



MAPLEWAVE

WHY 80% OF MVNOs FALTER AND HOW MVNEs MAKE THE DIFFERENCE

TABLE OF CONTENTS

EXECUTIVE SUMMARY	3
WHY MOST MVNOS END IN FAILURE	4
THE OPPORTUNITY & THE PROBLEM	4
WHAT MVNOS GET WRONG	4
1. STARTUP CAPITAL & OPERATING EXPENSES	4
2. DISTRIBUTION & GO-TO-MARKET PLAN	6
3. PRICING & VALUE PROPOSITION	7
4. DIGITAL ONBOARDING & CUSTOMER EXPERIENCE	8
5. BACK-END INTEGRATION	9
FAILURE DRIVERS BY INVESTMENT LEVEL	10
BAREBONE STARTUPS	10
MID-TIER OPERATORS	10
ENTERPRISE MVNOS	11
REGIONAL CHALLENGES	11
AFRICA	11
NORTH AMERICA & EUROPE	12
ASIA-PACIFIC	12
LATIN AMERICA	12
SUMMARY	13
THE CRITICAL ROLE OF MVNES	14
HOW MVNES HELP	14
TURNKEY PLATFORM SERVICES	15
COMPLIANCE AND REGULATORY SUPPORT	16
BUSINESS SUPPORT AND ANALYTICS	17
RISK MITIGATION	18
COMMERCE PLATFORM AND GO-TO-MARKET ACCELERATION	19
INNOVATION ENABLEMENT AND SCALABILITY	20
STRATEGIC INSIGHT AND OPERATIONAL COACHING	21
SUMMARY	21
HOW MAPLEWAVE CAN HELP	22
A FRONT-END PLATFORM BUILT FOR MVNES	22
OUR SOLUTIONS	23
ABOUT MAPLEWAVE	24
REFERENCES	25



EXECUTIVE SUMMARY

All over the world, new Mobile Virtual Network Operators (MVNOs) are popping up almost daily. Armed with a unique brand offering, these disruptors are looking to steal market share away from established telecom operators.

But while the opportunity is massive, the reality is sobering: 80% of MVNOs fail before reaching sustainability. Whether due to undercapitalization, technical complexity, or an unclear value proposition, most MVNOs run out of steam before they scale.

That's where Mobile Virtual Network Enablers (MVNEs) come in. As the technical and operational engine behind the MVNO model, MVNEs offer more than infrastructure - they bring stability, speed, and a strategic advantage. With the right partner, MVNOs can focus on building the right product for the right market, with confidence that their platform can scale with them.

In this whitepaper, we'll explore:

- Five reasons why most MVNOs fail.
- The role MVNEs play in MVNOs' success.
- How the right commerce platform makes a difference.

WHY MOST MVNOS END IN FAILURE

THE MVNO MODEL IS GROWING FAST. SO WHY DO 80% OF MVNOS FAIL?

THE OPPORTUNITY & THE PROBLEM

Mobile Virtual Network Operators (MVNOs) are the scrappy entrepreneurs of the telecom world. They deliver mobile services without the burden of owning spectrum or maintaining core infrastructure. Unlike their Carrier counterparts, their nimbleness lets them deliver unique offerings that are typically niche, digital-first, and low-cost – while piggybacking on top of established networks.

And the opportunity is huge - the global MVNO market is expected to reach over [\\$116.8 billion by 2028](#), driven by demand for personalized service, IoT, and cost-sensitive consumer segments.

On paper, the MVNO model looks simple – buy wholesale network access and resell it with a differentiated brand experience. But here's the problem: [80% of MVNOs fail](#), and most don't make it past their second year.

What separates the winners from the rest? Here are five reasons why these operations typically fall apart.

WHAT MVNOS GET WRONG

1. STARTUP CAPITAL & OPERATING EXPENSES

Most MVNOs don't fail because their concept was bad; they fail because they didn't budget to survive.

There's a persistent myth in the MVNO world: that you can launch lean, scale fast, and figure out the rest later. In reality, telecoms is an unforgiving industry that is complex, highly regulated, and expensive to break into.

A bold vision is one thing, but launching without a grounded financial plan is a recipe for disaster. Most MVNOs simply don't raise or reserve enough money to withstand the realities of startup and early operations.

- **Underestimating Startup Costs:** MVNOs frequently misjudge the true cost of launching a telecom brand. Expenses pile up quickly between OSS/BSS setup, SIM procurement, regulatory licensing, compliance overhead, go-to-market execution, and customer support infrastructure. [Traditional MVNOs can expect to spend 5 million dollars in the first year alone](#), and while their lean counterparts will spend less, many ventures still run out of money before they ever build momentum.
- **Ongoing Operating Expenses:** Most MVNOs expect to pay for network access. But what catches many off guard are the day-to-day operational costs, which often make up the bulk of required capital. These expenses include customer acquisition, channel partner commissions, marketing, support staff, and administration. These expenses add up quickly, so it's easy to burn through capital before the venture has even gotten off the ground.

- **Flawed Revenue Forecasts:** Many MVNOs are so fixated on their great concept that they overlook their revenue forecast. Many falsely overestimate their ARPU (Average Revenue Per User), underestimate churn, and assume they will gain subscribers quickly. When their expected financial results don't materialize, they offer deep discounts to attract customers. But this strategy erodes margins and attracts high-churn, low-value users. Worse still, these users are typically the most expensive to support, leading to further cash burn and no path to profitability.
- **Inflexible Business Models:** Some MVNOs commit too early to rigid pricing tiers, narrow market segments, or operational setups that don't scale. Then when market conditions shift, or competitors undercut them, they can't pivot fast enough. The bottom line is rigid models kill flexibility - and survival.
- **Short Runways and Burn Mismanagement:** Even well-funded MVNOs run into problems when they don't pace their spending. High upfront marketing costs, early team bloat, or overbuilding technology stacks without revenue to support them leads to a cash crunch. Too many MVNOs mistake funding rounds for validation and spend as if scale is guaranteed.

KEY TAKEAWAY: The biggest financial threat to MVNOs isn't lack of revenue - it's failing to budget for the real costs of doing business. If you don't plan for what comes after launch, you'll never get to scale.



FAILURE SPOTLIGHT: AMP'D MOBILE (UNITED STATES)

Amp'd Mobile launched in late 2005 as an entertainment-focused MVNO operating on Verizon Wireless's EV-DO network. Their differentiator was their Amp'd Live service, which offered videos, live events, radio, and content from major network channels that could be downloaded or streamed. Backed by major investors including MTV Networks and Universal Music Group, Amp'd Mobile raised approximately \$360 million. Unfortunately, Amp'd was brought

down by catastrophic financial mismanagement and a flawed customer acquisition and retention strategy. It was eventually discovered that **40% of their customer base were non-paying customers** who enjoyed downloading content but consistently failed to pay their bills. Despite substantial financial backing and an innovative content strategy, the company filed for Chapter 11 bankruptcy protection after just 18 months of operation, **owing over \$100 million to their investors**.

2. DISTRIBUTION & GO-TO-MARKET PLAN

Great brands don't sell themselves. Distribution is what makes or breaks an MVNO launch. Ask most failed MVNOs what went wrong, and you'll often hear about technology or pricing. But scratch deeper, and a quieter killer emerges: distribution equity.

Even household names like Disney Mobile, ESPN Mobile, and Yahoo Mobile collapsed - not because their brands lacked recognition, but because they lacked the right channels to reach customers effectively. These weren't unknown startups. They were globally beloved brands that were crushed under the weight of flawed distribution models.

Distribution equity is about putting your product in front of the right customer, at the right time, in the right place. And in the MVNO world, it's often the single most critical factor for survival.

- **Channel Misalignment:** Some MVNOs bank on slick e-commerce portals, only to discover their target market still wants to buy SIMs in physical stores. Others over-invest in brick-and-mortar, missing the digitally native customer who prefers app-based onboarding and eSIM activation. Without clear channel-product fit, acquisition stalls.
- **Inadequate Retail Presence:** You can't sell what people can't see. Too many MVNOs fail to secure shelf space at major retailers or carrier-neutral kiosks and end up losing out to better-positioned competitors. In markets where in-store purchases still account for 30% or more of activations, lack of visibility is fatal.
- **Poor Integration with Existing Products:** MVNOs with a parent business, like a retailer, ISP, or device manufacturer, often overlook bundling opportunities. MVNOs that fail to connect the dots across their ecosystem leave money (and subscribers) on the table.
- **Marketing-Distribution Disconnect:** Some MVNOs spend big on brand campaigns, social ads, and influencers while neglecting the last mile: making it easy to buy. The message lands, but there's no conversion path. Great marketing without accessible distribution is like a billboard in the desert.

KEY TAKEAWAY: Distribution isn't a downstream tactic. It's an upstream strategy. MVNOs must treat distribution equity with the same rigor they apply to pricing models and brand identity. Because at the end of the day, customers don't just need to want your service - they need to be able to get it. Easily.



FAILURE SPOTLIGHT: BLYK (UNITED KINGDOM)

In September 2007, Blyk launched as the world's first advertising-funded MVNO. Operating on the Vodafone network, Blyk offered an innovative business model that provided a set amount of free mobile services to 16 to 24-year-olds in exchange for receiving targeted advertising messages. Despite achieving impressive ad response rates, Blyk was hampered by its narrow demographic

focus, as the young cohort proved to be **price-sensitive consumers with limited purchasing power**, which turned off many advertisers. Blyk struggled to scale beyond 200,000 UK subscribers, but still made plans to expand into select Western European and Asian markets. The 2008 global economic crisis was the final blow, squashing their advertising-supported distribution model as marketing budgets were slashed across industries. Unlike traditional MVNOs that could rely on subscriber fees for revenue, Blyk's dependence on advertising made it extremely vulnerable to macroeconomic conditions and advertiser sentiment. In July 2009, Blyk announced it would cease UK operations.

3. PRICING & VALUE PROPOSITION

For MVNOs, pricing isn't just about numbers - it's your brand's message in action. It communicates who your service is for, what customers should expect, and how you stack up against the competition. But far too often, pricing is reactive, short-sighted, or disconnected from actual value.

- **Unsustainable Discounting:** Launching with aggressive promotions can bring in a wave of early adopters, but if the business model can't support those rates long term, churn will follow. Many MVNOs attract price-sensitive customers with razor-thin margins, only to lose them the moment prices normalize. Discounting is a tactic with a short shelf life, not a viable strategy.
- **Value Proposition Confusion:** What makes you different from your host MNO, or the 15 other MVNOs in your market? Too often, the answer is fuzzy. MVNOs that fail to define and communicate their unique value proposition get lost in the noise. When customers can't tell the difference, they go with the cheapest or most familiar option, which doesn't favour a newcomer.
- **Hidden Costs:** Nothing erodes trust faster than unexpected charges. Activation fees, top-up fees, data throttling, international rates. If your pricing isn't transparent and predictable, customers won't stick around.
- **Margin Compression:** Even MVNOs with smart pricing models can get caught when their wholesale costs shift. If your agreements with the host MNO aren't flexible, or your margin buffers are too tight, you'll either end up absorbing costs you can't afford, or re-pricing midstream (which is rarely well-received).
- **Inappropriate Premium Positioning:** Some MVNOs enter the market with a premium price tag, hoping that slick branding or exclusive features will justify it. But unless the experience, performance, and service levels match that price, customers won't stick around. Premium pricing without premium delivery is a recipe for disaster.

KEY TAKEAWAY: Pricing is more than math - it's market alignment. MVNOs must build pricing strategies that deliver real, sustainable value, while still being flexible enough to adapt to market shifts. The winners aren't just cheap or expensive; they're clear, consistent, and compelling.



FAILURE SPOTLIGHT: ESPN MOBILE (UNITED STATES)

ESPN Mobile launched in February 2006 as a sports-focused MVNO operating on Sprint's network, backed by Disney's substantial financial resources. The service targeted sports enthusiasts with ESPN-branded phones offering exclusive content, live sports updates, and multimedia features. Despite a \$150 million dollar investment from Disney and strong

brand recognition, ESPN Mobile **attracted only around 30,000 subscribers** - just 6% of its sales target. ESPN significantly overestimated market demand. With limited device options and high pricing, their exclusive content model wasn't sufficient to retain customers. They were also plagued by distribution problems and failed to secure partnerships with major retail channels. The company also made the critical error of **trying to replicate traditional MNO business models** with device subsidies and complex pricing structures, which proved unsustainable given MVNO margin constraints. ESPN Mobile ceased operations less than a year after launching, making it one of the first major MVNO failures in the United States.

4. DIGITAL ONBOARDING & CUSTOMER EXPERIENCE

In a mobile-first world, digital experience is everything. Yet for too many MVNOs, the customer journey surprisingly feels like an afterthought. MVNOs often underestimate how unforgiving users are. If it takes more than a few taps to get started, they're gone. If the app crashes, they won't retry. If they can't manage their plan easily, they'll head to a competitor that gets it right.

- **Complicated Signup Processes:** Every extra field, screen, or password reset increases the odds of abandonment. MVNOs that fail to streamline digital signups risk losing subscribers before onboarding is complete.
- **Poor Mobile App Experiences:** Your app is your storefront. If it's laggy, cluttered, or hard to navigate, you're not just frustrating users, you're driving them away. Great MVNOs invest in sleek, intuitive mobile interfaces that make everything from activation to account management frictionless.
- **Limited Self-Service Options:** Self-service isn't a feature; it's a baseline expectation. Forcing customers to call support for simple tasks, like checking usage, changing plans, or updating payment info, isn't just expensive, it's outdated.
- **Disjointed Omnichannel Experience:** Customers expect seamless transitions across every touchpoint. MVNOs that separate their digital and physical experiences create confusion. If a customer buys a SIM in-store, but can't activate or manage it via the app, trust breaks down.
- **Weak First Impressions:** Activation isn't just a technical process - it's your first real moment of truth. MVNOs that fumble onboarding with delays, errors, or unclear instructions risk losing customers within hours of acquisition. That's not churn. That's a failed start.

KEY TAKEAWAY: Onboarding isn't just step one; it's the make-or-break moment for customer trust. MVNOs that prioritize seamless digital journeys reduce support costs, increase retention, and turn first-time users into long-term advocates. And in markets where digital-native competitors are rising fast, a great customer experience isn't optional. It's survival.



FAILURE (AND SUCCESS) SPOTLIGHT: YOIGO (SPAIN)

When Xfera Móvil (later branded as Yoigo) launched in Spain in 2006, it aimed to disrupt the market with low-cost, no-frills mobile services. Despite strong initial interest, Yoigo's early years were plagued by a notoriously poor digital onboarding experience that frequently resulted in failed activations and significant delays. Yoigo's mobile app was slow, cluttered, and lacked core features like plan changes or real-time usage tracking. This forced even tech-savvy users into the expensive and inefficient support queue for basic account management. The disconnect between digital and physical channels, such as being unable to activate a SIM bought in-store via the app, further eroded trust and loyalty. Surprisingly, Yoigo overcame these early struggles to become Spain's fourth major mobile operator. They simplified their onboarding process, expanded distribution through major chains and own-branded stores, improved their self-service options, and focused on digital transformation and network upgrades. They are one of the few success stories that show how the right investments can and do work.

5. BACK-END INTEGRATION

MVNOs live and die by their operational agility. Behind every successful plan activation, billing cycle, or plan upgrade is a complex stack of integrated systems: OSS (Operational Support Systems), BSS (Business Support Systems), CRM, analytics, provisioning tools, and more.

When these systems work together, customers barely notice. But when they don't? Everything grinds to a halt. Dropped activations, billing disputes, delayed provisioning, and churn are often symptoms of the same root problem: brittle, disconnected back-end infrastructure.

- **OSS/BSS Integration Challenges:** Bridging operational systems (network provisioning, service logic) with business systems (billing, CRM, customer care) is notoriously complex. Many MVNOs underestimate the integration requirements, leading to months-long launch delays and fragile workflows that break under scale.
- **Billing Errors:** Few things destroy trust faster than a wrong bill. Whether it's overcharging, delayed invoices, or usage not matching expectations, billing disputes are a major driver of early churn.
- **Limited Real-Time Data Access:** Without real-time visibility into usage, service quality, or customer behaviour, MVNOs are flying blind. This means they will be slower to respond, have limited diagnostics, and will miss retention opportunities.
- **Inflexible Product Configuration:** Want to launch a new plan tier? Offer a weekend data boost? If your systems require weeks of development and testing to support simple changes, you can't keep up with the market. A static back end leads to a static business.
- **Manual Workarounds:** When systems can't talk to each other, humans have to step in – armed with spreadsheets, ticket queues, and band-aid processes that don't scale. Each manual handoff introduces delay, cost, and risk.

KEY TAKEAWAY: MVNOs that treat system integration as an afterthought quickly find themselves buried in inefficiency and complaints. Building for scale means investing in infrastructure that's modular, adaptable, and deeply integrated from day one.



FAILURE SPOTLIGHT: OVIVO MOBILE (UNITED KINGDOM)

Ovivo Mobile is another MNVO that tried its hand at an advertising-funded service model, offering free mobile services in exchange for viewing periodic advertisements. Ovivo operated successfully for two years, with a subscriber base of around 70,000 customers and intentions for expansion. However, in 2014, Ovivo Mobile suddenly ceased operations without any prior warning

to customers or stakeholders, leaving thousands without mobile service. The abrupt collapse was caused by critical backend integration failures with host carrier, Vodafone, and unsustainable operational challenges that overwhelmed the company's technical infrastructure. Unlike traditional MVNOs that primarily handle subscriber management and billing, Ovivo's business model required complex integration between mobile network services, advertising delivery systems, customer authentication platforms, and revenue sharing mechanisms with advertisers. These technical requirements created multiple points of failure that the company's limited resources and crowdfunded capital base could not adequately support.

FAILURE DRIVERS BY INVESTMENT LEVEL

There's a common misconception in the MVNO space: that more money guarantees success. But history paints a different picture. MVNOs fail at every investment level, from lean startups to well-capitalized enterprise brands. The difference isn't always in the resources, it's in how they're used.

BAREBONES STARTUPS

For small MVNOs entering the market with limited capital, the risks are immediate and unforgiving. These players often have big ambitions, but don't have the infrastructure to support them.

- **Undercapitalization:** Startups often underestimate how long it takes to reach profitability. With no buffer to absorb slow growth or unexpected costs, most MVNOs fail within the first 2 years.
- **Poor Market Fit:** Targeting a niche market is smart, but only if it is underserved and customers are willing to pay. Many startups guess wrong and launch with plans or features that don't resonate.
- **Weak Distribution Strategy:** Without retail partnerships or digital acquisition engines, customer growth stalls and customer acquisition costs become unsustainable.
- **Limited Negotiating Power:** Small-scale MVNOs often get unfavorable wholesale terms from MNOs, driving up costs and shrinking margins from day one.
- **Operational Inefficiencies:** If there is minimal investment in automation or scalable systems, everything becomes manual and expensive. This increases error rates, slows growth, and drains resources.

KEY TAKEAWAY: Without strong fundamentals, even the most creative startup will struggle to survive its first two years.

MID-TIER OPERATORS

Mid-sized MVNOs often launch successfully, find early traction, and then hit a wall. Their challenge isn't in launching - it's growing sustainably.

- **Tech Stack Limitations:** Legacy systems or overly basic platforms can't scale with growing subscriber needs. As volumes rise, outages, latency, and performance issues follow.
- **Customer Churn:** Mid-tier MVNOs often lack the brand equity or differentiation they need to retain users once new competitors enter the scene.
- **Regulatory Missteps:** Expanding into new markets or launching new services without deep regulatory expertise can lead to compliance failures and fines.
- **Working Capital Constraints:** Even if revenue grows, cash flow remains tight. Working capital is drained quickly if there are deferred payments to MNOs, delayed customer collections, or overinvestment in marketing.
- **Talent Acquisition:** It can be difficult to build (and afford) strong, experienced internal teams, especially given tough competition from carriers and tech firms.

KEY TAKEAWAY: These operators often show early promise, only to collapse when systems, funding, or strategy fail to scale with the business.

ENTERPRISE MVNOS

At the enterprise level, capital is no longer the issue - but alignment is. These MVNOs often spawn from media companies, large retailers, or global tech players. And while they launch with fanfare, they frequently fall victim to their own complexity.

- **Internal Misalignment:** When the MVNO team isn't integrated with the parent organization's core priorities, decision-making slows down, strategic goals get lost, and accountability is scattered.
- **Brand Confusion:** Well-known brands can struggle to explain why they're entering the mobile space, and what value they add. If the brand story doesn't make sense, it won't convert.
- **Channel Conflict:** Existing partners or business units may see the MVNO as a threat or distraction. Misaligned incentives lead to friction and low engagement.
- **Overestimation of Brand Value:** Enterprise players often assume their brand will do the heavy lifting. But in mobile, customers care more about pricing, coverage, and experience than logos.
- **Insufficient Demographic Appeal:** Even strong brands miss the mark. [Disney Mobile shut down in 2007](#) after failing to hold families' attention, despite rich media content and parental controls.

KEY TAKEAWAY: Strategy without execution is just theory. No amount of brand equity or capital can save an MVNO that fails to deliver a cohesive, competitive customer experience.

REGIONAL CHALLENGES

MVNOs are common all over the world – but each region faces its own unique challenges.

Africa

African MVNOs face unique challenges despite the continent's mobile-first technology approach. As of 2022, MVNOs represented only [0.6% of total mobile subscriptions in Africa](#), considerably below the global average of 1.3%.

Key challenges include:

- **Regulatory Barriers:** Complex, inconsistent regulatory frameworks that vary significantly between countries, often favoring established MNOs over new entrants.
- **Infrastructure Limitations:** Unreliable network coverage and internet connectivity in many regions, which hampers service quality.
- **Market Fragmentation:** Localized approaches are required for diverse payment systems, cultural preferences, and economic conditions.
- **Capital Constraints:** African MVNOs typically have limited access to investment funding compared to more developed markets

Despite these challenges, some African markets show promise, with [Senegal achieving nearly 14% MVNO penetration](#), demonstrating that success is possible with the right regulatory framework and business model.

North America & Europe

Europe has historically been the most developed MVNO market. However, recent trends show [European MVNO subscriptions contracting due to competition from operator sub-brands](#) and some MVNOs deploying their own networks. North American MVNOs face similar maturity challenges, with key failure factors including:

- **Market Saturation:** Intense competition in established markets drives margins down.
- **High Customer Acquisition Costs:** Expensive marketing is required to attract customers in highly competitive markets.
- **Brand Translation Failures:** Even the most powerful brands have fallen short because of distribution challenges.
- **Sub-Brand Competition:** MNOs that launch their own budget brands directly compete with MVNOs.

Despite these challenges, the Americas are projected to see [MVNO subscriptions increase at a CAGR of 10.6% from 2023 to 2029](#), led by expansion in Brazil, Mexico, and the US.

Asia-Pacific

Asia & Oceania represents the largest MVNO market by subscriptions globally, though [growth is expected to be modest](#) compared to other regions:

- **Pricing Pressure:** Established operators often engage in aggressive pricing strategies to maintain their market share.
- **Technology Fragmentation:** There are varying network standards and technology adoption rates across countries.
- **Scale Requirements:** Larger population centers demand a significant initial investment to achieve viable scale.
- **Regulatory Inconsistency:** There are widely varying regulatory approaches to MVNO licensing and operation.

Latin America

Latin America had [29 MVNOs as of 2015](#), with the market now experiencing significant growth potential. Key regional challenges include:

- **Economic Volatility:** Macroeconomic instability affects consumer spending and contract commitment.
- **Limited Network Access:** MVNOs encounter restricted wholesale terms from dominant operators in several markets.
- **Regulatory Development:** Regulatory frameworks are still evolving in many countries.
- **Digital Infrastructure Gaps:** Uneven development of supporting technologies for digital service delivery.

Despite these challenges, Brazil and Mexico are expected to drive significant MVNO growth in the coming years.

SUMMARY

The reasons for failure are well understood but often underestimated by new entrants. Without the right capital, channels, operations, and technical foundation, most MVNOs burn through resources and fall short of sustainability.

But it doesn't have to be this way. The next chapter explores how MVNEs can help turn these vulnerabilities into strengths and dramatically improve the odds of success.

THE CRITICAL ROLE OF MVNES

MVNES DON'T JUST LAUNCH MVNOS - THEY HELP THEM GROW, ADAPT, AND THRIVE WITH INFRASTRUCTURE, INSIGHTS, AND SUPPORT.

Behind many of these successes is a common denominator: a strategic partnership with a capable Mobile Virtual Network Enabler (MVNE). They provide the technical and operational backbone that help MVNOs work, including provisioning, billing, compliance, CRM, and more. Together, MVNOs and MVNEs are two peas in a pod, and form a powerful engine for telecom innovation.

MVNEs are playing an increasingly strategic role by enabling rapid deployment, reducing barriers to entry, and ensuring regulatory alignment. This collaborative model is particularly effective in regions where infrastructure expansion is limited but mobile usage is growing rapidly.

MVNOs that align with experienced MVNEs greatly improve their chances of long-term success. The role of MVNEs has evolved from technical enabler to that of a strategic partner, accelerating time to market while steering MVNOs away from early-stage pitfalls and cost overruns.



HOW MVNES HELP

Building from scratch is slow, risky, and expensive. MVNEs offer a shortcut with scale built in.

TURNKEY PLATFORM SERVICES

For most MVNOs, the dream is clear: launch fast, operate lean, and scale without friction. But the reality of building telecom infrastructure from the ground up is daunting, particularly when it comes to Operational and Business Support Systems (OSS/BSS). Development can take 12–18 months, integration is complex, and the margin for error is razor thin.

That's where a MVNE can help. They offer pre-integrated, turnkey platform services that provide MVNOs with a launch-ready foundation. From provisioning and billing to real-time usage tracking and customer self-care, these platforms are designed to work out of the box, with no massive dev team required.

- **Rapid Deployment of OSS/BSS:** MVNEs provide access to fully built OSS and BSS frameworks that are already tested, certified, and integrated with multiple MNO networks. This eliminates months of custom development and integration work. MVNOs can onboard customers, activate SIMs/eSIMs, monitor usage, and generate invoices within weeks, not quarters. With MVNE support, MVNOs can also tap into real-time provisioning engines, flexible rating and charging modules, and CRM integration for subscriber lifecycle management. Instead of piecing together tools from multiple vendors, MVNOs get a unified platform that's optimized for launch speed and operational consistency.
- **Scalable Cloud-Based Architecture:** MVNE platforms that use microservices-based cloud architecture are designed to scale as the subscriber base grows. As subscriber volumes increase or product complexity grows, the platform keeps pace without re-architecture or major reinvestment. This also allows MVNOs to expand into new geographies, quickly launch sub-brands, and run multi-tenant operations on a single stack.

KEY TAKEAWAY: Turnkey MVNE platforms eliminate the two biggest roadblocks for MVNOs: time and cost. With the right MVNE partner, MVNOs don't need to be engineers or system integrators. They can focus on their strategy, brand, and customer experience, while the technical core is delivered on day one.

SUCCESS SPOTLIGHT: HELLOSIM & PORTAONE (GLOBAL/ARMENIA)

When HelloSIM launched in 2016, it set out to simplify mobile access for international travelers.

With service availability in over 200 countries, HelloSIM knew they couldn't afford a slow rollout, fragmented systems, or poor customer support. So, they partnered with PortaOne, a globally recognized MVNE, to power their backend. PortaOne's turnkey OSS/BSS solution allowed HelloSIM to launch quickly with a fully integrated stack, covering provisioning, billing, and customer self-care. This eliminated the need for in-house development and kept overhead lean during their crucial first year. The result? **HelloSIM grew its customer base by a staggering 800% within a single year**, supported by automated onboarding and real-time account management. Their ability to roll out new features rapidly also drove 20% year-over-year revenue growth, thanks to smarter cost controls and a modular service model.



COMPLIANCE & REGULATORY SUPPORT

Launching a mobile service isn't just a technical feat - it's a regulatory one. Every market has its own rules for data privacy, financial transactions, numbering plans, and other regulations. For new MVNOs, navigating this landscape is both complex and time-consuming.

That's where MVNEs deliver massive value. With built-in compliance features and experienced regulatory teams, they help MVNOs succeed without an in-house legal department or compliance officer in every market.

- **Built-In Privacy & Payment Compliance:** Top-tier MVNE platforms are built to meet global standards. This includes payment standards like PCI-DSS, which ensures secure handling of credit card and mobile wallet transactions across payment gateways. They also manage GDPR (General Data Protection Regulation) to enforce privacy controls around customer data and consent in Europe. These compliance frameworks are embedded directly into CRM and billing modules, so MVNOs can store customer data securely, manage consent and retention policies, and process payments without taking on additional compliance risk.
- **Local Licensing & Numbering Administration:** MVNOs that operate in multiple countries often face another hurdle: local telecom licensing and numbering plans. These processes can vary wildly by region and often involve long approval timelines, requirements for local presence or incorporation, and complex documentation and technical specs. MVNEs take this burden off the MVNO's plate, handling regulatory applications and filings, Mobile Number Portability integration, and local number range acquisition and provisioning. They act as regulatory navigators, accelerating market entry and reducing the legal overhead that can stall a launch indefinitely.

KEY TAKEAWAY: MVNEs ensure MVNOs don't fall into costly legal traps, experience launch delays, or data breaches. In a world where data protection and consumer regulation are only tightening, compliance isn't a checklist - it's a competitive advantage.

BUSINESS SUPPORT AND ANALYTICS

Most MVNOs focus on technology and branding early on but overlook the behind-the-scenes operational mechanics that truly drive profitability. Billing accuracy, customer service, partner settlements, and fraud detection aren't glamorous, but they're essential to running a scalable, sustainable business.

MVNEs provide this critical layer of business infrastructure out of the box, allowing MVNOs to run lean while still operating like a mature telecom brand.

- **Revenue Assurance & Analytics:** MVNEs offer integrated tools that monitor the financial health of an MVNO from day one. These include revenue assurance dashboards to track real-time billing vs. usage discrepancies, fraud detection systems, and churn analytics. These insights help MVNOs identify leakage before it becomes systemic, make smarter decisions around plan pricing and bundling, and take proactive action to retain high-value subscribers. In a space where margins are tight and churn is high, data-driven decisions can make all the difference.
- **A La Carte Back Office Services:** Running a successful MVNO requires great people and processes. But hiring full teams for every function is costly and slow. MVNEs solve this with modular business support services that MVNOs can turn on as needed. This includes outsourced customer care, finance operations, and vendor management. Outsourcing this work lets MVNOs focus on high-impact activities, like acquisition, product strategy, and partnerships, while the MVNE handles the operational heavy lifting.

KEY TAKEAWAY: By offering both strategic intelligence and day-to-day operational muscle, MVNEs act like an outsourced operations department. They bring financial rigor, performance transparency, and execution support, which drive faster decisions and stronger margins.

RISK MITIGATION

Launching and operating an MVNO comes with many risks - technical, operational, financial, and reputational. From deployment delays to customer service breakdowns and billing outages, even small issues can escalate fast and damage trust.

MVNEs are not just service providers; they are risk-sharing partners who absorb complexity, minimize points of failure, and deliver proven safeguards that protect MVNOs from costly setbacks.

- **Shared SLAs & Performance Guarantees:** MVNEs guarantee performance with Service Level Agreements (SLAs). These SLAs often include guaranteed platform availability (e.g., 99.9%+ uptime), response and resolution time commitments, and penalty clauses for missed targets. For MVNOs, this means not navigating risk alone, as their MVNE is contractually accountable for delivering a certain level of service. It also reassures investors and stakeholders that key infrastructure is backed by commercial-grade support and stability.
- **Proven Go-Live Methodologies:** MVNEs have launched countless MVNOs across global markets. MVNEs ensure that proper staging and testing are completed, regulatory requirements are met, and billing and other key functions are operational on day one. They also train and support teams through the transition. Instead of building a launch strategy from scratch, MVNOs can leverage the experience of an MVNE to avoid common go-live mistakes.

KEY TAKEAWAY: MVNEs don't just enable your launch - they eliminate its risks. With built-in service guarantees, operational expertise, and real-world deployment experience, MVNEs help sidestep mistakes and act as an insurance policy for MVNOs.

COMMERCE PLATFORM & GO-TO-MARKET ACCELERATION

For MVNOs, success comes down to customer experience; how easy it is to sign up, manage services, redeem offers, and pay. Customers expect mobile-first journeys that are seamless, self-directed, and secure.

That's why modern MVNEs offer commerce platforms that handle the entire customer lifecycle. From acquisition and onboarding to retention and payments, these tools give MVNOs a scalable platform from day one.

- **Digital Storefronts:** Branded e-commerce environments for SIM/eSIM sales, mobile device bundling, and top-ups.
- **Subscription & Plan Management:** Self-service plan activation, changes, and billing cycles across prepaid, postpaid, and hybrid models.
- **SIM Fulfillment & Logistics:** Integrated ordering, inventory, and delivery workflows, including QR code eSIM distribution.
- **Loyalty & Promotions Engine:** Personalized offers, discounts, and points-based programs to drive acquisition and retention.
- **Customer Portals & Mobile Apps:** White-label interfaces for managing accounts, making payments, and accessing usage analytics.
- **Secure Payment Gateways:** PCI-DSS compliant integrations with multiple payment methods, including mobile wallets.

KEY TAKEAWAY: MVNEs give MVNOs a competitive advantage by delivering complete, commerce-ready systems right out of the gate. No fragmented vendors. No disconnected workflows. Just a seamless, digital-first customer journey that's ready to scale.

INNOVATION ENABLEMENT & SCALABILITY

The telecom market moves fast. As things change, MVNOs need the flexibility to innovate without re-architecting their entire platform.

That's where MVNEs become more than just enablers. They become accelerators. With modular platforms, open APIs, and a future-ready infrastructure, MVNEs empower MVNOs to go beyond basic connectivity and build new, differentiated experiences at scale.

- **Modular Architecture Built for Innovation:** MVNE platforms are designed to support plug-and-play innovation. Their architecture allows MVNOs to integrate Fintech solutions, IoT device management, analytics, AI, and automation tools, as well as new commerce channels like embedded eSIM provisioning. With well-documented APIs and sandbox environments, MVNOs can test new features, integrate partners, and deploy enhancements without major platform overhauls or long development cycles.
- **Built-In Scalability for Global Growth:** MVNE platforms are engineered to scale when expanding to new regions, launching sub-brands, and supporting short term surges in demand during promo campaigns. With cloud-native deployment, elastic infrastructure, and support for multi-tenant operations, MVNOs can scale without starting from scratch in each new market. And when local regulations, languages, or number portability requirements change, MVNEs help adapt without downtime or disruption.

KEY TAKEAWAY: MVNEs offer the foundation and flexibility MVNOs need to compete, grow, and lead. Whether it's entering new verticals, layering on new tech, or scaling across borders, MVNEs make it faster, safer, and more sustainable to build what's next.



SUCCESS SPOTLIGHT: UBIGE & TRANSATEL (GLOBAL)

When Transatel (now part of NTT) launched Ubige in 2017, the goal was to redefine global mobile connectivity across consumer devices, enterprise IoT, and automotive. Ubige needed an MVNE backend capable of powering eSIMs,

embedded device provisioning, and dynamic rating at scale. Transatel leveraged its own MVNE platform, enabling Ubige to deploy eSIM provisioning and onboarding across smartphones, tablets, connected PCs, and automotive platforms - **all within 4 months, a lightning-fast timeline in telecom**. They were also able to enable embedded eSIMs in global car brands including BMW, Jaguar Land Rover, Fiat, and Stellantis. Their architecture meant they could easily serve new device types, channels, and geographies without rebuilding the core platform. Ubige is now embedded in BMW's Personal eSIM for over 200 destinations and expanding across Europe.

STRATEGIC INSIGHT & OPERATIONAL COACHING

Launching an MVNO requires making the right decisions at every stage: who to target, how to price, where to sell, and how to grow. And while most new operators have a strong brand or market idea, few have deep telecom expertise to back it up.

This is where MVNEs step beyond infrastructure to become true strategic partners. With years of experience across diverse markets, MVNEs can help new players avoid costly mistakes and accelerate results.

- **Embedded Advisory & Benchmarking Support:** Leading MVNEs provide ongoing strategic guidance around market positioning, pricing models, and customer journey design. Their experience makes it easy for MVNEs to spot early signs of revenue leakage, churn spikes, channel inefficiencies, and onboarding friction. This allows them to recommend best practices in real time, giving MVNOs a competitive edge without needing large internal strategy teams.
- **Deep Value In Emerging Markets:** MVNEs are particularly invaluable in emerging and transitional markets, where infrastructure gaps, fragmented regulations, and language barriers present real launch challenges. Their support includes localized onboarding flows and KYC integration, multilingual customer support capabilities, regulatory interpretation and filing assistance, and trusted relationships with host MNOs across regions. Because MVNEs often act as intermediaries during wholesale contract negotiations, they can also advocate on behalf of the MVNO to secure better terms, shorter ramp times, and faster issue resolutions.
- **Operational Delegation, Strategic Focus:** By outsourcing day-to-day telecom operations to an MVNE, MVNOs are free to focus where it matters - building a unique brand, creating an engaging customer experience, and developing go-to-market campaigns. The MVNE handles the plumbing while the MVNO innovates at the surface.

KEY TAKEAWAY: MVNEs bring a rare combination of infrastructure, insight, and influence that helps MVNOs launch smarter, scale faster, and avoid the most common pitfalls. In an increasingly complex telecom world, having a partner who's "seen it all before" can be the difference between surviving and thriving.

SUMMARY

In an industry where margins are tight and competition is fierce, leveraging MVNE partnerships isn't just a shortcut to launch - it's a survival strategy. The most successful MVNOs aren't necessarily the biggest or most famous; they are the ones that made smart foundational choices, executed well, and adapted quickly.

HOW MAPLEWAVE CAN HELP

MVNES EXIST TO HELP MVNOS - BUT WHO HELPS THE MVNES?

An MVNE is only as effective as the tools and partners it works with. Choose well, and you can serve dozens of MVNOs with agility, control, and confidence. Choose poorly, and you'll face mounting technical debt, delayed go-lives, and dissatisfied clients. That's where Maplewave comes in.

A FRONT-END PLATFORM BUILT FOR MVNES

Maplewave provides MVNEs with a modular, white-label front-end platform that powers the entire customer journey, all while being fully integrated into OSS/BSS systems. It gives MVNEs a powerful way to deliver branded, commerce-ready experiences to every MVNO client - right out of the box.

- **Modular & White-Label by Design:** Deploy only the modules you need and share integrations across solutions for extra savings. Work with one vendor to further reduce project complexity and cost. Our white-label approach means multiple MVNOs can be served from a single platform.
- **Integrates With Every Key System:** Our platform integrates with all systems that support commerce transactions, including BSS/OSS, CRM, ERP, and provisioning systems.
- **Custom Journeys Without Custom Code:** Create unique customer journeys without expensive custom builds. Thanks to our containerized microservices architecture, we adjust only the "last mile" customer-facing logic, leaving core functionality untouched. This dramatically reduces time-to-market and development effort while enabling highly tailored deployments. It also ensures MVNOs stay on the upgrade path, with low maintenance and minimal technical debt.
- **Leverage Our Flexibility To Your Advantage:** As a collaborative partner, we don't work for you – we work with you. Choose which feature sets you need, the pricing model, and your deployment speed. For projects that need extra support, we can also spin up a dedicated managed services team to customize your software or manage work on your behalf.
- **Meet the Needs of Every MVNO:** Our platform is flexible enough to meet the needs of MVNOs big and small. Whether your client is digital only, or has a retail and online presence, we have the solutions and industry expertise to ensure their venture is successful.

OUR SOLUTIONS

Web POS:

- Complete transactions in minutes without swiveling between different systems.
- Sell in all channels – stores, pop-up events, and door-to-door.
- Enjoy robust functionality, including inventory management.

Paperless:

- Sign contracts and upload IDs for purchases in digital channels.
- Capture signatures using just a browser – no installation required.
- Digitize workflows and tie compliance to commissions.

E-Commerce:

- Let customers browse, build, and buy orders online.
- Can direct orders to a call centre without manual steps.
- Fulfill orders with a few clicks and eliminate manual updates to your product catalog.

Self-Care:

- Let customers manage their services, including making payments, checking usage, changing offers, and more.
- Available as a white label responsive web app.
- Supercharge your marketing efforts with targeted push offers.

Reporting:

- All actions are tracked and reported on across the platform for strategic insights.
- Built upon an enterprise reporting back-end.
- Integrates with data lakes to consolidate information in one view.



ABOUT MAPLEWAVE

Maplewave is the premier provider of digital solutions and consulting services for the telecommunications industry.

Our goal is to facilitate end-to-end telco transactions in every channel, an approach we call Transact Anywhere. Our solutions connect all channels for a seamless experience - from the warehouse, to the customer, and beyond.

Over the past 30 years, we have transformed our clients into market leaders by providing unparalleled insights into every aspect of their retail operations.

We help our clients execute their channel strategy and deliver an enhanced customer experience through our telco-focused platform and global expertise.

Maplewave has global offices in Canada, South Africa, and the UK.

REFERENCES

- ITWeb.** (2024). Keys to success for MVNOs, MVNEs. Retrieved from <https://www.itweb.co.za/article/key-to-success-for-mvnos-mvnes/GxwQDM1Dz2a7IPVo>
- Spenza.** (2025). How Much Does It Cost to Launch an MVNO? Retrieved from <https://spenza.com/blog/mvno-launch-cost/>
- TelcoDR.** (2025). MVNOs don't need MVNEs (and MVNEs' loss will be MNOs' gain. Retrieved from <https://telcodr.com/insights/mvno-without-mvne-blog/>
- McKinsey.** (2014). Virtually mobile: What drives MVNO success. Retrieved from https://www.mckinsey.com/~media/mckinsey/dotcom/client_service/telecoms/pdfs/february%202015%20-%20recall%20papers/virtually_mobile_2014-06.ashx
- Opensignal.** (2025). Slow but steady: The quiet growth of brand MVNOs. Retrieved from <https://www.opensignal.com/2025/04/29/slow-but-steady-the-quiet-growth-of-brand-mvnos/dt>
- Hollywood Reporter.** (2007). Disney shuts down mobile venture. Retrieved from <https://www.hollywoodreporter.com/business/business-news/disney-shuts-down-mobile-venture-151211/>
- Daily Maverick.** (2024). This mobile provider is failing to implement Rica law. Retrieved from <https://www.dailymaverick.co.za/article/2024-11-11-mobile-provider-is-failing-to-implement-rica-law/>
- TvTechnology.** (2006). ESPN Mobile Stops Moving: Any Portents Here? Retrieved from <https://www.tvtechnology.com/miscellaneous/espn-mobile-stops-moving-any-portents-here>
- Strand Consult.** (2010). The American MVNO mobile market is one long series of catastrophes. Retrieved from <https://strandconsult.dk/the-american-mvno-mobile-market-is-one-long-series-of-catastrophes/>
- TechCrunch.** (2007). Amp'd Mobile Implodes: Burns \$260 million, Declares Bankruptcy. Retrieved from <https://techcrunch.com/2007/06/02/ampd-mobile-implodes-burns-360-million-declares-bankruptcy/>
- RCRWirelessNews.** (2007). Deadbeat customers, Verizon Wireless' threats led to Amp'd bankruptcy. Retrieved from <https://www.rcrwireless.com/20070605/archived-articles/deadbeat-customers-verizon-wireless-threats-led-to-ampd-bankruptcy>
- The Register.** (2009). Blyk goes bye-bye. Retrieved from https://www.theregister.com/2009/07/27/bye_bye_blyk/
- BBC.** (2014). British firm Ovivo Mobile shuts down without warning. Retrieved from <https://www.bbc.co.uk/news/technology-26659929>
- TechAfrica News.** (2024). A Look into the Challenges African MVNOs Face: Can They Compete? Retrieved from <https://www.techafrikanews.com/2024/03/07/a-look-into-the-challenges-african-mvnos-face-can-they-compete/>
- Tech Africa News.** (2024). Growth in Africa's MVNO Market: Key Drivers and Strategies for Sustained Success. Retrieved from <https://techafrikanews.com/2024/08/15/growth-in-africas-mvno-market-key-drivers-and-strategies-for-sustained-success/>

Omdia. (2025). Omdia: MVNO market on the rise as global subscriptions to grow 3.6% CAGR by 2029. Retrieved from <https://omdia.tech.informa.com/pr/2025/feb/mvno-market-on-the-rise-as-global-subscriptions-to-grow-3point6-percent-cagr-by-2029>

Webull. (2025). Omdia: The number of global MVNO users is expected to increase to nearly 392 million by the end of 2029. Retrieved from <https://www.webull.ca/news-detail/12647728682419200>

BillRun! (2018). The Power Balance Between MNOs and MVNOs [PDF]. Retrieved from <https://www.vanillaplus.com/wp-content/uploads/2018/09/MVNOs-BR.pdf>

PortaOne. (2018). HelloSIM – MVNO Case Study with Successful Results. Retrieved from <https://www.portaone.com/case-studies/hellosim-mvno-case-study-growth-and-success/>

NTT. (2018). Transatel launches Ubigi, a global cellular service for the Internet of Things. Retrieved from <https://www.transatel.com/news-and-insights/press-releases/retail-brands/transatel-launches-ubigi-a-global-cellular-service-for-the-internet-of-things/>



WEBSITE

www.maplewave.com

ADDRESS

238 Brownlow Ave.,
Unit #320
Dartmouth, NS
Canada

THANK YOU!

