

# Tariff Trends SnapShot 39 - Mobile Data Pricing in Emerging Markets

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## Abstracts

In all four markets surveyed by TCL (Cambodia, India, Indonesia & Pakistan) there has been an increase in the number of bundled data packages offered, usually as a Daily or a 30 Day package.

The number of Post Pay data bundles are more limited, as MNOs focus on 30 Day Pre Pay packs, often with auto-refill every 30 days.

The introduction of flat rate data bundles is linked with the launch of 3G + HSPA networks, with Pakistan being the most recent emerging market to see the introduction of 3G services during 2014.

Pricing per GB in all four Emerging Markets is competitively priced as MNOs seek to create a mass market for Mobile Broadband services. One feature has been free mobile access to social networks as a promotional tool in Pakistan & also Indonesia.

In Cambodia & Indonesia in particular a large number of high data bundles have been introduced – with data allowances ranging from 10 GB up to 45 GB.

But despite the rapid growth in data volumes, data revenues lag behind, with the percentage increase in data volumes in some cases outstripping data revenue by more than 5 to 1 (XL Indonesia).

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