

| Tarifica Study Finds 10 Gigabit Broadband a Utility in Singapore but a Luxury in the United States

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Analysis highlights how regulation and competition, not technology, can drive broadband pricing gaps

The latest Tarifica Data Dive from the global telecom data provider reveals a striking contrast between Singapore and the United States in how ultra-high-speed broadband is priced and perceived. In Singapore, 10 gigabit fiber is now a mainstream service available to most households. In the United States it remains a premium product for a relatively small share of the market.

According to Tarifica's analysis, Singaporean consumers can purchase 10 gigabit service for as little as \$22 per month, while comparable U.S. offerings can cost up to \$195 per month. In practical terms, many American households pay several times more for a fraction of the speed. The difference is not about technology, since both countries use similar fiber infrastructure. It reflects how the markets are structured and regulated.

Singapore's wholesale open-access model, the government policy which was established in 2008, separates network ownership from retail operations. Every internet service provider leases capacity from the same underlying fiber network on identical terms. This has produced a highly competitive retail market where providers differentiate on price, service quality, and customer experience.

"In Singapore, the effects of this structure are easy to see," said Soichi Nakajima, Vice President of Data and Analysis at Tarifica and the author of the study. "Multiple ISPs compete vigorously, prices adjust quickly, and very high speeds are treated as standard for households. Ten gigabit broadband is no longer a status purchase. It is a routine utility."

The United States presents a different picture. Vertically integrated operators own both the infrastructure and the retail relationship in most local markets. Because many households have only one or two fixed-line options, competition is limited. Providers are able to position multi-gigabit service as a premium tier rather than a mainstream offer.

Tarifica's research found that while Singapore's leading providers SIMBA, M1, StarHub, and Singtel offer 10 gigabit plans between \$22 and \$65 per month, prices from U.S. providers range from \$100 to \$195 for similar or slower tiers. The result is that American consumers often pay four to seven times more per gigabit than Singaporeans do. Even in dense U.S. cities where construction costs are comparable, prices remain substantially higher, which points to market dynamics rather than geography as the primary driver.

"The key point is that both countries rely on the same fiber technology," Nakajima added. "The outcomes diverge because market rules differ. Singapore's approach promotes direct retail competition and pushes prices down. The U.S. approach allows limited rivalry and supports premium pricing. Technology sets what is possible. Competition and policy determine what it costs."

Looking ahead, Tarifica notes that broadband affordability will play a growing role in digital inclusion and national competitiveness. Demand for capacity is increasing with artificial intelligence, cloud services, and immersive applications. Where very high speeds are affordable, consumers and businesses can adopt new services more quickly. Where prices remain high, adoption lags and the benefits are concentrated among higher income segments.

Singapore's experience shows that a wholesale open-access framework can make next generation connectivity widely accessible. The U.S. experience shows that where competition is limited, ultra-fast broadband remains a niche purchase rather than a mass-market standard.

Ultimately, the lesson from Tarifica's latest Data Dive is that market design, not technology, determines who benefits and how quickly. As global connectivity needs accelerate, the choice between treating broadband as a baseline utility or as a premium luxury will shape who can participate fully in the digital economy.