GSMA™

Together with our members, we make connectivity work for all

- Engineering the future of connectivity
- Enhancing your profile across the ecosystem
- Advancing policy and regulatory priorities
- Supporting the global ecosystem
- Delivering industry services, intelligence and training

Find out more

Learn about how GSMA Membership could benefit you and your business at gsma.com/membership

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MVNO Summit

Discover the latest insights and strategies from across the MVNO ecosystem as we explore the innovative business models and strategic partnerships driving commercial sustainability.

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Our speakers

Danielle Rios Royston
Acting CEO
Totogi

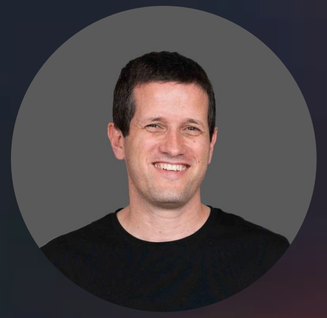
Riki Efraim-Lederman
General Manager
Amdocs ConnectX

Carlos Valero Alcantara
CTO
Finetwork

Justin Reilly
CEO
Wavelo

Rob Bennet
SVP, Retail Wireless Technology,
DISH

David Clyde
Group Brand Director
Lebara



Noam Lando
Co-founder & CEO
Webbing

Michelle Bugner
Head of Wholesale
Giesecke+Devrient

Sandeep Raithatha
Head of Strategy, Innovation & 5G IoT
Virgin Media O2 Business

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DR

TelcoDR

TelcoDR
CLOUD CITY
WELCOME TO
CLOUD CITY
by TelcoDR

FIERCE Telecom

TELECOM

Google Cloud, AWS and Azure want to 'friend' telcos, but not every telco is ready to click 'accept'

LightReading

CLOUD

The public cloud has failed to crack telecom

telecoms.com

PUBLIC CLOUD

Telcos and the public cloud: drivers and challenges

LightReading

DIGITAL TRANSFORMATION

Telcos have no easy escape from public cloud lock-in

FIERCE Telecom

TELECOM

Does it make sense to let dragons (AWS, Google Cloud) into the castle?

LightReading

CLOUD

Telco cloudification poses a huge systemic risk

FIERCE Telecom

TELECOM

Marek's Take: Can mobile operators really trust the cloud?

LightReading

CLOUD

Deutsche Telekom still favors telco DIY over public clouds

LightReading

CLOUD

DT, Three UK among service providers resisting public cloud adoption

aws
dish
Globe
KDDI
SK telecom
SMART COMMUNICATIONS
LIBERTY GLOBAL
giffgaff
mobileX
عمانتل Omantel
zain
airtel
Azure
AT&T
MTN
BT
verizon
TIM
عمانتل Omantel
Claro
PLDT
T-Mobile
O2
Digicel
zain
Google
vodafone
TELUS
SMART COMMUNICATIONS
zain
axiata
TIM
mobileX
عمانتل Omantel

EASY
PEASY
LEMON

SQUEEZY

better
tech

better tech + way cheaper

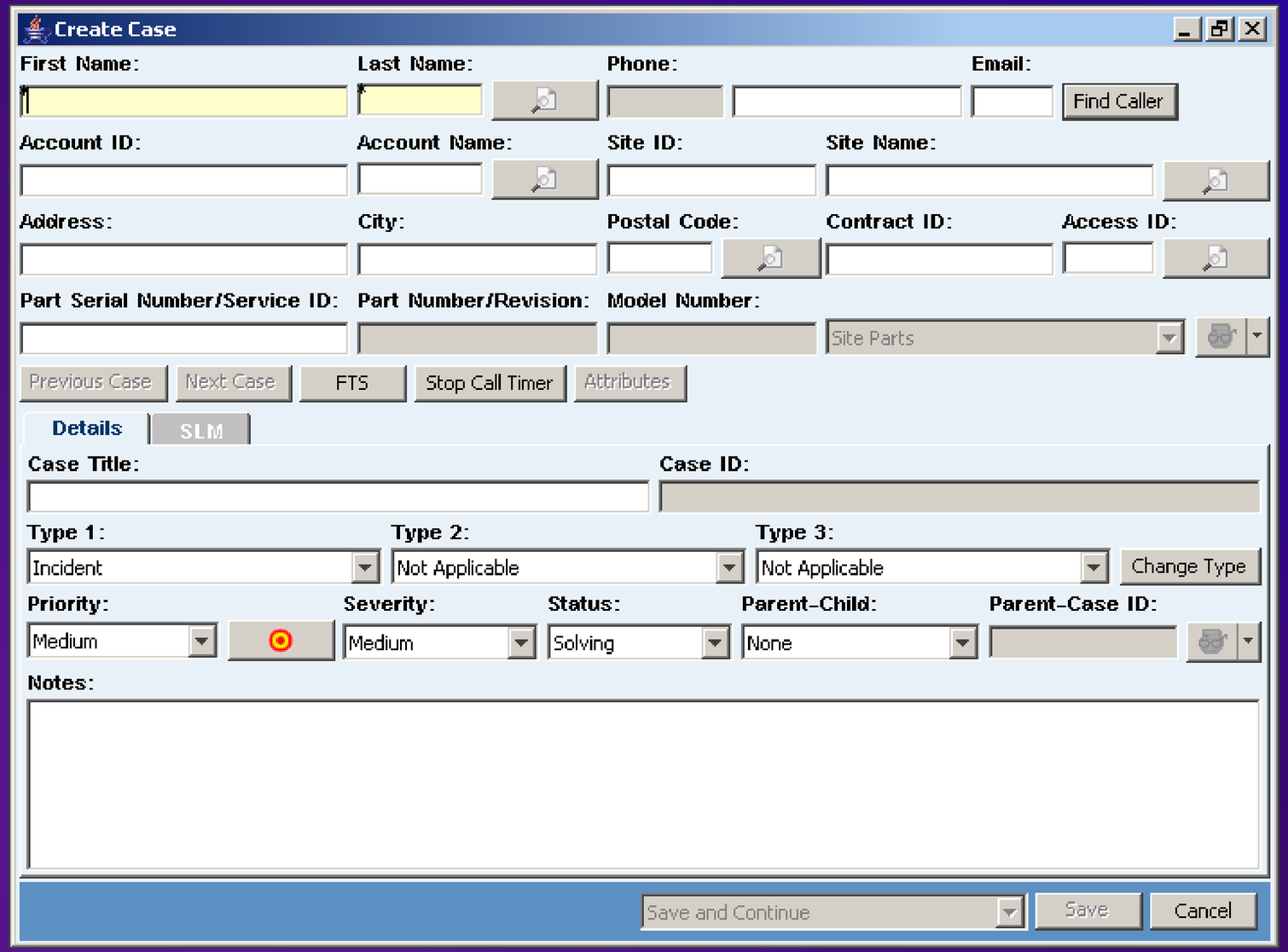
better tech + way cheaper = no brainer

GENERATIVE AI

Totogi

BSS Magic

Totogi reinvents BSS



THIS IS A REAL BSS. GUESS WHO?

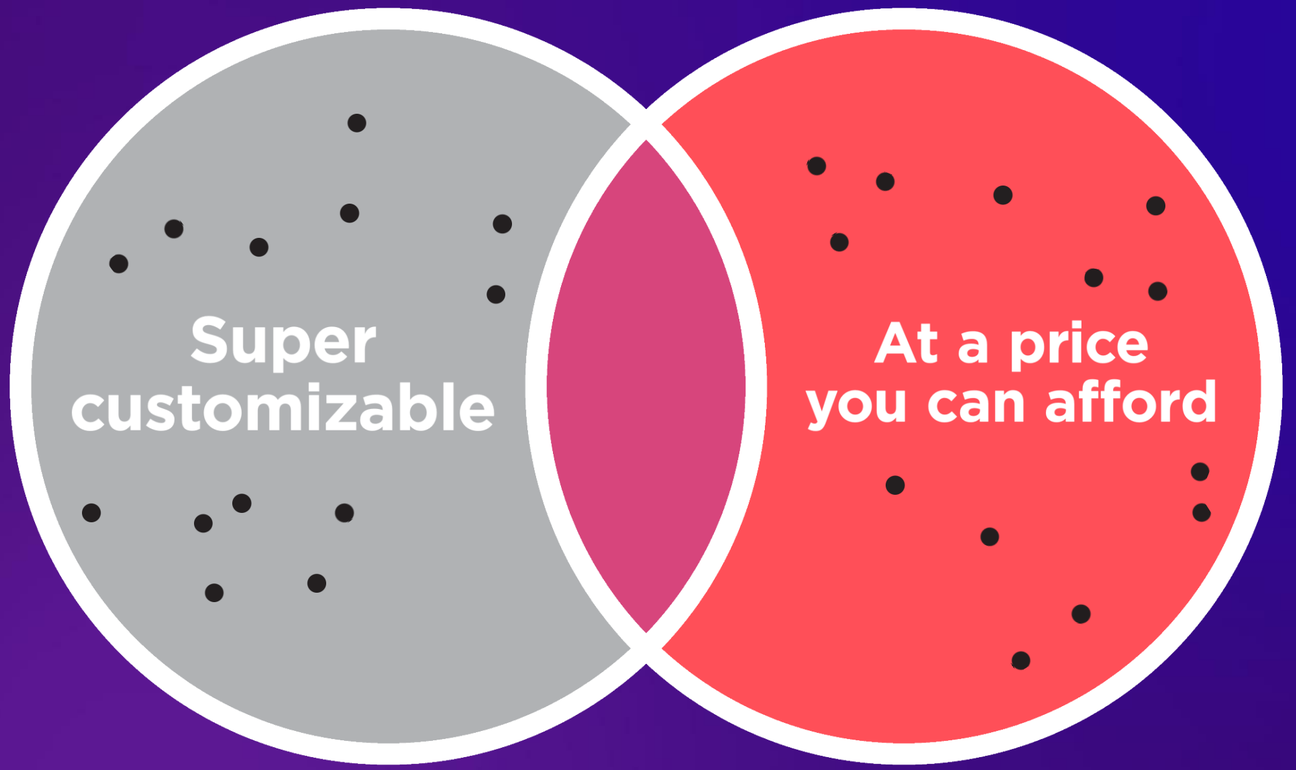
Totogi

100% consulting-heavy business model

SLOW
and
EXPENSIVE

Sprinkling AI on this DOESN'T FIX IT

Super
customizable


Super
customizable
At a price
you can afford

Super customizable
At a price you can afford
Delivered super-*fast*

Super customizable
At a price you can afford
Delivered super-*fast*

Super customizable
At a price you can afford
Delivered super-*fast*

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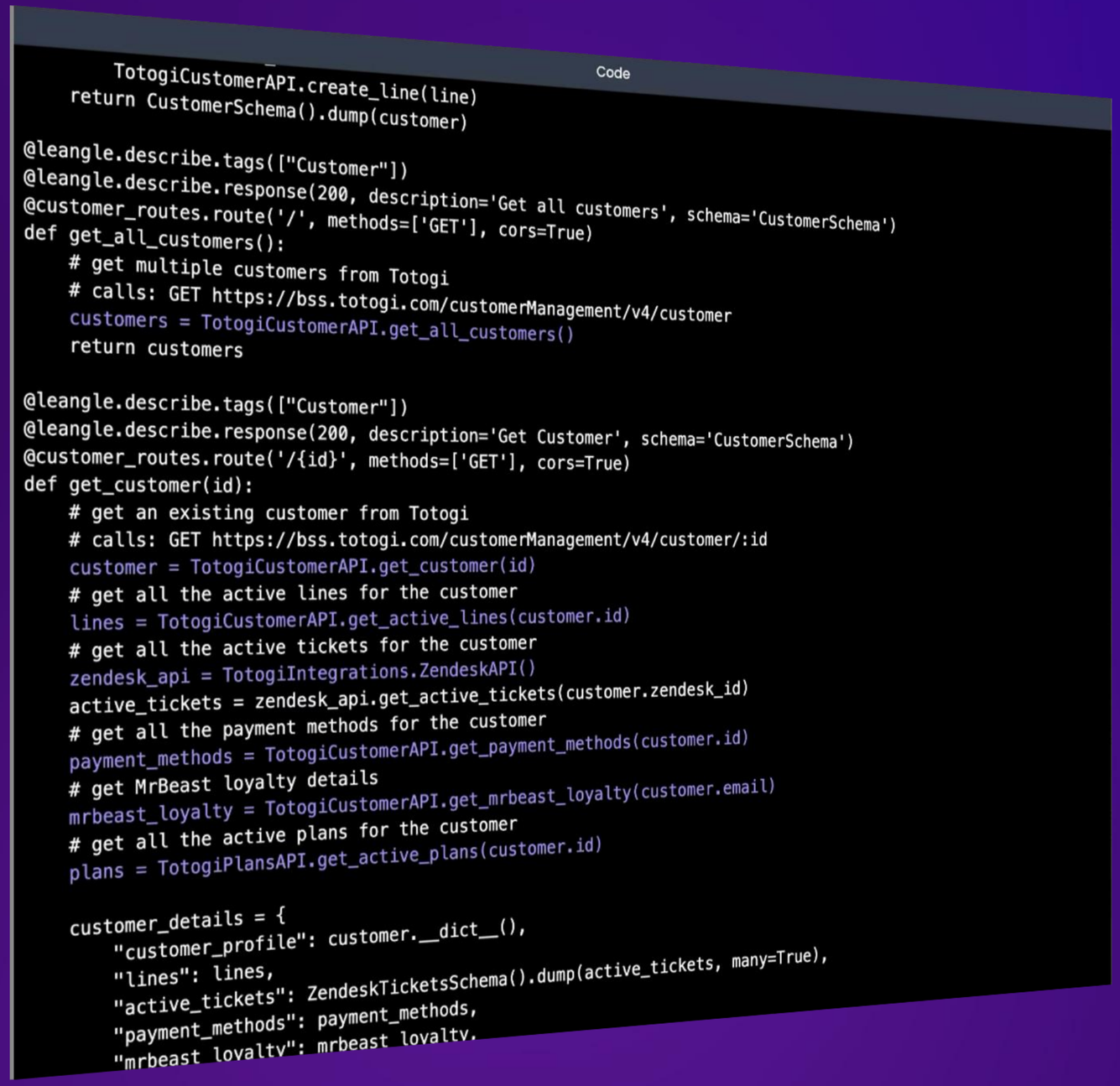
BSS Magic

Totogi reinvents BSS

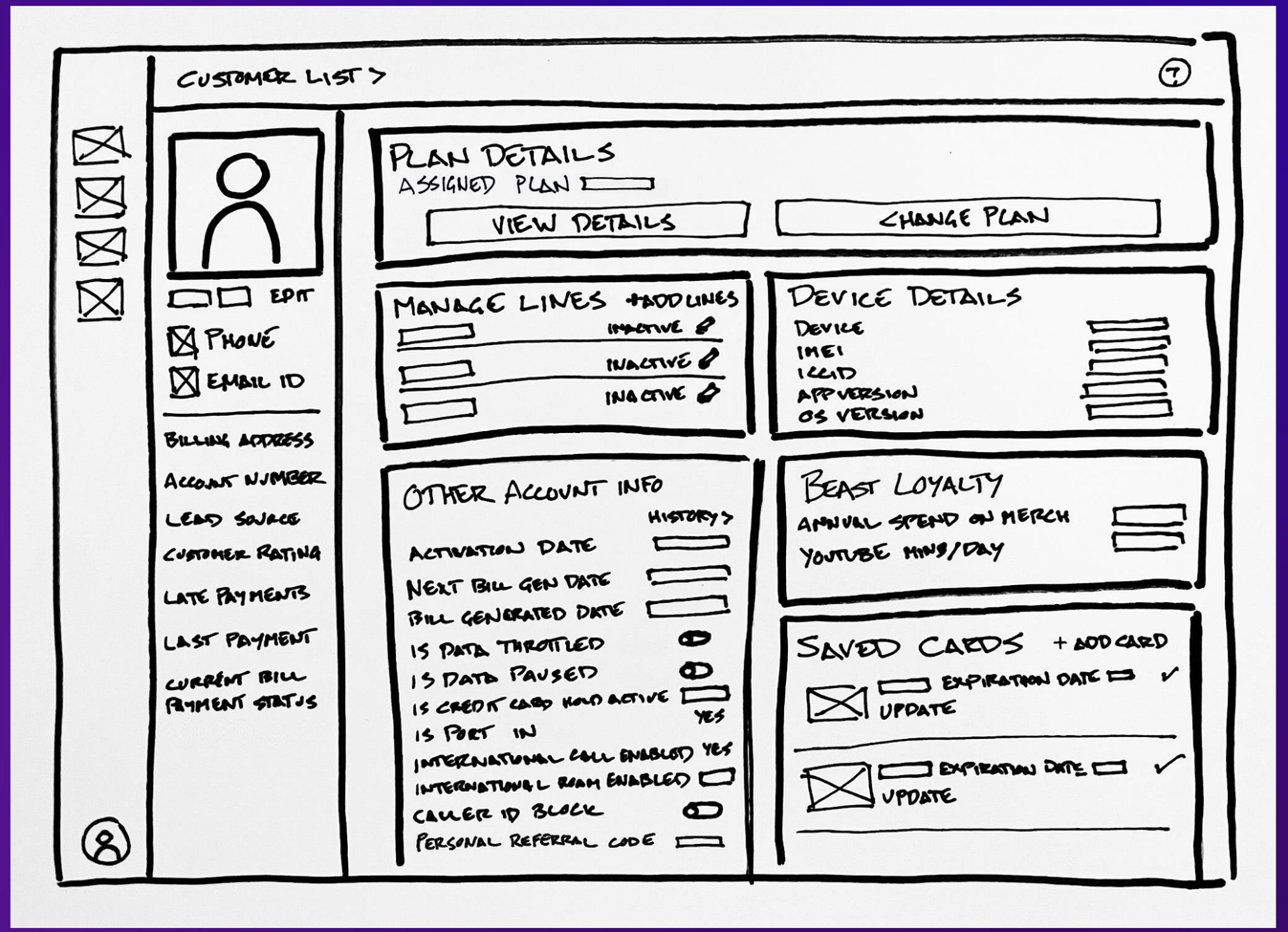
better tech + way cheaper = no brainer

Speak naturally with an AI-generated avatar.



Automatically generate flawless BSS software.

Create your own user interface.



Change the application whenever you want.

Integrate to anything and migrate data, instantly.

CRM

OTHER BSS SOLUTIONS

CUSTOMER SUPPORT

ORDER MANAGEMENT

BILLING SYSTEMS

ANALYTICS

Totogi

BSS Magic

Totogi reinvents BSS

Mr Beast

MR BEAST

Jimmy Donaldson is MrBeast, a philanthropist and YouTube sensation famed for his extravagant stunts and heartwarming charity work.

He creates videos with jaw-dropping challenges, lavish giveaways, and epic contests, setting a new benchmark for digital creators.

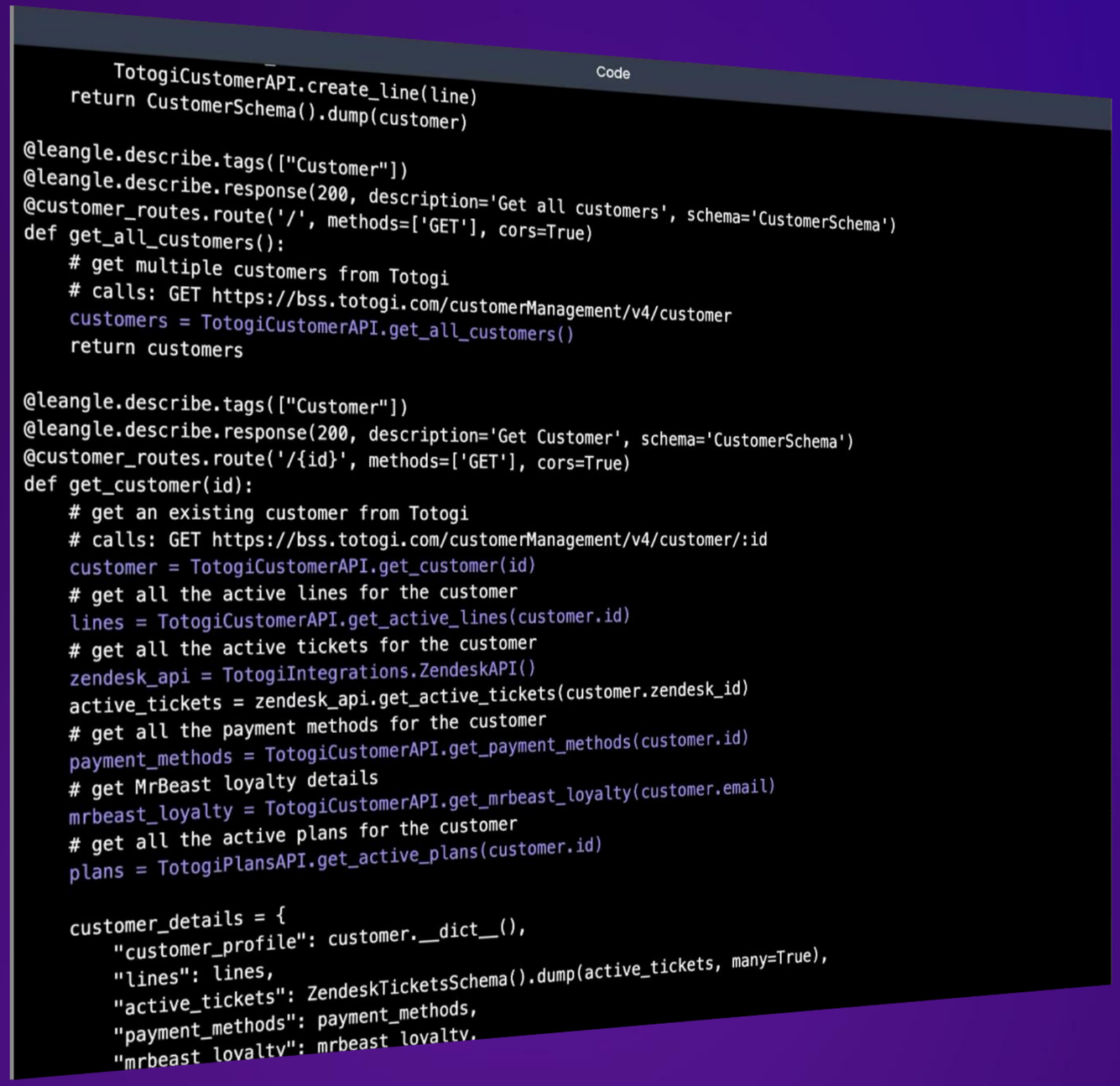
MrBeast is a pioneer of the YouTube era and has amassed a following of over 240 million subscribers.

Totogi

BSS Magic

Totogi reinvents BSS

Speak naturally with an AI-generated avatar.



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Integrate to anything and migrate data, instantly.

CRM

OTHER BSS SOLUTIONS

CUSTOMER SUPPORT

ORDER MANAGEMENT

BILLING SYSTEMS

ANALYTICS

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INNOVATING WITH THE BIG LEAGUES

Riki Efraim-Lederman
Amdocs

Carlos Valero
Finetwork

amdocs | make it amazing

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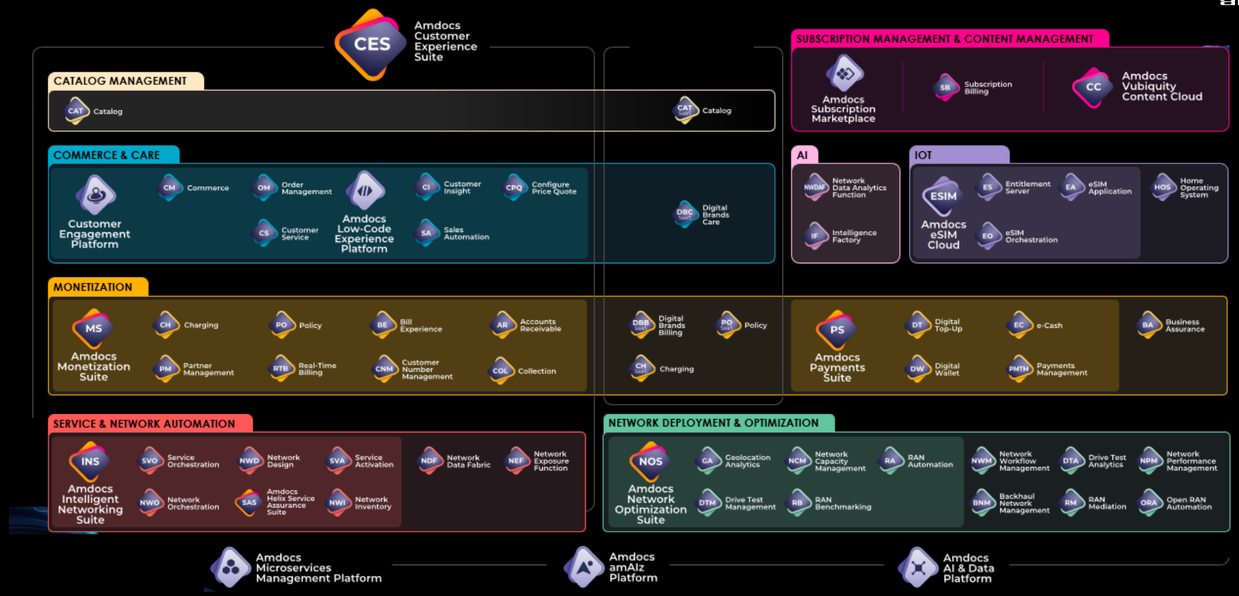

With +400 Clients

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CAN A BIG LEAGUE

HANDLE THE UNIQUE NEEDS OF MVNOs?

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MVNO Success Factors

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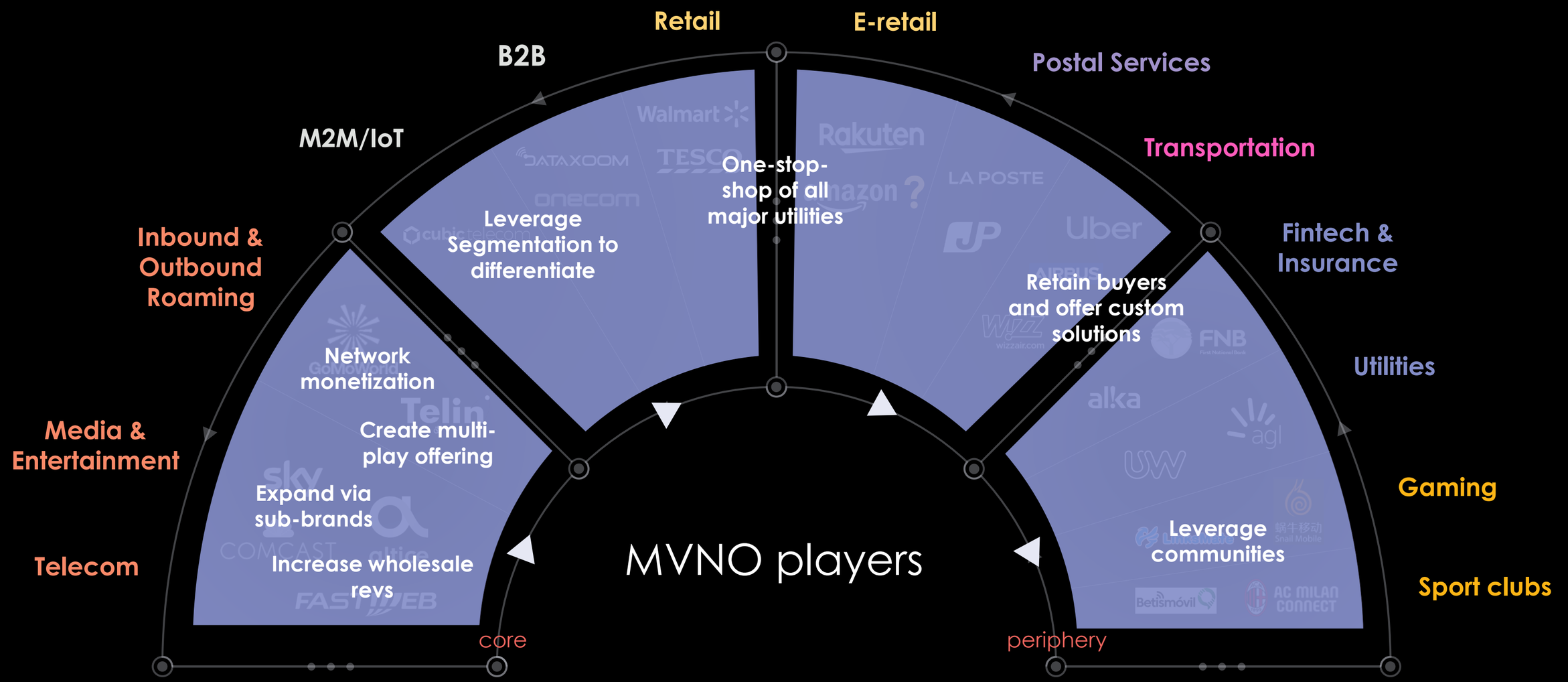
Connectivity is becoming a play all industries are looking to connect to



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FROM TRANSITION DIGITAL BRAND SUITE TO

GenAI native BSS SaaS

We are the invisible bridge, the digital handshake that connect any device and any brand.

connectX

aws PARTNER OF THE YEAR WINNER 2023

OPEN API CERTIFIED tmforum

tmforum Certified TM Forum Open APIs, segregated data

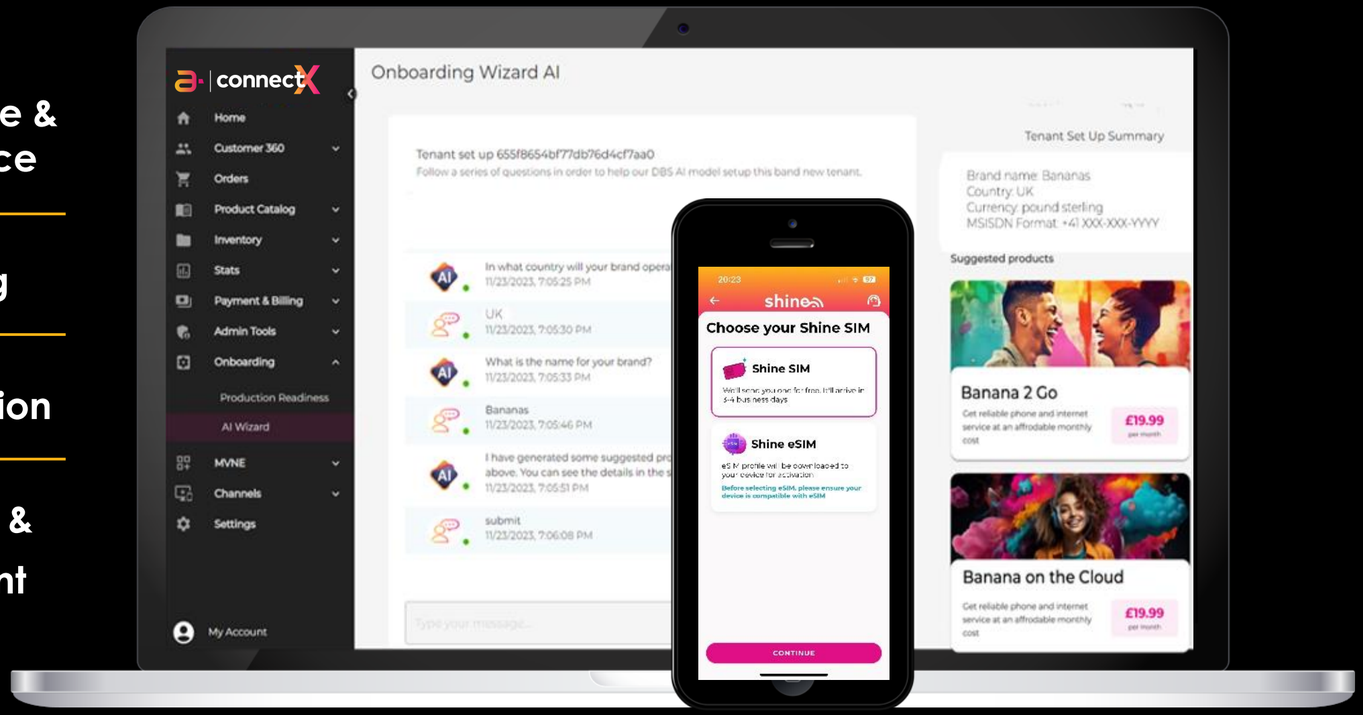
Powered By aws

Digital Care & Commerce

Catalog

Monetization

Ordering & Fulfilment



GenAI Native

SaaS PAYG

Seamless Digital CX

Telco Know How

7 customers

3 months

On-board, go live

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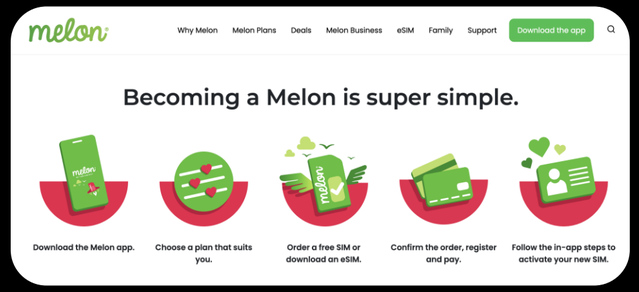
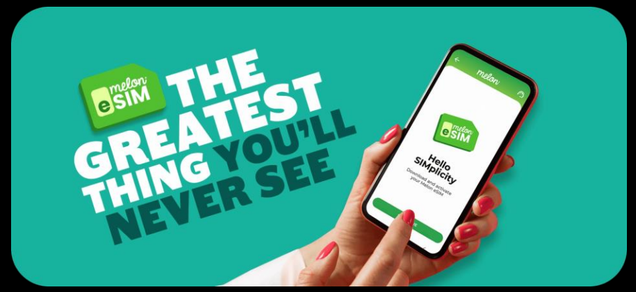
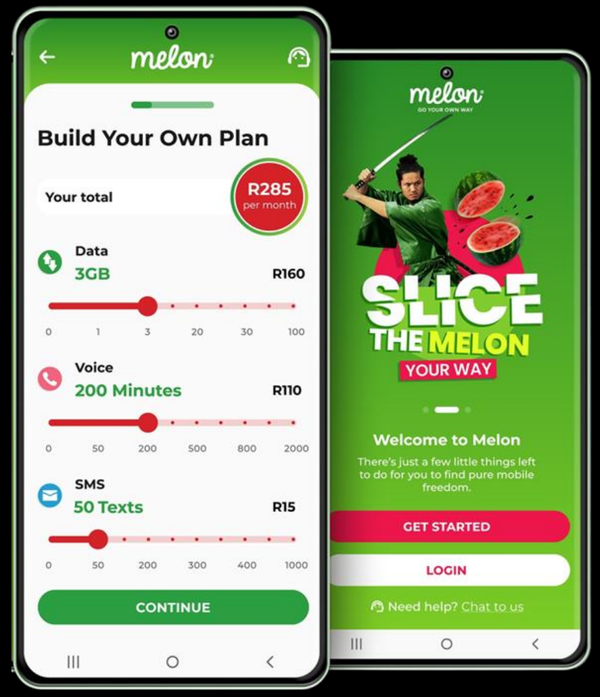
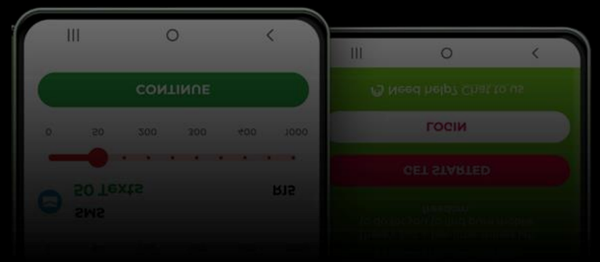
melon®

Calvin Collett









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WELCOME

finetwork

Carlos Valero

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The telecom stack of the future

Justin Reilly, CEO, Wavelo

Rob Bennett, SVP, Retail Wireless Technology at DISH Wireless

MWC Barcelona, February 28, 2024

wavelo

dish wireless

Looking back at 2020

San Francisco Chronicle

SFCHRONICLE.COM | Tuesday, March 17, 2020 | CONTAINS RECYCLED PAPER | $2.00

CORONAVIRUS PANDEMIC

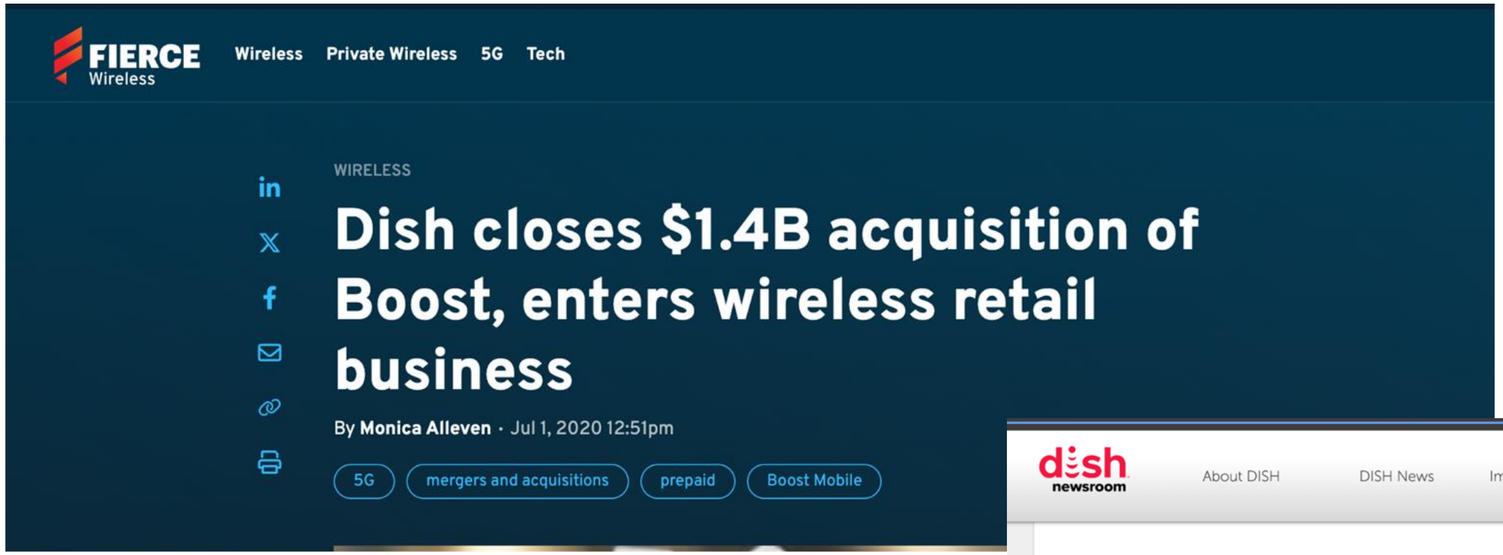
STAY AT HOME

6 Bay Area counties order nearly 7 million people to shelter in place

By Erin Allday

Six Bay Area counties announced "shelter in place" orders for all residents on Monday — the strictest measure of its kind yet in the continental United States — directing everyone to stay inside their homes and away from others as much as possible for the next three weeks in a desperate move to curb the rapid spread of coronavirus across the region.

The directive was set to begin at 12:01 a.m. Tuesday and involves San Francisco, Santa Clara, San Mateo, Marin, Contra Costa and Alameda counties — a combined population of more than 6.7 million. It is to stay in place until at least April 7. The three other Bay Area counties — Sonoma, Solano


FIERCE Wireless

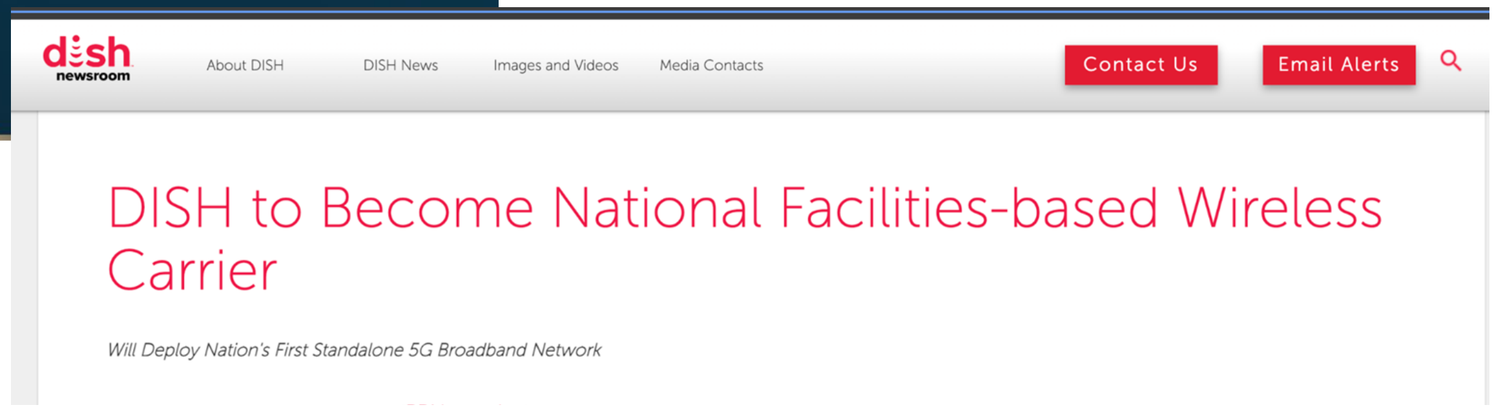
Wireless Private Wireless 5G Tech

WIRELESS

Dish closes $1.4B acquisition of Boost, enters wireless retail business

By Monica Alleven · Jul 1, 2020 12:51pm

5G mergers and acquisitions prepaid Boost Mobile


dish newsroom

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DISH to Become National Facilities-based Wireless Carrier

Will Deploy Nation's First Standalone 5G Broadband Network

IT Wireless Architecture Guiding Principles

Less == More

- Fewer “moving parts” improves functionality and Stability
- Less to change as we evolve the business
  a. Faster time to market
  b. Lower Cost

YAGNI

- Start with the essentials for the business
- Day 1 functionality vs Day 365

Multi Tenant Design

- Architecture and applications should be designed to support multiple brands

Enhance the Core

- Focus enhancement efforts in places where it will benefit the entire business
  - I.e. More Robust Account/Family model

Contract Driven Design

- Well defined interfaces between system
- If we can encapsulate properly, we can refactor later

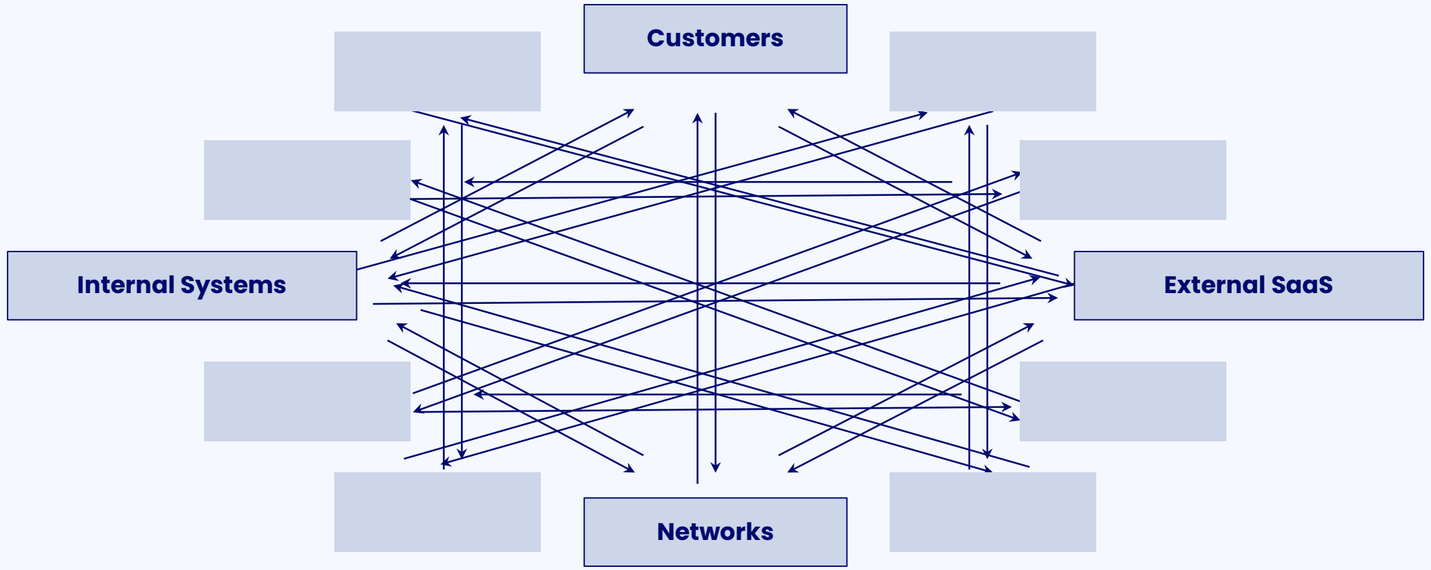
No Corner Cases

- Corner cases lead to poor experiences
- Can resolve from the experience or technology side
- Only gets harder to resolve as we move on

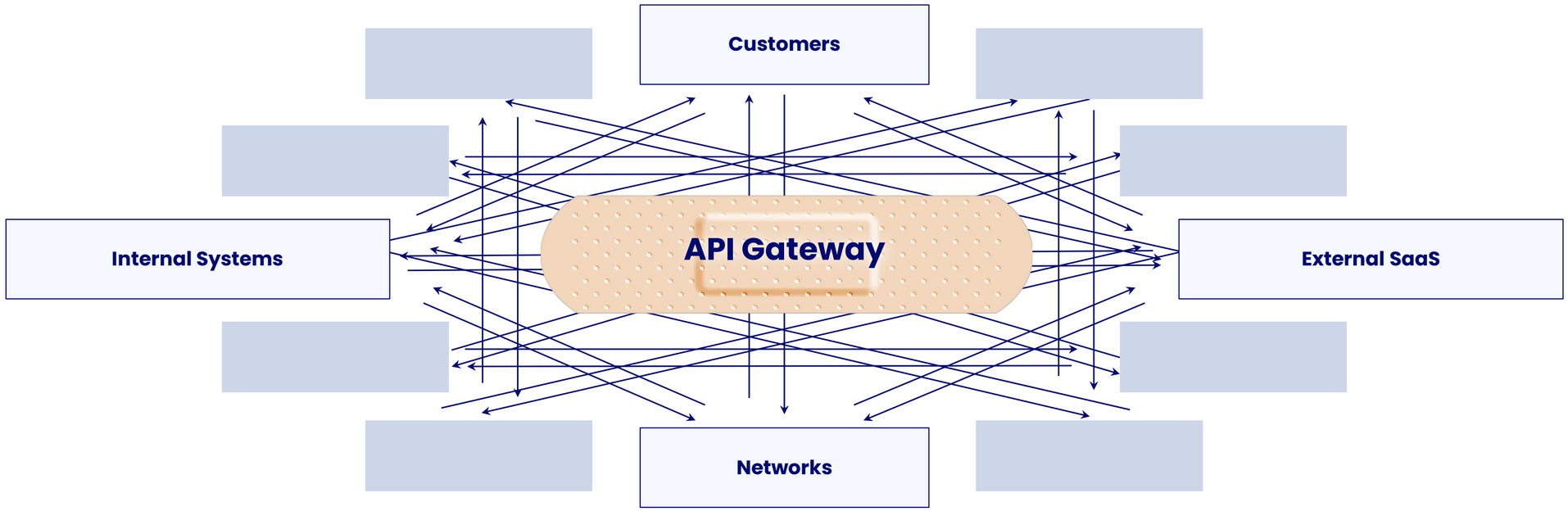
Typical Telco Platform

What we're solving

- Slow
- Unreliable
- Manual
- Inflexible



Digital Transformation



LEGO
LEGO
LEGO
LEGO
LEGO
LEGO

What unique challenges did you build for?

- **Customer experience** at a brand level is the same
- **Network experience** is fungible, dynamic optimization
- **Multi-network**
- **Prepaid and postpaid**
- **Flying the plane** while adding passengers

What’s next?

- **Innovating** in our digital experience
- **Driving** increased speed to change
- **Building** on the foundation
- **Intelligent** base-driven optimization

Thank you.

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LEBARA | MWC GSMA

Delivering a challenger brand experience

David Clyde,
Group Brand Director,
Lebara Mobile

What do we mean by ‘challenger brand’?

“…has business ambitions bigger than its conventional resources, and is prepared to do something bold, usually against the existing conventions or codes of the category, to break through.”

(Adam Morgan, Eating The Big Fish)

https://thechallengerproject.com

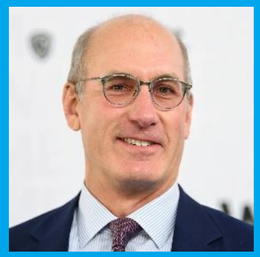
What defines a ‘challenger brand’?

1. State of the market

Vs.

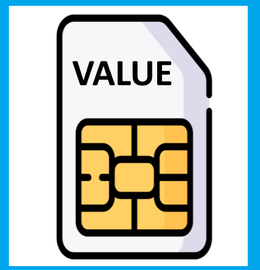
2. State of mind

Vs.



3. Growth

Vs.



+17%

+3-8%

Why focus on challenger brands?

‘Difference is the #1 brand factor impacting on share outperformance’

(Said Business School, Kantar BrandZ)

‘…what [investors] like more is an unbeatable proposition – they actually don’t care much about the tech, and nor do consumers. They want to know it works and that it affords true brand differentiation.

(James Grey, Greystone Strategy)

1. Take a stand

‘Lebara champions a smarter way to connect’

- ***a reliable network***
- ***and exceptional service***
- ***at an affordable price***

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LEBARA

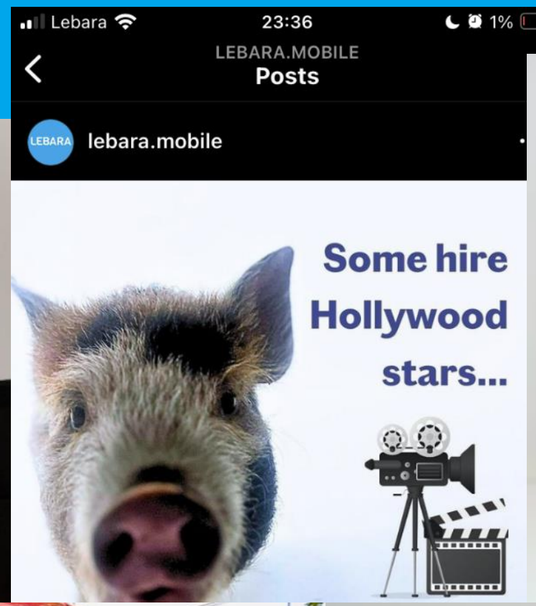
2. Know your enemy

‘Getting ripped off sucks. We wanted to do the exact opposite of the competition. We wanted to do ‘less’ but ‘better’

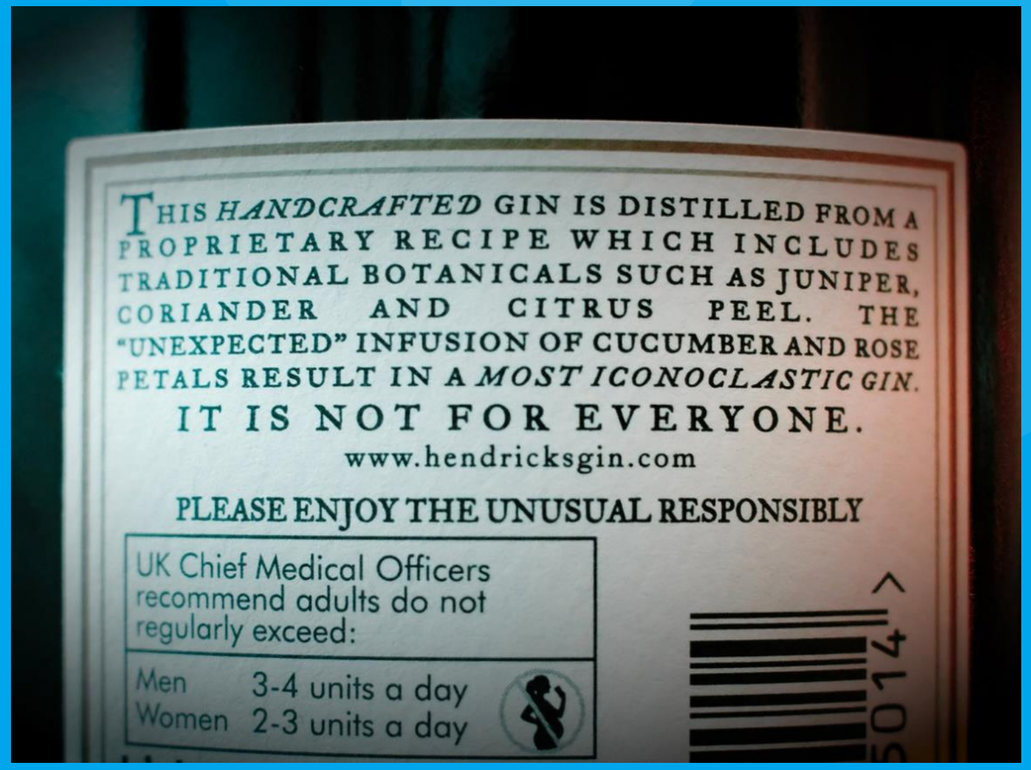
(Jeff Raider & Andy Katz-Mayfield, Founders of Harry’s)

global
NO SWEDISH MEATBALLS
NO INSTRUCTIONS
NO DIVORCE
VINTERIOR
The online marketplace for vintage furniture and homeware

3. Explain yourself



4. Find your tribe



5. Don’t be afraid of funny

91% prefer brands to be funny

48% don’t believe they have a relationship with a brand unless it makes them smile or laugh

89% of business leaders see the opportunity to use humour to enhance the customer experience

95% of business leaders fear using humour in customer interactions

Source: Oracle Happiness Report 2022

Zero stars.
Would not recommend.
- Satan
HOLY BIBLE
Bible App
from
YouVersion

In summary

- MVNOs are in the perfect position to become true challenger brands
- The customer experience is full of opportunities to be more ‘challenger’
- Encourage ALL your teams to look outside the category for inspiration
- If you’re launching an MVNO, and you’d like to benefit from our challenger brand experience, please get in touch.
- Thanks for listening

LEBARA | BRAND LICENCE PARTNER PROGRAM

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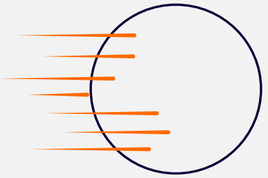
WEBBING®

UNLOCKING THE VALUE OF MISSION CRITICAL IOT

Mission Critical IoT Connectivity Requirements

Coverage

Simple and Scalable



Low Latency

Network Redundancy &
Automatic Failover

Robust Management

Future Proof

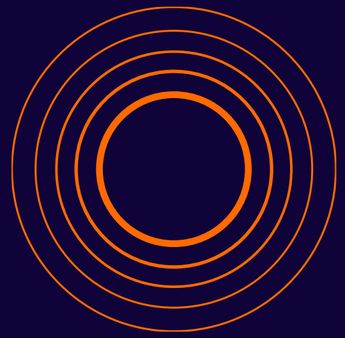
WEBBING

Redefining global data connectivity

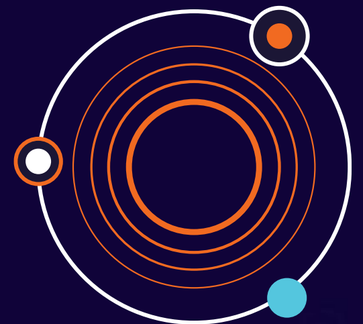
Founded
2010

B2B
Innovative
Full MVNO
Global Service
IoT Enabler

Webbing Portfolio

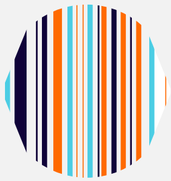


Webbing**CNCT**



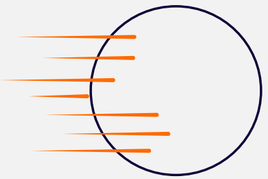
Webbing**CTRL**

Mission Critical Connectivity Stack



Global connectivity utilizing single SKU

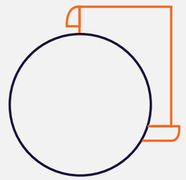
Enhanced global coverage with multi-network support in 190+ countries



High Performance and Low Latency

eSIM RSP Support (SGP02 / SGP22 / SGP32). Switch cellular providers remotely

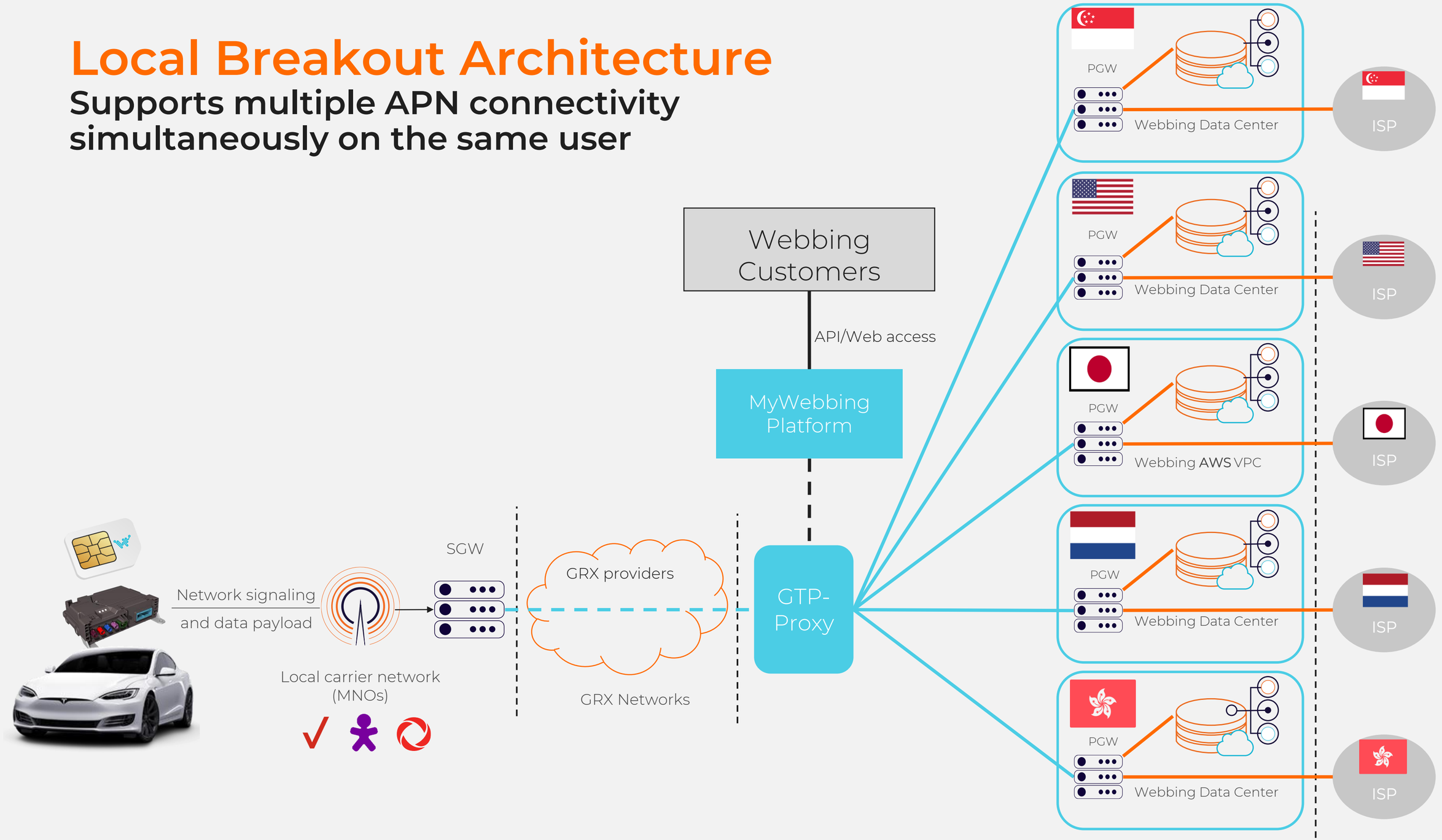
Management Platform for full connectivity lifecycle control



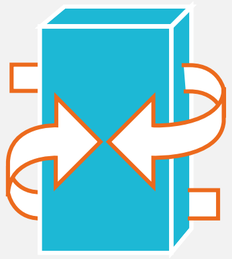
Compliance with connectivity regulations

Local Breakout Architecture

Supports multiple APN connectivity simultaneously on the same user



Types of Connectivity Regulations



IP Localization

Soft Localization

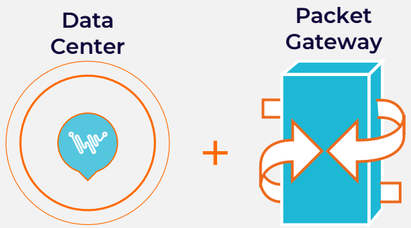
Full Localization

eCall
(automotive)

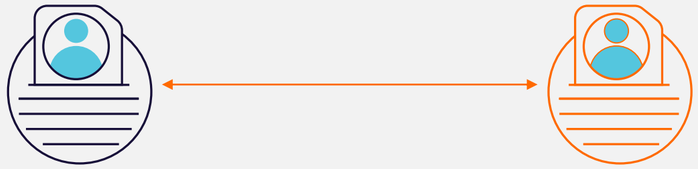
Full Compliance in Regulated Markets with Webbing

Global connectivity with the most advanced global network

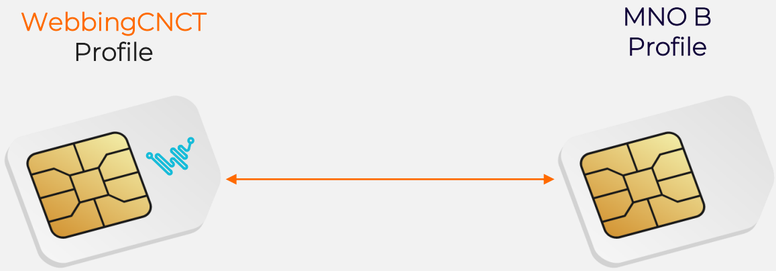
IP Localization:
Local Data Center and Packet Gateway



Soft Localization:
Change between IMSIs



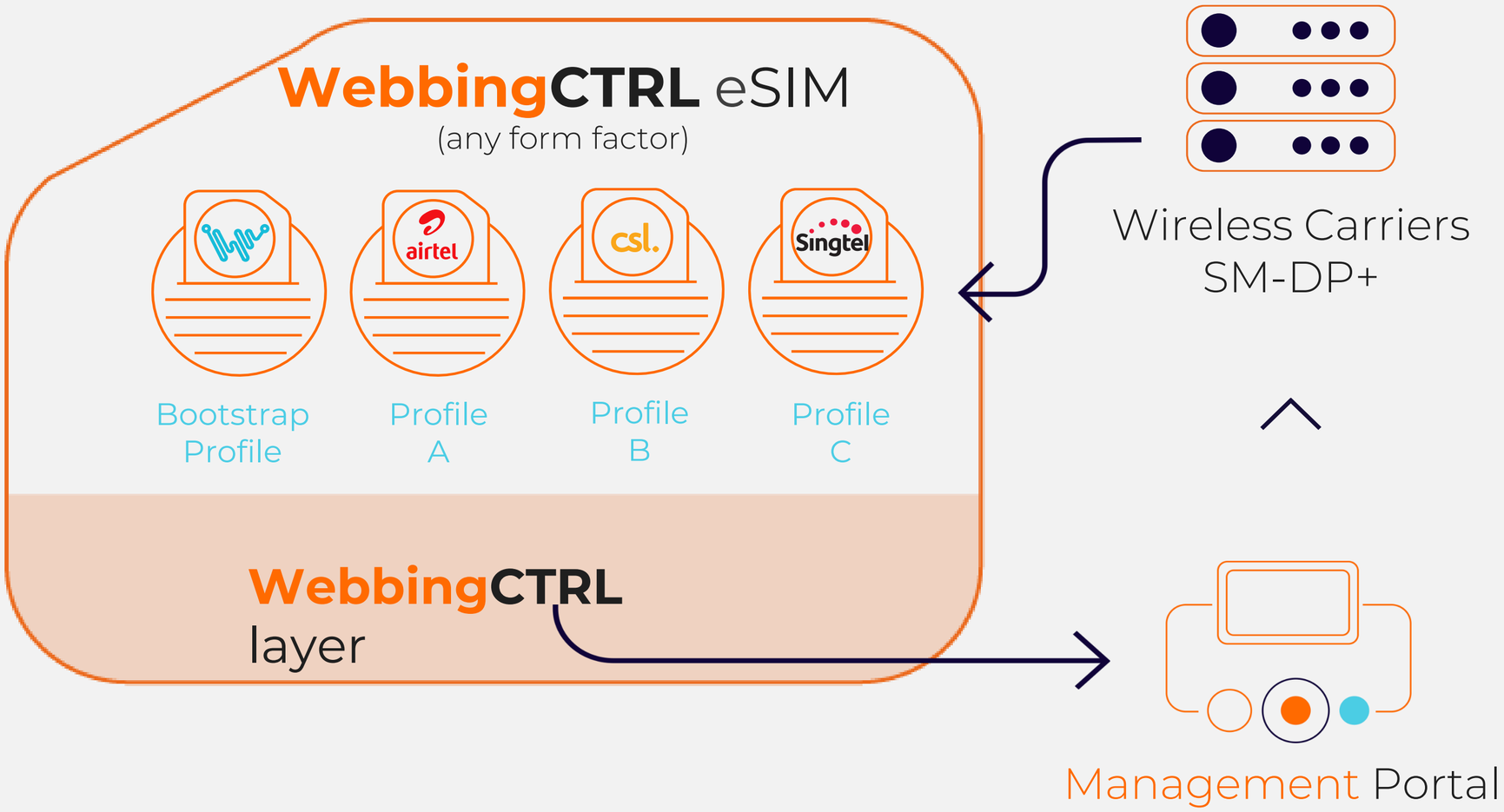
Full Localization:
Local Profile downloaded on eUICC SIM



eCall:
Designated profile for emergency calls

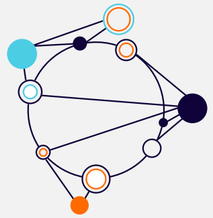
WebbingCTRL

Game-Changing eSIM Technology fully aligned with SGP.32 IoT eSIM Standard



WebbingCTRL

Smart Connectivity for Enterprises

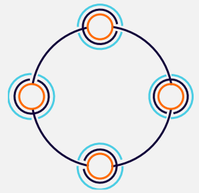


Control & Flexibility

- Remote profile management
- Backup & local profiles
- Secure by design

Single SKU

- Simple and efficient logistics
- Easily scalable
- Cost effective

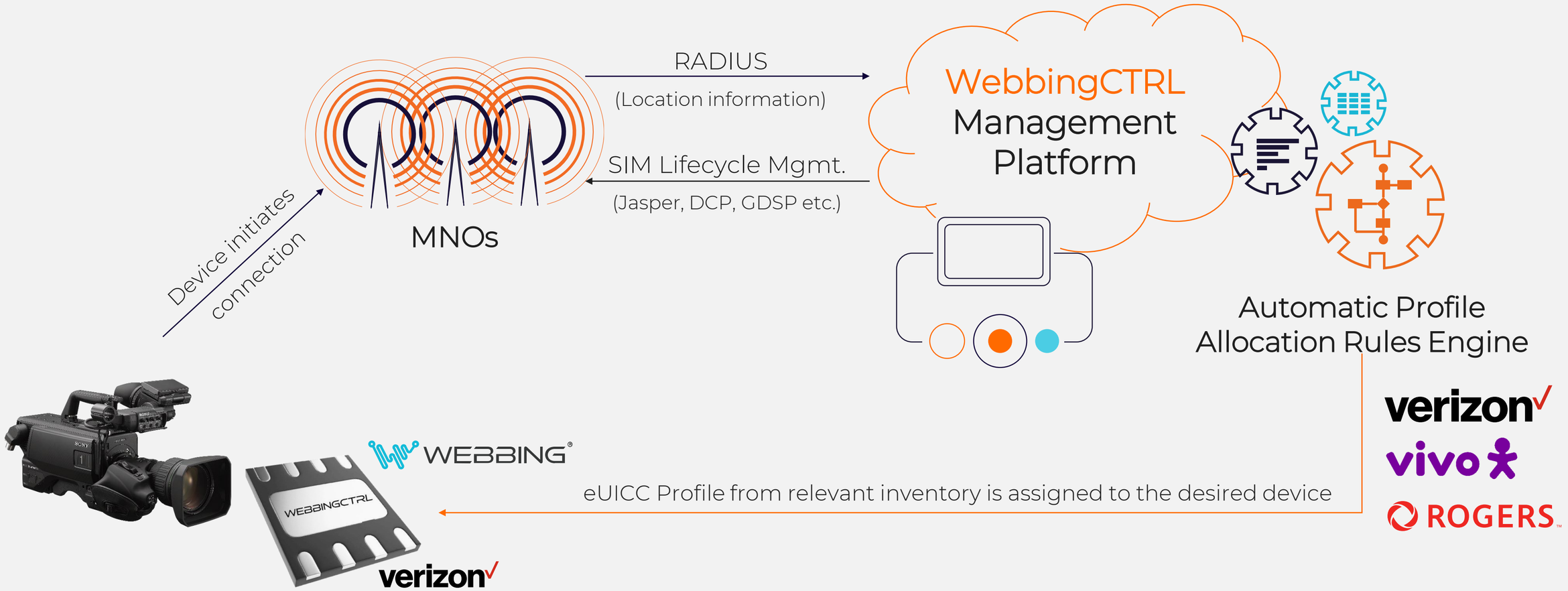


Business Continuity

- Quality and cost optimization
- True global
- Future ready

Automatic eSIM Profile Provisioning

Based on SGP 22/32

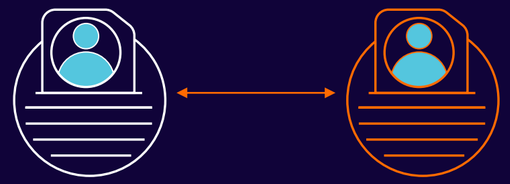


Continuous Data Connectivity with Webbing Solutions

Layers of Redundancy and Automatic Failover

Layer 1: WebbingCNCT
Change between host networks (i.e. problem with antenna)

Layer 2: WebbingCNCT
Change between IMSIs (i.e. problem with the roaming agreement)



Layer 3: WebbingCTRL
Change between profiles (i.e. problem with the carrier technology)

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Technology & strategies to meet growing consumer expectations

MWC MVNO Summit

Barcelona, 28th February 2024

Giesecke+Devrient
Creating Confidence

Why are we all *here*?

It is all about *digitalisation* of our business

Physical
to
Digital

1 billion
eSIM enabled devices in field

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Meet your customers where *they* are

>80% of carriers see eSIM as an opportunity to deploy a **customer friendly and digital user journey**

- IDC 2020

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That First Experience with your Brand

Customer will talk about it with their friends and family

Customer will likely forgive you if there’s an issue down the line

Sets the scene for a long-term customer

You’ve lost them as a customer

You’re likely to have lost them forever

(There’s no manager in a retail outlet that can smooth things over)

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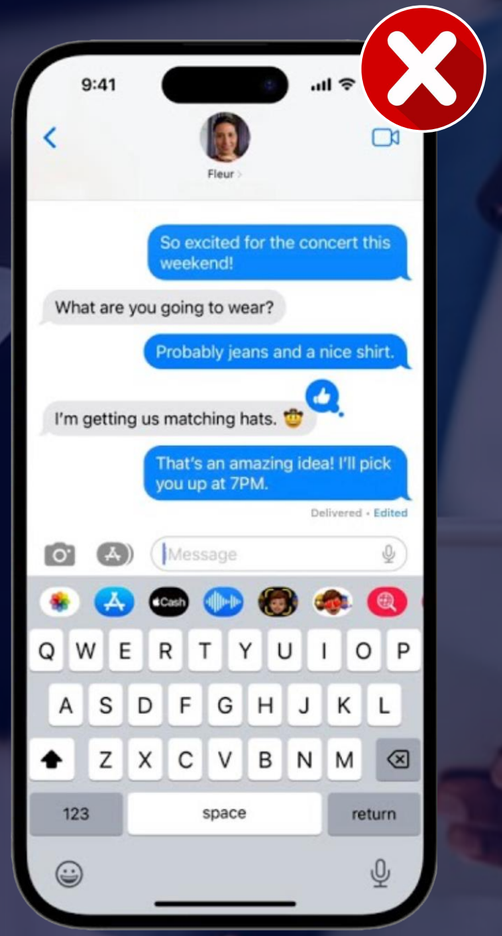
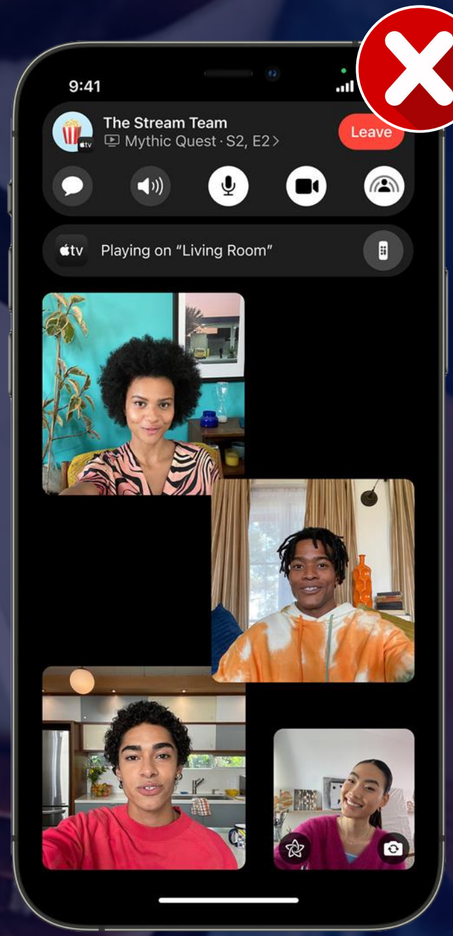
VoLTE

Wi-Fi Calling



iMessage



Facetime

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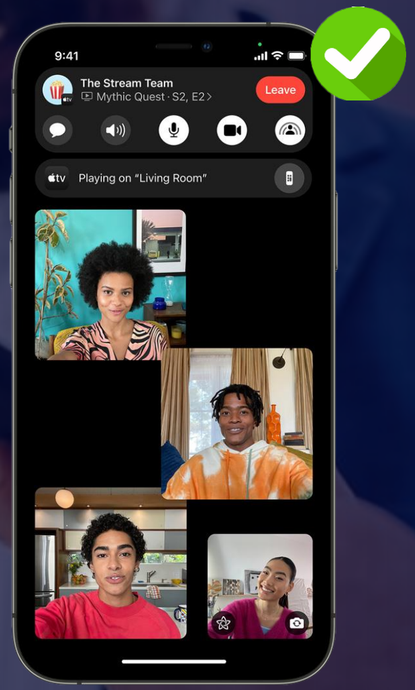
Creating Confidence

VoLTE

Wi-Fi Calling

iMessage



Facetime

Entitlement Server

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Additional Device Activations

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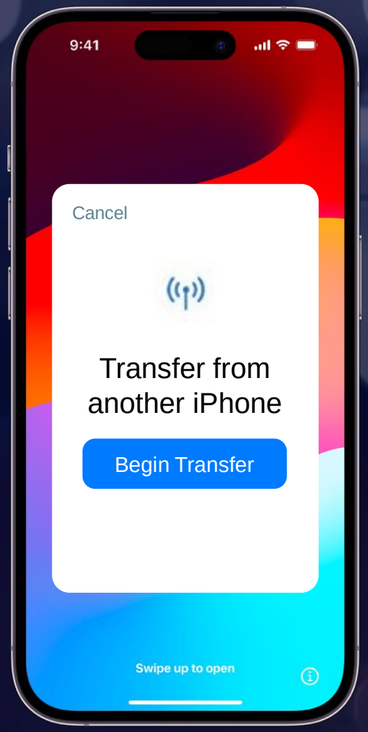
eSIM Quick Transfer (iOS)

Current iPhone



Latest iPhone

Different Scenarios:

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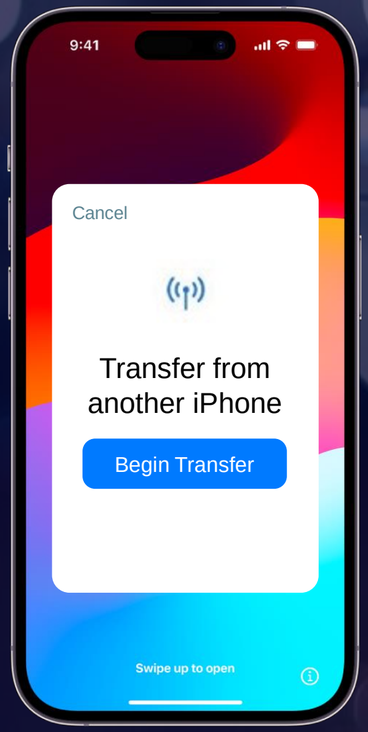
eSIM Quick Transfer (iOS)

Current iPhone



Latest iPhone

- Optimum transfer experience
- Enhances carrier reputation
- Retains customers
- Important for 2024

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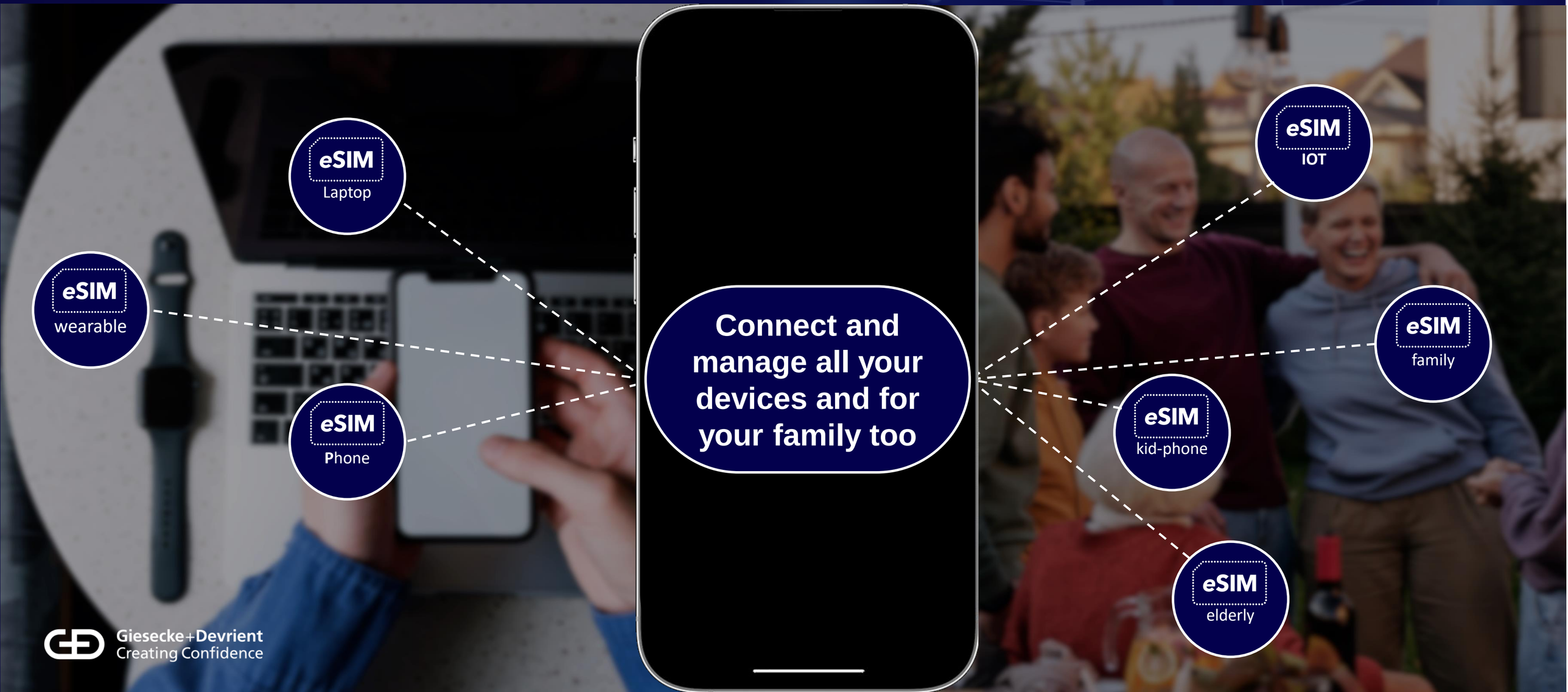
NetLync

AirOn360® ES

- The **fastest** and most **affordable** way to deploy entitlements today
- Now available to **every** MNO and MVNO - no matter what size
- One solution for **both** iOS and Android
- Commercial model that removes **all the risk** and **fits any budget**

Come and chat with our G+D representatives over in **Hall 7** to find out more

Digital connectivity onboarding of several devices



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What are the *key-take-aways?*

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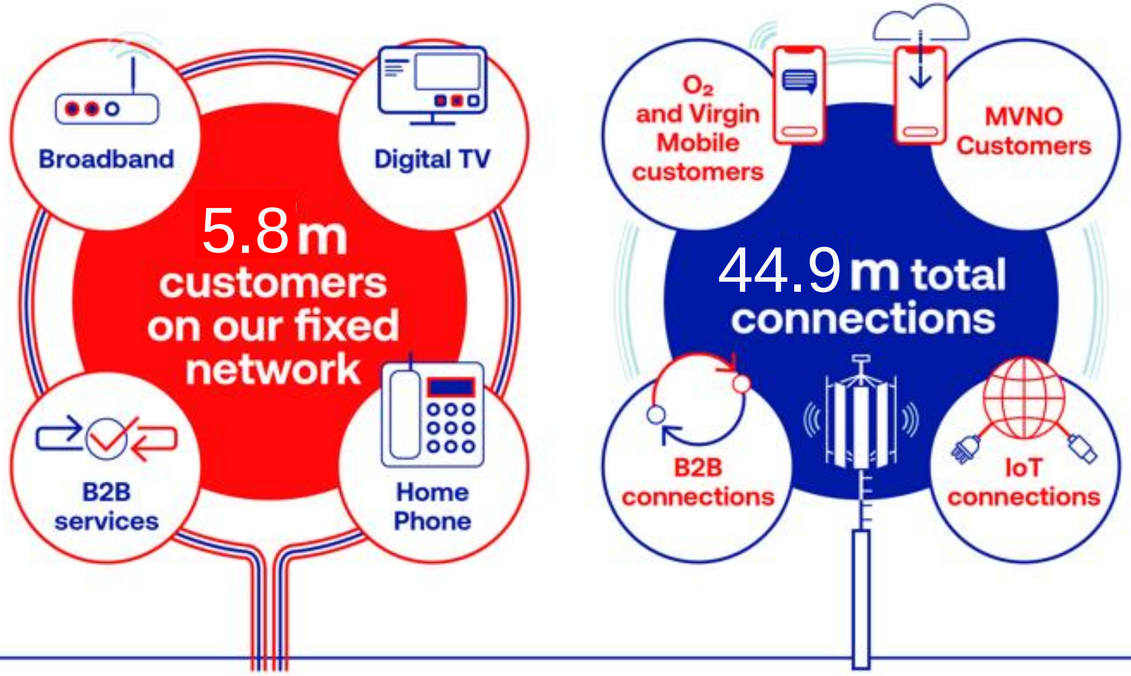
A Private Network Revolution: Unleashing 5G for Smart Factories and beyond

Sandeep Raithatha
Head of Strategy, Innovation & 5G IoT
Virgin Media O2 Business

Virgin Media O2

Leaders in connectivity. Supercharging the UK.

We've combined the UK's favourite mobile network operator with a fixed line network that offers the nation's fastest widely-available speeds. All to bring you a truly supercharged network.



Powered by **HFC** (Hybrid Fibre Coaxial) using **DOCSIS 2.0**, **3.0** & **3.1**
Fibre to the Premises uses **XGS-PON** technology.

Our Fixed Line Network:

- Carried just **over a fifth** of the UK's internet traffic in 2021
- Moves approx. **40%** of the UK's mobile traffic via the backhaul network (this is how we move mobile traffic between cell sites and the core network)

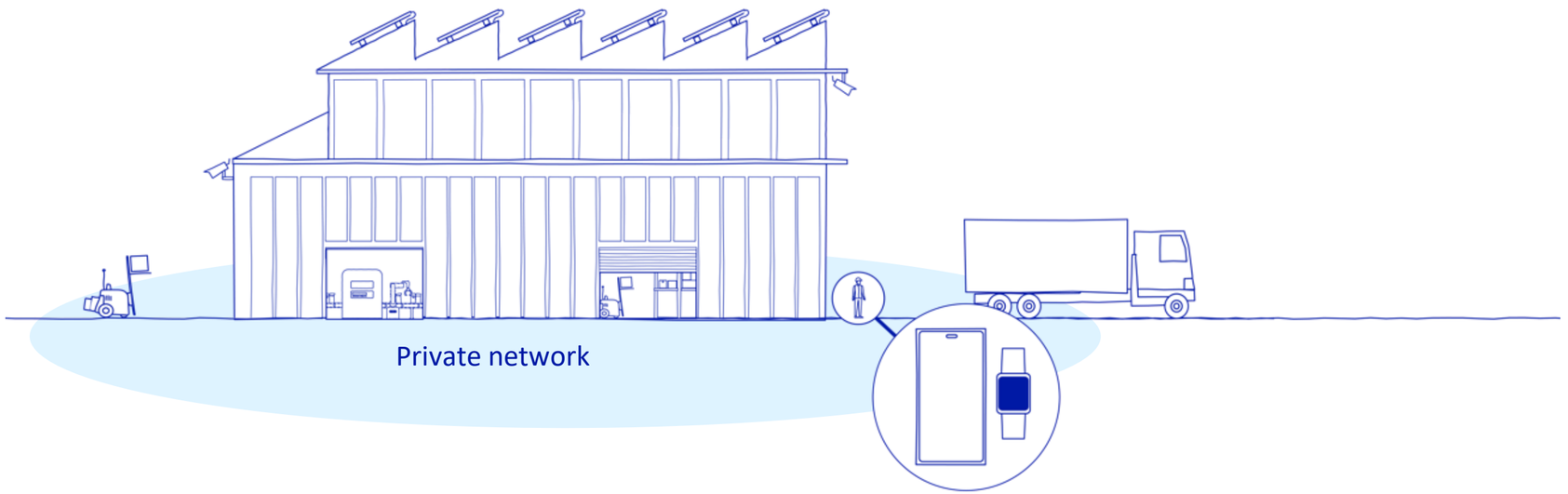
Our Mobile Network:

- Enables **116 billion** minutes of mobile calls each year, with demand for data growing by more than around **45%** annually
- 5G: 50% UK population coverage

* Figures accurate as at end of December 2023

5G private networks for digital transformation

The game-changing capabilities of 5G make digital transformation possible for industrial sites where it had been unfeasible before



Dedicated
Local network, dedicated resources, independently managed

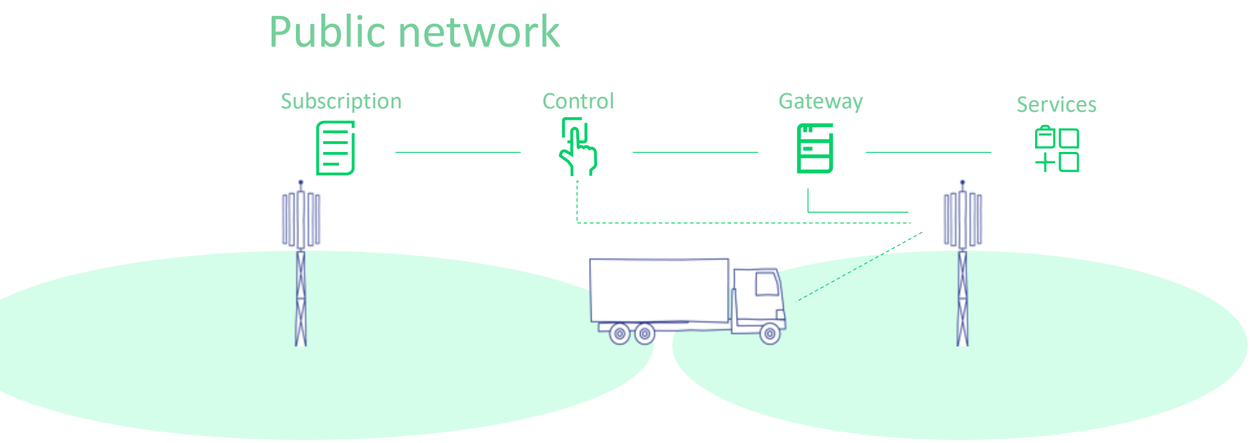
Secure
Cellular grade security, sensitive data stays on-premise

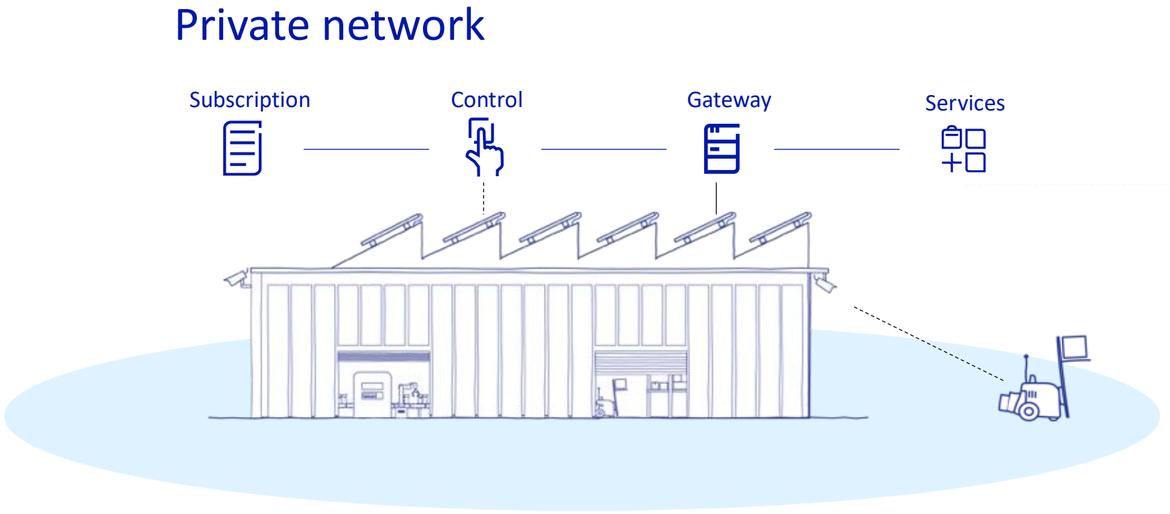
Optimised
Tailored performance for local applications, e.g. low latency, QoS

© Virgin Media O2

Private networks and public networks

Private networks are entirely self-contained and operated independently from public networks





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Business

Private Networks has the potential to transform entire sectors

Sectors such as Manufacturing, Transport, Logistics & Utilities have emerged as early adopter verticals despite macro-economic headwinds

Manufacturing

Utilities

Airports
and Seaports

Major infrastructure
projects

Oil, Gas and Energy
companies

Defence

Logistics and
Warehousing

Healthcare

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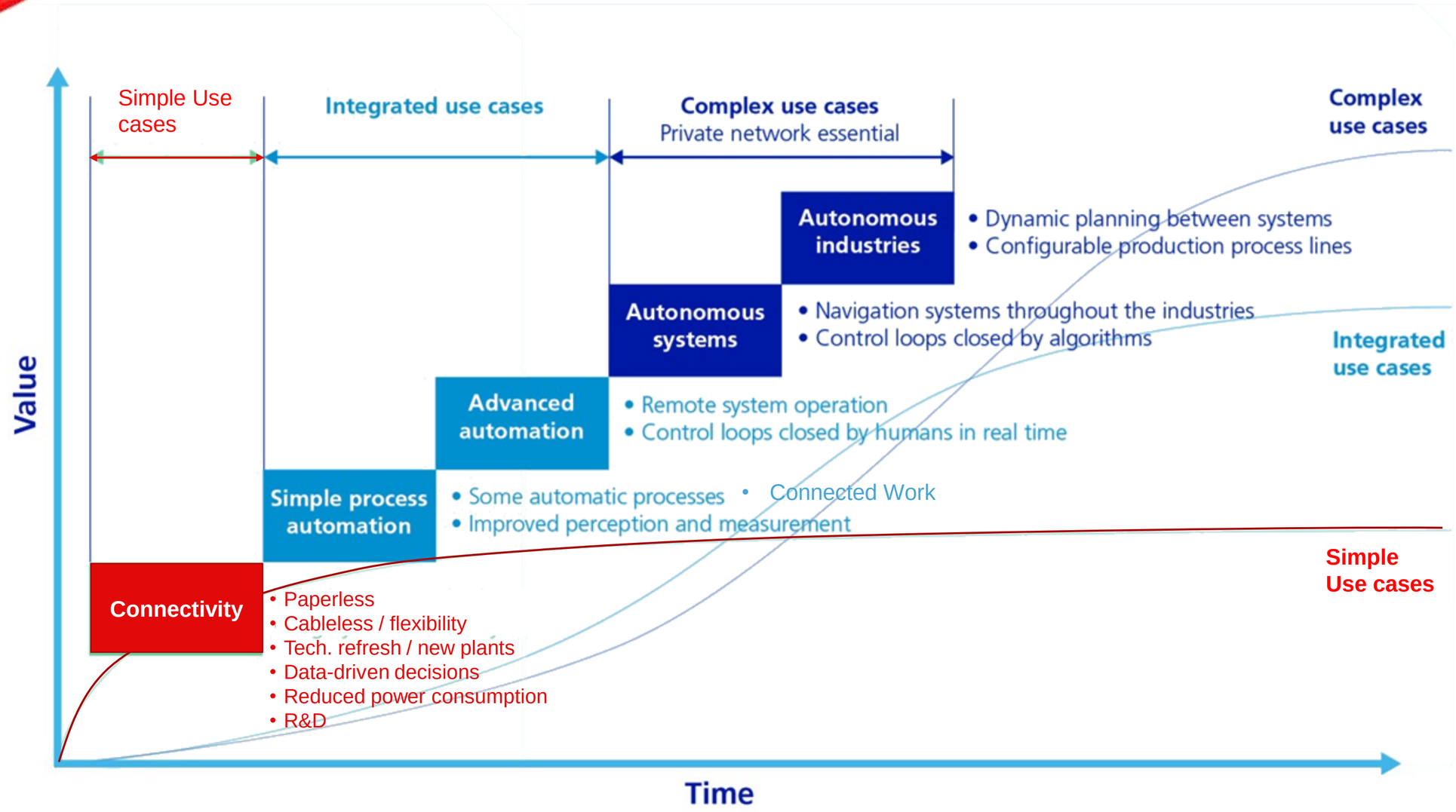
Business

Digital Transformation Journey

Thinking beyond the tech to drive key outcomes and value



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Virgin media O2 Business

British Sugar

The UK’s first multi-site private network

The problem

A lack of fast, site-wide connectivity was impacting productivity at British Sugar’s main UK factories

The solution

Close cooperation between Virgin Media O_2 Business and British Sugar teams led to the design of a dedicated private network

The outcome

Improved health and safety and security, increased productivity and efficiency with a secure private network

“Previously we needed someone in the control room and someone who could walk around the site. Now we have one person who can walk around the site with the control room in their hands.”

Paul Hitchcock, Head of Factory Organisation at British Sugar

© Virgin Media O2

British Sugar case study: **Providing a dedicated 4G private network**

Virgin media O2 Business

South London and Maudsley NHS Foundation Trust

The UK’s first 5G-connected hospital

The problem

The need to investigate efficiency, safety and security benefits of using smart, 5G-connected technologies in NHS hospitals

The solution

Use of smart, 5G-connected technologies in NHS hospitals – including IoT (Internet of Things), AR (Augmented Reality) and AI (Artificial Intelligence).

The outcome

Our Private 5G network reporting benefits of improved productivity & patient care with reliable connectivity

“We are proud to be partnering with Virgin Media O_2 Business to create the UK’s first 5G-connected hospital, which enables us to use digital innovations to improve patient outcomes. This is a very exciting step forward.”

Stuart MacLellan, Acting Chief Information Officer at SLAM

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It feels fantastic to be a part of the UK's

A slice of the action: the potential of 5G network slicing at Comic Con

Augmented reality e-sport, Hado, run on a dedicated slice on Virgin Media O2's 5G standalone network, which enabled remote play and live broadcasting.

The problem

The need to connect eSport competitors reliably in a congested venue with spectators also using the network whilst also broadcasting the game in high-quality

The solution

The dedicated network slice also provided a stable, secure and reliable communications platform that enabled the live broadcast of the games worldwide.

The outcome

Competitors taking part in the game at Comic Con were able to compete remotely and in real time against teams located in both the United States and South Korea

"5G standalone and network slicing will be game changers for the gaming industry. The ability to compete with people from all around the world and break down previous geographical limitations will have a real positive impact for Hado and other esports like it. It was particularly impressive that all of this was possible at a location as busy as Comic Con.."

Jim Sephton, Managing Director of Hado UK

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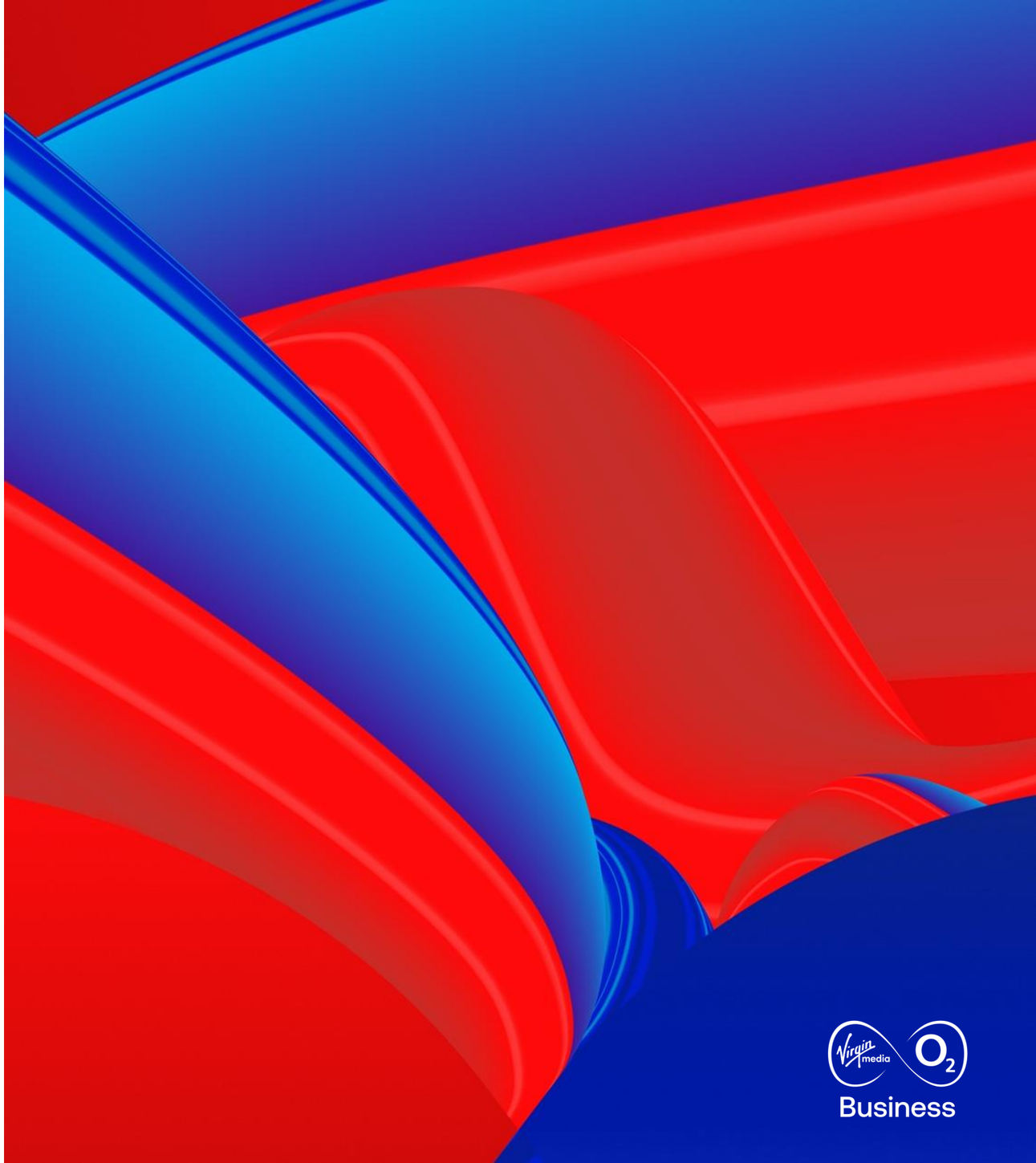
Key Takeaways

- Private 5G has a key role to play in digital transformation for critical industries as seen in Manufacturing or Healthcare

- Think beyond the technology to get the most value, don't lose sight of the business objectives

- Need to demonstrate ROI for the technology and solution. It's important to measure before, during and after



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Panel Session

The key ingredients required to successfully meet customer expectations

Danielle Rios Royston
Acting CEO
Totogi

Galit Dan
VP Business
Amdocs ConnectX

Justin Reilly
Chief Executive Officer
Wavelo

Rob Bennet
Senior Vice President, Retail Wireless Technology
DISH

David Clyde
Group Brand Director
Lebara

Noam Lando
Co-founder & CEO
Webbing

Michelle Bugner
Head of Wholesale
Giesecke+Devrient

Sandeep Raithatha
Head of Strategy, Innovation & 5G IoT
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GSMA™

Together with our members, we make connectivity work for all

- Engineering the future of connectivity
- Enhancing your profile across the ecosystem
- Advancing policy and regulatory priorities
- Supporting the global ecosystem
- Delivering industry services, intelligence and training

Find out more

Join us at Future Space, GSMA Pavilion, Hall 4

gsma.com/membership