

## MVNO - The new deal



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## OVERVIEW:

At a time when we are witnessing the launch, or announced launch of a growing number of MVNOs, this report seeks to establish the true scope of this phenomenon: will it forge itself a lasting position in the highly competitive telecom services' landscape, or will it remain confined to a basic service offering?

Starting with a look at the state of MVNOs' development in the most mature markets and sectors (media, retail), the report then explores the various strategies in place and identifies the chief selling points based on an analysis of the offers and their pricing, marketing and distribution schemes.

Also included in the report is a look at the players who are driving the mobile services market's growth: how MNOs are responding to this new trend, the stance being taken by integrated operators and what motivates companies – from a wide array of backgrounds (financial institutions, public utilities, automotive manufactures, airlines...) – to become MVNOs.

And, finally, IDATE has established several growth scenarios that will help further understanding of what is really at stake, and what the future holds for all of the players involved in the mobile services market: regulatory changes, and how competition and the changing shape of the service offering are impacting the sector's organisation.

## KEY QUESTIONS

- *What strategies are open to an MVNO?*
- *Under what conditions can an MVNO be profitable?*
- *What market share for MVNOs?*
- *What impact are MVNOs having on the mobile market in general?*
- *How are MNOs responding?*
- *What position are the other players taking: fixed telcos, ISPs, WISPs, internet and media companies...?*
- *What leverage thanks to regulation?*
- *What are the most likely growth scenarios?*

## MVNO IN BRIEF

- *MVNOs' rise in the mobile industry*
- *Value chain and business models*
- *Existing and potential MVNOs' strategies*
- *How MNOs are responding*
- *Growth scenarios*

## COUNTRIES

- *Belgium*
- *Denmark*
- *Canada*
- *France*
- *Germany*
- *Italy*
- *Spain*
- *UK*
- *USA*

## PLAYERS

- *7-eleven*
- *Amp'd mobile*
- *Boost Mobile*
- *Breizh mobile*
- *Debitel*
- *Disney mobile*
- *Easy Mobile*
- *Ello mobile*
- *Extreme Mobile*
- *Futur Telecom*
- *Gaymobile*
- *Helio*
- *Jitterbug*
- *M6 Mobile*
- *Mobile ESPN*
- *Movida*
- *OnStar*
- *Primus*
- *Qwest*
- *Saunalahti Group*
- *Tele2*
- *Telmore*
- *Tesco Mobile*
- *Transatel*
- *Virgin Mobile*
- *Wylless*

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Niche opportunities not addressed

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Converging services

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Regulatory leverage

Mobile number portability

Contract life spans

Simlock

Handset subsidies

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- Measuring the MVNO phenomenon

State of competition

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- MVNO/ESP and SP market share – Subscriber numbers

- ARPU (Average Revenue Per User)

Case studies: Germany, Denmark, the UK

- Retail pricing

Case studies: Belgium, Denmark, France

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- Germany
- Italy
- Spain
- The UK
- USA

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- Scenario 3: Limited growth or confined to pockets

For each of the three scenarios:

Regulation

Organisation and competition

Services and content

ARPU

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