Global Mobile Virtual Network Operator (MVNO) Market Size, Share, Development, Growth and Demand Forecast to 2022

Description: The telecommunications industry is very multifaceted with a large number of players, economic interventionism and continuously evolving business model. The mobile subscription penetration in most of the developed countries has reached more than 100%, and therefore the average revenue per user (ARPU) has dropped significantly in recent years. As a result, the mobile virtual network operator (MVNO) market in developed countries witnessed rapid growth during the recent years.

Mobile Virtual Network Operator (MVNO) Market

The discount, cellular M2M, business and media/entertainment segment accounted for more than 50% of the overall MVNO market in 2015. The cellular M2M and roaming segment are expected to witness the fastest growth during the forecast period.

Over the last decade, Western Europe has evolved as the most lucrative market for MVNOs. Germany, the U.K., and France are some of the major MVNO markets in Western Europe. Some of the emerging countries, such as Thailand, Oman, Hungary, Mexico, and Slovakia are expected to witness considerable growth in MVNO market during the forecast period.

In recent years, mobile network operators (MNOs) have also changed their approach towards MVNOs. In the initial phase of MVNO, the MNOs opposed MVNO legislation; however, the modern day MNOs are enthusiastically looking for new MVNO partners, in order to develop efficient wholesale strategies to retain their subscriber and gain optimum revenue from their existing network infrastructure.

MVNOs focus largely on the customer, community, and value added services. Technical flexibility is expected to be the major factor driving the growth of the global MVNO market during the forecast period. The telecom subscriber growth is expected to slow down considerably during the forecast period, owing to the maturing of telecom market. However, the growing demand of mobile internet in developing countries is expected to provide significant growth opportunity for MVNO vendors during the forecast period. The MVNO policy in India is taking shape and it is expected to come into effect from 2017. The telecom gross revenue in India was about $9.7 billion in 2015. More than 900 million telecom subscribers in the country would lay new opportunities for the MVNO market in India during the forecast period.

MVNOs work on a cost-efficient operational model, while its operating cost is about 30% to 50% lesser, as compared to MNOs. MVNOs offer unique brand positioning and user centric value proposition, in order to gain larger market share. Majority of MVNOs serves the emerging niche telecom markets through innovative distribution channels.

Western Europe dominated the global MVNO market in 2015. Over the past few years, the MVNO market has witnessed double digit penetration in Western Europe. Despite the large number of MVNOs players in North America, the penetration of MVNO has remained flat during the past few years. Despite fairly low APRU in Latin America and Asia-Pacific, the MVNO market is expected to grow significantly during the forecast period.

As of 2015, more than 1,300 MVNO vendors are operating globally. Europe accounted for the majority of MVNO vendor's concentration with more than 500 MVNO operators in the region. Asia-Pacific accounted for second most popular destination for MVNO operators in 2015; and it is closely followed by North America.


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