

## **ASEAN Mobile Virtual Network Operator (MVNO) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The ASEAN Mobile Virtual Network Operator Market size is estimated at USD 2.82 billion in 2024, and is expected to reach USD 3.83 billion by 2029, growing at a CAGR of 6.33% during the forecast period (2024-2029).

A mobile virtual network operator (MVNO) is a corporation that provides mobile phone services but does not have its frequency allocation of radio spectrum or all of the infrastructure needed to perform it. A corporation with infrastructure and frequency allocations is called a "mobile network operator."

#### Key Highlights

- By concentrating on specific value propositions for specialized target customer segments, MVNOs expand the subscriber base on the network of the host operator without compromising the host's focus or brand image. In this way, the MVNO functions as a "sub-brand" for the operator and aids in providing mobile services to various demographics.
- In ASEAN (Association of Southeast Asian Nations), Thailand, Singapore, Malaysia, and Vietnam exhibit high internet and smartphone penetration rates. Hence, the MVNOs are growing significantly in these countries. Moreover, the countries such as Brunei, Myanmar, Cambodia, Indonesia, and the Philippines, are adopting digitalization at a rapid pace and hence are analyzed to bolster the telecom sector and simultaneously the MVNO industry in the countries.
- Virtualization is a 5G network architecture feature, and most may move beyond virtualization. One MVNO may operate all networks metaphorically while concurrently operating none of the networks, much like a cloud. Similar to before 4G, MVNOs could use the host operator's mobile network in the 5G era to establish their own business. However, it might be the "slice" of the virtualized core network. In the 5G era, network functions virtualization (NFV) and "slicing" can be essential for many MVNOs.
- One of the biggest challenges for MVNO market vendors in the region is the reluctance of the MNOs to host MVNOs on their network. Currently, all major MVNO operators in the country are hosted by only the state telecom player National Telecom.

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-COVID-19 has led to an acceleration in digital connectivity in ASEAN countries, facilitating not only e-commerce but also businesses using digital technology, communications, and related services in manufacturing, retail, education, healthcare, transportation, finance, tourism, media, and entertainment. This has significantly increased data consumption during the pandemic, thus positively impacting the telecommunications sector.

## ASEAN Mobile Virtual Network Operator (MVNO) Market Trends

### Data Segment to Witness Significant Growth

- The focus of MVNO service offers has switched from voice to data, and some have developed distinctive value propositions around integrated offerings connected to other products and services provided by the parent company, such as gaming or enterprise cloud services.
- Indonesian telecom firms are racing to adapt to the shifting needs of their customers. The service providers have concentrated more on providing data-oriented mobile services than traditional calling and messaging plans, setting themselves apart from the competition with appealing data pricing plans and unlimited voice conversations. It is, therefore, not unexpected that Indonesia's average data prices are much cheaper than those of its neighbors, given that it is a mobile-first nation.
- Furthermore, mobile cellular connections are expanding in countries such as Laos, Cambodia, Myanmar, and other regions, which are analyzed to contribute to the market growth rate during the forecast period.
- Moreover, as the 5G service started catching up in the country (currently with 30% deployment) with government and industry momentum, the coming years may witness higher volumes of data consumption. Market vendors are expected to capitalize on the opportunity by providing cost-effective data services for actively growing consumer sub-genres in the form of gamers, power users, as well as corporate customers in the country.
- Internet penetration is significantly increasing in these countries. It is analyzed to boost the demand for data requirements at affordable prices, thereby contributing to the growth rate of the MVNO market during the forecast period.

### Singapore is Expected to Hold Major Share

- Singapore is one of the most connected countries, as well as one of the most advanced information and communications technology (ICT) marketplaces in the world. According to the smart nation initiative, the sector's growth is considered a source of economic and social development. Singapore, the first nation in the world to attain nationwide 5G service, has the fastest mobile internet speeds in the region, attributed to its well-developed telecom infrastructure.
- Governments and other regional players have increased efforts to eliminate the hurdles to adopting digital services in the context of COVID-19 and the shift to digital platforms. For instance, the Singaporean government developed the Singapore Digital Office (SDO) to promote initiatives that expedite the adoption of digital technology.
- Furthermore, by utilizing the advantages of cloud-native business support services (BSS) built on the public cloud, many MVNOs aim to adopt a cloud approach strategy. Costs are expected to be minimized, with a promise of increased agility and better customer service. MVNOs could provide additional services and new income sources with better data connectivity management.
- Moreover, as mobile operators roll out their 5G networks, the market for mobile broadband is expected to be driven by the ever-faster speeds they offer. The Internet of things (IoT), cloud gaming, autonomous driving, and digital applications can all benefit from faster mobile connections. Therefore, the growing number of mobile connections is analyzed to significantly contribute to the demand for MVNOs during the forecast period.

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## ASEAN Mobile Virtual Network Operator (MVNO) Industry Overview

The ASEAN mobile virtual network operator (MVNO) market is competitive and consists of significant individual players. Some considerable players include Feels Telecom Corporation Company Limited, Ansar Mobile Sdn Bhd, Gomo, and The Whitespace Company Ltd (Penguin Sim), among other companies.

- In November 2022, Celcom and Digi accepted many commitments made by the MCMC following their merger. It aims to create a clear separation from Celcom Digi Berhad's retail mobile business. This includes returning a total of 70MHz of spectrum over a three-year period, divesting Yoodo, and establishing a separate business unit to manage mobile virtual network operators.
- In September 2022, Zero1 launched 5G MVNO in Singapore via an agreement with local carrier Singtel. The MVNO is relying on Singtel's non-standalone (NSA) network infrastructure for the provision of 5G across the country.

### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

### Table of Contents:

#### 1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

#### 2 RESEARCH METHODOLOGY

#### 3 EXECUTIVE SUMMARY

#### 4 ASEAN MVNO MARKET

- 4.1 Market Overview of MVNO Industry in ASEAN
- 4.2 Market Segmentation Analysis by Component
  - 4.2.1 Data
  - 4.2.2 Voice

#### 5 Impact of 5G Deployment on MVNOS

#### 6 Regulatory Landscape Insights

#### 7 Impact of COVID-19 on the Telecom Industry and its Implication on MVNO

#### 8 COUNTRY ANALYSIS

- 8.1 Thailand
  - 8.1.1 Overall MVNO Market Estimates and Projections From 2022-2027
  - 8.1.2 Key Market Dynamics and Underlying Trends
  - 8.1.3 Segmentation Analysis- Data and Voice
  - 8.1.4 Key Metrics - Internet Penetration, Smartphone Adoption
  - 8.1.5 Key MVNOS - Thailand

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- 8.1.5.1 Feels Telecom Corporation Company Limited
- 8.1.5.2 The Whitespace Company Ltd (Penguin Sim)
- 8.1.5.3 Loxley Public Company Limited (I-KOOL 3G)
- 8.1.5.4 a2network (Thailand) Co. Ltd
- 8.1.5.5 Red One Network (Thailand) Co. Ltd
- 8.1.5.6 Ranking of MVNOS - Thailand
- 8.2 Singapore
  - 8.2.1 Overall MVNO Market Estimates and Projections from 2022-2027
  - 8.2.2 Key Market Dynamics and Underlying Trends
  - 8.2.3 Segmentation Analysis-data and Voice
  - 8.2.4 Key Metrics-ARPU, Internet Penetration, Smartphone Adoption, Technology Landscape (5G, 4G, Etc.)
  - 8.2.5 Key MVNOS - Singapore
    - 8.2.5.1 Circles.life
    - 8.2.5.2 Gomo
    - 8.2.5.3 Geenet Pte Ltd
    - 8.2.5.4 RedONE Pte Ltd
    - 8.2.5.5 Myrepublic Limited5
    - 8.2.5.6 Vivifi
    - 8.2.5.7 Zero1 Pte Ltd
    - 8.2.5.8 Changi Travel Services Pte Ltd (Changi Mobile)
    - 8.2.5.9 StarHub Limited (Giga)
    - 8.2.5.10 Ranking of MVNOS - Singapore
- 8.3 Malaysia
  - 8.3.1 Overall Mvno Market Estimates and Projections from 2022-2027
  - 8.3.2 Key Market Dynamics and Underlying Trends
  - 8.3.3 Segmentation Analysis-data and Voice
  - 8.3.4 Key Metrics- Arpu, Internet Penetration, Smartphone Adoption, Technology Landscape (5G, 4G, Etc.)
  - 8.3.5 Key MVNOS - Malaysia
    - 8.3.5.1 Ansar Mobile Sdn Bhd
    - 8.3.5.2 Merchantrade Asia Sdn Bhd
    - 8.3.5.3 One XOX Sdn Bhd
    - 8.3.5.4 Tune talk Sdn Bhd
    - 8.3.5.5 redONE Network Sdn Bhd
    - 8.3.5.6 Pavo Communications Sdn Bhd
    - 8.3.5.7 Celcom Axiata Berhad (YODOO)
    - 8.3.5.8 Altel Communications Sdn Bhd
    - 8.3.5.9 Ranking of MVNOS - Malaysia
- 8.4 Vietnam
  - 8.4.1 Overall MVNO Market Estimates and Projections from 2022-2027
  - 8.4.2 Key Market Dynamics and Underlying Trends
  - 8.4.3 Segmentation Analysis-data and Voice
  - 8.4.4 Key Metrics-ARPU, Internet Penetration, Smartphone Adoption, Technology Landscape (5G, 4G, Etc.)
  - 8.4.5 Key MVNOS - Vietnam
    - 8.4.5.1 Indochina Telecom Mobile Joint Stock Company
    - 8.4.5.2 Masan Group Corporation (Mobicast)
    - 8.4.5.3 ASIM Telecom Joint Stock Company (Local)
    - 8.4.5.4 Ranking of MVNOS - Vietnam

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