



Hard Copy

- *GBP 2495 | USD 4990 | EUR 3680*

Single User Online PDF

- *GBP 3743 | USD 7485 | EUR 5520*

- Pages: 158
- Edition: 3rd
- Published: July 2008
- Informa Telecoms & Media, Paul Merry

ORDER ONLINE: <http://www.mvnodirectory.com/research/MVNOStrategies.html>

Key Forecasts to 2013 - Including detailed analytical and qualitative analysis of the MVNO business opportunity backed up by detailed forecast data to 2013.

Identification - Concentration on segmentation across both MVNO and MNO markets

Key case studies - In-depth analysis undertaken towards identifying segmentation, marketing and device strategies geared towards new entrant and existing telecom operator success

Updated analysis of WCIS - Tracking MVNO'S across major regions of the world

Industry survey - Analysis of new substantial industry-wide survey

Evolution - Wholesale business models

New players - Within the telecommunication realm including Google and Apple

Key Issues Addressed

- * What have been successful MVNO approaches and why
- * How is marketing and distribution integrated into the full customer service virtual operator experience.
- * Is the MNVO business sustainable and if so in what formats are success guaranteed
- * Are VoIP/WiMax realistic alternative to classic examples of virtual operations
- * What is the size of the potential market now and moving forward

TABLE OF CONTENTS

CHAPTER 1 - EXECUTIVE SUMMARY

MVNO market status... 1

New service launches ... 1

Figure 1.1: Global, new MVNO launches each year, by region, 2001-2007 ... 1

Figure 1.2: Global MVNOs, by service approaches, 2007 ... 2

Service specialisation, segmentation and micro-segmentation ... 3

Segmentation service approach ... 4

Service and customer segmentation strategies ... 4

Figure 1.3: Service segmentation strategy map ... 5

New entrant innovations ... 6

Convergence and segmentation ... 6

Evaluating service segment approaches ... 7

Figure 1.4: Selected major MVNO service approaches... 7

MVNO forecasts, 2008-2013 ... 8

Global MVNO market outlook ... 8

Figure 1.5: Global MVNO subscriptions, 2008-2013 ... 8

Regional MVNO market overview ... 9

Figure 1.6: Global MVNO subscriptions, by region, 2008-2013... 9

Figure 1.7: Global MVNO subscriptions, by regional market share, 2008 versus 2013 ... 10

Figure 1.8: Global MVNO service segments' market shares, 2008 versus 2013 ... 10

CHAPTER 2 - MARKET STATUS

Assessing MVNO market potential ... 13

MVNO service evolution ... 13

Figure 2.1: MVNO service evolution ... 14

Stage one MVNO service evolution ... 14

Stage two MVNO service evolution ... 15

Stage three MVNO service evolution ... 15

Issues and challenges facing prospective MVNOs ... 16

Figure 2.2: MVNO market entry considerations for new entrants ... 17

Market dynamics... 17

Customer identification – market growth potential ... 18

MVNO market drivers ... 18

Factors encouraging wholesale MVNO access ... 18

Figure 2.3: Germany's E-Plus: Example of MVNO market invigoration ... 19

Factors encouraging MVNO launch... 20

Customer and service approach diversification... 21

Global and regional MVNO market development ... 21

Global and regional growth in the MVNO market ... 21

Figure 2.4: Global MVNO subscriptions, by region, 2Q06-4Q07... 22

Figure 2.5: Global MVNO share of total global mobile subscriptions, by region, 4Q06 and 4Q07 ... 23

Regional shares of the MVNO market ... 23

Figure 2.6: Global MVNO subscriptions, by regional market shares, 4Q06 and 4Q07 ... 24

Overall performance ... 24

Service diversification ... 25

Figure 2.7: Relative complexity, subscription and revenue generation potential of the different

MVNO service approaches... 26

MVNO launch status ... 27

Figure 2.8: Global: new MVNO launches each year, by region, 2001-2007 ... 27

Figure 2.9: Global MVNOs, by region, 2006 versus 2007 ... 28

Figure 2.10: Global MVNOs, by service approaches, 2007 ... 28

Figure 2.11: Global MVNOs, by region and by service approaches, 2007 ... 29

CHAPTER 3 - MOBILE SEGMENTATION

The service segmentation opportunity... 31

The MVNO strategic approach – a solution for MNOs in developed markets ... 32

Service segmentation and new entrant players ... 33

The emergence of convergence... 34

Alternate technologies ... 34

Motivating factors for segmentation ... 35

Figure 3.1: Motivating drivers for MVNO market entrance ... 36

Developing service segmentation ... 36

Figure 3.2: Service segmentation strategy map ... 37

Segmentation and specialisation ... 38

Figure 3.3: Single versus multiple approach overview ... 38

Single segment approach ... 39

Advantages ... 39

Disadvantages ... 39

Multi-segmentation approach ... 39

Advantages ... 40

Disadvantages ... 40

The advantages of multi-segmentation approaches over specialisation ... 41

Servicing multiple customer requirements ... 41

Figure 3.4: Multi-segmentation service approach stages ... 41

CHAPTER 4 - SERVICE SEGMENT EVALUATION

Advantages of segmentation ... 43

Segmentation by strategic approach ... 43

Cost Leadership Strategy in relation to MVNOs ... 43

Differentiation Strategy in relation to MVNOs ... 44

Focus Strategy in relation to MVNOs... 45

Porter's Generic Strategies and MVNO segmentation... 46

Blue Ocean Strategy ... 47

New service paradigms ... 48

Mobile advertising ... 48

Strategic considerations ... 49

Opportunities ... 49

Challenges ... 50

MVNO mobile advertising case examples ... 51

Blyk ... 51

Mosh Mobile ... 51

Xero Mobile... 51

Segmentation by community ... 52

Strategic considerations ... 52

Opportunities ... 53

Challenges ... 53

Community MVNO case examples ... 53

Call4Care ... 54

RCSC football team MVNO ... 54

Youth segment ... 55

Strategic considerations ... 55

Opportunities ... 56

Challenges ... 56

Youth MVNO case examples ... 57

TMF Mobile ... 57

M6 Mobile... 57

Ethnic segment ... 58

Strategic considerations ... 58

Opportunities ... 59

Challenges ... 60

Ethnic MVNO case examples ... 60

Le French Mobile ... 60

Movida ... 61

Grey market segment ... 61

Strategic considerations ... 62

Opportunities ... 62

Challenges ... 62

Grey market MVNO case examples ... 63

Jitterbug... 63

Enterprise segment... 64

Strategic considerations ... 64

Opportunities ... 65

Challenges ... 66

Enterprise MVNO case examples... 67

Yes Telecom ... 67

RSL Com ... 68

M2M/telematics and tracking MVNO services ... 68

Strategic considerations ... 68

Opportunities ... 69

Challenges ... 70

M2M/telematics and tracking case examples ... 70

Kore Telematics ... 70

Wireless Maingate... 71

CHAPTER 5 - CASE STUDIES

Mobile segmentation and evolving service models ... 73

Google ... 74

Corporate background ... 74

Business model ... 74

Service offering ... 75

Figure 5.1: Selected Google mobile products ... 75

Google Maps for Mobile ... 76

Click-to-Call ... 76

Android... 76

Figure 5.2: Open Handset Alliance members, Apr-08... 77

Other services... 77

Market focus and strategy ... 78

Opportunities and challenges... 79

Handset strategy... 81

Distribution... 81

Pricing/charging strategy ... 81

Partnering strategy ... 82

Sonopia ... 82

Corporate background ... 82

Service offering ... 82

Client MVNO personalisation services... 83

Market focus and strategy ... 83

Opportunities and challenges... 83

Handset strategy... 85

Distribution... 85

Pricing/charging strategy ... 85

Partnering strategy ... 85

Rebtel ... 85

Corporate background ... 86

Service offering ... 86

Figure 5.3: Rebtel free call process ... 86

Market focus and strategy ... 87

Opportunities and challenges... 87

Handset strategy... 89

Distribution... 89

Pricing/charging strategy ... 89

Partnering strategy ... 89

Lebara Mobile ... 90

Corporate background ... 90

Service offering... 90

Market focus and strategy ... 90
Opportunities and challenges... 91
Handset strategy... 92
Partnering strategy ... 92
Distribution... 92
Pricing/charging strategy ... 92

CHAPTER 6 - REGIONAL DEVELOPMENTS

Introduction ... 95

Figure 6.1: Global MVNO subscriptions, by region, 2Q06-4Q07 ... 95

Asia Pacific ... 96

Asia Pacific Developed ... 96

Australia ... 96

Figure 6.2: Australia: MVNO subscriptions, 2Q06-4Q07 ... 96

New Zealand... 96

Hong Kong ... 98

Figure 6.3: Hong Kong: 1528 Smart's MVNO subscriptions, 2Q06-4Q07 ... 98

Asia Pacific Developing ... 99

Philippines ... 98

Figure 6.4: The Philippines: MVNO subscriptions, 2Q06-4Q07 ... 99

Europe ... 100

West Europe ... 100

Austria ... 100

Figure 6.5: Austria: MVNO subscriptions, 2Q06-4Q07 ... 100

Belgium ... 101

Figure 6.6: Belgium: MVNO subscriptions, 2Q06-4Q07 ... 102

Denmark... 102

Figure 6.7: Denmark: MVNO subscriptions, 2Q06-4Q07 ... 103

France ... 103

Figure 6.8: France: MVNO subscriptions, 2Q06-4Q07 ... 104

Germany... 105

Figure 6.9: Germany: MVNO subscriptions, 2Q06-4Q07 ... 106

Netherlands ... 106

Figure 6.10: The Netherlands: MVNO subscriptions, 2Q06-4Q07... 107

Norway ... 107

Figure 6.11: Norway: MVNO subscriptions, 2Q06-4Q07 ... 108

Portugal ... 108

Figure 6.12: Portugal: Rede4's MVNO subscriptions, 2Q06-4Q07... 109

Spain ... 109

Figure 6.13: Spain: MVNO subscriptions, 2Q06-4Q07... 110

Sweden... 110

Figure 6.14: Sweden: Sense's MVNO subscriptions, 2Q06-4Q07 ... 110

Switzerland... 111

Figure 6.15: Switzerland: MVNO subscriptions, 2Q06-4Q07 ... 111

UK ... 112

Figure 6.16: UK: MVNO subscriptions, 2Q06-4Q07 ... 112

East Europe ... 113

Estonia... 113

Figure 6.17: Estonia: Bravocom's MVNO subscriptions, 2Q06-4Q07... 113

Latvia... 114

Figure 6.18: Latvia: Zetcom's MVNO subscriptions, 2Q06-4Q07 ... 114

Lithuania ... 115

Figure 6.19: Lithuania: MVNO subscriptions, 2Q06-4Q07 ... 115

Slovenia ... 115

Figure 6.20: Slovenia: MVNO subscriptions, 2Q06-4Q07... 116

Poland ... 116

Figure 6.21: Poland: mBank's MVNO subscriptions, 4Q06-4Q07... 117

Russia ... 117

Figure 6.22: Russia: MVNO subscriptions, 2Q06-4Q07 ... 118

Ukraine... 119

The Americas ... 119

North America ... 119

The US ... 119

Figure 6.23: The US: MVNO subscriptions, 2Q06-4Q07 ... 120

Canada ... 121

Figure 6.24: Canada: MVNO subscriptions, 2Q06-4Q07 ... 121

Latin America ... 122

Bolivia ... 122

Figure 6.25: Bolivia: Cotas' MVNO subscriptions, 4Q06-4Q07 ... 122

Chile ... 123

Africa and the Middle East ... 123

Africa ... 123

South Africa ... 124

Figure 6.26: South Africa: MVNO subscriptions, 2Q06-4Q07... 124

Middle East... 125

Israel ... 125

Jordan ... 125

CHAPTER 7 - FORECASTS

Methodology ... 127

Definitions ... 127

Figure 7.1: MVNO definitions used for forecasting... 127

Metrics considered ... 128

Figure 7.2 Selected MVNO market entrance and development metrics ... 129

Figure 7.3: MVNO service evolution roadmap... 130

Figure 7.4: Approach type cross-referenced by status of market development matrix... 130

Global MVNO market outlook, 2008-2013 ... 131

Figure 7.5: Global MVNO subscriptions, 2008-2013 ... 131

Regional MVNO market overview, 2008-2013 ... 132

Figure 7.6: Global MVNO subscriptions, by region, 2008-2013... 132

Figure 7.7: Global MVNO subscriptions, by regional market share, 2008 versus 2013 ... 133

Figure 7.8: Global MVNO service segments' market shares, 2008 versus 2013 ... 134

Regional MVNO market analysis, 2008-2013 ... 134

Asia Pacific Developed... 134

Figure 7.9: Asia Pacific Developed, MVNO subscriptions, by service segment, 2008-2013 ... 134

Figure 7.10: Asia Pacific Developed, MVNO service segments' market shares, 2008 versus 2013 ... 135

Asia Pacific Developing ... 136

Figure 7.11: Asia Pacific Developing, MVNO subscriptions, by service segment, 2008-2013 ... 136

Figure 7.12: Asia Pacific Developing, MVNO service segments' market shares, 2008 versus 2013 ... 137

North America ... 138

Figure 7.13: North America, MVNO subscriptions, by service segment, 2008-2013 ... 138

Figure 7.14: North America prepaid and MVNO subscriptions, 2008-2013... 139

Figure 7.15: North America, MVNO service segments' market shares, 2008 versus 2013 ... 139

Latin America ... 140

Figure 7.16: Latin America, MVNO subscriptions, by service segment, 2008-2013 ... 140

Figure 7.17: Latin America, MVNO service segments' market shares, 2008 versus 2013 ... 141

West Europe ... 142

Figure 7.18: West Europe, MVNO subscriptions, by service segment, 2008-2013 ... 142

Figure 7.19: West Europe, MVNO service segments' market shares, 2008 versus 2013... 143

East Europe ... 144

Figure 7.20: East Europe, MVNO subscriptions, by service segment, 2008-2013 ... 144

Figure 7.21: East Europe, MVNO service segments' market shares, 2008 versus 2013 ... 145

Middle East and Africa ... 145

Figure 7.22: Middle East and Africa, MVNO subscriptions, by service segment, 2008-2013 ... 145

Figure 7.23: Middle East and Africa, MVNO service segments' market shares, 2008 versus 2013 ... 146

