



In
partnership
with



Transforming the monetization model of mobile connectivity

**From volume-based to
performance-based offerings**

Introducing differentiated connectivity performance tiers

Singtel, in partnership with Ericsson, is revolutionizing its connectivity services business by pioneering a tiered, performance-driven offering structure. This approach demonstrates how communications service providers (CSPs) can rethink and reshape their business models.

Building on Singtel's early introduction of 5G standalone and its rollout of network slicing technology at major public events, Singtel transformed its offering and created three new connectivity tiers: Singtel 5G+, 5G+ Enhanced and 5G+ Priority. This new approach leverages differentiation in connectivity to deliver tangible performance benefits, deeper indoor coverage, prioritization, and protection provided by the 5G standalone network. For Singtel, the result is a shift from volume-based to performance-based offerings, creating new business opportunities and encouraging increased consumer loyalty.

What came before: 5G standalone leadership and early slicing wins

In 2022, Singtel gained nationwide 5G standalone coverage, establishing a solid foundation for unlocking new opportunities and exploring the full potential of 5G. This included advanced capabilities for providing premium experiences to users, such as end-to-end network slicing.

The latter capability enabled Singtel to embark on a new phase of exploration, with the first major trial occurring during the 2022 Singapore Grand Prix, when Singtel deployed slicing and Radio Resource Partitioning (RRP) to ensure premium connectivity for selected users in the high-traffic environment. This was followed in 2023 by Singapore's National Day Parade, where Singtel further explored new technology capabilities such as Priority-Based Admission Control (PBAC) to guarantee connectivity for both priority users and public safety teams on separate, dedicated slices of the network during a period of even greater network demand.

These early trials validated the technical feasibility of differentiated connectivity and demonstrated its commercial potential for a new phase of scaling and monetization of differentiated connectivity offerings. What followed was an era of exceptional innovation with new offerings such as Priority Event Passes and new technologies like User Equipment Route Selection Policy (URSP) being implemented by Singtel on its journey to pioneer new business opportunities with 5G standalone, which was outlined in the case study 'Unleashing the power of differentiated connectivity'.¹

Singtel's innovative achievements, driven by its partnership with Ericsson, have gained increasing national and international recognition since 2023. Recent awards include, 'Most Innovative 5G Communication Service' at NetworkX in 2024² and 'Best Mobile Security Solution' at GSMA GLOMO 2025³ for Singtel's Enterprise Mobile Protect and 5G Priority.

Singtel's introduction of Mobile Protect and URSP has reinforced the company's leadership in delivering secure, application-aware connectivity. These developments mark a new era of differentiation to

better serve its customers as Singtel shifts from volume-based pricing to performance-based value propositions.

From then to now:

A new business momentum

In 2025, Singtel launched a tiered offer structure under the Singtel 5G+ brand. This structure introduced three distinct tiers – Singtel 5G+, 5G+ Enhanced, and 5G+ Priority – as well as upsize options for 5G+ Enhanced and 5G+ Priority, which include higher data limits and worldwide roaming options. These offers were designed to provide consumers with clear and differentiated performance classifications to fit a diverse range of needs. The approach mirrors the airline industry model, where consumers can select a level of service that matches their needs and willingness to pay.

The base tier, Singtel 5G+, is built on the activation of 5G standalone in 700 MHz spectrum to deliver strong coverage and indoor performance, ensuring a reliable experience for all users. Higher-tier users enjoy the benefits of advanced features such as network slicing and partitioning, which deliver faster speeds and lower latency during periods of congestion.

"Our deployment of 5G standalone and advanced slicing technologies has enabled us to deliver differentiated connectivity with guaranteed performance. These capabilities have been rigorously tested in high-demand environments, proving their readiness for large-scale commercialization."

Hai Thoo Cheong,
VP Mobile Engineering, Singtel

¹ Ericsson, "Unleashing the power of differentiated connectivity" (2023).

² IOT NOW, "Network X Awards 2024 winners crowned in Paris" (2024).

³ GSMA, "GLOMO Awards Winners Unveiled at MWC25 Barcelona" (2025).

Figure 1: Singtel's new offering structure for differentiated performance

	Economy	Business	First class
	5G+	5G+ Enhanced	5G+ Priority
Connectivity	Network PLUS - 700 MHz Coverage PLUS – deep inside	Network PLUS - 700 MHz Coverage PLUS – deep inside Enhanced network – 2x faster speed Enhanced roaming – trusted partners	Network PLUS - 700 MHz Coverage PLUS – deep inside Priority lane – 4x faster speed Priority roaming – first-choice partners
Services		Enhanced security – security protection software Enhanced care – 24/7 hotline	Priority security – mobile protect Priority care – dedicated in-store service and 24/7 hotline
Extras		Enhanced deals – latest phones	Priority deals – 15 percent off accessories

These enhancements are complemented by value-added services, including additional threat protection provided through the network and premium customer care, creating a holistic experience that goes beyond connectivity.

Since Singtel's initial launch, commercialization has accelerated. The tiered offer structure went live in

May 2025, and work is underway to extend the benefits to prepaid customers. This required the enabling of 5G standalone for prepaid subscribers, ensuring that differentiated connectivity is accessible across the entire customer base.

Singtel is also working with key ecosystem partners to bring differentiated connectivity benefits to specific applications.

An example is Singtel's recent launch with Tencent Games⁴ of the cloud-based game Honor of Kings. This world-first deployment employs Singtel's advanced 5G network to deliver dedicated, low-latency capabilities to enable smoother and more competitive gameplay for players, at home or on the move. With this technology, players will no longer have to deal with heavy downloads or high-end hardware, as all intense processing and rendering takes place in the cloud, making it easier for players to game on any mobile device. This solution also enables the boosting of real-time processing across IoT devices and support for generative AI for smart glasses. These offers just scratch the surface of what differentiated connectivity could offer users and how CSPs could monetize it, while also optimizing their network resources to match different user needs with more efficiency.

⁴ Singtel press release, "Singtel and Tencent Games to launch Honor of Kings" (4 September, 2025).

A changing tide: From data buckets to experiential value

For more than a decade, CSPs' main offering has been the data bucket, with the volume of data as the key value proposition. However, as the buckets have gradually increased in size, the traditional model is losing applicability. The larger data buckets hold little appeal for users, who typically do not consume their full monthly allowances. The result is a market where CSPs mainly compete on price, putting downward pressure on the average revenue per user (ARPU). In an initial attempt to break out from this negative spiral, Singtel tried offering value-added service (VAS) bundled with Quality-of-Service (QoS). The outcome has been disappointing, with revenues not growing as expected.

Singtel's new approach to reverse this downward trend is to focus on performance and experience, as well as to address new users' application-driven behavior (for example, new high-bandwidth and AI-based applications). By offering differentiated tiers, Singtel not only provides consumers with a compelling reason to upgrade, it provides them with

a new currency of understanding when it comes to the best choices to suit their needs. Features such as priority lanes, enhanced security, and premium support create tangible benefits that consumers can perceive and value. This additional value creates opportunities for upselling and consumer acquisition. Singtel's approach covers all angles, because the base tier remains strong and competitive enough to meet the everyday needs of more price-sensitive users, ensuring that all users enjoy a reliable experience.

The technical foundation for this strategy is robust. Singtel has deployed a comprehensive toolbox that includes Ericsson's RAN features such as RRP, Automated Radio Resource Partitioning (ARRP), Relative Priority Scheduling, PBAC, and Rate-Controlled Scheduling, combined with Ericsson's 5G Core support for network capabilities like URSP, Application Detection Control and Security-as-a-Slice. These features have been tested under real-world conditions in some of Singapore's most demanding environments, ensuring that performance promises can be delivered consistently.

"At Ericsson, we see differentiated connectivity as a shared ambition. Singtel's leadership is at the heart of this transformation, and our role is to enable it – bringing the technology, expertise, and ecosystem partnerships to build the technical foundation that turns vision into reality."

Zsolt Kormanyos, CTO,
Global Customer Unit Singtel at Ericsson



Extending the model to enterprise and campus networks

The Singapore Grand Prix and National Day Parade deployments were great successes, but differentiated connectivity is not limited to consumer services. Singtel has applied the same principles to enterprise and campus environments, which it continues to explore, where the need for assured performance and security is even greater. Offerings such as 5G+ Priority for business enable enterprises to benefit from consistent, reliable connectivity, improving their operational efficiency and delivering uninterrupted network performance where it matters most. Technologies such as URSP with Mobile Device Management and Enterprise Mobile Protect provide businesses with the tools needed to guarantee connectivity for critical applications.

Campus networks equipped with ARRP and Advanced Scheduling enable organizations to prioritize traffic for essential services, from public safety to industrial automation. This approach gives enterprises a new vocabulary for the type of connectivity that would benefit them – a vocabulary consisting of assurance, priority, and security rather than raw bandwidth – helping them unlock the full potential of 5G for mission-critical operations.

Lessons from Singtel's journey

The transition from concept to commercial reality has delivered several important lessons. First, cross-functional collaboration between teams is essential. Product, marketing, and technology teams must work together to clearly define the features that enable differentiation, while marketing teams translate these capabilities into offers that consumers can understand and value. Second, experimentation along the way is critical. Early pilot events such as the Singapore Grand Prix and the National Day Parade were not designed to generate immediate revenue, but to build operational expertise. These trials provided insights into network behavior under extreme load, device performance, and consumer experience, all of which informed the subsequent design of commercial offerings. Finally, proof under real-world conditions is a must. Features such as PBAC and RRP were proven during high-demand scenarios, ensuring that the promises made to consumers can be kept even in the most challenging environments.

What comes next?

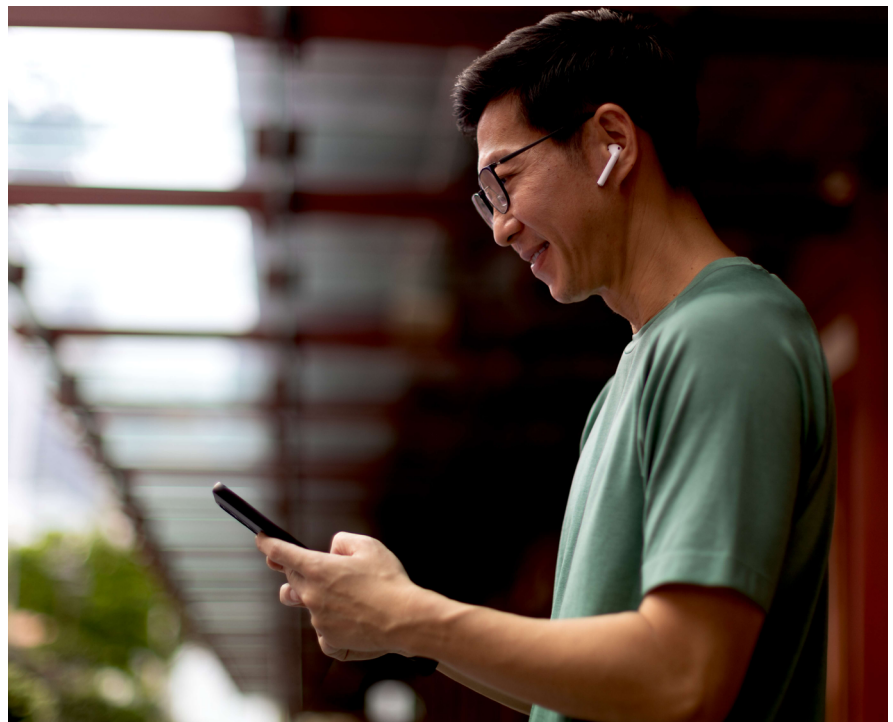
Singtel plans to focus on three key areas, now and throughout 2026:

1. Introduce advanced 5G features such as granular rate control and latency management – this will enhance the performance guarantees associated with premium tiers.
2. Enrich its value proposition through additional benefits, including priority customer care, exclusive retail experiences and curated partnerships. These enhancements will ensure that higher tiers deliver a comprehensive experience, not just faster connectivity.
3. Evolve its pricing and loyalty models by adopting concepts such as dynamic pricing and tier-based rewards, aiming to maximize the value of its network investments while giving consumers greater flexibility and choice. These initiatives will be supported by advanced observability and automation, enabling real-time adjustments to meet changing demand patterns.

The momentum continues as more capabilities are coming

From a business journey perspective, Singtel is targeting an upcoming era of application-driven, enhanced performance differentiation. This will demand new types of applications that are purpose built, backed by strict service-level agreements for connectivity and capable of interacting with the mobile network via connectivity performance-related APIs.

Enhanced automation and network programmability, leveraging AI-driven capabilities will also be essential to reach this stage. Finally, the device and ecosystem readiness will be crucial and for that, Singtel and Ericsson are actively engaging with different ecosystem partners, both in Singapore and at a global level, to transform the industry in this direction.



"With Singtel 5G+, we're able to offer customers scalable, performance-based connectivity that better suits their needs and behaviors, building loyalty in the process."

Terence Lai, VP, Digitalisation, Products and Partnerships, Singtel Singapore.

How can others get started?

Singtel’s progress can serve as a roadmap for other CSPs looking to leverage the emerging commercialization opportunities of 5G standalone in a similar way – capturing the value from more personalized experiences.

There are three pillars to Singtel’s approach:

Creating a roadmap for differentiation

The technological advancements and features of 5G standalone should be used to place different classifications of consumer experiences into distinct groupings. CSPs should test different combinations to find what is right for their business or create a roadmap of the different features that drive performance differentiation. It is important that identifiable consumer needs are appropriately mapped to the capabilities of the targeted grouping.

Devising an offering structure

Delivering the value of 5G to consumers is critical in securing brand positioning. CSPs should ensure that they have a clear and communicable offering structure that can be understood by their customers. CSPs will also want to design new products that can

utilize the various levels of differentiated performance or associate them with services that will. This is an effective way of leaving the door open for adding new value to a CSP’s offering structure down the line, capturing more consumer interest and loyalty.

Choosing a revenue model

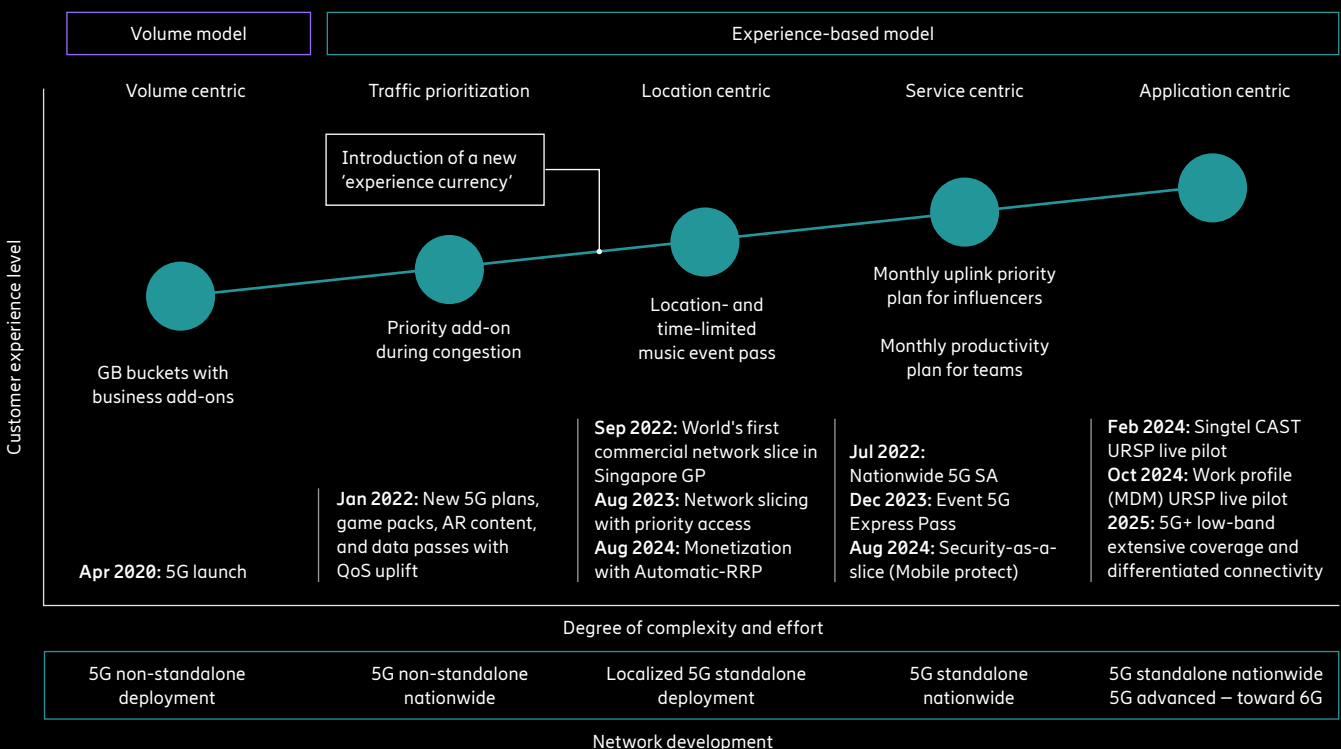
Linking new revenue models and their associated prices to the performance tiers on offer or through applications will deliver financial benefits across a CSP’s 5G consumer base. Not only that, performance-based models have no upper limit to opportunities for additional options and chargeable experiences that can be rolled out. CSPs will want to test price elasticity to find what works for them.

Experimentation will always be an unmissable step in the journey of CSPs seeking to emulate Singtel’s success. To speed this progress along, the best thing CSPs

can do is ensure they have company-wide commitment and engagement with this new venture. The monetization of 5G is dependent on technology, but also on product and marketing units working together with aligned goals, priorities, and language.

Perhaps the most important thing to remember is that the market will initially require education on the value that is in store for it with performance differentiation. By clearly defining the value and making it real for consumers, the easier it will be to translate progress into financial impact. With a partnership spanning 30 years, and a shared vision to unleash the potential of 5G connectivity for consumers and enterprises, Singtel continues to work closely with Ericsson throughout this journey to charter new territories, push boundaries, and shape the future of connectivity, bringing value to new use cases for both consumers and enterprises.

Figure 2: Singtel’s connectivity business journey



About Singtel

Singtel is Asia's leading communications technology group, providing a portfolio of services from next-generation communication, 5G and technology services to infotainment to both consumers and businesses. The Group has presence in Asia, Australia and Africa and reaches over 760 million mobile customers in 21 countries. Its infrastructure and technology services for businesses span 21 countries, with more than 428 direct points of presence in 362 cities. For consumers, Singtel delivers a complete and integrated suite of services, including mobile, broadband and TV. For businesses, Singtel offers a complementary array of workforce mobility solutions, data hosting, cloud, network infrastructure, analytics and cyber security capabilities. Singtel is dedicated to continuous innovation, harnessing technology to create new and exciting customer experiences and shape a more sustainable, digital future.

For more information, visit www.singtel.com

About Ericsson

Ericsson's high-performing, programmable networks provide connectivity for billions of people every day. For nearly 150 years, we've been pioneers in creating technology for communication. We offer mobile communication and connectivity solutions for service providers and enterprises. Together with our customers and partners, we make the digital world of tomorrow a reality.

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