

PUBLISHING NEXT WEEK

The Worldwide Directory of Mobile Network Operators, 2nd Edition.

Publication date 15th September 2008

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1. Lycamobile Commences MVNO Operations – UK
September 9, 2008

Lycamobile, an ethnic market MVNO, has finally commenced its MVNO operations in the UK in partnership with Orange. The prepaid SIM cards (originally allotted to Orange) of the company have become available in shops from last week onwards. The company offers a free on-network call talk time of up to 39 minutes, which will thereafter be charged at 9p (USD 0.15) per minute. On-network SMS will be charged at 9p (USD 0.15) each, while calls to UK landlines will cost 8p (USD 0.14) per minute, and calls to other mobile network providers 10p (USD 0.17) per minute. The charges for international calls start from 4p (USD 0.07) per minute to fixed lines in select countries, including Brazil, China, Poland, Romania and Turkey. However, the cost for international mobile calls will be higher. The MVNO aims to attract around 750,000 UK customers in the next 12 months of its operations.

2. Cyfrowy Polsat Launches Mobile Postpaid Services – Poland
September 9, 2008

Cyfrowy Polsat, a Polish digital television platform operator, has officially announced the launch of its mobile postpaid telephony service called Family Mobile Telephony. The service, which is completely flexible, offers customers an option to set the level of monthly fee, terms of agreement, model and price of handset, and the number of minutes available in the subscription plan. For offering MVNO services, the company is utilizing its own telecom network as well as the radio network of Polska Telefonia Cyfrowy (PTC), the operator of Era mobile service.

3. Orange Partners With GlobalCell – UK
September 8, 2008

Orange has signed an MVNO deal with GlobalCell, which plans to target its services at Eastern Europeans living in the UK. GlobalCell will provide SIM-only prepaid service to its customers and will offer customer interaction in the native language of its customers, which includes Polish, Russian, Lithuanian, Slovak and English. Orange had earlier signed MVNO deals with Byk, IDT, 3 national roaming and Cable & Wireless.

Commenting on the agreement, Marc Overton, Vice President of New Business, Wholesale & Strategy at Orange, said: "Partnering with exciting MVNOs such as GlobalCell not only demonstrates our desire to become the network partner of choice for new and existing MVNOs but also extends the Orange reach to much broader segments of the market". Further, Rochus Schreiber, Managing Director of GlobalCell, said: "We are delighted to work with Orange – a partner with strong customer focus. Our goal is to make life for our subscribers easier by offering different types of services in their native language. With support from Orange we deliver a new customer experience for Eastern Europeans in the UK."

4. Dardafone Partners With PTK For MVNO Services – Kosovo
September 8, 2008

Dardafone, a subsidiary of UNIFI Communications (a US-based telecom company), has entered into an agreement with PTK, a leading GSM network operator in Kosovo, to provide MVNO services in Kosovo. Dardafone was awarded an MVNO license by the regulator in June this year.

Commenting on the agreement, Adnan Merovci, Chief Executive Officer of PTK, said: "Today we signed heads of agreement and thereafter further details will be incorporated, following discussions to take place in the near future". He added that the definitive agreement to be drafted hereafter will be submitted to the PTK J.S.C. Board of Directors for approval.

5. People Telecom Inks Deal With Telstra – Australia
September 8, 2008

People Telecom has entered into a wholesale agreement with Telstra for the resale of Telstra's 2G cellular services. With the signing of this deal, the company will be able to provide business customers services on Vodafone, Optus and Telstra on a single bill. Under the terms of the deal, People Telecom will be able to offer services through Telstra's Next G network. However, the operator's subscribers will only be able to use 2G SIM cards over Telstra's network

Commenting on the agreement, John Stanton, Chief Executive Officer of People Telecom, said: "I think we are the

only service provider able to do this". He added that the agreement has strengthened the company's objective of becoming a multi-network MVNO in Australia. According to the company, the move will significantly help its retail and wholesale subscribers as they can utilize the vast reach of Telstra's network. Earlier in July this year, People Telecom ended its six year relationship with Optus. Later, in August, the company entered into a wholesale deal with Vodafone.

6. Lebara Slashes Call Rates – UK

September 8, 2008

Lebara Mobile, an ethnic market MVNO, has reduced its UK national call rates from 15p (USD 0.26) to 10p (USD 0.17) per minute. The company has also reduced call rates to select international destinations. However, SMS rates have been kept the same at 10p (USD 0.17) per SMS both nationally and internationally. According to Jon Fawcett, Marketing Director at Lebara, the objective behind doing so was to encourage customers to use Lebara SIM only, rather than using it as a secondary SIM for making international calls. The company is also spending GBP 750,000 (USD 1.3 million) on its marketing campaign, which covers ethnic, mainstream, outdoor and print media.

Commenting on the development, Jon Fawcett said: "One of our objectives was to work out the best way of changing our proposition from a single play offer to a double play of low cost international and low cost national calls, so our customers use our SIM all the time. So our two aims are to make clear to our core target audience that calling nationally with Lebara on prepay will be better value than using the established networks; and to broaden the appeal of Lebara so any prepay consumer in the UK can now benefit from the unique combination Lebara has to offer".

Commenting on the development, Robert Gaskin, UK Country Manager of Lebara, said: "We believe that our move to reduce UK call rates will prove to be a market-changing strategy for us. The Lebara Mobile proposition is already immensely popular and we are hoping that this will benefit our existing customers as well as attract new customers." Lebara has entered into a distributor agreement with Brightstar and is planning to expand its multilingual customer services team to cater to growing customer demand.

7. Cellular Market Competition Set To Intensify – New Zealand

September 8, 2008

The competition in New Zealand's cellular market is expected to intensify with the entry of two new mobile resellers in coming weeks. M2, an Australian telecom company, and Black and White, a locally owned start-up firm, are set to enter the NZD 2.2 billion (USD 1.5 billion) cellular market along side Telecom New Zealand, Vodafone and TelstraClear. According to Dominion Post, M2 has entered into a wholesale agreement with Vodafone to utilize its nationwide network while Black and White has signed a deal to outsource back-end administration and billing to M2 and retaining marketing to itself.

TelstraClear, an Australian firm, has recently launched its MVNO services for private users. The country will experience further competition with the expected launch of NZ Communications, the country's third wireless network, in 2009.

8. Tesco Telecom Appoints New CEO – UK

September 8, 2008

Tesco, the UK-based supermarket chain and telecom service provider, has appointed Lance Batchelor as the new Chief Executive Officer of the company's telecom business. Batchelor, in his new role, will manage the Tesco Telecoms business, which includes Tesco Mobile, internet access, internet phone, home phone and sales of landline, mobile phones and accessories. He joined Tesco as UK Marketing Director a year ago. Prior to this, he served as UK Marketing and Commercial Director at Vodafone and as Chief Marketing Officer and General Manager at Amazon, the online retailer.

Tesco has appointed Lance as part of its strategy to increase its share in fast growing markets such as financial services, telecoms and internet/home shopping. The company aims at achieving GBP 1 billion (USD 1.7 billion) in profits every year as against the current levels of approximately GBP 400 million (USD 706.7 million). Commenting on his appointment, Lance Batchelor said: "I am excited to come on board at such a promising time for Tesco Telecoms. Not only are we growing our store and online presence, but our commitment to value offerings is becoming increasingly relevant as consumers are demanding a better deal."

9. Nokia E71 To Be Exclusively Available With Fido – Canada

September 7, 2008

The internet is abound with rumors that Nokia and Fido have entered into an exclusive arrangement for the provisioning of full QWERTY keyboard equipped Nokia E71 via Fido for the Canadian population. A user wanting instant savings for its purchase will be required to just pick Nokia E71 through Fido and sign up for their service. Fido is an MVNO owned by Rogers Wireless. However, this development appears quite strange considering the fact that Fido primarily targets the youth segment.

10. Vodafone Acquires Majority Stake In Crazy John's – Australia

September 4, 2008

Vodafone Australia has acquired a majority stake in Crazy John's, a local mobile phone retailer, held by Patricia Ilhan, widow of Crazy John's founder John Ilhan. The company became Vodafone MVNO in late 2007 after concluding a long term relationship with Telstra due to some legal disputes. Commenting on the deal, Russell Hewitt, Chief Executive Officer at Vodafone Australia, said: "Vodafone is very pleased to confirm that Crazy John's will become a significant part of Vodafone's ongoing business strategy. Crazy John's is a dynamic company with innovative, high-value products and services that continue to be relevant and appealing to Australian customers."

Commenting on the stake sale, Patricia Ilhan said: "On a personal level I know that John was excited when he struck a commercial arrangement with Vodafone last year. He knew he had found a dynamic partner for Crazy John's to move forward. John's belief has been vindicated in today's announcement." Crazy John's operates 120 retail stores while Vodafone operates 200 branded stores in Australia,

11. Managing Director Of ExtremeMob Quits – UK

September 4, 2008

Ian Pond, Managing Director of ExtremeMob, left the company in late August 2008 as the MVNO was facing difficulties in launching its services due to non-availability of any network partner. It is understood that Xebera, owner of ExtremeMob, which is backed by Polish billionaire Roman Karkosik, is not showing the required interest in the company. Roman Karkosik also owns a relatively new b2b distributor Advantage Cellular which is headed by

John McFarnon. Pond joined the company in February 2008 and earlier served at Orange where he was involved in rebranding of the operator.

Commenting on the situation, Farnon said: "There was no point in Ian being with us while there is no business, as we don't have a network partner. We need to do a deal with a network partner so we can get the pricing right. We will come back when we can get the right deal for us". It is also understood that ExtremeMob has halted its recruitment plans amidst difficulties in launching MVNO services and a slow mobile market. Earlier this year, Pond had commented: "The launch is not looking like summer this year. It's at a difficult point at the moment. It's a lengthy process, and it's taking longer than we hoped."

12. TelstraClear Re-Enters As MVNO – New Zealand

September 4, 2008

TelstraClear, the New Zealand subsidiary of Australia based Telstra Corporation, is re-entering the New Zealand mobile market via an MVNO arrangement. Initially, the company is offering a free Nokia 6275i handset along with national calls at NZD 0.29 (USD 0.19) per minute to fixed-line and mobile phones and 500 SMS for NZD 20 (USD 13.6) per month to any network. In addition, the company will also provide calls to mobile or landline phones in the UK, the US, Australia, Ireland and Canada at NZD 0.40 (USD 0.27) per minute.

Currently, the company only provides service to customers signing a 24-month contract to the operator's broadband and fixed-line package. However, Steve Jackson, Head of Consumer Market Division at TelstraClear, points out to the possibility of a standalone mobile service in the future. He said: "Nothing's ruled in - nothing's ruled out". Previously, TelstraClear operated as an MVNO using Vodafone New Zealand's network, which was closed in June 2007.

13. IOL Netcom Partners With MTNL For Mobile Services – India

September 2, 2008

IOL Netcom has entered into a franchisee agreement with MTNL to provide CDMA-based wireless services using spare capacity on MTNL's CDMA network. The company has received franchisee rights for two metro circles of MTNL operations i.e. Delhi and Mumbai. IOL Netcom is expected to launch the services within 90 days. However, it would be interesting to see if the venture passes through various policy and regulatory hurdles since Videocon's promoters hold a 14.9% stake in IOL Netcom.

IOL will directly compete with MTNL's already existing CDMA service 'Garuda' in the two circles. The agreement might also be subject to scrutiny to analyse if it is an MVNO arrangement. Meanwhile, Siddharth Srivastava, President of IOL Netcom, stated that the company has set a target of one million subscribers and INR 450 ARPU (USD 10.2) per month within few months of its launch.

14. Virgin Mobile France Deploys Miyowa's Messaging Solution – France

September 2, 2008

Virgin Mobile France has deployed an innovative MoveMessenger solution (mobile instant messaging technology) from Miyowa, a leading provider of instant messaging and Mobile Web 2.0 technologies. The MVNO started its operations in France in 2006 and has around 1 million subscribers. Recently, the company launched 'ExcessGold' subscription package, which includes unlimited SMS and e-mails and Windows Live Messenger running over Miyowa's platform.

Commenting on the deal, Pascal Lorne, Chief Executive Officer of Miyowa, said: "Virgin Mobile France is a true national reference as it is the fourth mobile operator in France. It is our twenty-first deployment at an operator, which proves that our technology is reputed and trusted." He added: "Our technology is designed to serve the needs of today's market. In France today, 90% of 12-24 year olds' own a mobile phone. This is why we are focused on providing innovative and exciting solutions that are perfectly suited to the target market". Julien Allisy, Marketing Director of Virgin Mobile France, said: "We strive to offer our customers the services and functionality that they really want from a mobile service and, importantly, at an affordable subscription. With our young audience in mind, we naturally wanted to include MIM in our new ExcessGold service. Miyowa has enabled us to do this – we are delighted to be working together."

15. Telogic Partners With PTK Centertel For MVNO Launch – Poland

September 1, 2008

Telogic, a leading MVNE of Denmark, has entered into an agreement with PTK Centertel for the launch of MVNO services in Poland. Jens Fricke, Chief Executive Officer of Telogic Poland, said: "It is very important milestone in our MVNE business in Poland, as a number of customers have been waiting for us to launch their MVNO businesses". The company is hopeful of starting the new service very soon and at low cost as well.

Telogic assists companies in launching their mobile services by using the existing infrastructure of other mobile network operators. By taking care of key services and technologies, such as contracts with mobile operators, SIM card management, billing, customer service, CRM and number portability, Telogic helps MVNOs concentrate on their marketing and sales efforts.

16. Ministry Of Communications Pushes For Early MVNO Licenses – Israel

August 31, 2008

The Ministry of Communications intends to bring forward the date for the issuance of licenses to MVNOs. Earlier, the cabinet had decided to publish MVNO licenses by April 2009; however, Ministry of Communications will now publish the licenses and regulations in January 2009. According to senior officials of Ministry of Communications, a hearing will be held in November 2008 to obtain the viewpoint of telecommunication companies on the terms that an MVNO must meet to obtain the license, including eligibility norms, guarantees, and commitments. The Ministry will announce its final policy a month later after reviewing all the comments.

The Ministry expects some sort of agreement between an MVNO and an MNO related to the usage of network or purchase of airtime. In case the parties fail to reach an agreement on price, the ministry will intervene and fix the price an MVNO must pay for the usage of infrastructure. However, it is understood that any such agreement is a distant possibility since cellular operators will take any step to stop their entry. This implies that the support of Ministry of Communications is a must for the launch of MVNOs in the country.

17. Telecom Netia Restructuring Operations – Poland

August 29, 2008

Telecom Netia has initiated its restructuring process after a lull period of several years. The management of the

company has various ambitious plans and ideas to implement and revamp the whole company. In the process, the company has also acquired Tele2, which has 720,000 voice customers and 15,000 broadband internet customers. Though, the stock of the company trades 97.4% lower than its IPO price, this development is welcome news for its shareholders.

Commenting on the future of the company, Miroslaw Godlewski, Chief Executive Officer of Netia, said: "We are growing into a rival of TP telecom, a rival playing in the same league. This is a new situation, quite a revolutionary for the market. By acquiring Tele2, we have reached the number of voice clients we wanted to have in 2011. We will be able to generate net income earlier than planned. We will be able to offer more services. Thanks to better profitability, we will be able to build our offer without certain limits. I cannot give details but we will change as fast as today". Earlier, the company also increased its sales forecast by PLN 10-25 million (USD 4.4-11 million) from PLN 950 million (USD 419.1 million). Telecom Netia also plans to become an MVNO at the end of September or beginning of October.

18. Brightstar Partners With IMPDA And Lebara Mobile – UK August 29, 2008

Brightstar has entered into an agreement with Independent Mobile Phone Dealer Association (IMPDA) and Lebara Mobile, an ethnic market MVNO. The agreement entails IMPDA members to receive access to a complete range of SIM-free handsets and accessories of Brightstar's manufacturing partners as well as comprehensive portfolio of convergence and IT products. Brightstar will manage a dealer loyalty programme for IMPDA members furthering efforts to generate sales. IMPDA members will also receive prior information and access to special offers on new products. They will also be provided with manufacturer training and priority stock allocation on certain products. In addition, they will also be entitled to free demonstration handsets, promotional materials and access to marketing support and a point of sale design service.

Commenting on the agreement, Chris Caudle, Chairman of IMPDA, said: "This is a fantastic opportunity for our members to access the full range of products and services available from Brightstar and to maximise the benefits of working with one of the leading mobile distributors." It will add even more value to their IMPDA membership, helping them to gain a competitive advantage over other dealers, and major retailers. We are looking forward to working with Brightstar to ensure that our members can take full advantage of the potential it brings to them". Further, Richard Baxendale, Managing Director of Brightstar UK and Ireland, said: "We're delighted to be working with IMPDA to bring our experience and expertise in mobile technologies and the full range of benefits of our services to its members. Independent dealers such as IMPDA provide a very valuable and personal level of service to local customers throughout the UK, and play an important role both in educating and developing the market".

Brightstar has also entered into an agreement with Lebara Mobile, an MVNO operating in the UK, to provide end-to-end warehousing and supply chain services. Commenting on the agreement, Baxendale said: "Brightstar has access to some of the most advanced, state-of-the-art warehousing and distribution facilities. This agreement enables us to make even better use of those resources and gives Lebara the ability to provide a highly proficient and consistent service to its major retailer and dealer customers in the UK". Rob Gaskin, Managing Director of Lebara UK, said: "We look forward to leveraging Brightstar's considerable resources to further enhance our customer service to grow and develop our business throughout the UK."

19. Ikea Kick-Starts MVNO Services – UK August 28, 2008

Ikea has started its MVNO services by encouraging customers to unlock their existing handsets and insert Ikea SIM cards. It is understood that Ikea staff is sending customers to nearby unlockers in order to overcome the shortfall of phone range in their stores. This tactic is similar to the one used by failed MVNO brand easyMobile, which encouraged customers to unlock 'and free' their phones. Commenting on the situation, Teddy Pedersen, Managing Director at Mobile Partners UK Limited and Ikea's MVNO partner, said: "We are encouraging people to unlock their phones. It's based on the assumption that customers have a phone already, and they can just use our SIM card".

Earlier this month, Ikea launched its MVNO services under an agreement with T-Mobile and charges GBP 0.09 (USD 0.16) per call and GBP 0.06 (USD 0.11) per SMS.

20. MVNO Business Finds Takers Globally – Global August 27, 2008

Recent announcements by several companies to make an entry into MVNO business highlights the fact that the model continues to remain popular. Countries where new MVNO operators have been announced include Cameroon, Jordan, Portugal, Singapore, US and the UK. More recently, India has also shown interest in the implementation of MVNO model in the country.

One of the reasons for quick mushrooming of MVNOs is that they can segment and target the market according to their choice, such as youth market, enterprises, sports fan, ethnic communities and low-spending segment, etc. Recently, Qualcomm announced its decision to enter MVNO business by launching 'LifeComm' in the US (September 2008) specifically targeting the health conscious segment. MVNOs specifically target low-spending customers and generate healthy profits by gaining volumes. However, it should also be kept in mind that there are various other factors that decide the success or failure of an MVNO, which include state of the market, customer service, branding and marketing strategy, contract with an MNO, etc.

21. More MVNOs Reaping Mobile Advertisement Benefits – Australia August 27, 2008

According to the advertising industry, mobile ad spending, which is set to grow significantly, is not being properly reaped by telecom operators and possibly may not do so in future as well, as they do not clearly understand the advertising business. However, some of these MVNOs have successfully implemented the mobile advertising concept by targeting specific demographic segments with relevant advertising. E.g. Blyk, an ad funded youth MVNO, in the Europe and SMS Pup Mobile, a prepaid MVNO service from ComTel and Empowered Communications.

Research reveals that around 50% of the mobile users are willing to receive advertisements on mobile phone as long as they are relevant and help in reducing call and SMS charges. By generating money from advertisements sent through SMS and MMS, SMS Pup is offering a 65% discount to its customers over a base plan of AUD 29.

Commenting on the trend in Australia, David Sweet, Managing Director of SMS Pup Mobile, said: "The average Australian is battling rising fuel, food and mortgage costs, so if they can save on their mobile phone, that's money that can be allocated elsewhere." ComTel also delivers short, high-quality video clips and links into MMS messages of 100K size so that users can play them whenever they feel and can also forward them to their friends.