

# The Future of MVNOs

<https://marketpublishers.com/r/FC7E124830AEN.html>

Date: May 2007

Pages: 173

Price: US\$ 3,055.00 (Single User License)

ID: FC7E124830AEN

## Abstracts

**Site License Price:** US\$6,110.00

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.

## Contents

### LIST OF TABLES AND CHARTS

### METHODOLOGY

### ACKNOWLEDGEMENTS

### MANAGEMENT SUMMARY

## CHAPTER ONE – ANALYSIS OF THE MOBILE VIRTUAL NETWORK OPERATOR (MVNO)

- 1.1 Exactly what is an MVNO?
- 1.2 A definition of an MVNO and MVNE
- 1.3 Types of MVNO business model
- 1.4 The role of an MVNE
- 1.5 The size of the MVNO market
- 1.6 Growth rate for the MVNO market
- 1.7 New types of MVNO provider
- 1.8 The attractions of an MVNO
- 1.9 Key characteristics of the MVNO market
- 1.10 The regulator's view of an MVNO
- 1.11 Case study – The introduction of MVNOs into the French market
- 1.12 The process of MVNO introduction in France
- 1.13 The French Fair Competition Authority report
- 1.14 Case study – Auchan Telecom MVNO
- 1.15 The MNO provider's view of an MVNO
- 1.16 MNO and MVNO agreements
- 1.17 Advantages and limitations of forming an MVNO
- 1.18 Types of MVNO
- 1.19 Examples of MVNO market sectors
- 1.20 Examples of Pre-Paid MVNOs
- 1.21 Examples of Post-Paid MVNOs
- 1.22 When to provide an MVNO
- 1.23 MNOs that are seeking to become an MVNO
- 1.24 Growth of the Pan-European MVNO
- 1.25 Summary

## **CHAPTER TWO - THE MAIN WORLDWIDE MARKETS FOR MVNOS**

### 2.1 Introduction

### 2.2 Outline of the main markets (Europe; the Americas and Asia) – 37 countries

2.2.1 Outline of the main MVNO markets in Europe including: 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.

2.2.2 Outline of the main MVNO markets in the Americas including: USA (special section); Bolivia; Chile and Canada.

2.2.3 Outline of the main MVNO markets in Asia & Australasia including: Australia; China; Hong Kong; India; Indonesia; Japan; Malaysia; New Zealand & Taiwan.

### 2.3 Recent MVNOs established

### 2.4 MVNO brands active in a number of countries

### 2.5 MVNOs in new countries

### 2.6 Tele2 MVNO presence

### 2.7 Pulling back to the home market

### 2.8 MVNOs formed by incumbent operators

### 2.9 The main MVNO markets

### 2.10 Summary

## **CHAPTER THREE – THE IMPACT OF REGULATION ON THE MVNO MARKET**

### 3.1 Introduction

### 3.2 Regulatory intervention by country

### 3.3 Regulation in the Netherlands example

### 3.4 Regulation in Norway example

### 3.5 Regulation in the UK example

### 3.6 Examples of regulatory interventions and the MVNO

### 3.7 The regulator's role in enabling market access

### 3.8 Summary

## **CHAPTER FOUR – MVNO PRICING IN PRACTICE**

### 4.1 Introduction

4.2 MVNO pricing in seven countries: Austria, Belgium, Germany, the Netherlands, Switzerland and the UK

### 4.3 Summary

## **CHAPTER FIVE – CASE STUDIES OF EXISTING & PROPOSED MVNOS**

- 5.1 Introduction
- 5.2 BT Mobile case study
- 5.3 Virgin Mobile UK case study
- 5.4 Blyk Mobile UK case study
- 5.5 Lebara Mobile case study
- 5.6 Summary

## **CHAPTER SIX – GLOBAL MVNO GROWTH CONCLUSIONS**

- 6.1 Introduction
- 6.2 Advantages of Post-Paid services
- 6.3 Potential new service opportunities for MVNOs
  - 6.3.1 Advertising revenue
  - 6.3.2 Content add-ons
  - 6.3.3 New forms of Fixed Mobile Convergence
  - 6.3.4 New forms of MNO
  - 6.3.5 New forms of MVNE
  - 6.3.6 The rise of the Next Generation MVNO
- 6.4 The importance of unique content
- 6.5 The changing valuation of MVNOs
- 6.6 Conclusion – the present & future prospects for MVNOs
- 6.7 The development of content-based MVNOs
- 6.8 Attractive markets for the MVNOs
- 6.9 MVNO five year subscriber forecast – 2007 to 2012

## **APPENDICES**

- Appendix I – Glossary of terms
- Appendix II – List of worldwide MVNOs

## **THE FUTURE OF MVNOS - LIST OF FIGURES AND CHARTS**

## Tables

### TABLES

- Table 1. The distinction between the MNO; MVNO and service provider
- Table 2. Virgin Mobile UK – annual operating cost breakdown
- Table 3. Services & resources provided by the MNO; MVNE and MVNO
- Table 4. MVNO market size – analysts forecast
- Table 5. Main MVNOs by subscriber
- Table 6. The numbers of MVNO worldwide by country
- Table 7. MNOs with multi-brand MVNOs
- Table 8. MVNO country openings
- Table 9. Selected MVNO service launches
- Table 10. The MVNOs that failed during 2006
- Table 11. MVNOs that were acquired in 2006
- Table 12. Selected European countries opening to MVNOs
- Table 13. Selected French MVNOs – Target audience
- Table 14. Examples of MVNOs in Europe
- Table 15. Examples of Pre-Paid MVNO services
- Table 16. Examples of Post-Paid MVNO services
- Table 17. Lebara Mobile services by country
- Table 18. Carphone Warehouse mobile services by country
- Table 19. For MVNO service providers in the following 17 countries: Austria; Belgium; Denmark; Finland; France; Germany; Italy; Portugal; Russia; Netherlands; Norway; Spain (applicants); Sweden; UK; USA; Canada and Australia.
- Table 20. Main new MVNOs announced in 2007
- Table 21. Fastest growth MVNO operators by subscriber numbers
- Table 22. Debitel's non-German MVNO operations
- Table 23. Instances of regulatory intervention
- Table 24. Examples of MVNO pricing in seven European markets including: Austria, Belgium, France, Germany, Netherlands, Switzerland and the UK
- Table 25. Summary positioning – BT Mobile
- Table 26. Summary positioning – Virgin Mobile UK
- Table 27. Summary positioning – Blyk Mobile
- Table 28. Summary positioning – Lebara Mobile
- Table 29. Types of MVNO business model
- Table 30. MVNO acquisition costs
- Table 31. Countries with estimated MVNO numbers
- Table 32. The maturity of key MVNO markets around the world

Table 33. Examples of MVNO service differentiation

Table 34. The most attractive markets for MVNOs

Table 35. A five year MVNO subscriber forecast (2007 to 2012)

## CHARTS

Chart 1. Capex costs against sales for the MNO & MVNO

Chart 2. Virgin Mobile UK – annual operating cost breakdown

Chart 3. MVNO EBITDA compared with MNO

## DIAGRAMS

Diagram 1. Types of customer segmentation by the MVNO

Diagram 2. The MVNO Mobile market life cycle

Diagram 3. Types of MVNO differentiation strategy

Diagram 4. E-Plus strategy Pre-August 2005

Diagram 5. E-Plus strategy Post-August 2005

Diagram 6. Stages of development in the MVNO market

Diagram 7. Traditional MVNO business model

Diagram 8. Evolved MVNO business model

Diagram 9. Mobile content value chain

Diagram 10. Generic forms of MVNO differentiation

## I would like to order

Product name: The Future of MVNOs

Product link: <https://marketpublishers.com/r/FC7E124830AEN.html>

Price: US\$ 3,055.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/FC7E124830AEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970