A woman is the central focus of the image, smiling warmly. She is carrying a large, round, woven basket on her head. The basket is made of a dark material with a complex, crisscrossing pattern. The woman is wearing a plaid shirt. The entire image has a warm, reddish-orange tint. The text is overlaid on the lower left portion of the image.

Connected Women
EXECUTIVE SUMMARY
OOREDOO MYANMAR:
MYANMAR, MOBILE AND MATERNAL HEALTH

Executive summary

In a highly competitive mobile market, differentiating from the competition is critical. In 2014, Ooredoo launched the first non-state-owned mobile network in Myanmar, followed closely by its competitor Telenor. This case study tells the story of Ooredoo Myanmar partnering with an international NGO and a local tech start-up to launch a mobile maternal health service: maymay.

Developed with the support of a GSMA Connected Women Innovation Fund grant, the service has now been evaluated by the Connected Women team to assess the social benefits (so far) for women in Myanmar, the commercial benefits for Ooredoo, and the potential future impact of the service.

This document is a summary of the results of this evaluation, which was conducted four months after launch. For more information please see the full report.

Author: Georgia Barrie

M&E design, methodology and technical lead: Alexandra Tyers

Acknowledgments: Max Cuvellier, Claire Sibthorpe, Dominica Lindsey



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Women



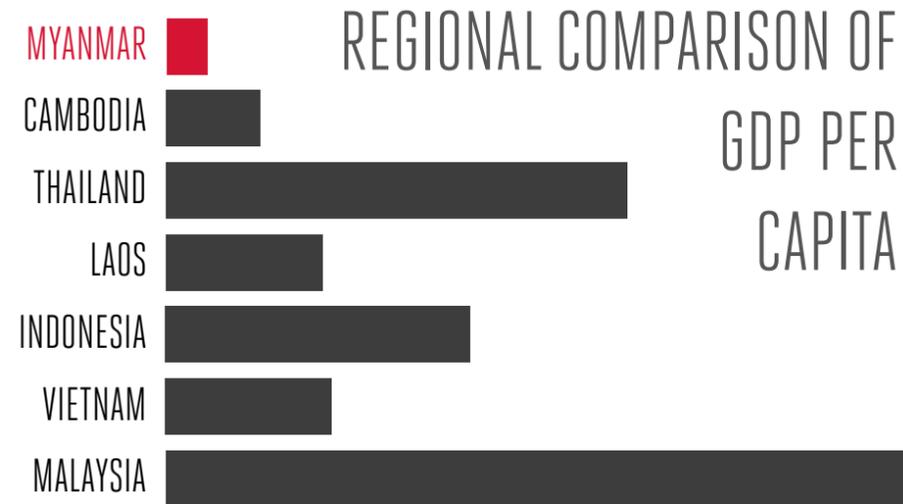
Myanmar in 2013: A mobile greenfield

2013

By the end of 2013 mobile subscriber penetration in Myanmar was estimated at 11%, one of the lowest in the world. Mobile communications were provided by state-controlled operators, and a lack of investment and competition meant that coverage was poor and usage very expensive: the average cost of a SIM was \$125 USD in 2013.

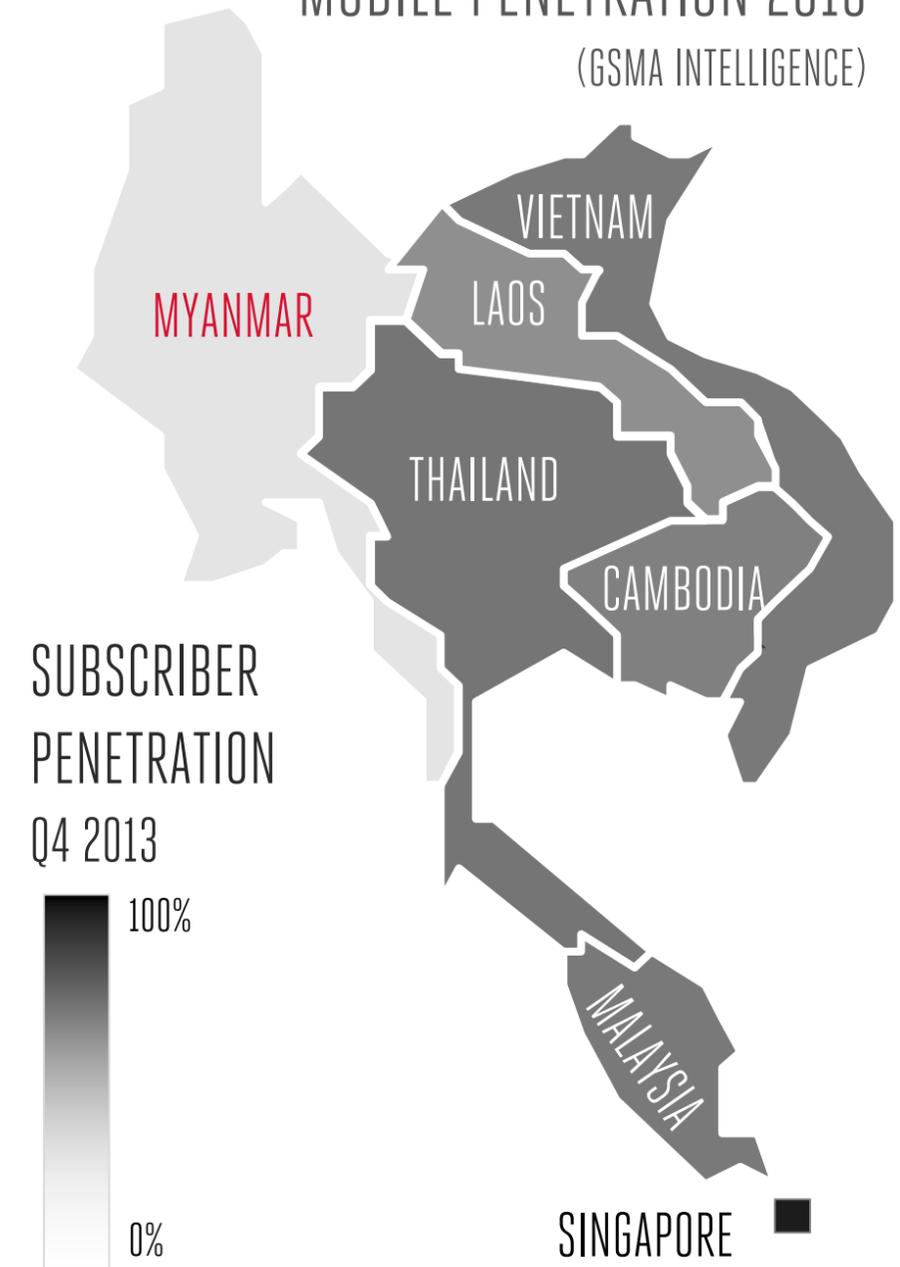
AVERAGE COST OF SIM IN 2013

 **USD \$125**



As part of its wide-ranging reforms, the Myanmar government has since granted network licences to international operators for the first time. By opening its doors to foreign investors, the government hopes to boost investment in network infrastructure, increase competition, and significantly improve mobile access for the population of Myanmar. It is estimated that growth in the mobile market will add 7% to the country's GDP.

MOBILE PENETRATION 2013
(GSMA INTELLIGENCE)



Myanmar in 2014: Network launches

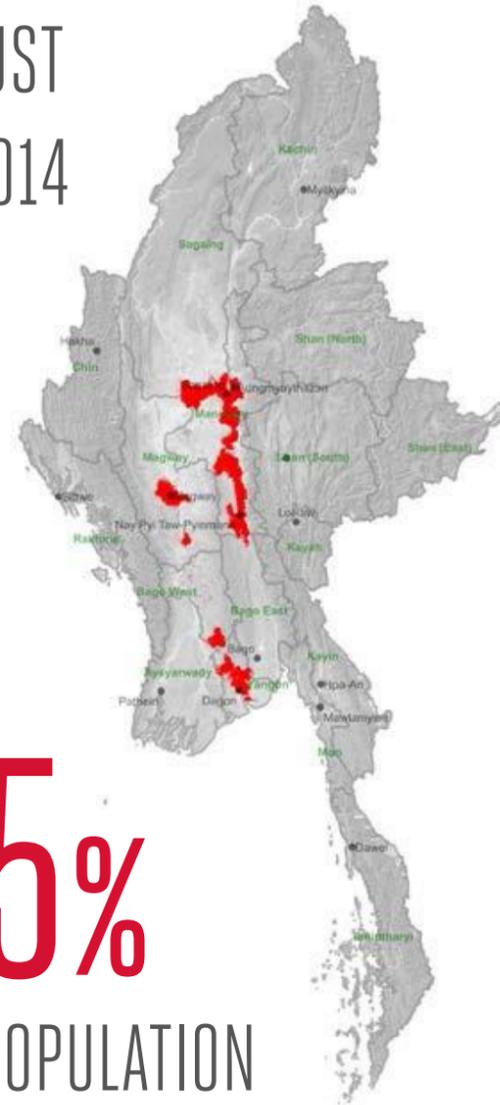
2014

Over 90 bids were received in what was one of the most competitive licensing rounds in history. The successful bidders were Ooredoo and Telenor, but more licences are expected to be granted in the coming years.³ Ooredoo launched its network in mid-August 2014 and Telenor launched three months later in mid-November.

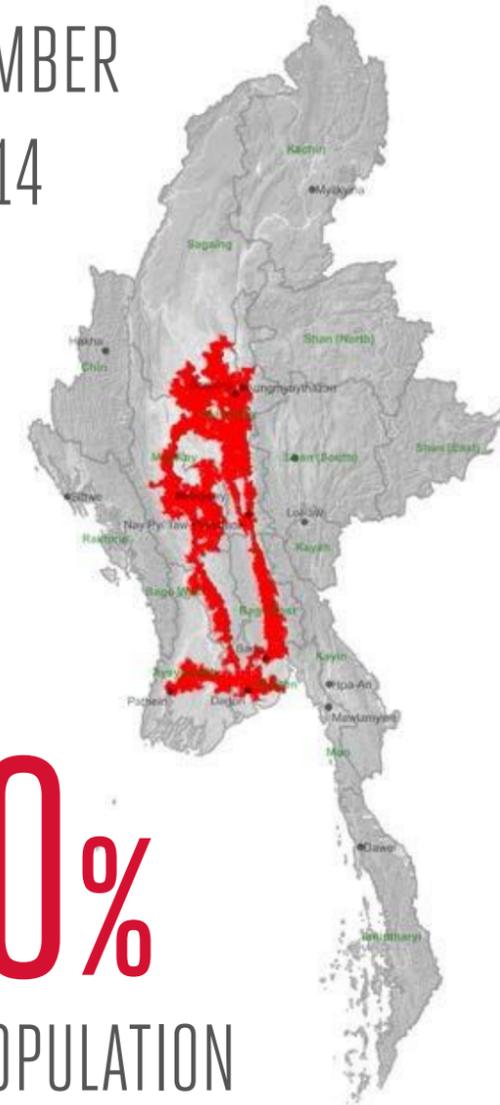
Telenor is investing in 2G and 3G whereas Ooredoo is, for the first time, building a 3G-only network. Ooredoo's hopes that a 3G-only network will encourage first-time mobile users in Myanmar to 'leapfrog' traditional mobile usage and purchase a smartphone and 3G subscription rather than a basic or feature phone¹.

Ooredoo network roll-out: 2014²

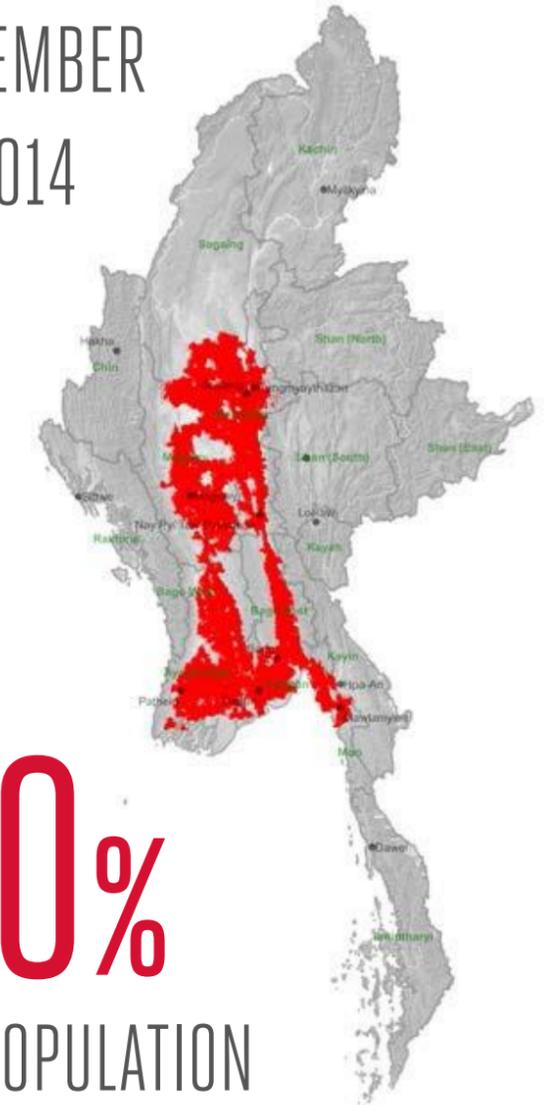
AUGUST
15 2014



NOVEMBER
21 2014



DECEMBER
31 2014



1. Mobile World Live: Myanmar ready to leap into 3G era, August 2014

2. Ooredoo Myanmar



“

We think we can get Myanmar using advanced services more quickly than other markets

”

Nick Swierzy, CSO, Ooredoo Myanmar

Barriers to women's adoption of mobile



“Without it [a mobile phone] I’m still ok. Food is more essential”
Rural woman focus group participant

Although the cost of ownership has fallen significantly since the launch of the Ooredoo and Telenor networks, mobile ownership and usage will continue to be prohibitively expensive for a large segment of the population.



“I’ve never bought one [a phone] so I have no idea about it”
Rural woman focus group participant

Most of the population have never owned or even seen a smartphone handset and consumer insights research showed that women typically had lower awareness of mobile services than men.



“If you touch [a smartphone], it gets here and there, you don’t know where it goes”
Rural woman focus group participant

Consumer insights research showed that technical literacy levels were low for both urban and rural men and women and were particularly low among rural women.



“Sometimes I check for it [health information] on Facebook”
Urban woman focus group participant

There are very few websites written in Myanmar language or with content specific for Myanmar consumers, particularly women, which limits the value of mobile data services.

Identifying the market opportunity

Ooredoo saw an opportunity to design a service to address some of the major barriers to the adoption of 3G among women whilst also providing a means to differentiate Ooredoo from its market competitors.

A maternal health service was targeted as an opportunity as a consumer insights study found that personal and family health represents the biggest concern for the Myanmar population.

A health service would also open up new marketing channels such as hospitals and health workers.



Forming the partnership

As well as receiving funding and advisory support from GSMA Connected Women, Ooredoo engaged two partners on the project: health NGO Population Services International (PSI) and technology start-up Koe Koe Tech.



- Project management
- Proposition development and marketing
- Distribution channel



- Develop health content
- Secure approval from Ministry of Health
- Monitoring & Evaluation



- Application development
- Develop product specifications/user experience
- Brand development and management of app



- Seed funding
- Guidance on product development
- Guidance on monitoring and evaluation

Developing maymay

Named maymay, meaning 'mother' in Myanmar language, the app is designed to provide maternal and child health advice to women during pregnancy and for 3 years post-birth. The health content is based on the MAMA (Mobile Alliance for Maternal Action) maternal health content but translated to the Myanmar language and adapted to the local context.

Some of the features developed and in development:

MATERNAL HEALTH ADVICE



Users receive 3 maternal health advice alerts per week, tailored to the user's stage of pregnancy.

HEALTH WORKER HOTLINE



Users can call a dedicated hotline, operated by PSI staff, from 9am to 5pm 5 days a week to seek advice

DOCTOR LOCATOR

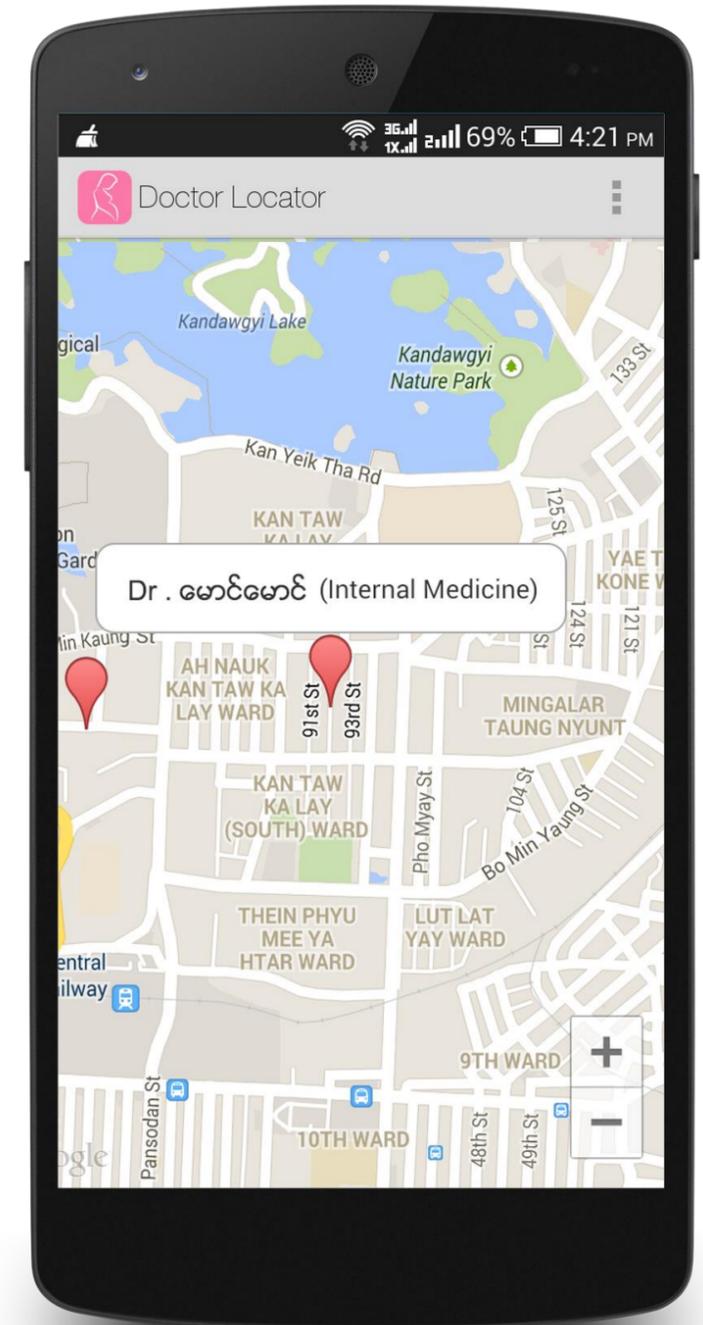
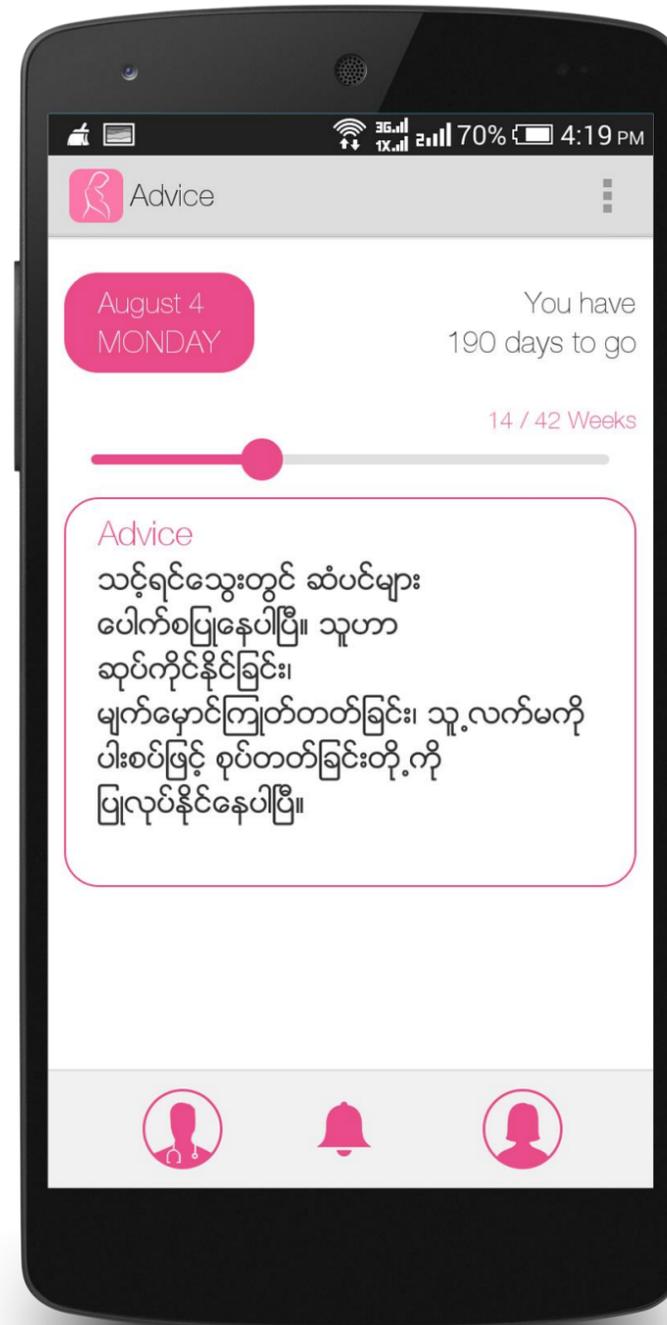


Users can search for their nearest health workers and see their location, schedules and contact details.

PHAYPHAY ("FATHER")



Due to strong interest from male users, a 'father' version of the app was developed.



February 2015: App usage

REGISTERED USERS

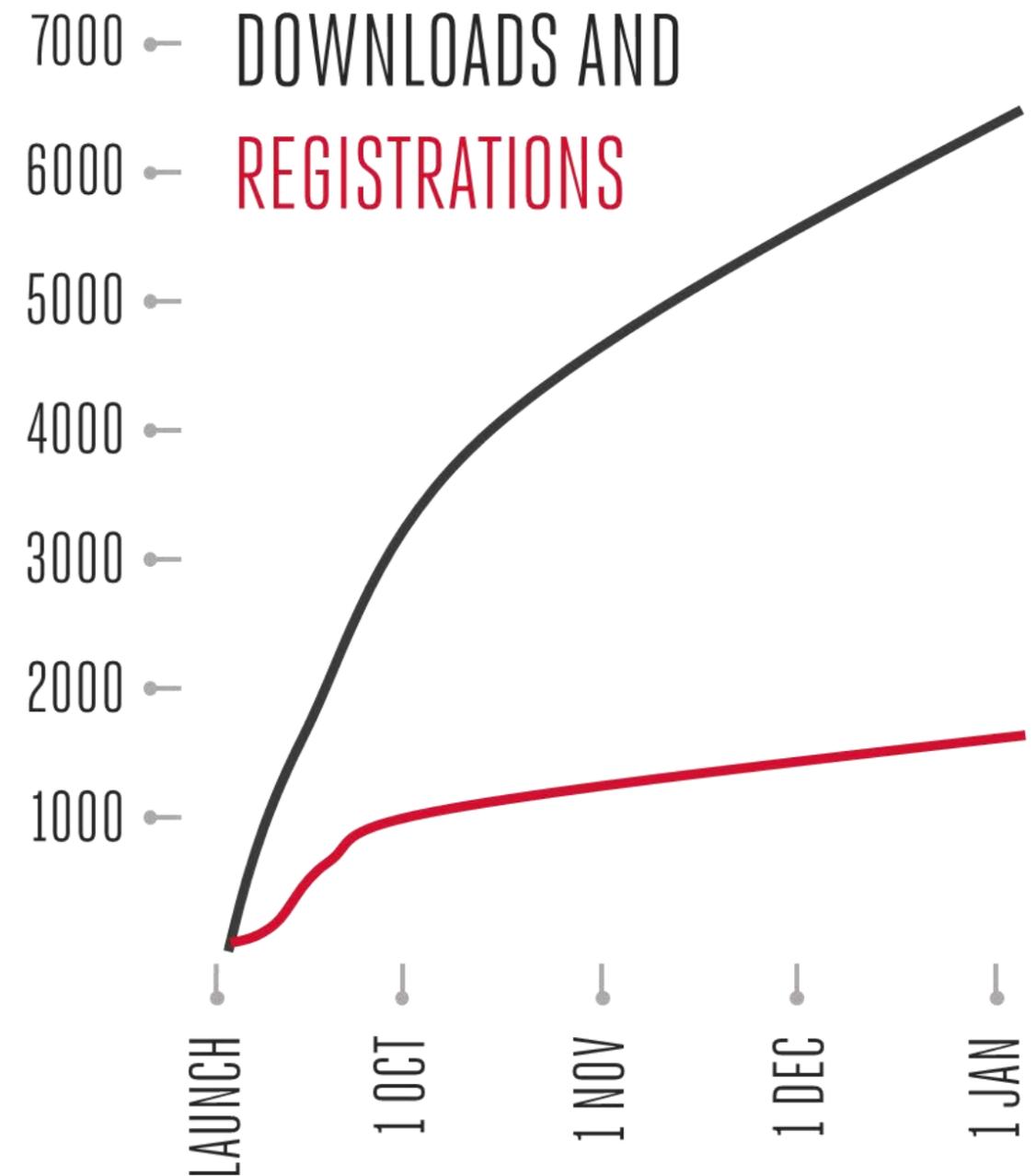
(REGISTRATION DATA)

1.7k



The app launched on the Google Play Store on 5th September 2014 and, in the first four months after launch, had almost 7,000 downloads and 1,700 registered users. The drop-off between download and registration is primarily due to the fact that non-Ooredoo subscribers can download the app but cannot complete the registration process.

In order to mitigate this issue, Ooredoo will allow non-subscribers to use the basic notification feature and keep all premium features exclusive to Ooredoo subscribers. It is hoped this will help to drive uptake and awareness as well as encourage non-subscribers to purchase an Ooredoo SIM in order to access premium features.



February 2015: Commercial impact

In December 2014 Ooredoo conducted a phone survey of registered users of maymay. Although the survey was done on a small scale, combined with the app's back-end usage data it provides an early indication of the commercial and social impact of the service.

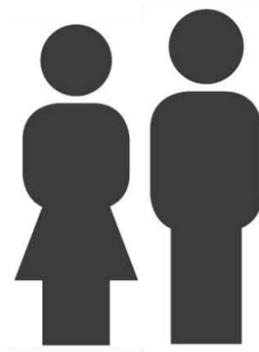
COMMERCIAL IMPACT

(SURVEY DATA)

MAYMAY SIGNIFICANTLY IMPROVED MY:

PERCEPTION
OF OOREDOO
BRAND

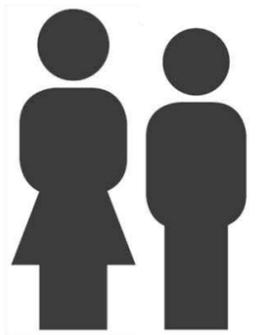
85%
OF FEMALE USERS



90%
OF MALE USERS

CONFIDENCE
USING A
MOBILE

74%
OF FEMALE USERS



68%
OF MALE USERS



7%
OF USERS

PURCHASED AN
OOREDOO SIM IN
ORDER TO USE MAYMAY

The majority of users reported that the app had significantly improved their perception of the Ooredoo brand and qualitative feedback suggests that it is having an impact on customer stickiness, with some users using saying they use their Ooredoo SIM as their primary SIM in order to use the app. Three quarters of women surveyed also said that their confidence using mobile has been significantly improved by using the maymay app which, it is hoped, may encourage women to trial other mobile data services.

The biggest challenge in the next twelve months will be scaling up the user base and increasing the number of users from the lower-income rural segment.

February 2015: Social impact

Although it is too early to test the impact of the app on maternal health outcomes, users report that the app is having a positive effect on maternal health knowledge and practices and is a valued service.

SOCIAL IMPACT

MAYMAY SIGNIFICANTLY IMPROVED MY:

MATERNAL
HEALTH
KNOWLEDGE



40%
OF FEMALE USERS

MATERNAL
HEALTH
PRACTICES



55%
OF FEMALE USERS

(SURVEY DATA)

TOP SOURCES OF MATERNAL HEALTH INFO AMONG FEMALE MAYMAY USERS

DOCTOR



MAYMAY



INTERNET



FAMILY



FRIENDS



MIDWIFE



The impact of maymay on maternal health information and practices appears to be positive with 62% of users citing it as one of their top 2 or 3 sources of maternal health information and 55% of female users reporting that the app has led to a change in their maternal health practices.

The most common reasons for respondents saying the app has not had a significant improvement on their maternal health knowledge or practices were the user having only used the service for a short time and the user already having access to the information (e.g. through their doctor). Improvements in maternal health knowledge and practices are expected to be much more significant once users have had more time using the app and once it is available in lower-income, rural areas where access to other sources of maternal information are much more limited.



Connected
Women



“

I can change those habits that are not good for my baby, I abide by everything the app says

Maymay user, Yangon

”

Lessons learned



PARTNER- SHIPS

Form the right partnerships

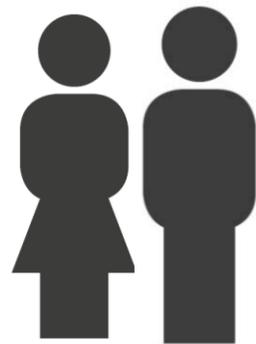
The business model behind maymay rests on the synergies between the partners. As an NGO, PSI were able to support in the development of maymay at a low cost to Ooredoo. Koe Koe were able to develop the app at no cost to Ooredoo in return for the revenues from in-app advertising and access to Ooredoo's marketing and distribution channels.



CONSUMER INSIGHTS

Invest in consumer insights research

One of the key success factors in developing this service was the use of focus group discussions with Myanmar women. Major changes were made to the original design of the app, such as significantly reducing the number of steps required to register, based on feedback from target users.



TARGET SEGMENT

Factor in men when designing for women

Focus group discussions with men highlighted a strong interest, particularly among those in urban areas, in a maternal and child health mobile service. This interest is supported by the fact that 32% of current registered maymay users have registered as male and 60% of those who answered the phone survey were men.



DISTRIBUTION CHANNELS

Take advantage of low-cost channels

To date marketing and distribution channels have been limited to social media, SMS blasts from Ooredoo and the maymay website. Capitalising on low-cost channels such as social media and developing app features to 'recommend a friend' will be critical to the commercial sustainability of a service such as this.

For more information...



Case study report

More information on the development of maymay and results to date can be found in the full case study report



Phayphay blog

More information about 'phayphay', the male version of the maymay app can be found in our [phayphay blogpost](#)

A series of quantitative studies into various aspects of the service will be undertaken over the next two years by researchers from the University of Sydney and UCLA with support from partners such as the International Growth Center (IGC).

GSMA Connected Women will continue to support in tracking the commercial and social impact of maymay as network coverage expands to a greater proportion of the population. Results will be shared on the GSMA Connected Women website
www.gsma.com/connectedwomen

Connected Women

GSMA Connected Women works with partners to deliver socio-economic benefits to women and the broader mobile ecosystem through greater inclusion of women across the industry. The programme is focused on increasing women's access to and use of mobile phones and life-enhancing mobile services in developing markets, as well as closing the digital skills gender gap, attracting and retaining female talent, and encouraging female leadership in technology on a global basis.

For more information, please visit:
www.gsma.com/connectedwomen

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