

# Global Mobile Virtual Network Operators Market Size Study & Forecast, by Operational Model (Reseller, Service Provider, and Full MVNO), By Service Type (Postpaid and Prepaid), By Subscriber (Business and Individual/Residential), and Regional Analysis, 2023-2030

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## Abstracts

Global Mobile Virtual Network Operators Market is valued at approximately USD 78.15 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 8.5% over the forecast period 2023-2030. A Mobile Virtual Network Operator (MVNO) is a wireless service provider that operates without owning a radio access spectrum or network infrastructure. Instead, it leases network services from a licensed mobile operator to offer mobile services under its brand. These providers market their wireless services independently, targeting specific customer segments and leveraging their consumer base. MVNOs have the flexibility to target specific market segments or niche customer groups with tailored mobile plans, pricing, and services. They often differentiate themselves based on factors such as pricing, customer service, value-added services, and targeted marketing strategies. MVNOs operate independently or as part of larger telecommunications companies, and they play a significant role in increasing competition and innovation in the mobile telecommunications industry. The rise in mobile virtual network operator (MVNO) adoption is driven by accessible plans, adaptable options, credit check-free services, broad device compatibility, and specialized offerings. Furthermore, companies in the MVNO market are actively engaged in strategic initiatives like mergers, acquisitions, partnerships, and collaborations. For instance, in July 2023, Spitfire Network Services Limited, a U.K.-based provider of fixed-line voice, internet, and WAN services to businesses, announced a comprehensive MVNO agreement with BT Wholesale, a U.K.-based

telecom service provider. Under this partnership, Spitfire's advanced core network will integrate with BT Group's EE 4G and 5G Radio Access Network, offering enhanced security, top-notch connectivity, and flexible and innovative billing options. Also, the surge in utilization of IoT devices and connectivity solutions in sectors like automotive, electronics, and robotics is fueling the demand for MVNO services. These services facilitate smooth connectivity and efficient data transmission across various industries.

In addition, the rapid adoption of 5G and the latest wireless technologies is expected to stipulate the demand for a new generation of MVNOs. 5G is poised to usher in a transformative era of connectivity, enhancing efficiency and enabling new services across various sectors. Mobile network operators remain at the forefront of 5G deployment and ongoing technology advancements. According to Statista, in 2022, it was assessed that approximately 104,7.22 million mobiles have subscribed to 5G around the world. Also, it is anticipated that the figure is likely to rise and reach nearly 2021.2 million by 2025. This growth is fueled by substantial investments from network operators and the availability of a wide range of 5G-enabled smartphones at various price points. Accordingly, these trends signify the increasing integration of 5G technology in the MVNO sector and the growing demand for affordable 5G-supported mobile devices, which are expected to drive sustained growth in the Mobile Virtual Network Operator market during the estimated period. Moreover, the increasing advancements in virtualization technologies, as well as the growing penetration of mobile devices present various lucrative opportunities over the forecast years. However, the increasing competition among MNOs and MVNOs and the stringent government rules and regulations are challenging the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Mobile Virtual Network Operators Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 owing to the increasing use of segment-targeted pricing and creative distribution tactics, favorable regulatory framework, and rapid deployment of cloud-based solutions. Also, a rise in several strategic initiatives aimed at enhancing MVNO offerings. For example, in May 2023, Mobi announced an exclusive multiyear MVNO agreement with T-Mobile, enabling Mobi customers to access T-Mobile's nationwide network across the United States, including the islands. By combining T-Mobile's industry-leading 5G speeds, reliability, and coverage with Mobi's inviting Hawaii stores and friendly customer service team, Mobi aims to deliver an enhanced experience for its customers. Whereas Asia Pacific is expected to grow at the highest CAGR over the forecast years.

significant expansion of the telecommunications industry is significantly propelling the market demand across the region. Emerging economies like India, Vietnam, and Myanmar are actively working on expanding and modernizing their telecom services. Also, the development of advanced cellular networks is further driving major growth in the regional market. For example, in Japan, MVNOs offer a range of services including online gaming, remote vending machine management, Machine-to-Machine (M2M) solutions, and surveillance. Additionally, in the healthcare sector, they provide voice-controlled services for patient monitoring and security applications.

Major market players included in this report are:

Verizon Communications Inc. (U.S.)

Comcast Corporation (U.S.)

FreeNet AG (Germany)

AT&T Inc. (U.S.)

T-Mobile USA Inc. (U.S.)

Charter Communications Inc. (U.S.)

Lyca Mobile (U.K.)

Cricket Wireless LLC (U.S.)

Alphabet Inc. (Google Fi) (U.S.)

Republic Wireless (U.S.)

Recent Developments in the Market:

In January 2023, T-Mobile entered into a partnership with Nextbase, a provider of smart car dash-cams. Through this partnership, Nextbase introduced the IQ dash-cam equipped with network connectivity, offering features such as over-the-air notifications, updates, and real-time video streaming.

In December 2022, Grover collaborated with Gigs, a data-subscription telecom-as-a-service platform provider, to introduce mobile virtual network operating services (MVNO). Additionally, Grover offers eSIM services in the U.S. and expanded into European markets.

In January 2022, World Health Energy Holdings (WHEN) Group completed the acquisition of CrossMobile, a licensed Mobile Virtual Network Operator (MVNO) in Poland. This strategic move aims at the expansion of network infrastructure and the development of cyber-security solutions.

### Global Mobile Virtual Network Operators Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Operational Model, Service Type, Subscriber, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define the market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters to detailed information about the crucial aspects such as driving factors & challenges that will define the future growth of the market. Additionally, it also

incorporates potential opportunities in micro markets for stakeholders to invest along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Operational Model:

Reseller

Service Provider

Full MVNO

By Service Type:

Postpaid

Prepaid

By Subscriber:

Business

Individual/Residential

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

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Rest of Middle East & Africa

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