Proposed Business Strategy for IndiHome Case Study: PT Telkom Indonesia Tbk

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ABSTRACT: IndiHome is a home internet service consisting of landlines phone, internet and TV which was officially launched in 2015 by PT Telkom Indonesia. As one of the programs from Telkom's main project, IndiHome has shown rapid growth since it was just launched. According to the annual report, IndiHome is the market leader of fixed broadband services, holding 82.3% market share in 2020. However, it is shown that there is a significant decline of IndiHome's market share of 4.2% compared to the previous year. To analyze the research, both qualitative and quantitative methodology is used with primary data gathered from internal interviews, questionnaire and netnography. The result indicates that to increase market share growth, a customer improvement strategy is needed which is carried out by improving the quality of services that can improve IndiHome's image in the customer's mind. The new bundling strategy and good synergy between Telkom and government could make Telkom able to develop and provide services in all regions in Indonesia. Market research to map potential customers based on data usage on cellular phones can also be conducted. Telkom can also carry out internal development in the form of gap analysis between the growth of market trends and Telkom's capabilities. By doing this, Telkom can continue to keep informed with developments that occur and stay agile with all changes.

KEYWORDS: Business Strategy, Indihome, Fixed Broadband Internet, Marketing Strategy, Telkom

INTRODUCTION

The shift in people's activities to become completely online since the pandemic broke out had an impact on the explosion of internet use globally. This is directly proportional to the increase in demand for the internet network. With a large population, the internet penetration rate in Indonesia in 2020 reached 69.8% with a total of 190.92 million users. According to the World Bank Indonesia, the penetration rate for fixed broadband users as an internet access tool in Indonesia shows that 4 percent of the population accesses the internet via fixed broadband. Even so, there is a growth of users over time, starting from 2016 the number of users was 1.9 million until in 2020 it reached 9.7 million people (World Bank, Telkom Annual Report, 2020).

The need for the internet that continues to increase sharply is what then causes the internet business to be ogled by many other companies as a business opportunity. The increase in internet users stimulates new players to take part in the competition in responding to the high demands of customers for internet networks which causes fierce competition in the telecommunication industry.

PT Telekomunikasi Indonesia Tbk (Hereinafter referred to as Telkom) is a state-owned information and communication company as well as a complete telecommunications service and network provider in Indonesia. One of services that Telkom provides is home internet broadband, IndiHome. According to the annual report, IndiHome is the market leader of fixed broadband services, holding 82.3% market share in 2020. It is recorded that from year to year, IndiHome's subscriber growth shows a positive trend with an increase every year. There is a good trend for IndiHome in 2016 – 2019 marked by an increase in market share which improves overtime. However, there is a worrying condition, namely when the pandemic hits and everyone is stuck at home and there is a spike in internet traffic which is shown in the graph where fixed broadband internet consumption and user base is increasing, this is inversely proportional to the inflection point towards the Indihome market share. This is indicated by the significant decline of IndiHome's market share of 4.2% compared to the previous year. This data indicates that there is increasingly fierce competition in the fixed broadband market which could challenge IndiHome's status quo as a market leader if not mitigated quickly. In other words, IndiHome needs a strategy to accelerate customer growth to anticipate the current competition.

LITERATURE REVIEW

According to Mitchell (2020) in his article, fixed wireless broadband is high-speed internet access in which connections to service providers use radio signals rather than cables. Fixed wireless systems typically allow download rates of up to 30 Mbps. Fixed wireless
internet providers, like most other internet access technologies offered to residential consumers, often do not impose bandwidth limitations. Fixed wireless internet service, on the other hand, is frequently more expensive than traditional technologies such as DSL owing to the technology required. Fixed wireless broadband services rely on transmission towers, also known as ground stations, to connect with one another and with the location of the user. These ground stations, like mobile phone towers, are maintained by internet service providers. To communicate with the fixed wireless ground stations, subscribers install transceiver equipment in their house or business. Transceivers are made up of a tiny dish or rectangular-shaped antenna with radio transmitters connected. Fixed wireless dishes and radios, as opposed to satellite internet systems, connect solely with ground stations.

Several authors have undertaken research that address fixed broadband and its market in Indonesia. Pradono (2021) investigates the competition model between fixed and mobile broadband for the Indonesian telecommunication market. Applying non-linear exponential regression and the Lotka-Volterra model to analyze the raw data, the competition between fixed and mobile broadband services is mutual for the Indonesian telecommunication market. This result is supported by the fact that the slow growth of fixed broadband service in Indonesia results from internal constraints in the deployment of fixed broadband itself rather than the fast adoption of mobile broadband service. Based on this study findings, it concludes that the government can deploy both fixed and mobile broadband in the same region. This is because both broadband technologies benefit from each other's existence rather than one broadband service preventing the other from growing. This certainly fits the condition in Indonesia with diverse topography, especially those categorized as rural areas, thus requiring a combination of fixed and mobile broadband services to accelerate the distribution of equal access to broadband internet for all Indonesian people.

Sianipar, Sucherly, Kaltum and Oesman (2018) made a study about customer relationship management to customer value & customer loyalty of fixed broadband company in Indonesia. According to the study, the ability to provide convenience in the form of ease of supplementary services, the convenience of online billing information, and the service office, has a greater role in improving customer value than the development of psychological benefits, and rewarding. The ability of the company to provide convenience in the form of ease of additional services, the convenience of online billing information, and service offices, has a greater role in improving customer loyalty than psychological benefits, and gift giving. Customer value plays a role in improving customer loyalty. Increased customer convenience efforts in the form of ease of additional services, the convenience of online billing information, and service offices, have a greater role in improving customer value than psychological benefits, and rewarding, which implies an increase in customer loyalty.

In his paper, Santoso (2016) explains the proposition analysis of fixed broadband services based on product segmentation and purchasing power of urban society. This study discusses an aspect of marketing management from the aspects of product development which is in marketing management known as 5 P (Product, Place, Promotion, Price, Profit) and 3C (Company, Customer, Competitor). The research data is taken in two major cities in Indonesia, indicating that the affordable product (“Freemium”) is a product that is likely selected by the respondents. It requires a series of efforts and strategies that support the marketing and development so that whenever the product will be launched to the market, it is in great demand and chosen by customers. Because at the end, starting from planning and business analysis to the execution, the final result is still have to be a product that is qualified, and meet as much as possible of the customer expectations, which is based on this study, it is a product that has a high value but remains affordable in terms of its price.

**METHODOLOGY**

This study will use both qualitative and quantitative research methods as a way to achieve the objective of this research, where the result will be used to develop and propose strategy for IndiHome. Qualitative research is described as an unfolding model that occurs in a natural setting that enables the researcher to develop a level of detail from high involvement in the actual experiences (Creswell, 1994).

The research use primary and secondary data. Primary data was obtained through interviews with management of PT Telkom Indonesia. There were 2 respondents who were interviewed. The number of informants chosen is depending on the author's needs and it is claimed in qualitative research that the decision on a sufficient sample size to achieve the study purpose is made by the researcher (Sim, Saunders, Waterfield, & Kingstone, 2018). In addition to interviews, Questionnaire and Netography will be used for primary data. Meanwhile, secondary data is obtained through internal data from PT Telkom Indonesia, websites, books, articles, and other media.
This study will analyze the external and internal conditions. To perform external analysis, such as domestic business situation and global environment, PESTEL Framework, Porter's Five Forces, Competitive Analysis and Customer Analysis will be used. Then for internal analysis to identify the competitive advantage will be used STP Model Analysis, Marketing Mix, Porter Value Chain and VRIO Framework. The strategy will then be formulated with SWOT Analysis and SWOT Matrix.

FINDINGS AND ARGUMENT

Internal Analysis: Strength and Weakness (S and W)

The Internal Analysis of strengths and weaknesses focuses on internal factors that give an organization certain advantages and disadvantages in meeting the needs of its target market (Olsen, 2021). Strengths refer to core competencies that give the firm an advantage in meeting the needs of its target markets, while weaknesses refer to any limitations a company faces in developing or implementing a strategy (Olsen, 2021). Based on the internal analysis that has been carried out, below will be explained the points regarding the strengths and weaknesses of IndiHome:

**Strength of IndiHome**

- IndiHome has a strong positioning in the customer's perspective as a digital service provider to serve customer needs for unlimited digital activities from home.
- Physical evidence is tangible evidence of the services provided by IndiHome. Based on the analysis on marketing mix, compared to its competitors, IndiHome excels in this element with the spread of Plasa Telkom and Car Sales throughout Indonesia. This can be very useful when a potential customer wants to register and needs a guarantee, or as a place to report when something unexpected happens.
- With supporting infrastructure with a fiber optic-based backbone network along 167,935 km, consisting of 64,700 km of international networks, and 103,235 km of domestic networks with a total capacity of 129,600 Gbps as well as global submarine cable infrastructure leases, TelkomGroup has a large connection network for the European continent, Asia and America, and connecting cities in Indonesia, enabling them to reach more customers than their competitors, based on the value chain analysis and VRIO analysis that were conducted.
- PT Telkom's research and development activities that continue to follow the development of the era towards digital and are technology-driven, meaning that Telkom develops following the development of existing technology, related to data centers, smart homes and also current LEO technology, equipment and point options being prepared for the possible application of this technology in areas not covered by optical cables in Indonesia through its subsidiary PT Telkom Property based on the interview that were conducted.
- Telkom has a large capital with a reputation in telecommunications, making Telkom have the ability to be able to develop its business in order to reach wider customers.

**Weakness of IndiHome**

- IndiHome offers too many types of packages with different bundling. There is also a bundling option aimed at target customers based on internet consumption, seen from the bundling options they provide on their official website.
- Still lacking content industry in IPTV services. With the rise of OTT services, the need for interesting industry content is getting higher (Based on interviews and marketing mix).
- The obligation to carry out the mandate from the state in order to provide internet connections to all corners of the country makes Telkom have to continue to expand. For expansion, large investments for supporting infrastructure needs are needed in order to be present in an area. Not to mention the difficulty of installing in remote and remote areas, public infrastructure such as culverts do not yet exist. Expenses and revenue must be taken into account, such as high customer potential and return on investment (Based on interview conducted).

External Analysis: Opportunities and Threats (O and T)

External Analysis looks at the opportunities and threats that exist in your organization's environment independent of the organization (Olsen, 2021). Opportunities are favorable conditions in the organizational environment that can produce rewards if utilized properly, while threats are obstacles that are presented to the organization that prevent it from achieving its desired goals (Olsen, 2021). Based on the external analysis that has been carried out, below will be explained the points regarding the opportunities and threats of IndiHome:
Opportunities of IndiHome

- The Indonesian government has restructured its national broadband development strategy in an effort to provide high-speed internet access or broadband through the Indonesian Broadband Plan, which aims to provide strategic directions and guidelines in accelerating and expanding comprehensive and integrated broadband development in the territory of Indonesia for the period 2014-2019 in the context of implementing the National Long-Term Development Plan 2005-2025 and the Master Plan for the Acceleration and Expansion of Indonesia's Economic Development 2011-2025.

- Based on the August 2021 Official Statistics News from BPS, there was an increase in Indonesia's economic growth in the second quarter of 2021 compared to the first semester of 2020 (7.07 percent year on year/yoy). Significant GDP growth will grow in line with the increasing demand for the telecommunications industry.

- The shift in the use of channels from offline to online in almost all consumer category products which was an unexpected and massive surge in digital adoption occurred in a short period of time. This behavioral shift is also underpinned by the trend of more and more SMEs going online, and with the ecosystem and regulatory environment continuing to support the size of the digital economy can be a significant scaling opportunity, despite the challenging environment caused by COVID and market fragmentation. According to Fortune data, there were 40 million new internet users added in 2020; 400 million, or 70% of the region's population, are now online in Southeast Asia.

- The development of increasingly advanced telecommunications technology, one of which is by placing satellites as an alternative to using fiber cables for data transfer and becoming the main supporter of the telecommunications industry. Along with the need for internet in all regions which continues to increase sharply along with the occurrence of digitalization in various sectors, this has caused internet business to be looked at by many other companies as a business opportunity, both from domestic and foreign companies to invest billions of dollars in building mega-businesses. constellations of telecommunication satellites in Low Earth Orbit for commercial use.

Threats of IndiHome

- With the new technology, namely satellite-based internet technology, especially low-earth orbit that allows equal distribution of internet access that can connect inaccessible areas with fiber optic cable, this is one threat that can be a substitute for IndiHome as well as fixed broadband services. Although currently low-orbit satellite services are not yet available in Indonesia, sooner or later this technology will appear and disrupt the market. It is known that several tech giants have invested billions of dollars in this technology, including Starlink by SpaceX, Project Kuiper by Amazon, OneWeb, Lightspeed by Telesat. This technology can prove the transformation of the connectivity landscape based on global coverage and suitability for areas not served by fiber optics (Garrity & Husar, 2021).

- The shift to online platforms makes the telecommunications industry tougher, makes the internet a commodity and provides many options for deciding on the best service. Many competitors are aggressively pursuing strategies to attract customers by providing quality services at affordable prices. According to netnography, there is a tendency for customers to continue to look for alternatives and switch the services when there are other ISPs in their area.

- Based on competitor analysis reported by Speedtest, from Top Fixed Broadband Internet Indonesia, IndiHome is in third place with a score of 17.78 in terms of speed, and in terms of consistency, IndiHome is in last position with a consistency score of 25.2%, the lowest compared to its competitors.

- In customer analysis, it was found that the NPS score was 4.9. Although a positive value on the NPS Score indicates that the company has more promoters than detractors, this value is still relatively low and can be a threat for IndiHome to be able to improve for IndiHome in order to provide an even better customer experience.

- According to netnography, it was found that there is a perception of IndiHome in customers' mind that IndiHome is much slower than its competitors.

SWOT Matrix

To facilitate a SWOT analysis, managers use a set of strategic questions that link the firm’s internal environment to its external environment, as shown in Figure 3.1, to derive strategic implications (Rothaermel, Strategic Management 5e, 2020). In this SWOT matrix, the horizontal axis is divided into factors that are external to the firm and the vertical axis into factors that are internal to the firm.
### Table 1. Analysis Result in SWOT Matrix

<table>
<thead>
<tr>
<th>SWOT Matrix</th>
<th>Internal Strengths (S)</th>
<th>Internal Weakness (W)</th>
</tr>
</thead>
</table>
| SW | 1. IndiHome has a strong position as a digital service provider in Indonesia  
2. IndiHome is superior in physical evidence compared to competitors  
3. Telkom has the largest network and attracts more customers  
4. Division RnD Telkom continues to develop along with technological developments  
5. Telkom has a large capital with a reputation in telecommunications. | 1. Too many types of packages with different bundling  
2. Need more content in IPTV services to be more competitive  
3. Difficult to expand because of the responsibility in carrying out the interests of the state (as the biggest shareholder). |

<table>
<thead>
<tr>
<th>O</th>
<th>External Opportunities (O)</th>
<th>SO Strategies</th>
<th>WO Strategies</th>
</tr>
</thead>
</table>
| 1. | The strategic direction of accelerating broadband development in Indonesia (National Long-Term Development Plan 2005-2025)  
2. Positive trends in Indonesia's economic growth  
3. Massive shift in the use of online channels due to COVID  
4. Development of advanced telecommunications technology using satellites as an alternative | (S1, S2, S3, S4, O2, O3) Strengthen marketing activities to increase subscribers  
(S1, S4, S5, O1, O2, O3) Cooperating with the government for an even distribution of internet networks in remote areas | (W1, W2, O2, O3) Reconsidering bundling strategies and simplifying the packages offered (Product)  
(W2, O2, O3, O4) Considerations Strategic collaboration with currently popular OTT services accompanied by making their own OTT service (UseeTV) more attractive by giving quality content (Promotion)  
(W3, O1, O2, O3) Synergize with the government in the construction of fiber-based infrastructure  
(W3, O2, O3, O4) Attract business partners with the latest technology in an effort to expand business in remote areas |
External Threats (T) | ST Strategies | WT Strategies
---|---|---
1. There is a new technology, namely low-earth orbit satellite | (S1, S3, S4, S5, T1, T2, T3) Adopt the use of LEO by working with companies that already provide these services, while working to develop the technology | (W3, T1, T2, T3, T4) Adopt the LEO technology by using strategic alliances with established companies, to tap unreached geographical area in Indonesia |
2. There are many competitors in the market | (S1, S2, S3, S4, S5, T2, T3, T4, T5) Continue to improve the quality of services, especially internet services, in order to maintain existing customers | (W1, W2, T2, T3, T4) Planning different marketing strategies for different customers based on location. |
3. Relatively low speed and consistency compared to its competitors | (S1, S3, S5, T2, T3, T5) Conduct socialization regarding knowledge about the relationship between speed and number of devices. According to netnography, most customers don't compare speed, only compare the price between ISPs. |
4. NPS value is still relatively low | |
5. Perception of IndiHome in customers' mind that IndiHome is much slower than its competitors. | |

Proposed Segmentation, Targeting and Positioning
After conducting customer research, it was found that there was little change in the IndiHome target market. The result will be presented in Table 2. The word in bold and underline is a new point of targeting.

Table 2. Proposed Targeting of IndiHome

<table>
<thead>
<tr>
<th>Description</th>
<th>Target Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region</td>
<td>Metropolis, residential area</td>
</tr>
<tr>
<td>Age</td>
<td>18 - 60 years old</td>
</tr>
<tr>
<td>Gender</td>
<td>Male, Female</td>
</tr>
<tr>
<td>Education</td>
<td>High School - Post Graduate</td>
</tr>
<tr>
<td>Social Class</td>
<td>Medium to High</td>
</tr>
<tr>
<td>Occupation</td>
<td>Students, Private Sectors, Civil Servants,</td>
</tr>
<tr>
<td></td>
<td>Entrepreneur, Housewife</td>
</tr>
<tr>
<td>Family Life Cycle</td>
<td>Young - Adult, Single/Married</td>
</tr>
<tr>
<td>Personality &amp; Lifestyle</td>
<td>Socialite, Tech-savvy</td>
</tr>
<tr>
<td>User Status</td>
<td>Nonuser, potential user</td>
</tr>
<tr>
<td>Behavioural</td>
<td>Based on internet consumption (Gamers, Office Worker, Students, Standard user)</td>
</tr>
</tbody>
</table>

For the region, it is recommended to stay in the metropolis, or big cities with residential because based on the interview, supporting infrastructure is needed to be able to install IndiHome devices in an area. In big cities, the infrastructure is adequate, so installation is easier and cheaper to do. Even so, according to netnography, it was found that new customers tend to install IndiHome if their neighbors have also installed it, so targeting residential areas will be more effective. In addition, it was found in the survey that most users were aged 45 years and over, meaning that there was a change from 18-45 years to 18-60 years. Apart from that, there is an addition from occupation, namely entrepreneur and housewife, it was found according to netnography that most of the customers are also people from this job.
Strategy Diamond Model

Strategy is the set of goal-directed actions a firm takes to gain and sustain superior performance relative to competitors (Rothaermel, Strategic Management 4e, 2019). There is an integrated set of options for developing a good strategy (Hambrick & Fredrickson, 2001). There are five points, which forms the Strategy Diamond Model.

**Arenas**

The most fundamental choices strategists make are those of where, or in what arenas, the business will be active (Hambrick & Fredrickson, 2001). Decisions about a firm’s arenas may encompass its products, services, distribution channels, market segments, geographic areas, technologies, and even stages of the value-creation process (Hambrick & Fredrickson, 2001). IndiHome provides Triple Play home internet consisting of Home Phones, Fast Internet on Fiber and Interactive TV for all people in Indonesia. IndiHome holds 82.3% of the discrete fixed broadband market in Indonesia and the number of users continues to increase every year. Telkom specifically divides the targeting of its products with the mobile sector (through Telkomsel) targeting the lower middle-class society and the consumer sector (through IndiHome) targeting the upper middle-class community. With this, Telkom can reach more customers by starting to map the monthly household internet consumption against the costs incurred each month from customers in the mobile sector. By identifying it, it can become a business map for infrastructure development to potential areas. With fiber optic-based services, the author believes that Telkom still has to continue to develop core technology in this field. However, Telkom must remain vigilant to see new options, one of which is technology that will disrupt the telecommunication industries.

**Vehicles**

As a leader in telecommunications technology, Telkom has had a strong foundation in technology for more than 56 years. After previously using copper cables until 2018, Telkom has finally totally migrated to fiber optics. Although Telkom is not a pioneer in providing internet services based on optical cable, in the end, Telkom through IndiHome was able to become the market leader in fixed broadband. To continue to be able to develop to provide services in all regions in Indonesia, a good synergy is needed between Telkom and the government. The provision of infrastructure can become a burden if it is not accompanied by high demand in the area. In addition, Telkom can also carry out internal development in the form of gap analysis between the growth of market trends and Telkom's capabilities, for example the growth of the latest technology that is currently hot in the world, namely the internet using satellites based on low earth orbit. If a large gap is found between Telkom and new technology, it means that it is impossible for Telkom to catch up there considering the high research and development costs and infrastructure, Telkom can grow by conducting joint ventures or acquisitions.

**Differentiators**

Telkom is known as a telecommunications service provider with a vast coverage area and a strong and consistent signal. Where Speedy is one of Telkom's internet-related service packages. Telkomnet Instant was discontinued in 2006, and Speedy was introduced to replace it. Many internet customers began to install Speedy with a steadier connection during that year. With the advancement of technology and the ever-increasing need for the internet, Telkom changed the name of Speedy to Indihome in 2015, along with a few other changes. Copper wires were originally utilized as a conducting medium. Then Telkom developed a new technology called internet on fiber, which uses fiber optic cable medium to deliver greater speeds while being reasonably stable. Since the launch of IndiHome as an internet service, Telkom wants the public to move from the Speedy network to IndiHome. With internet service, landline service, and interactive TV packed together. As a result, user can get three services in one product. Since its release, IndiHome has been well received by customers and has quickly grown to become the largest internet service provider. However, according to customer analysis there is a perception about IndiHome in the minds of customers that IndiHome is much slower than other ISPs in Indonesia. This indicates that there are efforts to differentiate but the services provided are not in accordance with what is offered. To stay competitive, IndiHome need to build its image by create value in term on the product first. According to customer analysis, elements such as speed, price and network coverage are the three elements that are expected in choosing an internet provider and Telkom should focus more on these elements. In addition, in terms of pricing, after benchmarking to competitors, fixing a high price doesn't need to be bad as long as the value offered can be delivered to the customer. Staging

For short term, Telkom can focus on doing internal development starting from leveraging its strength to deliver quality products to customers. IndiHome can also promote its marketing on digital platforms by advertising on social media, socializing...
product knowledge to customers. In the long term, Telkom can initiate collaboration with the government, especially during a pandemic like now, the need for internet for certain sectors has increased drastically. Telkom can take advantage of this momentum by, for example, collaborating with the ministry of education to build internet infrastructure for schools in remote areas.

**Economic Logic**

Most of the population still relies on cellular networks to connect to the internet. According to the World Bank, fixed broadband services are used only by very small segments of the population (schools, medical facilities, government offices, and businesses). The total number of fixed broadband subscribers in Indonesia is around 9.7 million. Fixed broadband penetration only reached 4% of the population, or 16% of households. This is an opportunity for Telkom to see the condition of the vast area and the large number of people followed by the increasing need for internet and the people tend to be adaptive to technology. Telkom can still develop fixed broadband services by looking at existing products such as telecommunication and televisions. Telkom can also carry out internal development in the form of gap analysis between the growth of market trends and Telkom's capacity to build its company and reach a bigger customer base is aided by the presence of large capital with reputation in telecommunications. As for the external study, despite the challenging environment caused by COVI and market fragmentation, this behavioral shift is underpinned by the trend of more and more SMEs going online, and with the ecosystem and regulatory environment continuing to support the size of the digital economy can be a significant scaling opportunity. However, signs of emerging technology dangers and an increasing competitive business climate force Telkom to take action to counteract these concerns.

Based on research, IndiHome should plan marketing strategies to improve the quality of services that can then increase new customers as well as improve IndiHome's image in its customer's mind. In addition, IndiHome can do bundling strategy by provide less package option to the customer. Good synergy is needed between Telkom and government, to continue to be able to develop to provide services in all regions in Indonesia. IndiHome can also conduct market research to map potential customers based on data usage on cellular phones. Telkom can also carry out internal development in the form of gap analysis between the growth of market trends and Telkom's capabilities. By doing this, Telkom can continue to keep informed with developments that occur and stay agile with all changes.

**CONCLUSIONS**

IndiHome offer package comprises internet, landline, and interactive TV, allowing customers to engage in digital activities from home. With its largest fiber optic-based backbone network, IndiHome could reach a larger number of clients than its competitors and continues to evolve with the digital era and is technology-driven. Telkom's capacity to build its company and reach a bigger customer base is aided by the presence of large capital with reputation in telecommunications. As for the external study, despite the challenging environment caused by COVID and market fragmentation, this behavioral shift is underpinned by the trend of more and more SMEs going online, and with the ecosystem and regulatory environment continuing to support the size of the digital economy can be a significant scaling opportunity. However, signs of emerging technology dangers and an increasing competitive business climate force Telkom to take action to counteract these concerns.

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