal Telecom, Sri Lanka Telecom Mobitel, celcom, maxis, digi, metfone, Dialog: E-learning portal, educational content; XL axiata, celcom: Free Internet package	
Others unless specified (i.e. Seniors, Lower Income Group, People under lockdown, Non-specified group)	Dialog: Free relief data	celcom, Smart: Quota upgrade; grameenphone; Smart, Ncell, Dialog: Bonus data	Dialog, Ncell: 4G customers; digi; robi, grameenphone: Discount on data; grameenphone: Voice	banglalink, Sri Lanka Telecom Mobitel, robi, grameenphone, Ncell, cellcard, metfone: Awareness campaign / Free call service	celcom, Ncell, Dialog: Data/SMS on credit; Dialog: Bill extension; robi: Loyalty programme /chatbots; Dialog: Free entertainment; metfone: Free wallet transfer; grameenphone: Emergency loan	grameenphone, robi, Ncell: Student plan; metfone: Discount, free data; yes: Free SIM card & data	XL axiata: Ramadan; Ncell: PAYG New internet combo pack; StarHub, Singtel, M1: Seniors

PAYG - Pay as you go

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Source: Aleevar Research, Opensignal.com, Official published product and services in the respective telcos

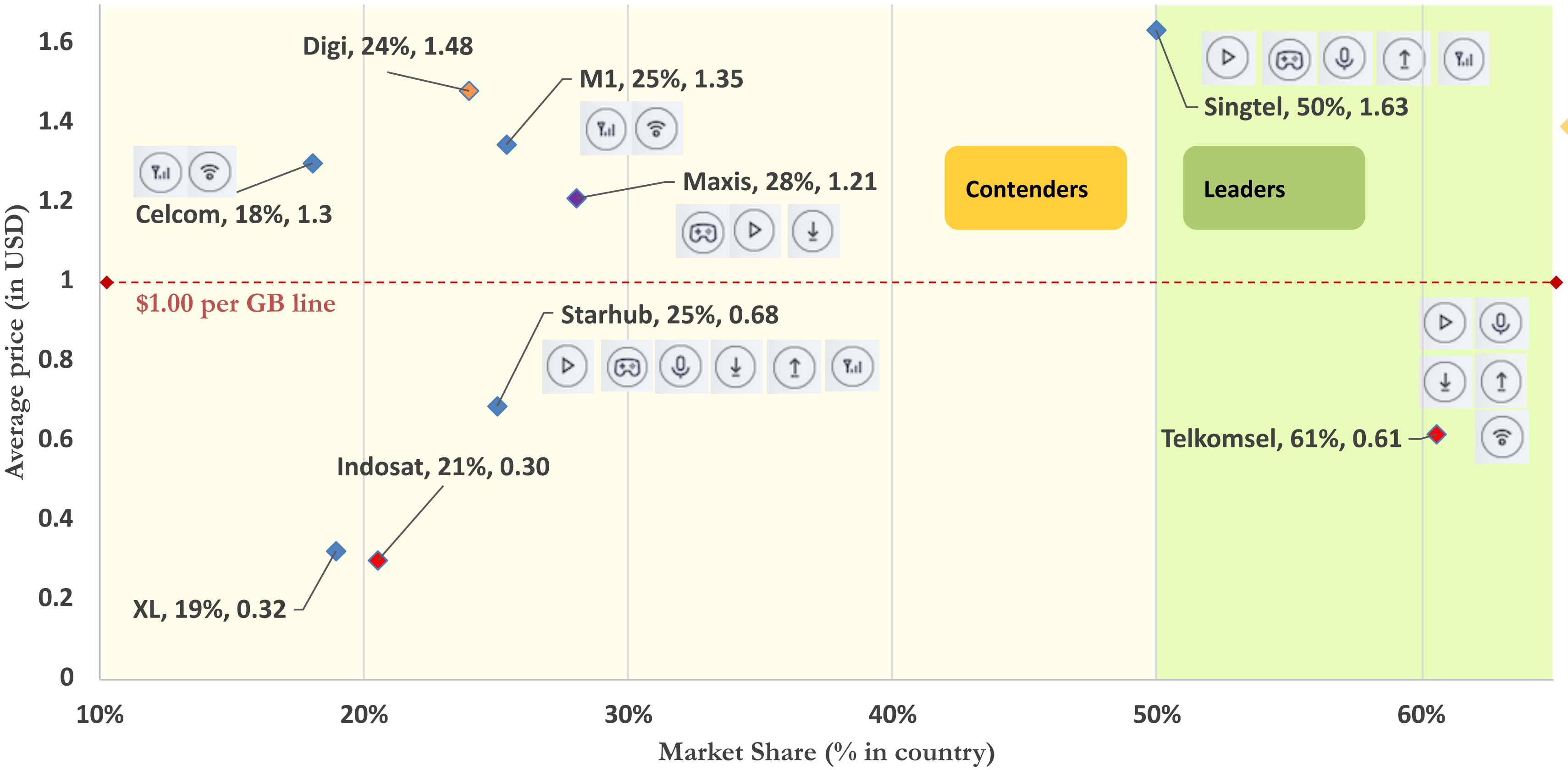
Mobile data market of Indonesia, Malaysia and Singapore

The tales of the leaders and contenders

Five (5) telcos[1], namely Singtel, Digi, M1, Maxis and Celcom, mobile data brand are **priced over $1.00 per GB.** Singapore's Singtel is the **leader** in **premiumization priced highest at $1.63** per GB with the largest market share at 50% well over their peer **contenders** such as M1, Malaysia's Maxis, Digi and Celcom.

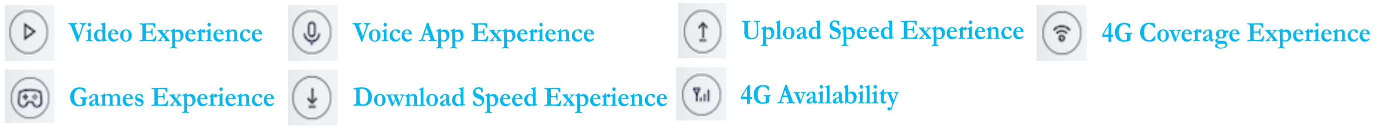
Below the $1.00 per GB line, Indonesia's Telkomsel, despite having the largest market share at 61%, is considered **leader** mobile data brand at $0.61 per GB ahead of the **contenders** namely Starhub, Indosat and XL.

South East Asian: 2020 Mobile data price vs Market share



Finding

Network QOS strength



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Source: Aleevar Research, Opensignal.com, Official published product and services in the respective telcos

Telcos’ trilemma on premiumization

The equilibrium of QOS, Price and market Share measure

Trilemma on premiumization by telcos[1] is to ascertain and maintain **equilibrium** by providing good **QOS**, affordable **Price** and increase market **Share** to remain competitive in their respective countries market.

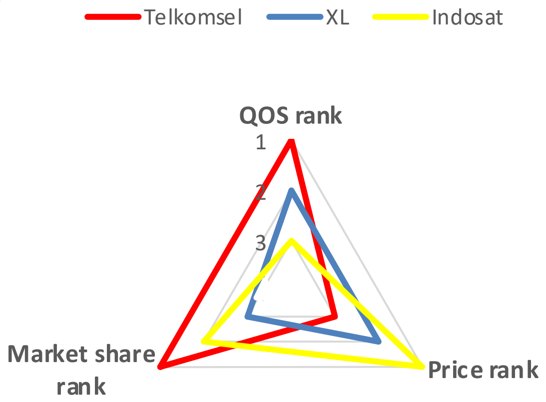
Indonesia’s Telkomsel ranks 1 in both QOS and market share (largest share at 61%) while Indosat ranks 1 as lowest Price (i.e. $0.30 per GB) but ranks 3 in QOS. XL ranks 2 for both QOS and Price however ranks 3 on market share (i.e. 19%).

Malaysia’s Maxis ranks 1 in all 3 measures while Celcom ranks 2 for both QOS and Price (i.e. $1.30 per GB) but ranks 3 in market share (i.e. 18%). Digi ranks 2 in market share (i.e. 24%) but rank 3 in QOS and Price (i.e. $1.48 per GB).

Singapore’s Singtel ranks 1 in market share (i.e. 50%) and ranks 2 in QOS while Starhub ranks 1 for both QOS and Price (i.e. $0.68 per GB). M1 ranks 2 in market share (equally with Starhub at 25%) and Price (i.e. $1.35 per GB).

Finding

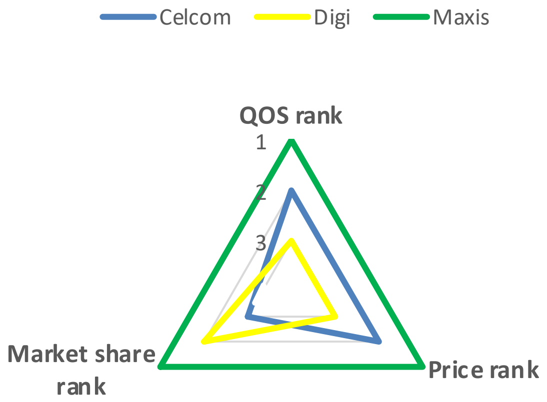
Indonesia telco rank



Telco	Market Share	Average (in USD)
Telkomsel	61%	0.61
Indosat	21%	0.30
XL	19%	0.32

IA = $0.41

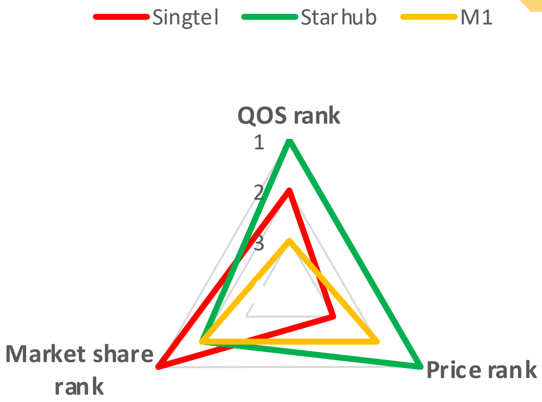
Malaysia telco rank



Telco	Market Share	Average (in USD)
Maxis	28%	1.21
Digi	24%	1.48
Celcom	18%	1.30

IA = $1.33

Singapore telco rank



Telco	Market Share	Average (in USD)
Singtel	50%	1.63
Starhub	25%	0.68
M1	25%	1.35

IA = $1.22

IA – Industry Average

Note 1: All product and company names are trademarks™ or registered® trademarks of their respective holders. The use of the names does not imply any affiliation with or endorsement by the brand.

Source: Aleevar Research, Opensignal.com, Official published product and services in the respective telcos

Takeway

Photo by Patrick Perkins on Unsplash /

Takeaway

Premiumization path for telco

Pricing strategy and tactics

Premiumization pricing strategy and tactics can be considered only after having reviewed QOS and market Share.

Pricing consideration encompasses;

1. Determine **objective** and the motivation.
2. Ascertain the **methods** and measure that can be taken
3. Employ **tactics** by approaching current use cases in the market

The expected outcome of the exercise has three (3) components;

1. **Intent**
2. **Measures**
3. **Approach by use cases**

The activities ahead are to;

1. Review **product performance**,
2. Review **market offerings**
3. Conduct **customer market research**

Premiumization
(Pricing strategy)

Objective

1. Profit oriented
2. Sales - oriented
3. Status - oriented

Methods

a. Cost – based
b. Demand – based
c. Competition - based

Tactics

i. 2-part pricing (fixed & variable)
ii. flat rate pricing (usage right)
iii. discount pricing (amount, group & time based)
iv. bundling pricing (pure, mixed)
v. skim pricing (new product, value added)
vi. penetration pricing (low margin)
vii. cooperative pricing (market leaders operate to full capacity, an increase in capacity causing high increase in cost)

The expected outcome

Intent

1. Maximise profit (i.e. sales and investment)
2. Protect or develop market via increase volume rather than profit (i.e. sales volume, market share, time period)
3. Maintain position and loss of share (i.e. sales, market share)

Measures

a. Production cost and management cost
b. Demand and willingness to pay
c. Competition and market structure

Approach by use cases

i. 2-part pricing
ii. Free quota and extra quota
iii. Discount for front liners and education
iv. Bundling
v. Skim pricing for E-learning, repackage plan
vi. Penetration that can be similar Discount
vii. Cooperative that can be similar to bundling

The activities

1. **Review product performance**

Product revenue | Product margin | QOS

2. **Review current market offerings' use cases**

Free data | Discounts | Extra quota | E-learning | COVID-19 awareness & information | Repackaged plans | Subscriber benefits

3. **Conduct customer market research (i.e. QOS, satisfaction, willingness to spend, etc.)**

Takeaway

Source: Aleevar Research, Opensignal.com, Official published product and services in the respective telcos

Telco's premiumization checklist

Suggested future action plan and activities

The suggested **action plan** and **activities** are

1. **Communicate to Telco's business** units on Premiumization and De-premiumization consideration
2. Syndicate and **business alignment** with business units
   a. Maintain (or reduce) price but consider to
      i. Review **product performance**
         - Product revenue (i.e. current sales, new sales)
         - Product margin (i.e. market pricing, A&P, CAPEX and OPEX associated to product if any)
         - Review QOS (e.g. network and customer satisfaction)
      ii. Review **current market offerings' use cases** due to **COVID-19** period;
         - Free data (frontliners, first responders)
         - Discounts (heavy users, WFH community)
         - Extra quota (gamers, creative users, entertainment seekers)
         - Repackaged plans (WFH community
         - E-learning (students, teachers, graduates, lecturers, educationist)
         - COVID-19 awareness & info (all customers)
         - Subscriber benefits (new/ existing customers)
      iii. Conduct **customer market research** (i.e. QOS, satisfaction, willingness to spend, etc.)
      iv. Introduce and test **new product/pricing and/or improve QOS** based on **market research results**
   b. Measure and monitor uptake results
      i. Maintain share
      ii. Increase share
      iii. Decrease share

Item	Stake-holders	Activities and/or information sources
1	Telcos	Aleevar's Trilemma of Telco Premiumization Insight 2020
2	Business units	Business alignment workshop
2.a.i.	Marketing & sales and Network operation	• Sales report • Cost of product, services, marketing campaign • Past network QOS performance test and customer satisfaction survey

2.a.ii.	Corporate Strategy	• Internal current offering vs external market offering
		  • Current market product and pricing,
		  • Social media mentions (share of voice), campaign

2.a.iii.	Marketing & CSR	• Dipstick customer online panel survey on current COVID-19 pandemic situation (usage, behaviour and attitude)
2.a.iv.	Marketing	• Product and/or service development/improvement • Measure customer satisfaction and response
2.b..	Marketing	• Measure based on 2.a.i.

Takeaway

CSR – Corporate Service Responsibility

Appendices

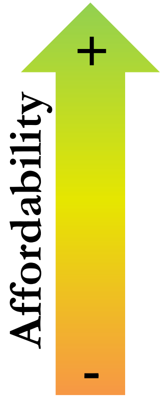
Photo by Beatriz Pérez Moya on Unsplash

Appendices

Affordability

Selected 2018 ITU Mobile data (MD)

1. Singapore ranked 7 offered the most affordable MD at 0.3% GNI
2. Sri Lanka (rank 29) and Indonesia (rank 39) being affordable for MD at 0.6% and 0.7% of GNI
3. Malaysia, Cambodia and Bangladesh affordability ranged between 0.9% and 1.9% of GNI
4. Nepal MD ranked 142 as the least affordable 5.2% of GNI



Rank		as % of GNI p.c.	USD	PPP$	Monthly data allowance (in GB)	Tax rate included (%)	GNI p.c., USD, 2018
7	Singapore	0.3	14.8	17.64	2	7	58,770
29	Sri Lanka	0.6	2.1	6.6	2		4,060
39	Indonesia	0.7	2.4	6.7	2	10	3,840
48	Malaysia	0.9	7.4	18.1	5		10,460
88	Cambodia	1.7	2.0	4.9	1.5	10	1,380
90	Bangladesh	1.9	2.7	6.7	1.5	21	1,750
142	Nepal	5.2	4.2	12.2	4		960

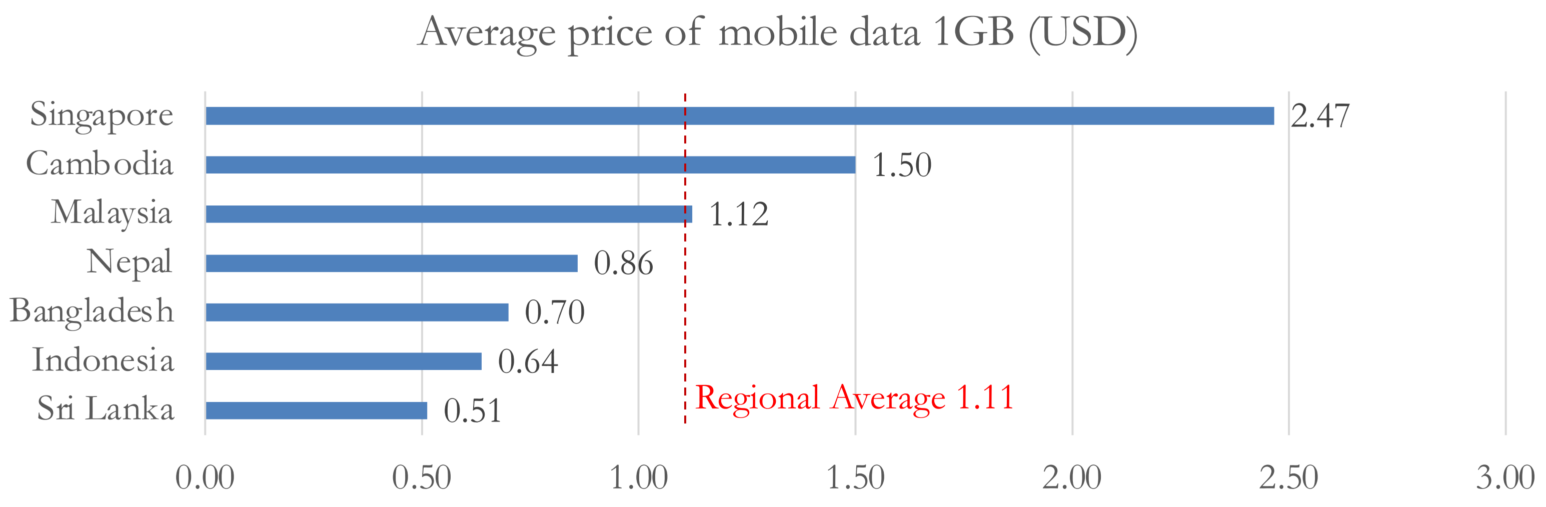
https://www.itu.int/net4/ITU-D/ipb//

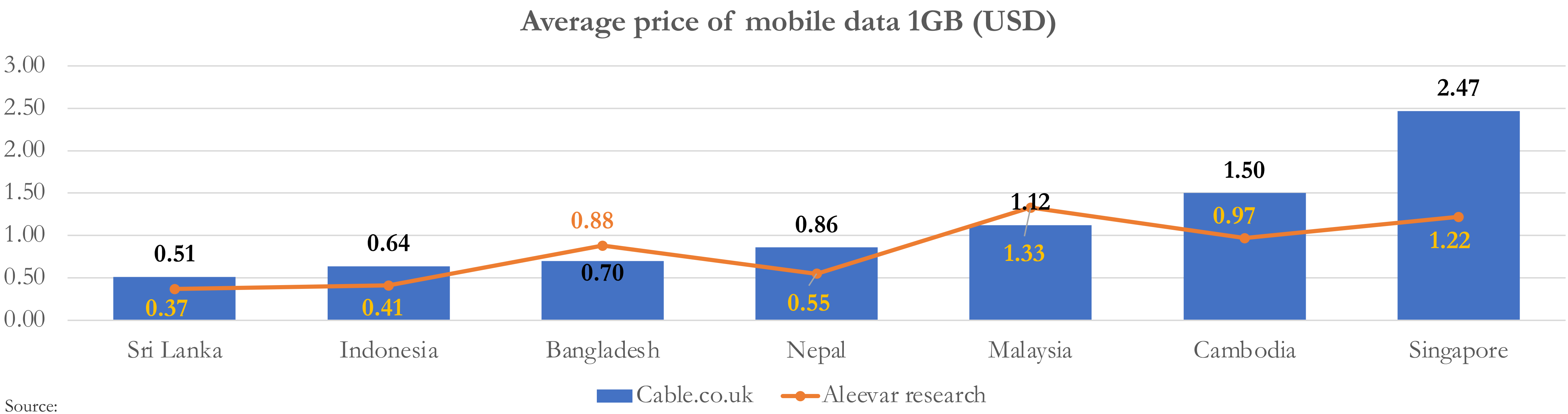
Price comparison

Global international report on pricing

1. 2 international reports on global pricing for mobile data (MD) and fixed broadband (FBB) were reviewed
   a. 2020 ICT Price Basket ITU.int - Affordability approach – 5 year
   b. Cable.co.uk – Comprehensive on all the providers – 2 year only

2. Cable.co.uk will be used as global pricing reference for POC





Source:
https://www.cable.co.uk/mobiles/worldwide-data-pricing/#highlights
https://www.cable.co.uk/broadband/pricing/worldwide-comparison/, https://www.itu.int/net4/ITU-D/ipb/

Mobile Data Price 2020

Average price by telco and by country

Current state: Price in Bangladesh	Share	Opco average (in USD)	IA (in USD)	Cable.co.uk (in USD)	Normalised Opco average (factor)
GP	47%	0.83	0.88	0.7	-0.06
Robi	30%	1.29	0.88	0.7	0.46
Banglalink	19%	0.53	0.88	0.7	-0.40

Current state: Price in Malaysia	Share	Opco average (in USD)	IA (in USD)	Cable.co.uk (in USD)	Normalised Opco average (factor)
Maxis	28%	1.21	1.33	1.12	-0.09
Digi	24%	1.48	1.33	1.12	0.11
Celcom	18%	1.3	1.33	1.12	-0.02

Current state: Price in Cambodia	Share	Opco average (in USD)	IA (in USD)	Cable.co.uk (in USD)	Normalised Opco average (factor)
Smart Axiata	41%	1.35	0.97	1.5	0.39
Metfone (Viet	46%	0.93	0.97	1.5	-0.04
Cellcard	13%	0.63	0.97	1.5	-0.35

Current state: Price in Nepal	Share	Opco average (in USD)	IA (in USD)	Cable.co.uk (in USD)	Normalised Opco average (factor)
Ncell	48%	0.58	0.55	0.86	0.05
Nepal Teleco	47%	0.63	0.55	0.86	0.15
Smart	5%	0.44	0.55	0.86	-0.20

Current state: Price in Indonesia	Share	Opco average (in USD)	IA (in USD)	Cable.co.uk (in USD)	Normalised Opco average (factor)
Telkomsel	61%	0.61	0.41	0.64	0.50
XL	19%	0.32	0.41	0.64	-0.22
Indosat	21%	0.30	0.41	0.64	-0.27

Current state: Price in Sri Lanka	Share	Opco average (in USD)	IA (in USD)	Cable.co.uk (in USD)	Normalised Opco average (factor)
Dialog	51%	0.56	0.37	0.51	0.51
Mobitel	31%	0.26	0.37	0.51	-0.29
Hutch	18%	0.29	0.37	0.51	-0.22

Current state: Price in Singapore	Telco	Share	Opco average (in USD)	IA (in USD)	Cable.co.uk (in USD)	Normalised Opco average (factor)
Singapore	Singtel	50%	1.63	1.22	2.47	0.34
	Starhub	25%	0.68	1.22	2.47	-0.44
	M1	25%	1.35	1.22	2.47	0.10

Source:

1. IA – Industry Average is average price in USD per GB quota of top 3 telco in the country collected from telco official website
2. Worldwide mobile data pricing: The cost of 1GB of mobile data in 228 countries

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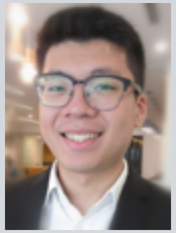

Kong Min Yao is the Business Analyst