



Newsletter

MVNO Market in Russia and in the world: main trends and perspectives of development

September 2013

Virtual operators market (MVNO) is still a “hot” topic on the telecommunication market, as a proof a lot of activities are held on this matter. For past year analysts from J'son & Partners Consulting are actively participating in several industry events - MVNO Russia 2012, MVNO & MNP Russia 2013, MVNOs Industry Summit 2013 etc.

J'son & Partners Consulting presents a brief results of market research “MVNO market in Russia and in the world: main trends and perspectives of development”.

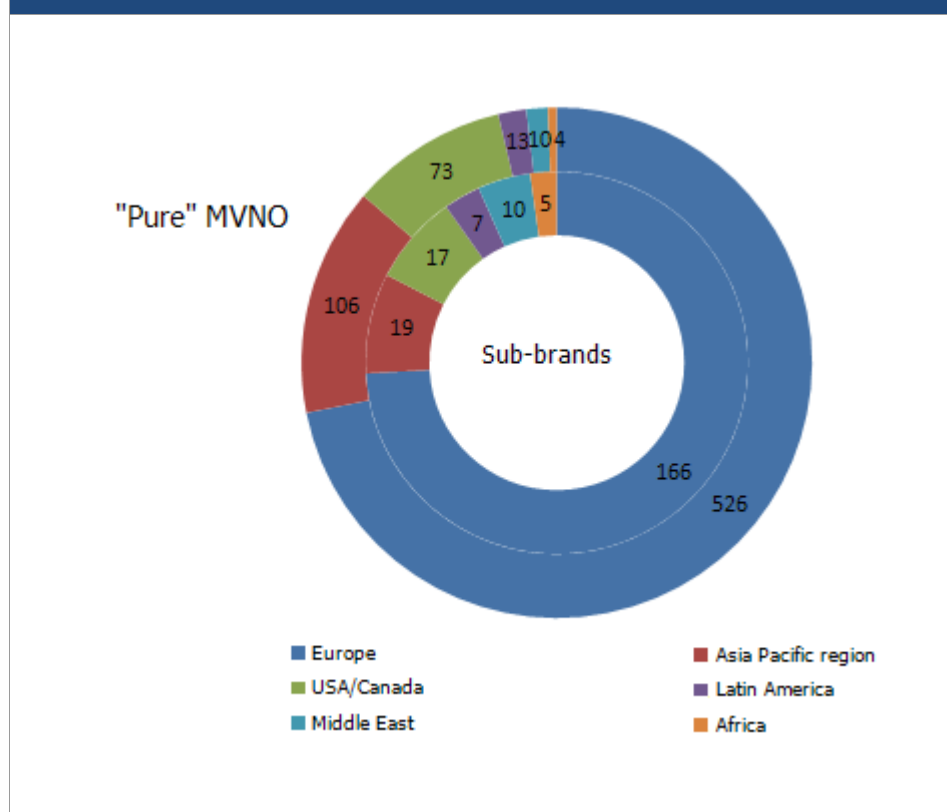
MVNO market in the world

Mobile Virtual Network Operator (MVNO) is the concept of the mobile operator without its own frequency resource and base stations (other infrastructure elements may be present). At this point MVNO is already well established in the developed countries of Europe and Asia, the U.S. and Canada, and gradually spread to emerging markets. Globally, according to Wireless Intelligence on May 2012, there were more than 1,000 mobile virtual network operators, including 812 “pure” MVNO and 224 companies - large sub-brand operators. Ten largest MVNO in 2013 had 1.4% share of the global mobile market by subscribers, others had 0.4% - on another MVNO, which were not included in the top ten.

In general, the global market for virtual operators is geographically heterogeneous even within the same macro-region. For example, in Western Europe, where the main parts of the MVNO are presented, the proportion differs significantly from country to country. For example, in early 2013 in Italy MVNOs share was 5.2%, while this index of only independent MVNO in Germany and the Netherlands was more than three times - up to 16%.

According to the forecasts of Western research agencies in the medium term (till 2016-2017) MVNO subscriber base in the world will increase to 200-300 million, Western Europe and the United States in the meantime will keep the leading positions.

Fig. 1. Number of MVNO by world region, 2012



Source: Wireless Intelligence, May 2012

Business models

MVNO operate on a mass (discounters) markets as well as on niche markets (for example, oriented on migrants, travelers, etc.). In recent years, there are new-generations of MVNO specializing, for example, on inter-machine communication (M2M), mobile financial services, etc. Many fixed-line operators provide MVNO to expand their bundled offerings (broadband internet, fixed telephony, pay TV and mobile), in order to increase ARPU and reduce subscriber churn. On the virtual operators market operate also a lot of specialized providers (Mobile Virtual Networks Aggregators, MVNA), which allow companies to brand (light MVNO) and rapidly create MVNO, providing them with MVNO-packaged solution, the solution of "turnkey". Rate of return usually delayed for high level projects (full MVNO), which can have almost the entire infrastructure except the base stations and as a result they have quite significant risks. On the other hand, in those countries (Russia is one of them), where mainly telecommunications companies are entering or trying to enter; the MVNO market already have a part of the network and IT infrastructure development, in this case vector can be directed toward the establishment of full MVNO. Virtual operators can also execute the contracts with several MNO to optimize their offerings and increase revenue.

Drivers and constraints

For mobile operators, cellular network virtual operator models have pros and cons. On one side MVNO help mobile operators to expand geographically, reach the niche group of subscribers, fully using underload network resources and to reduce cost for purchase and keeping the subscribers. On the other hand operators are afraid of the high growing competitiveness and "stealing" its subscriber base, decreasing rate of control of MVNO, etc. The last factor pushes operators to create light MVNO that are easier for controlling.

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In emerging markets, the development of the MVNO market is constrained by many factors such as the low virtual operator brand awareness in comparison with the brands of major operators which are presented on the market for a long time; has a noticeable development of operator's sub-brands; insufficient development of retail distribution of MVNO networks; higher tariffs for interconnect (MTR) in some countries, weak support from mobile operators. On the other hand, in recent years there are new opportunities for virtual operators 'new wave', which is a significant motivating factor for the development of models of MVNO, among them are the development of LTE networks and public Wi-Fi (can be used to offload mobile data traffic), the growth of M2M-decisions market, increased consumption of data services at the continuing high rates of international roaming, a steady stream of migrants, the active use of social networks, etc.

Major influence on MVNO market are causing the sectorial regulators; in the meantime the approaches to the regulation may differ even within the Eurozone

Regional specific features

MVNO markets of different countries should be considered in the context of historical and regional development of the mobile market as a whole. For example in the U.S. where in contrast to Russia and other countries with a high proportion of prepaid subscribers, prepaid tariffs pay-as-you-go model and "bring your own device» (BYOD) – are offered by MVNO and resellers, while "big" operators practiced mainly sale of long-term contracts with subsidized phones. In this sense, the scope of the interests are more or less clearly divided between "real" and virtual operators , and there is no conflict of interest (major cellular operators are considering MVNO subscribers as its "wholesale" customers , and MVNO - as its another effective sales channel) .

The Western European MVNO market is the largest market of virtual operators - here concentrated most of the projects. The region is leading in the number of subscribers. World's largest multinational MVNO are working the in Western Europe - Lycamobile (30 million subscribers in 16 countries), Virgin Mobile (20 million subscribers), Lebara (7 European countries and Australia; 4 million subscribers), Tesco Mobile (5 European countries; 3,5 million subscribers), Transatel Mobile (5 European countries) etc.

Western European MVNO market is the most highly developed market of virtual operators around the world. It is characterized by a high proportion of MVNO-subscribers (about 15%), covered a huge variety of market segments and target user groups and business models.

In Russia , Eastern Europe, Latin America, China, India and other developing countries, MVNO model is being on the basic step and not only because of the lack of activity control, but perhaps to a greater extent due to the fact that the market for mobile communications in these regions developed by others, different from developed countries scenarios. For example, in contrast to the Western European markets due to the late appearance on the MVNO market in Central and Eastern Europe, "big" operators have already managed to launch customized tariffs, designed for specific groups of users to run their own sub-brands.

Despite the presence of numerous MVNO in a number of countries in Central and Eastern Europe, the virtual operators are not able to capture a significant share of the market.

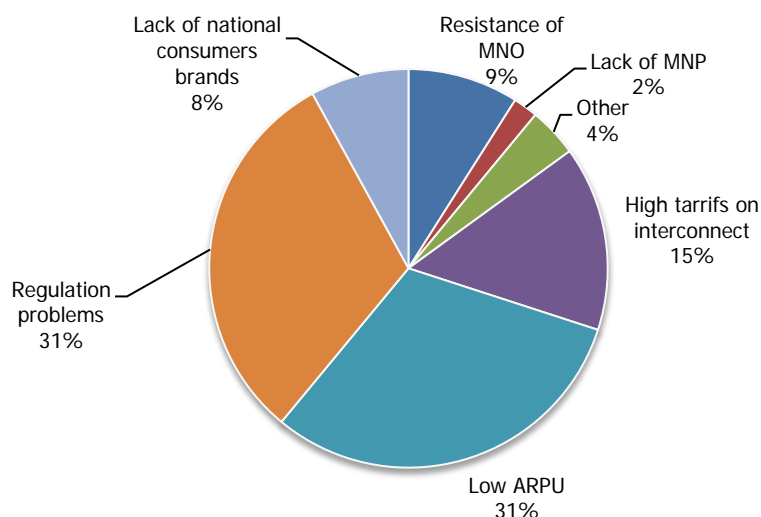
On developed Asian markets (Japan, South Korea), despite of the dozens existing MVNO (there are also projects on the LTE networks), their share is relatively small. For example, in South Korea, the share of MVNO subscribers as of September 2013 did not exceed 4 %. However, this segment is growing rapidly, largely due to a number of regulator's initiatives (in particular, the tariffs for MNP). A characteristic feature of South Korean market is that MVNO, generally offer lower rates for voice communication in comparison with the cellular operators, whereas the rates for data transmission from them, on the contrary, much higher.

On the largest emerging Asian markets (China and India) market for virtual operators have not yet formed, but has a high potential. According to forecasts of Pyramid Research, Chinese MVNO share will reach 5% after 5 years from the start of such projects. In India, the emergence of virtual operators prevents the very high competition and low tariffs.

MVNO market in Latin America is also in the very early stage of its development. According to Informa Telecoms & Media, by September 2013 the share of virtual operators is less than 0.2% of the mobile market in the region. In some countries (Colombia, Chile) have been launched quite interesting projects, there is a noticeable subscriber base here, while, for example, in the three largest countries - Brazil, Mexico and Argentina - in total there are no more than 5 MVNO and a very small number of subscribers.

MVNO market in Africa is still at an early stage of development - in the last 5 years on the continent was launched just a few virtual operators, most of them (6 projects) - in South Africa. The main difficulties of African MVNO market associated with under-developed regulatory framework, low ARPU, the insufficient development of the MVNE model, poorly developed distribution networks and the high cost of interconnect rates (MTR), opposition from the mobile operators.

Fig. 2. Main barriers of the African MVNO market















Source: African Telecom News Survey, Blycroft, 2012, CSMG 2013

MVNO markets in Eastern and Central Europe, Russia, Latin America and Africa, as well as major developing Asian countries (China, India) are still at an early stage of development. The main constraint is the late appearance of MVNO (many niches are occupied by mobile operators and their sub-brands), lack of regulation, combating cellular operators and the absence of major national brands. On the other hand, the markets in the medium and long term can become one of the main drivers of the MVNO market.

MVNO market in Russia

80 Russian companies issued 109 MVNO-licenses as of mid-September 2013, according to the data of the Russian Agency for Supervision in the Communications. According to J'son & Partners Consulting, a little more than a dozen projects actually work in Russia, excluding the sub-brands of operators (for example, "Just to talk" by "MegaFon", "E" by SMARTS, etc.). However, about more than 30 companies with MVNO-licenses received non-geographic numeration in the numbering codes DEF-941, 958, etc. A number of projects (MTT Mobile, Domolink Mobi, Mobile Qwerty, etc.) launched by telecommunication operators are positioned as a full MVNO, unlike most of the other projects that are simply branded tariffs from the "big operator". For example, MTT operator provides not only marketing and sales, but also billing, pricing, routing and has its own regional and international channels.

Table 1. Main currently operating MVNO projects in Russia

№	Brand	Launch Year	Host-operator	Category	Operations areas
1		2001	Megafon Vimpelcom Skylink	Telecom	Moscow and St.Petersburg
2		2003	Megafon	Telecom	Moscow and Moscow region
3		2006	Megafon	Telecom	Moscow
4		2010	Skylink	Telecom	Moscow and Moscow region
5		2011	Skylink	Telecom	Vladimir, Voronezh, Kaluga, Moscow, Tver, Krasnodar regions etc.
6		2011	Megafon	Telecom, government enterprise	Saint-Petersburg
7		2011	Megafon	Retail and whole sales	Moscow and Moscow region
8		2012	SMARTS	Telecom	Republic of Tatarstan
9		2012	Skylink	Telecom	Czech Republic
10		2012	Yota Networks	Telecom	30 regions of Russian Federation
11		2012	Yota Networks	Telecom	Kazan
12		2013	Skylink	Telecom	Moscow and Moscow region

Source: J'son & Partners Consulting, industry sources

Subscriber base of mobile virtual operators in Russia does not exceed 1% of the number of active SIM-cards provider even taking into account affiliated with the host MVNO operators and sub-brands of mobile operators. The share of independent MVNO at the end of the first half of 2013 is estimated by J'son & Partners Consulting, as 0.2% (0.5 million subscribers). These figures correspond roughly to the level of developing countries in Latin America and Eastern Europe and suggest that the MVNO market in Russia is still in a very early stage of its development.

Analysis of the existing and other MVNO-projects on different realization stages (including planned, closed and “frozen”) in Russia showed the following:

The most “viable” MVNO launched by telecommunication companies and the one that are oriented on the national communities. There are also some promising niches such as providing services to the state employees, projects in the segments of B2B and M2M, work on LTE- networks and projects managed by the state (“ERA – GLONASS”, “Selskaya Svyaz” etc.). MVNO in retail, which is popular in developed markets, was mostly unsuccessful in Russia.

MVNO of “full cycle” has the greatest potential in Russia that can provide a reasonable direct costs and complete management services. Provided numeral resource in codes of non-geographical numeration (more than 10 million lines) defines the upper limit for the full MVNO subscriber base forecast in the medium term - about 4% of the number of active SIM-cards of mobile communication in Russia

In general the perspectives for MVNO in Russia are mixed and would be largely determined by industry regulators. The largest mobile operators’ awareness of the benefits of using this model and finding the best and optimal business strategies, might be the main market driver. Up to this point, or to a significant change in telecom industry legislation MVNO market in Russia will remain on its basic step, same as in many developing countries.

Detailed results of the Research: "MVNO Market in Russia and in the world: main trends and perspectives of development" are presented in the full version (192 pages)

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21 Century – TV	InvestSvyaz	Narodny mobile phone
7K	Intelecom	Nasha set'
AKOS	Intercom Technology	NefteGasTelecom
iConnect	Internod	Nizhny Novgorod Cellular Communication
IQLine	Intrastpay	NP Promote the development and use of navigation technologies
Alt Telecom	Informational systems	Osnova Telecom
Auchan	ION	Astrakhan-Telecom
Bashinformsvyaz	Yota	Radiana
BE-Prime	KantriKom	Rostelecom
WINACH Telecom	Link-Master	Rostelcom
WAN telecom	LandMarket	RusElitTorg
WEST CALL LTD	MATRIX telecom	GUP Automated telephone station
Volgograd-GSM	Megafone	Smolny
Vimpelcom	Interregional	SunSim
Gals Telecom	TransitTelecom	Safetel
Global Telecom	Mit-Tel	Svyaznoi
Globus-telecom	MobilCom	ServicePartner
Delta Mobil	MobilStar	SIBIINTERTELECOM
Delta Telecom	Mobile Medical Technologies	Sigma Telecom
Deltacom Partnership	Mobilyuks	Sistematika
Delphin Telecom EA	Moscow City Telephone Network	SITI Telecommunications LTD
DARIX	Moscow cellular network	Sititel
Euroset	Mtel	Sky link
E-Mobile	MTS	
Invest Network	Navigation and Information Systems	

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Skartel	Bildmobil	Fitel
SL-Kamchatka	BLESKmobil	FM Mobile
SMARTS	blueline	Free Telecom
Sonet	Boost Mobile	FreedomPop
Sprint	Bouygues Telecom	Freenet Mobile
Satellite Internet	Btel	Fresh Mobile
Taiga.mobi	C&M	Gamma Mobile
Tattelecom	Camtel	Georg
Telecom-Service	Carrefour Mobile	GHS
Teleprovider	Catalyst	Giffgaff
Topika Omni Apriori	Cell C	GoMobil
TransTelecom-NN	China Mobile	GTS
Trivon Networks	China Telecom	Ha-loo
Ural cellular company	China Unicom	Hello Mobile
FEBO Telecom	CJ Hello Vision	Heyah
FSUE Chief Research Scientific Computing Center	CJ Hello Vision (CJHV)	Hutchison 3G
General Management Department of the President of the Russian Federation	cMobile	Hyves
Fregat-F	CNC	IIJ (Internet Initiative Japan)
Central Telegraph	Connectica	IIJ Mobile
EcoMobile	CO-OP Italia	iiNet
Express Telecom	Cosmote Romania	Interpark
Eldorado	Credo Mobile	ITST
Legal Center: Chastnoe delo 1528 Smart Pinoy	Cyfrowy Polsat	Janet 3G
8ta	Daily Telecom	Japan Com. Inc.
99mobile	Datora	Japan Communications
Ahmes	Deutsche Telekom (T-Mobile)	JCB
Albaphone	Dialog (Netia)	JCI
Aldi Talk	Disney Mobile	Jim Mobile
Algar Telecom	Drillisch Telecom	Kabel BW
Alibaba	Econet	Kajeet
Amaysim	EDD	KCT
Annex Telecom	Edeka Mobil	KICC
APP Chat	Epian Mobile	Kirène Mobile avec Orange
Asda Mobile	E-Plus	Klucz
Aster	Erg Mobile	Klucz Mobile
Auchan Telecom	Eto'o Telecom	Kontakt
Ay Yildiz	Evergreen Mobile	Korea Telecom
B&C solution	Everything Everywhere	KPN
Base	Exetel	KT
BBIQ Mobile	Eye' Vision	KT Powertel
	Falabella	La Poste Mobile
	Family Mobile	Lark Mobile
	FastWeb	Leader's Telecom
	FIDO	Lebara

Legos	Postafon	TMGroup Mobile
LGU+	Poste Maroc	T-Mobile
Lidl	PosteMobile	Touba Mobile
Lidl Mobile	Ratuken	Tracfone Wireless
LycaMobile	RCS & RDS	Transatel
M6 Mobile	Red Bull Mobile	True move H
Magyar Telekom	Red Pocket	Tubierdonka
mBank Mobile	RedBull	Tune Talk
Merchant Korea	Relax Mobil	Turkcell
MNI	Republic Wireless	Tyntec
Mobiho	RM Mobile	U:FON
MOBIL.CZ	S1	Ufida
Mobile Viking	SFR	Ultra
Mobilkom	SIM4Travel	Unicoms
Mobistar	Simple Mobile	Universal Music Mobile
MOL	SK Telecom	UPC
Monista	SK Telink	UQ Communications
Movistar	Smartel	Uros
MTN	SMS Mobility	Vecton Mobile
MTV Italia	Solavei	Vectone Mobile
MuCoSo B.V	Sonofon	Vectra
Multimedia	Spacenet	ViralMobil
Naymobile	Spike Technics	Virgin Mobile
Netfon	Sprint Nextel	Vodafone
Netia	SROaming	Vocall
Neuf Cegetel	StarTEL	Voyager Mobile
NJU Mobile	Steam Communications	W Naszej Rodzinie
NTT DoCoMo	Stream Mobile	White Mobile
NTV Mobile	Suning	Willcom
Onse Telecom	Swan Mobile	Wind
OpenCall	Swisscom	Wireless Logic
Optus	Symyo	Wirnnestel
Orange	Tchibo Mobil	WRodzinie
Orange Business Services (ZAO Ekvant)	TDC	Yes Telecom
Ortel Mobile	Tele2	Yoigo
Otelo	Telecom Italia	YooZoom
Penny Mobile	Teleena	Yourfone.de
Phones4U	Telefonica O2	Zact
PLAY	Telenet	
Plus	Telmore	
Polkomtel	Telogic	
Pond Mobile	Tesco Mobile	
Porto Segura	Telstra	
	Ting	

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