

3rd
edition
February 2009



The MVNO Directory 2009

blycroft > publishing

blycroft > publishing

The MVNO Directory 2009

Executive summary

- What is an MVNO?
- What is an MNO?
- Who are the players in this sector?
- How long have they then been around?
- What do MVNOs offer and who do they target?
- Where do they operate?
- Who operates MVNOs and which networks partner with them?

Many questions exist about MVNOs and with the release of Blycroft's MVNO Directory 2009 now is the time that many of these become answerable. Close to 400 operators are active in this market and a further 70 branded operations are acting as MVNOs. A further 90 operations could be launching soon and that does not include those in the making behind closed doors.

But to start with, what is an MVNO? There are many theories and statements from the mobile industry defining what makes up an MVNO. Technical terms such as minutes of use and spectrum allocation are used in defining true MVNOs. The mainstream opinion of what makes an MVNO has simplified since the launch of the MVNO pioneers back in the late 90s. The most straight forward definition is, an MVNO is any mobile operator which does not own a physical network. Even that definition has its exceptions but it is the most widely accepted and as such is used for The MVNO Directory.

The theory is, if a company sells a mobile phone service to an end user and manages the relationship with that user, including the processes of billing and marketing, then they are performing the function of the operator. However, they lack a physical existence as they use another operator's base stations - so they are acting virtually. The operator which owns the base stations is therefore a mobile network operator (MNO) and the virtual company is a mobile virtual network operator (MVNO). Using this definition means that mobile service providers are incorporated into the MVNO space.

As examples, the most known MVNO is Virgin Mobile UK. Cited as being the first MVNO it is also one of the most successful MVNOs. The operation rapidly became popular within the UK youth market and illustrated that MNOs needed to think differently if they were to increase both the size and value of the mobile voice and messaging markets. Now MVNOs exist in many countries targeting almost every imaginable demographic. For instance, Lycamobile has emerged from the calling card market and has witnessed rapid expansion as a European MVNO targeting ethnic populations and the international calls market. Still within the UK, Blyk has launched successfully as a no-cost service and looks set to expand across Europe. Across the Atlantic and in the USA, big names have ventured into the market expecting big returns by winning large quantities of clients from their existing customer bases. However, the formula is not always that straight forward. ESPN and Disney both put this theory into action, both companies have since retreated to supplying mobile content instead of mobile services. At the same time the launch of Disney Mobile UK was cancelled, but Disney Mobile Japan went ahead. The service is still trading and reportedly a big hit with the overall female market, not just children.

The existence of MVNOs relies on MNOs to allow them access to their networks. Regulatory approval, enhanced legislation and licenses specifically for MVNOs have failed as driving forces in pushing forward MVNO launches. Perhaps the biggest catalyst for MVNOs is an underperforming third or fourth MNO. The MNO will have spent capital on a spectrum license, building out its physical network, purchasing and deploying OSS



and BSS products for its back office systems and then putting its plans into a marketing campaign and employing staff to run the whole thing. If you were the number one MNO why would you want to allow a third party onto your network? They could churn your subscriber base and then give you back a percentage of the revenue you already had 100% of. For the underperforming MNO the situation is different. The start-up capital will have left the MNO owing millions of dollars and the day to day running costs may also exceed subscription revenues. The MNO needs to do something to address their negative balance sheet and not having many clients means their exposure to churn is less than their competitors, the other MNOs. By allowing an MVNO onto their network they can indirectly increase their subscriber base, receive revenues from the MVNO (which receives them from their subscribers) and take a swing at the bigger MNOs all in the same process. What then follows is a process where the other MNOs recognise the danger posed by the MVNO and allow a partner MVNO onto their network. The MNOs recognise they may lose revenue but it is better to have the subscribers churn to their partner MVNO than their competitors' MVNOs. Further proposals are accepted and the market reaches a point where each MNO has multiple MVNOs. The Netherlands is the best example of this proliferation of MVNOs. The Netherlands has a small population catered for by 4 MNOs, active MVNEs and over 40 active MVNOs, 6 branded operations and at least 6 more MVNOs in the planning stages. Having noted the battle to avoid churn it is also worth pointing out that not all MVNO activity focuses around churn. It is equally true that MVNOs find and create markets where MNOs have elected to miss out. This was after all the whole driving force of Virgin Mobile UK. A brand which recognised that little existed for young people in the mobile market, now Virgin Mobile UK rivals other MNOs and is known globally as a super MVNO.

Commonly targeted customer bases for new MVNOs are bargain hunters, international callers, roaming clients,

multi-play offerings (mobile phone, TV, fixed line or Internet services from the one company), sports fans, mobile content users, existing in-store customers, youth markets, business users and in some cases just anyone and everyone. The list does go on and this is the main driving force for new MVNO launches. Where there is an identifiable group of people and someone believes these people have a combined demand for their own network - someone will commission it.

The short answer to what do MVNOs offer is quite simply everything mobile. The simplest MVNOs offer just voice or data only services with no gimmicks, fads, special features or tie ins. The biggest operations offer mobile TV, mobile broadband, MMS, SMS, GPRS, pre-pay, post-pay, hybrid contracts, top of the range handsets, international roaming, online account management or concierge based account managers. The truth is that anything the host MNO offers so too can the MVNO, so long as their agreement and in house software allows for these extras. These value added services can be the driving force for an MVNO, such as Helio, now owned by Virgin Mobile USA.

This represents a brief account of the MVNO market. Available as of February 2009 is the 3rd edition of Blycroft's MVNO Directory, The MVNO Directory 2009. By purchasing this directory you will gain access to the mobile industry's guide to MVNOs. From it you can see how many MVNOs are currently active, which countries they operate in, when they launched, who they partnered with for their network access, what services they offer, who they target and crucially we have provided named contacts and contact information.

Further information including samples pages can be found at www.MVNODirectory.com.

The MVNO Directory 2009 can be ordered as either a PDF or as an Excel data file. To see a full description of what The MVNO Directory 2009 contain then please click here.



blycroft > publishing

The MVNO Directory 2009

About The MVNO Directory 2009

The MVNO Directory 2009, published February 2009, found 366 companies offering mobile services as either an MVNO or mobile service provider. From these 366 companies we identified over 400 active operations, but consolidated some of these into a single profile.

- 366 active operations
- 89 operators who may launch
- 72 mobile brands identified
- 820 named contacts
- Details of MVNOs no longer trading



The directory does not include subscriber data, personal e-mail addresses or direct-line telephone numbers. All information is provided where possible. Data gathered for the 3rd edition was sourced during January 2009 and while we are confident in the accuracy and reliability of the data, Blycroft does not accept liability for any incorrect data or losses as a result of using the directory. By purchasing the directory you agree to this condition

The MVNO Directory 2009 profiles both MVNOs and SPs. Profiles of active operations consist of the following data points (data provided where possible):

- Operation Name
- Geographic focus
- Telephone (mainly switchboard numbers)
- Fax
- URL
- Generic e•mail
- Postal address
- Launch date
- Parent company name / industry / URL
- MNO partner name / URL
- Management (named contacts and job titles for 289 operations • usually within the senior management team)
- Target customer type
- Type of service (pre•pay / post•pay)
- Messaging offered (SMS / MMS)
- Roaming status (international)
- Mobile Internet status

Failed, merged and never happened operations

With a multitude of online resources claiming to provide free listings of MVNOs it is easy to get confused and find yourself in a sea of erroneous information. Research for The MVNO Directory 2009 identified over 220 operations where alternative sources have claimed them to be MVNOs. For the benefit of users of The MVNO Directory 2009 there is a chapter listing all of these operations with a brief reason as to why they were not suitable for inclusion and a URL, where possible, should you wish to review them. The most common reason for a company not being included is their withdrawal from the market or that they never launched a mobile service.

Brands acting as MVNOs

Research also found 70+ operations which seemed to be MVNOs but having reviewed them they were reclassified as brands of MNOs or subsidiaries. By clever marketing exercises from their parent MNO and erroneous reporting by the telecoms industry these operations are often reported as being MVNOs. To assist users of The MVNO Directory 2009 you will find a chapter regarding these operations; containing the names of the brands, URLs and the MNOs which own and operates each operation. Profiles of MNOs are not included in The MVNO Directory 2009 but can be found in The Worldwide Directory of Mobile Network Operators (The MNO Directory) at www.MNODirectory.com.

Ones to watch

The research process also came across companies planning to launch their own MVNO or seriously considering the prospect. This brief chapter will provide you with the names, URLs and countries being targeted by potential operators. Of course, there is no way to provide a definitive list of future MVNOs but these potential operations provide a good insight. Many of these operations already have regulatory approval and the required licenses. Therefore all they need is a host MNO.

Research process

Each edition of The MVNO Directory, now in its 3rd edition, builds upon the previous. The process begins by taking the existing list of operations and removing the information from the database which is likely to have changed since the previous edition, such as the contact information and the management teams.

MVNO news published since the previous edition is reviewed to ensure the list of operators is up to date, with any launches being added to the directory and withdrawals removed. One of the main sources for this research comes from the paid for MVNO News service, which can be found at www.MVNODirectory.com. Blycroft also researches and authors a directory of MNOs and publishes two weekly research services (Africa & Middle East Telecom Week, Eastern Europe Telecom Week). All of these services help towards the MVNO Directory update process. This process provided a list of almost 800 companies for individual review via Internet research and direct contact. Data was further enhanced via a mailing campaign to the operators. Our researchers are skilled in finding hard to find data. They spend a great deal of time making efforts to ensure that profiles are as complete as possible. The vast majority of profiles for the directory are complete.



blycroft > publishing

The MVNO Directory 2009

Reasons to purchase The MVNO Directory 2009

Companies purchase The MVNO Directory mainly to enable the expansion of their business. The world of MNOs consists of just over 700 operators with many of these operations owned and operated by a select club; namely Vodafone, France Telecom, Telefonica, Zain and so forth. The MVNO market on the other hand is much more fragmented, which is to the benefit of many. Each operation typically operates in just one country or across a specific region, such as the Benelux countries or Germany and Austria. The focuses of the operations are normally precisely targeted at a definite group within society and parent companies are often seeking to expand and develop upon established client bases from other sectors. This can easily mean that the management of these smaller operations are keener to hear of methods, practices and products which will assist them to do business better; more so than established MNOs with massive research and development departments made up of teams of in house developers and experts.

MNOs themselves also utilise the MVNO Directory to help guide their MVNO strategy and in some cases MNOs have entered markets as MVNOs rather than purchasing spectrum and building out additional networks. Within the solutions sector companies have used The MVNO Directory as the decision maker as to whether or not to target their products at MVNOs.



Other key reasons we have identified for purchasing The MVNO Directory are as follows:

Valid list of operators

If you had the time you could compile a list of operations; you would certainly find Virgin Mobile, Tesco Mobile and many other big names with relative ease. But there are over 50 operations in the USA, nearly 30 in the UK, 40 in the Netherlands and 366 companies globally all profiled in The MVNO Directory 2009. This is the 3rd edition of The MVNO Directory and our research started back in 2006.

Expertise

The same people who research The MVNO Directory also work on the MVNO News service. These people deal with MVNOs and mobile service providers routinely and have now authored the 3rd edition of The MVNO Directory. As a publisher we also author The MNO Directory, Africa & Middle East Telecom Week and Eastern Europe Telecom Week.

Time taken to research

The MVNO Directory 2009 takes advantage of ongoing in-house research services and initially called upon a year's worth of these resources to update the list of companies to include. This list then had to be validated and cross referenced with external resources. Having compiled the list during December 2008 the research process then began, which took the month of January 2009 to complete. The researched list was then mailed and proofed.

Work for the directory is performed by experienced researchers. Their experience means they are quicker and more adept than most people at finding this information and consequently they also have far higher chance of finding hard to reach but relevant data.

3 years of improvement

This is the 3rd edition of The MVNO Directory. Each edition sees an improvement in coverage as the researchers discover more of the hidden operators. The researchers are also able to fill in further data points each year which were not captured in previous editions.

Supported by 'The MVNO News' service

Blycroft, publishers of The MVNO Directory 2009, also publishes a weekly news service about the MVNO market place. This service keeps track of the market all year round and ensures new launches, changes in the market and services being withdrawn are included in the directory.

Who buys The MVNO Directory 2009

- OSS / BSS companies
- Mobile content developers
- MAPOS companies
- Mobile network operators
- Mobile virtual network enablers
- MVNO start-ups
- Financial and telecommunication analysts

Company Name	Country	Service Offered	Contact Information
Beeline (Germany)	Germany	Mobile service	Phone: +49 201 2000 0000 Fax: +49 201 2000 0000 Web: www.beeline.de
Beeline (Spain)	Spain	Mobile service	Phone: +34 91 200 00 00 Fax: +34 91 200 00 00 Web: www.beeline.es
Beeline (Italy)	Italy	Mobile service	Phone: +39 02 200 00 00 Fax: +39 02 200 00 00 Web: www.beeline.it
Beeline (France)	France	Mobile service	Phone: +33 1 200 00 00 Fax: +33 1 200 00 00 Web: www.beeline.fr
Beeline (UK)	UK	Mobile service	Phone: +44 20 200 00 00 Fax: +44 20 200 00 00 Web: www.beeline.co.uk
Beeline (Austria)	Austria	Mobile service	Phone: +43 1 200 00 00 Fax: +43 1 200 00 00 Web: www.beeline.at
Beeline (Czech Republic)	Czech Republic	Mobile service	Phone: +420 200 00 00 Fax: +420 200 00 00 Web: www.beeline.cz
Beeline (Slovakia)	Slovakia	Mobile service	Phone: +421 200 00 00 Fax: +421 200 00 00 Web: www.beeline.sk
Beeline (Slovenia)	Slovenia	Mobile service	Phone: +386 1 200 00 00 Fax: +386 1 200 00 00 Web: www.beeline.si
Beeline (Croatia)	Croatia	Mobile service	Phone: +385 1 200 00 00 Fax: +385 1 200 00 00 Web: www.beeline.hr
Beeline (Hungary)	Hungary	Mobile service	Phone: +36 1 200 00 00 Fax: +36 1 200 00 00 Web: www.beeline.hu
Beeline (Poland)	Poland	Mobile service	Phone: +48 22 200 00 00 Fax: +48 22 200 00 00 Web: www.beeline.pl
Beeline (Romania)	Romania	Mobile service	Phone: +40 21 200 00 00 Fax: +40 21 200 00 00 Web: www.beeline.ro
Beeline (Bulgaria)	Bulgaria	Mobile service	Phone: +359 1 200 00 00 Fax: +359 1 200 00 00 Web: www.beeline.bg
Beeline (Serbia)	Serbia	Mobile service	Phone: +381 11 200 00 00 Fax: +381 11 200 00 00 Web: www.beeline.rs
Beeline (Montenegro)	Montenegro	Mobile service	Phone: +382 20 200 00 00 Fax: +382 20 200 00 00 Web: www.beeline.me
Beeline (Bosnia and Herzegovina)	Bosnia and Herzegovina	Mobile service	Phone: +387 33 200 00 00 Fax: +387 33 200 00 00 Web: www.beeline.ba
Beeline (Macedonia)	Macedonia	Mobile service	Phone: +389 2 200 00 00 Fax: +389 2 200 00 00 Web: www.beeline.mk
Beeline (Albania)	Albania	Mobile service	Phone: +355 22 200 00 00 Fax: +355 22 200 00 00 Web: www.beeline.al
Beeline (Kosovo)	Kosovo	Mobile service	Phone: +377 30 200 00 00 Fax: +377 30 200 00 00 Web: www.beeline.ko
Beeline (Lithuania)	Lithuania	Mobile service	Phone: +370 5 200 00 00 Fax: +370 5 200 00 00 Web: www.beeline.lt
Beeline (Latvia)	Latvia	Mobile service	Phone: +371 6 200 00 00 Fax: +371 6 200 00 00 Web: www.beeline.lv
Beeline (Estonia)	Estonia	Mobile service	Phone: +372 6 200 00 00 Fax: +372 6 200 00 00 Web: www.beeline.ee
Beeline (Belarus)	Belarus	Mobile service	Phone: +375 29 200 00 00 Fax: +375 29 200 00 00 Web: www.beeline.by
Beeline (Ukraine)	Ukraine	Mobile service	Phone: +380 44 200 00 00 Fax: +380 44 200 00 00 Web: www.beeline.ua
Beeline (Russia)	Russia	Mobile service	Phone: +7 495 200 00 00 Fax: +7 495 200 00 00 Web: www.beeline.ru
Beeline (Kazakhstan)	Kazakhstan	Mobile service	Phone: +7 77 200 00 00 Fax: +7 77 200 00 00 Web: www.beeline.kz
Beeline (Kyrgyzstan)	Kyrgyzstan	Mobile service	Phone: +995 312 200 00 00 Fax: +995 312 200 00 00 Web: www.beeline.kg
Beeline (Tajikistan)	Tajikistan	Mobile service	Phone: +992 37 200 00 00 Fax: +992 37 200 00 00 Web: www.beeline.tj
Beeline (Turkmenistan)	Turkmenistan	Mobile service	Phone: +993 7 200 00 00 Fax: +993 7 200 00 00 Web: www.beeline.tm
Beeline (Uzbekistan)	Uzbekistan	Mobile service	Phone: +998 71 200 00 00 Fax: +998 71 200 00 00 Web: www.beeline.uz
Beeline (Kazakhstan - International)	Kazakhstan	Mobile service	Phone: +7 77 200 00 00 Fax: +7 77 200 00 00 Web: www.beeline.kz
Beeline (Kyrgyzstan - International)	Kyrgyzstan	Mobile service	Phone: +995 312 200 00 00 Fax: +995 312 200 00 00 Web: www.beeline.kg
Beeline (Tajikistan - International)	Tajikistan	Mobile service	Phone: +992 37 200 00 00 Fax: +992 37 200 00 00 Web: www.beeline.tj
Beeline (Turkmenistan - International)	Turkmenistan	Mobile service	Phone: +993 7 200 00 00 Fax: +993 7 200 00 00 Web: www.beeline.tm
Beeline (Uzbekistan - International)	Uzbekistan	Mobile service	Phone: +998 71 200 00 00 Fax: +998 71 200 00 00 Web: www.beeline.uz

blycroft > publishing

The MVNO Directory 2009

Pricing and format

Single user, PDF – GBP 795.00

This license allows for the PDF to be used by named person. It may not be shared with colleagues or redistributed or reassigned from the named user. The PDF may not be shared with contractors.

1-5 users, PDF – GBP 995.00

This license allows for the PDF to be used by 5 named people within the same department of a single organisation. It may not be shared with other departments within the organisation and it may not be transferred to persons other than the 5 named contacts. The PDF may not be shared with contractors, unless the contractor(s) are named users.

1-10 users, Excel + PDF – GBP 1495.00

This license allows for the Excel and PDF files to be used by 10 named people within the same department of a single organisation. The files may not be shared with other departments within the organisation and may not be transferred to persons other than the 10 named contacts. The license does not allow for the files to distribute via or upload to an Intranet. The files may not be shared with contractors, unless the contractor(s) are named users.

11+ users, Excel + PDF – GBP 1995.00

This license allows for usage of the Excel and PDF files throughout the entire organisation.

Contractors may access the files for use when solely employed by the same organisation and it is the licensed organisation's responsibility to ensure that contractors do not retain copies of the files once their work is complete with the organisation.

It is also the licensed organisation's responsibility to ensure that the contractor does not use the files for their alternative client base and for projects unrelated to the licensed organisation. If the licensed organisation is unable to control this then they should not provide access to contractors. Breaches of these terms and damages to Blycroft Ltd as a result of allowing contractors access to these files will be made liable against the licensed organisation where reasonable efforts were not made to ensure adherence to these terms.

No license permits for the distribution of the files in whole or part outside of the licensed organisation. With the exception of providing the list to a recognised mailing house which will not retain a copy of the list. All intellectual property rights remain with Blycroft Ltd. Licenses are non-transferable and may not be sold or exchanged.

Blycroft Ltd reserves the right to uniquely digitally encode files so that the original licensee can be traced and to seed lists to protect its intellectual property rights. Any digital encoding will be done so as not to cause problems to the end user and are done solely as a measure to ensure adherence to the license terms and conditions.



blycroft > publishing

About Blycroft

Blycroft Ltd is a UK telecommunications publisher with a focus on emerging markets. Blycroft currently publishes 3 weekly paid for research services and two global directories. The titles are 'Africa & Middle East Telecom Week', 'Eastern Europe Telecom Week', 'The MVNO News', 'The Worldwide Directory of Mobile Network Operators (MNO Directory)' and 'The MVNO Directory'.

As a publisher we pride ourselves on publishing accurate information which is relevant to our clients' needs. Our client base incorporates all continents and spans many industries which are keen to be involved in the telecoms market. We are positioned well to respond to specific requests from clients and our aim is to secure long-term relationships instead of quick one off sales.

We have a solid status and are experiencing growth during the global credit crunch. We will be expanding our publication portfolio in 2009 and into 2010. This is due to our focus on the emerging markets, the high standard to which we work and our policy of treating all clients like accounts rather than providing privileged terms to a select few.

Further details about Blycroft Ltd can be found at www.Blycroft.com. Also feel free to e-mail our Head of MVNO Research, FAO: Mark Thomas (editor@blycroft.com).

All rights reserved. Reproduction in whole or in part in any form or medium without express written permission of Blycroft is prohibited. All other product names and logos are trademarks or registered trademarks of their respective owners.

Blycroft Ltd., Registered in England and Wales No. 3666284.
Registered Office: 2a Alton House Office Park, Gateway House, Aylesbury, HP19 3XU, UK

VAT No. GB 697 9253 64



blycroft > publishing

FAX BACK ORDER FORM

COMPLETE AND FAX TO +44-1494-778-994

The MVNO Directory 2009

(MVNOs and Major Resellers from Europe, North America and the Rest of the World)

Questions: Call +44-1494-771-734 or visit www.MVNODirectory.com for more information.

Pricing (payment must be received prior to the directory being shipped)

> UK clients will also be charged VAT @ 15%.

> I would like to order The MVNO Directory 2009. I am ordering the following licence (tick as appropriate):

Single user, PDF – GBP 795.00

This license allows for the PDF to be used by named person. It may not be shared with colleagues or redistributed or reassigned from the named user. The PDF may not be shared with contractors.

1-5 users, PDF – GBP 995.00

This licence allows for up to 5 named users to receive the PDF file (e-book) which is The MVNO Directory. Upon receipt of payment the PDF is e-mailed directly to the users. The PDF file or its contents may not be shared with further colleagues or posted / uploaded to any Intranet or Internet site.

1-10 users, Excel + PDF – GBP 1495.00

This licence allows for a whole business unit to have access to the PDF file and for the Excel data of the active MVNO contacts to be inputted into a CRM system or similar for that business unit. This options allows for easier mailing and telesales campaigns. This licence does not allow for The MVNO Directory to be posted or uploaded in full or in part to either an Intranet or Internet site.

11+ users, Excel + PDF – GBP 1995.00

This licence allows for an entire single organisation to access both the PDF and Excel file. The files may be uploaded into the organisation's Intranet system but may not be placed onto an Internet site.

COMPLETE AND FAX

TO +44-1494-778-994

QUESTIONS?

CALL +44-1494-771-734

OR VISIT

WWW.MVNODIRECTORY.COM

FOR MORE INFORMATION.

Blycroft Limited, PO Box 2, Craven Arms, SY7 9WL, United Kingdom. Registered in England and Wales No. 3666284. Registered Office: 2a Alton House Park, Gateway House, Aylesbury, HP19 3XU, England VAT No. GB 697 9253 64. Please note that all orders are handled by Blycroft Ltd's principal sales agent, CMS: Chiltern Magazine Services Ltd. Registered Office: 2a Altons House Office Park, Gatehouse Way, Aylesbury, HP19 3XU, UK. Registered in England and Wales No. 3240740 VAT No. GB 685 4343 10. Calls to and from Blycroft and its agents may be monitored or recorded for quality control and training purposes.

Delivery contact information

Name _____

Job title _____

Email _____

Company name _____

Postal address (including zip/post code and country): _____

Phone _____

Fax _____

Billing contact information (if different)

Name _____

Job title _____

Email _____

Company name _____

Postal address (including zip/post code and country): _____

Phone _____

Fax _____

Payment information

Please INVOICE me , I understand that I will not receive the directory until I have made payment on the invoice.

PO number, if applicable: _____

Credit Card Payment: "Please charge my credit card for my order as per this order form."

Card number: Security Number: Expiry Date: /

(from reverse of card)

Card holder's names: _____ Card holder's signature: _____