

# The Future of MVNOs

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## Abstracts

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This report is the most thorough ever published survey examining the current state of play of MVNOs in 37 countries around the globe. Profiles of the main players in each of the main mobile markets where access onto the incumbent's network has been allowed and a summary of the key MVNO players in each of those countries are provided.

The report evaluates the role of the country regulator in enabling the MVNO to become established in the some key markets, where the finding reveals that the most logical approach is not to prescribe but to ensure that the dominant mobile provider does provide access to the MVNO.

The research discovers a range of different approaches and trends that are now driving the market. The mobile market globally is becoming more fragmented with the power of brands and distribution – together with the emergence of new low-cost MVNE aggregators – favouring the development of new niche MVNOs based on a small social community. The report features case studies based on in-depth interviews with BT, Lebara, Virgin Mobile and Blyk, each using a different business model.

A section provides a ranking of the existing 30 MVNO countries that we have identified according to six broad criterias and identify the most attractive MVNO markets for future investment.

A section looks at pricing since the MVNO's have entered the market.

The final section provides a forecast of the MVNO subscriber base in 5 years time.

### **Countries covered:**

**EUROPE:**

Austria; Belgium; Czech Republic; Denmark; Finland; France; Germany; Iceland; Ireland; Italy; Israel; Luxembourg; Poland; Portugal; Romania; Russia; Slovakia; Spain; Sweden; Switzerland; the Baltic States and the UK.

**AMERICAS:**

USA (special section); Bolivia; Chile and Canada.

**ASIA AND AUSTRALASIA:**

Australia; China; Hong Kong; India; Indonesia; Japan; Malaysia; New Zealand & Taiwan.

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