

Mobile Virtual Network Enabler Market Size, Share & Trends Analysis Report By Service Type (Infrastructure Services, Business Support Systems), By Deployment Model (On-premise, Cloud-based / SaaS-based), By End User Industry, By Region, And Segment Forecasts, 2026 - 2033

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Abstracts

The global mobile virtual network enabler market size was estimated at USD 3.79 billion in 2025, and is projected to reach USD 7.86 billion by 2033, growing at a CAGR of 10.2% from 2026 to 2033. The industry is experiencing steady growth due to the expanding global presence of mobile virtual network operators and the increasing preference for outsourced telecom operating models.

New market entrants, digital brands, retailers, financial institutions, and enterprises are seeking to launch mobile services without building their own network infrastructure, driving demand for MVNE platforms. Rising mobile data consumption, competitive prepaid offerings, and the need for faster time-to-market are further supporting adoption. In addition, growing enterprise demand for branded connectivity and managed mobility services is widening the commercial opportunity for MVNE providers.

Technological advancement is reshaping the market through the adoption of cloud-native architectures, API-led integration models, and automated telecom operations. MVNE vendors are increasingly offering SaaS-based platforms that enable faster deployment, flexible scaling, and lower upfront investment for clients. The expansion of eSIM technology, digital onboarding tools, AI-enabled customer service, and real-time analytics is enhancing platform value. Growth in 5G networks is also creating new opportunities for advanced charging systems, private wireless services, and IoT

connectivity management within the MVNE ecosystem.

Investment activity in the MVNE market is rising as telecom operators, private equity firms, and technology companies seek exposure to recurring-revenue digital infrastructure models. Capital is being directed toward platform modernization, regional expansion, cybersecurity enhancement, and product development focused on billing, automation, and customer engagement. Strategic partnerships between MVNE vendors and mobile network operators are also increasing to accelerate MVNO launches and enterprise mobility offerings.

Despite positive momentum, the industry faces several restraints that may hinder growth. Dependence on host mobile network operators can create pricing pressure, limited wholesale access flexibility, and margin constraints for MVNO clients and their enablement partners. Integration with legacy OSS/BSS systems can be costly and time-consuming, especially for complex multi-country deployments. Intense competition among vendors may compress service pricing, while evolving regulatory obligations can increase compliance costs. In addition, some large operators continue to develop in-house capabilities, reducing outsourcing opportunities for independent MVNE providers.

Global Mobile Virtual Network Enabler Market Report Segmentation

This report forecasts revenue growth at global, regional, and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the global mobile virtual network enabler market report based on service type, deployment model, end user industry, and region.

Service Type Outlook (Revenue, USD Million, 2021 - 2033)

Infrastructure Services

Business Support Systems (BSS)

Operational Support Systems (OSS)

Billing & Charging Solutions

Others

Deployment Model Outlook (Revenue, USD Million, 2021 - 2033)

On-premise

Cloud-based / SaaS-based

End User Industry Outlook (Revenue, USD Million, 2021 - 2033)

Enterprises

IoT Connectivity Providers

Others

Regional Outlook (Revenue, USD Million, 2021 - 2033)

North America

U.S.

Canada

Mexico

Europe

Germany

UK

France

Asia Pacific

China

Japan

India

South Korea

Australia

Latin America

Brazil

Middle East and Africa (MEA)

KSA

UAE

South Africa

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