

• INDUSTRY INSIGHTS

Future proofing your MIVNO

Customer engagement strategies
for 2025 and beyond

APAC

INTRODUCTION

The MVNO landscape in APAC is evolving rapidly, demanding more than just competitive pricing to stand out—it requires redefining how MVNO's connect with customers.

With the APAC MVNO market projected to reach \$61.42 billion by 2030, driven by 5G adoption and explosive growth across emerging Southeast Asian markets, the stakes are extraordinarily high. Rising MNO wholesale costs, complex regulatory environments spanning from Indonesia's comprehensive data protection laws to Singapore's enhanced cybersecurity requirements, and consumer demand for seamless 5G experiences underscore the urgency for providers to deliver value through enhanced, personalised communication.

Today's customers across the region expect reliability, tailored offers, and proactive engagement that addresses their diverse needs. This eBook explores how MVNO's can overcome MNO dependency, slash churn, and boost revenue by leveraging innovative tools and strategies. From automating 5G e-SIM activations to powering IoT usage alerts across archipelagic geographies, the focus is on creating customer-centric journeys that thrive in the world's most diverse and rapidly-growing mobile market.



APAC MVNO market
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Navigating the future: trends in 2025

In 2025, the MVNO industry across APAC continues to grow and adapt to a changing world, driven by technological advancements and shifting customer expectations. This rapid evolution challenges providers to innovate while offering unprecedented opportunities to differentiate across the world's most diverse telecommunications landscape.

The shift towards 5G and IoT

High-speed 5G networks and IoT proliferation are redefining connectivity across APAC's vast geography. South Korea leads with 95% 5G penetration by 2030, while Malaysia achieves exceptional 512.10 Mbps median speeds despite launching 3.5 years after South Korea. Thailand reaches 80%+ population coverage supporting 7.3 million 5G subscribers, and Australia targets 90% of subscribers on 5G/6G by 2030. MVNO's must adopt 5G and IoT to stay competitive, but MNO dependency complicates infrastructure upgrades and e-SIM provisioning, especially across Indonesia's archipelagic challenges and the region's diverse spectrum availability.

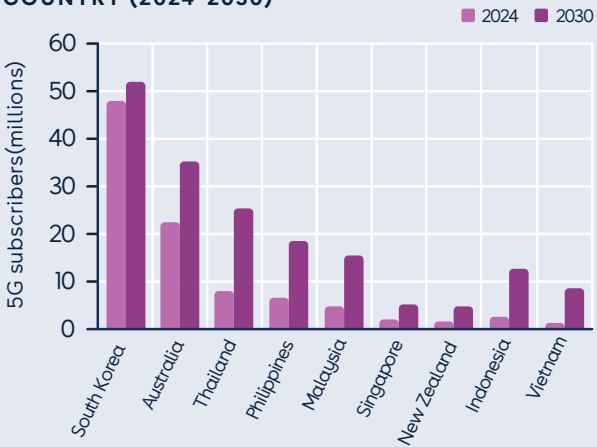
Changing customer expectations

APAC customers in 2025 demand seamless 5G experiences, real-time IoT updates, and personalised plans that reflect their diverse economic conditions. Philippines users average 5 hours daily mobile internet usage versus Japan's 1.5 hours, reflecting varied digital behaviours. Across Southeast Asia, the internet economy reached \$174 billion in 2021 with a projection to \$363 billion by 2025, pushing MVNO's towards customer-centric models that address local market nuances from Singapore's sophisticated consumers to Indonesia's growing middle class.

The rise of personalised offers

Personalisation is key across APAC's varied markets, with MVNO's leveraging data-driven insights for tailored plans. Thailand's regulatory framework introduces the "One Region, One Mobile Virtual Network Operator" initiative, aiming to establish seven regional MVNO's by 2026, reflecting a broader trend towards localised, customer-focused strategies.

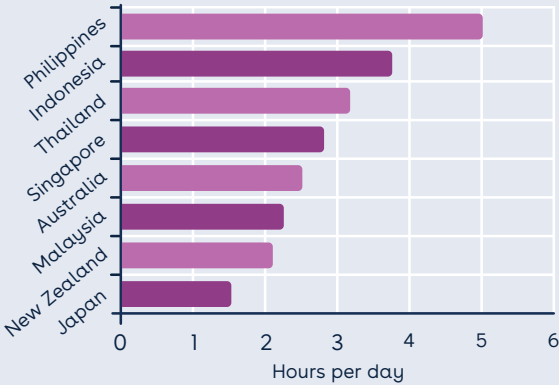
5G SUBSCRIPTION PROJECTIONS BY COUNTRY (2024-2030)



Key insights

South Korea leads 5G subscriber growth with mature market penetration, while Southeast Asian markets show significant expansion potential. Australia and Thailand demonstrate strong adoption curves, creating opportunities for MVNO 5G across diverse regional markets.

MOBILE INTERNET USAGE PATTERNS ACROSS APAC



Key insights

Mobile usage varies dramatically across APAC markets, with Philippines leading at 5 hours daily versus Japan's 1.5 hours. This reflects different market maturity levels and consumer behaviours that MVNO's must address with tailored engagement strategies.

Competitive pressure and market saturation

The APAC MVNO market spans from Australia's mature ecosystem with 66 active MVNO's to Vietnam's nascent market with first MVNO launched in April 2019. Australia faces mature market pressures shifting toward MNO sub-brands, while over 80 active MVNO's operate across Japan, representing one of the world's most developed virtual operator sectors.

New Zealand presents a unique challenge: despite 114% mobile penetration and 99% 5G coverage, MVNO market share remains below 2%, with only 4 active MVNO's requiring 50,000+ subscribers for commercial viability. This highlights how market size constraints can limit MVNO opportunities even in developed markets. Indonesia and Philippines show early-stage development with regulatory support, pushing innovation to overcome varying MNO dependencies across archipelagic and developing market complexities.

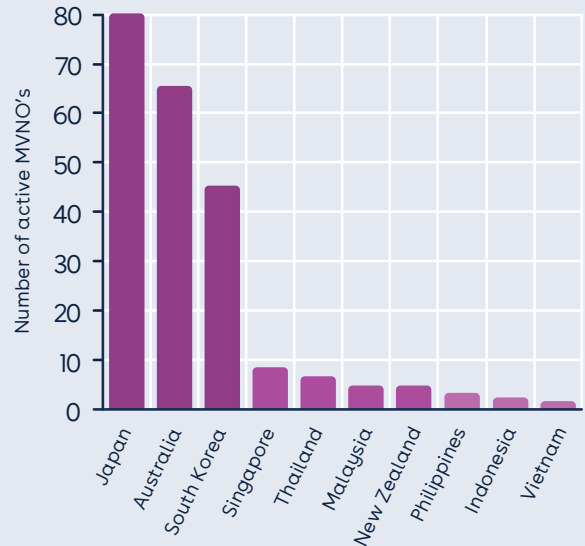
The need for innovation and agility

To succeed, MVNO's must be agile, embracing technologies like automation for 5G e-SIM activations, AI Agents for support and cloud solutions for IoT scalability across diverse geographical challenges. Quick pivots in response to market shifts are essential for survival in 2025's dynamic landscape.

└ The rise of AI agents in customer engagement

As APAC MVNO's strive for agility across diverse markets, AI Agents are emerging as a transformative force in customer engagement. These intelligent systems can autonomously handle inquiries, predict customer needs, and deliver personalised offers in real time across multiple languages and cultural contexts.

MVNO MARKET DEVELOPMENT STAGES ACROSS APAC



Key insights

APAC MVNO markets show distinct development stages from Japan's 80+ active MVNO's to Vietnam's nascent market with first MNVO in 2019. Australia's 66 MVNO's face mature market pressures, while New Zealand remains constrained with only 4 MVNO's despite good infrastructure, highlighting market viability challenges.

In 2025 AI Agents are expected to manage up to **50%** of customer interactions



By 2025, AI Agents are expected to manage up to 50% of customer interactions in the telecom sector, with APAC operators particularly proactive in developing solutions that address regional diversity and scale.

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Breaking barriers: tackling engagement hurdles

The need for innovation and agility

Engaging customers has always been a core challenge for MVNO's in a crowded landscape, shaped by operational, competitive, and regulatory factors that vary dramatically across APAC's diverse markets. Let's dive into some of the key pain points within the sector.

Maintaining consistent service quality

Reliable service is critical, yet MNO dependency makes differentiation tough across APAC's varied infrastructure landscapes. With consumers prioritising speed and reliability from Southeast Asia's affordability-focused markets to Singapore's premium expectations, MVNO's must deliver consistent 5G experiences despite limited network control.

This challenge amplifies across Indonesia's archipelagic geography and Thailand's diverse regional requirements, while Australia's mature market sees discount MVNO's capturing 45% of MVNO market share through quality service delivery.

Personalisation at scale

Tailoring offers to diverse APAC customers—from Australia's growing subscriber bases to Singapore's sophisticated urban consumers—presents unprecedented complexity. Advanced analytics are vital, but scaling personalisation across millions of users spanning multiple languages, cultures, and economic conditions requires significant investment, especially given varying profit margins from Australia's competitive landscape to emerging market dynamics in Southeast Asia.



Integrating multiple communication channels

APAC customers engage across SMS, email, and OTT platforms with varying preferences by market maturity and digital adoption levels. Singapore's 97% smartphone penetration demands different approaches than Indonesia's growing 73% smartphone connections.

With RCS adoption varying significantly across the region, omnichannel integration remains a hurdle, risking churn if not executed well, particularly with cross-border roaming complexities spanning diverse regulatory frameworks.

Responding to customer feedback

Feedback volumes are rising dramatically, amplified by social media adoption that varies from Japan's mature digital landscape to Philippines' explosive mobile usage growth (5 hours daily). Efficient systems to manage and respond promptly across multiple languages and cultural contexts are essential, yet many providers struggle to keep up with regional diversity, impacting loyalty across markets with different service expectations.

Adapting to changing customer expectations

Expectations evolve rapidly across APAC's diverse development stages, with consumers demanding 5G reliability, IoT updates, and flexible pricing that reflects local economic conditions. Australia and New Zealand consumers prioritise affordability while Singapore's premium market focuses on service quality, requiring constant innovation that addresses market-specific needs across the region's varied economic landscape.



Data privacy and security concerns

Privacy scrutiny intensifies across APAC in 2025, with Indonesia's Personal Data Protection Law imposing fines up to 2% annual turnover, Thailand's PDPA requiring explicit consent, and Singapore's enhanced frameworks creating comprehensive compliance requirements.

Customers expect transparency in data use, complicating personalisation efforts across the region's complex regulatory environment where each market maintains different privacy frameworks.

Building long-term customer relationships

Retention is tougher than acquisition across APAC's varied competitive landscapes, particularly in Australia's mature market dynamics. New Zealand's market demonstrates the retention challenge: with only 26,000 customers for the largest MVNO after a decade, the constrained market size makes customer lifetime value critical for survival.

MVNO's must foster loyalty beyond price across diverse cultural contexts and economic conditions, a task requiring sustained engagement amidst varying churn pressures and regulatory frameworks spanning from Singapore's supportive environment to more restrictive markets across the region.



Power up engagement: winning strategies for APAC MVNO's

So how to tackle these challenges? Providers can adopt innovative, technology-driven strategies that prioritise customer needs across APAC's diverse landscape. With 5G subscriptions projected to grow exponentially across South Korea, Australia, Thailand,

and Southeast Asian markets, and privacy regulations from Indonesia's GDPR-inspired laws to Singapore's enhanced frameworks shaping operations, MVNO's must transform how they connect with customers to drive loyalty and growth.

Leverage advanced analytics for personalisation

In APAC, mobile internet users will grow from 1.4 billion (51% penetration) to 1.8 billion (61% penetration) by 2030, underscoring the demand for personalised experiences across diverse markets. Use advanced analytics to tailor plans and offers to individual preferences.

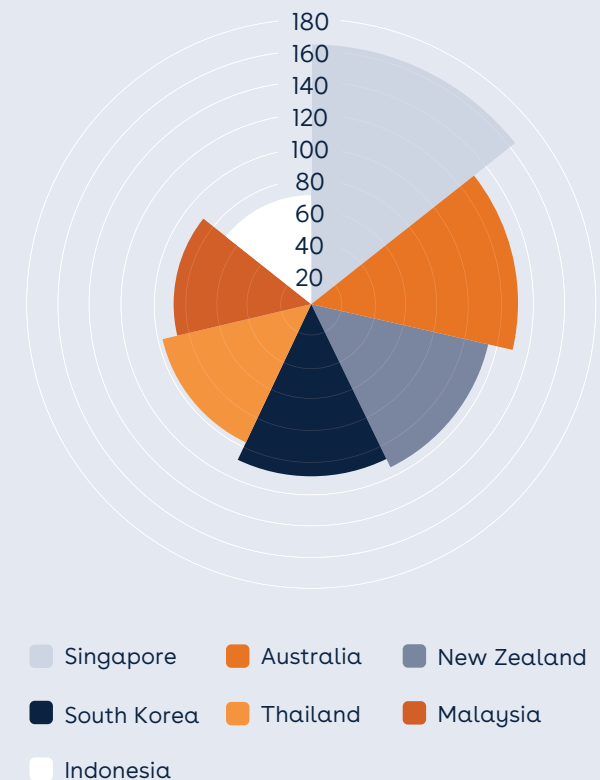
Implement seamless omnichannel integration

Customers engage across SMS, email, and OTT platforms with varying digital maturity levels—Philippines users averaging 5 hours daily mobile internet versus Japan's 1.5 hours. Unified platforms that integrate these channels ensure seamless messaging across diverse languages and cultural contexts, even with cross-border complexities spanning APAC's regulatory frameworks. For example, a provider could send 5G usage alerts via SMS while offering email-based loyalty rewards in local languages, creating cohesive journeys that reduce friction and boost satisfaction across markets.

Adopt proactive customer service

Real-time data and predictive analytics allow providers to anticipate issues across diverse market conditions, reducing churn from Southeast Asia's competitive landscape to Australia's mature market dynamics. Proactive strategies—like notifying customers of potential overages before they occur—maintain satisfaction in price-sensitive markets while automated campaigns, such as 5G upsell offers, engage customers across varying service expectations.

MOBILE PENETRATION RATES ACROSS APAC MARKETS



Key insights

Singapore leads with 163.8% penetration indicating multi-SIM usage, while Australia shows 130% mobile connections to population. South Korea and other developed markets exceed 100%, while emerging markets like Indonesia (69%) show significant growth potential.

Streamline feedback with automated workflows

Rising feedback volumes, amplified by social media adoption varying from mature to emerging markets, demand efficient systems across multiple languages and cultural contexts. Automated workflows enable timely responses that build trust and align with diverse customer expectations for responsiveness.

For instance, SMS surveys can help MVNO's gauge sentiment across regional markets, ensuring customer voices shape service improvements that address local needs spanning Singapore's premium requirements to Indonesia's developing market dynamics.

Stay ahead of evolving expectations

Flexible platforms that deploy new services—like IoT usage alerts or 5G plans—keep MVNO's ahead of trends across APAC's varied development stages. In Southeast Asia, where IoT adoption accelerates alongside 5G growth, offering real-time alerts for connected devices meets enterprise demands, while 5G speed guarantees appeal to Singapore's premium consumers, ensuring value-added experiences that address diverse market requirements.



Reduce churn by 15% with loyalty campaigns

Automated loyalty campaigns can strengthen connections in competitive markets

Prioritise data privacy and security

Compliance with Indonesia's Personal Data Protection Law, Thailand's PDPA, and Singapore's enhanced frameworks is non-negotiable across APAC's complex regulatory landscape. Robust security measures and transparent data practices—such as clear opt-in policies for personalised offers in local languages—enhance customer confidence across varied privacy expectations.

MVNO's must balance personalisation with privacy, a critical factor for trust spanning from Southeast Asia's emerging regulatory frameworks to Australia's established privacy principles.

Foster long-term relationships

Continuous engagement builds loyalty beyond price across APAC's diverse cultural and economic landscape. Initiatives like automated loyalty campaigns—offering bonus 5G data for long-term customers or localised content partnerships—can strengthen connections.

In competitive markets like Australia's mature ecosystem to Southeast Asia's emerging opportunities, rewarding loyalty helps MVNO's retain customers amidst varying churn pressures and regulatory complexities.



Pendula in action: proven benefits for success

Effective customer engagement is a game-changer for APAC MVNO's in 2025, and tools like Pendula are leading the way in delivering measurable outcomes across the region's diverse markets. By addressing challenges like MNO dependency, varying regulatory frameworks, and diverse customer expectations, Pendula

empowers MVNO's to thrive in the world's most competitive landscape. Through automation and data-driven strategies, Pendula has helped MVNO's achieve significant results, as seen in its work with Australia's largest MVNO's amaysim and MATE. Here's how Pendula transforms engagement and drives success for MVNO's.

Pendula's role in MVNO success

Pendula's workflow automation and customer engagement platform enables MVNO's to deliver personalised, two-way communication at scale. Integrating seamlessly with systems like Salesforce, it streamlines customer journeys—from 5G e-SIM activations to real-time IoT usage alerts—ensuring efficiency and satisfaction across varied market conditions. In a region where 5G adoption grows exponentially (South Korea reaching 95% penetration by 2030, Australia targeting 90% of subscribers), Pendula's ability to automate complex processes helps MVNO's overcome MNO dependency and scale new services across diverse geographical challenges.



amaysim's engagement transformation

Pendula's work with amaysim highlights its impact on retention and efficiency in competitive markets. By implementing targeted SMS campaigns, Pendula helped amaysim increase mobile plan renewals by 5% and reduce reactivation times by 5 days, ensuring customers stayed engaged and returned faster. Across broader implementations, Pendula enabled a 30% uplift in campaign engagement, a 10% reduction in churn, and \$3.1 million in saved revenue.

amaysim



What's great is that now we can leverage Pendula to make rapid and responsive changes to our customer journeys, improving their experience and driving higher conversion rates.

Eric Alkema, Head of CRM

MATE's retention success

Similarly, MATE leveraged Pendula to enhance customer loyalty, achieving a 2% reduction in churn through automated campaigns, surpassing regional industry averages. By delivering timely, personalised offers—such as bonus data for long-term customers—MATE strengthened relationships across diverse customer segments.

In competitive markets like Australia's mature ecosystem, where retaining customers is significantly more cost-effective than acquisition, Pendula's approach helps MVNO's build lasting loyalty across varied cultural and economic landscapes.



Pendula's user-friendly flow builder, diverse data suites, and regular updates make it invaluable. They help us at automating operational tasks, enhancing lead generation, and fostering better customer engagement.

Raucheen S, Head of Customer Lifecycle at MATE

THE BENEFITS

Enhanced customer satisfaction and loyalty

Pendula's automation fosters satisfaction by delivering timely, relevant communication across APAC. For example, a Southeast Asian MVNO can use Pendula to send 5G usage alerts in local languages while ensuring customers feel supported, while Thai MVNO's can leverage regional loyalty offers that strengthen connections across diverse consumer preferences.

Improved retention and revenue growth

With mobile internet users across APAC growing from 1.4 billion to 1.8 billion by 2030, retention becomes critical across diverse market conditions. Pendula's proactive engagement—like amaysim's 5% renewal increase—reduces churn across varied competitive landscapes, while data-driven upsell campaigns, such as 5G bundles tailored to local economic conditions, boost revenue in markets ranging from Singapore's premium segment to Southeast Asia's price-sensitive consumers, as demonstrated by \$3.1 million in saved revenue.

Operational efficiency and cost savings

Automation streamlines operations across APAC's complex geographical and regulatory landscape, cutting overheads while ensuring compliance. Pendula's ability to automate e-SIM activations across archipelagic challenges or IoT alerts spanning diverse time zones—as demonstrated by amaysim's 5-day reactivation improvement—frees resources for innovation, helping APAC MVNO's scale 5G and IoT services amidst varying regulatory demands and market maturity levels.

Competitive differentiation and agility

Pendula enables unique experiences—like real-time IoT alerts or culturally-adapted campaigns for diverse populations—setting MVNO's apart in saturated and emerging markets alike. Its flexibility ensures agility, helping MVNO's adapt to new regulatory frameworks or rapidly deploy new services across APAC's diverse market conditions and consumer expectations.



Looking ahead: the future of MVNO engagement in APAC

Beyond 2025, organisations will face new opportunities as 6G emerges and AI-driven personalisation becomes standard across APAC's diverse technological landscape. By 2030, 6G could enable ultra-low latency for IoT applications spanning Indonesia's archipelagic

geography, while AI chatbots and agents may handle 80% of customer interactions across multiple languages and cultural contexts. MVNO's that invest in scalable automation now—like Pendula—will be best positioned to lead in this next wave of innovation across the world's most dynamic mobile market.

Ready to kickstart your organisation's success in 2025?

Start by exploring how Pendula can transform your customer engagement strategy.

Request a conversation today to learn more about:

- Automating 5G e-SIM activations
- Powering IoT usage alerts across complex geographies
- Building loyalty that transcends cultural and economic boundaries

Take the first step towards mastering engagement across the world's most competitive mobile landscape.

Your customers are waiting.

GET STARTED



Resources

Dive deeper into the trends, data, and regulations shaping the APAC MVNO landscape in 2025 with these trusted sources:

MARKET ANALYSIS & TRENDS

GSMA Mobile Economy APAC 2024

Comprehensive insights on APAC mobile trends, market size projections, and 5G adoption rates

[!\[\]\(5f2ad55541d1c76614ad618336f6fa7b_img.jpg\) GSMA](#)

Mordor Intelligence APAC MVNO Market Report 2024

Detailed analysis of MVNO market size, growth projections, and competitive landscape

[!\[\]\(fe5d33c08faf9a42a148630afb19375e_img.jpg\) Mordor Intelligence](#)

ASEAN MVNO Market Analysis 2025

MVNO opportunities across Southeast Asian markets

[!\[\]\(1ec9c5991b6cfbe205eacf87caeef44f_img.jpg\) Mordor Intelligence](#)

TECHNOLOGY & NETWORK PERFORMANCE

Ericsson Mobility Report

APAC Regional Analysis - 5G deployment and subscription trends

[!\[\]\(1ee9500f722bcabf6161b47e0c714cbe_img.jpg\) Ericsson](#)

OpenSignal APAC Mobile Network Experience Report 2024

Mobile network performance benchmarks

[!\[\]\(63ece90d81c8e557bea8b4e55e8e8779_img.jpg\) Opensignal](#)

REGULATORY & PRIVACY FRAMEWORKS

ASEAN Framework on Personal Data Protection

Regional data protection harmonization

[!\[\]\(8f9f492c8b324b2f2f24e3396ef087a1_img.jpg\) Arcadsoftware](#)

Indonesia Personal Data Protection Law 2022

Comprehensive data protection legislation

[!\[\]\(a7069cde1de4d148f6375913b9bfe13b_img.jpg\) H. S. F. Kramer](#)

Thailand PDPA and Regional Updates

Southeast Asian privacy law developments

[!\[\]\(c598d40919147a08e34a5a98f694195e_img.jpg\) DLA Piper](#)

Singapore PDPA Enhancement Framework

Enhanced data protection and cybersecurity requirements

[!\[\]\(32312a5c60df463bd16ec68f52301b94_img.jpg\) PDPC](#)



pendula

NEXT-GEN CUSTOMER
ENGAGEMENT

Future proofing your MVNO: customer engagement strategies for 2025 and beyond. APAC.

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