

MVNO Market by Operational Model (Reseller, Service Operator, Full MVNO), Subscriber (Consumer, Enterprise), Service Type (Postpaid, Prepaid), Business Model (Discount, Ethnic, Business, Youth/Media) and Region - Global Forecast to 2028

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Abstracts

MarketsandMarkets forecasts that the MVNO market size is projected to grow from USD 84.6 billion in 2023 to USD 116.8 billion by 2028, at a CAGR of 6.7% during the forecast period. Many countries in the have a robust mobile-first culture, with a high penetration of smartphones and mobile devices. This mobile-centric environment creates opportunities for MVNOs to leverage existing mobile networks and offer IoT connectivity services to various devices, thus driving the market growth.

“By Operational Mode, the service operator segment is expected to grow with the highest CAGR during the forecast period.”

Service operators have their own infrastructure, which enables them to have complete control over their business and service offerings. The degree of control and flexibility an MVNO has will depend on which operating elements it controls. However, host operators may impose some restrictions on MVNOs in the retail environment. Service operator is one of the most popular models for new entrants. It enables MVNOs to start with a select set of operating elements and develop their own operations gradually. After their proposition has been proven and they have gained a considerable number of customers, MVNOs take over the operations of their host MNOs. The service operator model suits and helps businesses with brands or service concepts differentiate themselves from existing players.

“By Subscriber, the consumer segment is expected to hold the largest market size

during the forecast period.”

MVNO is a consumer-driven market, with more than 80% of the market covered by consumer-based vendors. The consumer is projected to be the dominant segment during the forecast period due to the availability of MVNOs that provide customer-centric offerings, such as affordable data & voice plans and the latest technologies. Currently, MVNOs are attracting more customers due to higher brand loyalty than new mobile entrants. These MVNOs provide unique services to their customers to differentiate themselves from traditional operators. The areas of differentiation include tariff flexibility, high-quality customer services, unique distribution models, bundling with fixed services, and access to unique content (music, games, and videos) and services.

“Asia Pacific is expected to grow with the highest CAGR during the forecast period.”

The MVNO market in the Asia Pacific region has undergone significant transformation in recent years. Asia Pacific has always been an emerging region for the telecom industry. The region's diversified geographic area and high customer base creates huge opportunities for MVNOs. As per the International Telecommunication Union (ITU), APAC has emerged as the largest marketplace for the telecom industry across the globe. China and India are the world's largest marketplaces for the telecom industry in terms of network infrastructure capacity and end-user subscribers. In terms of mobile subscriber base, the region holds the greatest number of consumers as compared to other regions and will remain one of the fastest-growing markets by 2024 and beyond.

Breakdown of primaries

The study contains insights from various industry experts, from solution vendors to Tier 1 companies. The break-up of the primaries is as follows:

By Company: Tier 1–62%, Tier 2–23%, and Tier 3–15%

By Designation: C-Level Executives–38%, Directors–30%, and Others–32%

By Region: North America–40%, Europe–15%, Asia Pacific–35%, Middle East and Africa–5%, Latin America–5%,

The major players in the MVNO market Virgin Media Business (UK), Dataxoom (US), Lebara (UK), KDDI (Japan), Asahi Net (Japan), Virgin Mobile (US), Tracfone Wireless

(US), Boost Mobile (US), Lycamobile (UK), Tesco Mobile (UK), Postemobile (UK), Airvoice Wireless (US), Asda Mobile (UK), Giffgaff (UK), Kajeet (US), Voiceworks (Netherlands), Ting (US), Red Pocket Mobile (US), Consumer Cellular (US), Hologram (US), 1oT (Estonia), Soracom (Japan), Onomondo (Denmark), Airlinq (US), EMnify (Germany), and 1NCE (Germany). These players have adopted various growth strategies, such as partnerships, agreements and collaborations, new product launches, product enhancements, and acquisitions to expand their footprint in the MVNO market.

Research Coverage

The report segments the global MVNO market by operational model into three categories: reseller, service operator and full MVNO. By subscriber, the MVNO market is divided into two categories: consumer and enterprise. By business model, the MVNO market has been classified into discount, specialist data, ethnic, business, international/roaming, youth/media, bundled, and others. By region, the market has been segmented into North America, Europe, APAC, MEA, and Latin America.

Key benefits of the report

The report would help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall MVNO market and the subsegments. This report would help stakeholders understand the competitive landscape and gain insights to better position their businesses and plan suitable go-to-market strategies. The report would help stakeholders understand the pulse of the market and provide them with information on the key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Provision of demographic-related customer services, Profit maximization opportunity for both MNOs and MVNOs), restraints (MNOs giving low priority to MVNO customers), opportunities (Adoption of IoT, M2M, and BYOD by MVNOs to attract new customers), and challenges (Fragmented nature of market, Stringent government rules and regulations for MNOs and MVNOs) influencing the growth of the MVNO market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the MVNO market.

Market Development: Comprehensive information about lucrative markets – the report analyses the MVNO market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the MVNO market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players as Virgin Media Business (UK), Dataxoom (US), Lebara (UK), KDDI (Japan), Asahi Net (Japan), Virgin Mobile (US), Tracfone Wireless (US), Boost Mobile (US), Lycamobile (UK), Tesco Mobile (UK), Postemobile (UK), Airvoice Wireless (US), Asda Mobile (UK), Giffgaff (UK), Kajeet (US), Voiceworks (Netherlands), Ting (US), Red Pocket Mobile (US), Consumer Cellular (US), Hologram (US), 1oT (Estonia), Soracom (Japan), Onomondo (Denmark), Airlinq (US), EMnify (Germany), and 1NCE (Germany).

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