SEGMENTING THE GLOBAL MVNO FOOTPRINT

As of the end of 2015, the world’s mobile network operators (MNOs) host 1,038 mobile virtual network operators (MVNOs) and 277 MNO sub-brands. This represents a total of more than 1,300 mobile service providers worldwide hosted by MNOs, in addition to their own core brands.

Number of MVNOs by region, 2015*

<table>
<thead>
<tr>
<th>Region</th>
<th>Number</th>
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</thead>
<tbody>
<tr>
<td>Europe</td>
<td>599</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>137</td>
</tr>
<tr>
<td>North America</td>
<td>113</td>
</tr>
<tr>
<td>Latin America</td>
<td>29</td>
</tr>
<tr>
<td>CIS</td>
<td>18</td>
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<tr>
<td>MENA</td>
<td>14</td>
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<tr>
<td>SSA</td>
<td>13</td>
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</tbody>
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Two thirds of all MVNOs can be found in Europe.

* excluding 115 ‘international’ MVNOs that provide global connectivity to roammers and thus operate across multiple markets.

Global MVNO segmentation, 2015

- **26%** Focus on low-cost services
- **20%** Focus on bundles and data services
- **12%** Telecom
- **12%** Media
- **8%** Migrant
- **8%** Retail
- **5%** M2M
- **9%** Business
- **6%** Discount

Sub-brands differ from MVNOs in that they are wholly-owned and operated by their MNO parent, despite being marketed independently of that MNO.

Discount
An MVNO whose main proposition is low-cost services

Telecom
An MVNO whose offering forms part of a range of telecom services such as fixed-line phone and broadband internet

Media/Entertainment
An MVNO associated with the media or entertainment industries

Business
An MVNO whose primary offering targets business customers

Migrant
An MVNO whose primary offering focuses on international voice services

M2M
an MVNO that supports (embedded) machine-to-machine services

Retail
An MVNO associated with the consumer retail industry

Roaming
An MVNO whose offering is typically targeted at international travellers through roaming agreements with MNOs across multiple markets

MVNO presence split by tariff and region, 2015*

- **Prepaid**
- **Contract**
- **Prepaid/Contract**

Number of sub-brands by region, 2015

- **Europe**: 188
- **Asia Pacific**: 22
- **CIS**: 14
- **Latin America**: 15
- **MENA**: 20
- **North America**: 13
- **SSA**: 5

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