

MVNO Summit 2025

Discover the latest insights and strategies from across the MVNO ecosystem as we explore the evolving landscape of mobile services and vertical applications.

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Our Speakers



Pablo Iacopino
GSMA Intelligence



Hakan Koç
1GLOBAL



Andy Youé
Wavelo



Martina Klingvall
Telness Tech



Omar Parreira
Nova Mobile



Andrew Wright
Aetha Consulting



Gloria Trujillo
GSMA - *Moderator*



Javier Sendin
GSMA - *Moderator*

MVNO Summit Agenda

Time	Title	Presenter
16:00	Moderator welcome	Javier Sendin, GSMA
16:05	MVNOs in 2025 and beyond: a new growth & innovation story	Pablo Iacopino, GSMA Intelligence
16:22	Disrupting the telco industry through eSIM	Hakan Koç, 1GLOBAL
16:38	Next Generation MVNO	Andy Youé, Wavelo
16:54	Telecom should be joyful	Martina Klingvall, Telness Tech
17:10	The rise of 'Brand MVNOs'	Omar Parreira, Nova Mobile
17:26	MVNOs in an increasingly delayed industry	Andrew Wright, Aetha Consulting
17:45	Fireside chat: moderated by Gloria Trujillo, GSMA	Hakan Koç, 1GLOBAL Andy Youé, Wavelo
18:15	Moderator wrap-up and closing remarks	Javier Sendin, GSMA

Up Next

MVNOs in 2025 and
beyond: A new growth
and innovation story

Pablo Iacopino

Head of Research and
Commercial Content

GSMA Intelligence



MVNOs in 2025 and beyond: a new growth & innovation story

DATE

- March 2025

AUTHOR

- Pablo Iacopino
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About GSMA Intelligence

info@gsmainelligence.com

GSMA Intelligence is the definitive source of mobile industry insights, forecasts, and research, used around the world. Our insights cover every mobile operator, network, and MVNO in every country worldwide.

COMPREHENSIVE
DATA PLATFORM

INSIGHTFUL
RESEARCH

EXPERT
ANALYSIS

BESPOKE
CONSULTING

EVENT
SUPPORT

Who we work with



Mobile Network
Operators



Regulatory
Bodies



Government
Departments



Financial
Corporations



Cybersecurity
Firms



OEMs and
Manufacturers



Technology
Companies



Consulting
Businesses



BY THE NUMBERS

7/10

of Forbes' Top digital
companies worldwide, rely on
our data and insights

50m+

individual datapoints covering
everything from operational to
economic

4,600+

networks tracked, spanning
every country

9/10

of the top Telecoms in the world
work with GSMA Intelligence

MVNOs: a new growth & innovation story

Opportunities span consumer and enterprise markets

The number of MVNOs has more than doubled in the last decade (worldwide)



The outlook for MVNOs is promising, shaped by important driving forces

Consumer shift to digital

The rise of Digital Industries (IoT and beyond)

New technologies (e.g. eSIM, 5G, AI)

New business models and propositions

Consumer market: the eSIM opportunity for MVNOs

eSIM is now a reality...looking for scale

eSIM is global

Number of consumer eSIM devices that have been launched*

271

Number of operators that have launched eSIM service for smartphones**

441

Number of countries that have launched eSIM service for smartphones***

123

Full global reach when international roaming is included

Data as of June 2024. * Sum of smartphones, tablets and smartwatches (cumulative). ** Sum of MNOs, MVNOs and global providers of international roaming services. *** Excluding eSIM service for international roaming

Source: GSMA Intelligence

Scaling eSIM brings new business opportunities

- **Consumer awareness** of eSIM has doubled in the last few years.
- **Growth outlook is encouraging:** 76% eSIM penetration by 2030 globally.
- **eSIM opportunities for MVNOs:** new consumer propositions (eSIM-only, eSIM first, digital brands) and new use cases (e.g. temporary services).
- **eSIM-only phones** (beyond the USA) **will be a game changer**. Timelines are unclear...but keep an eye on it.

Travel eSIM

A clear use case for eSIM, capturing consumer interest

There is growing use of eSIM for international roaming, which explains the proliferation of global providers of roaming connectivity services (e.g. Airalo, Holafly, eSIM.me) and growing interest among MNOs and MVNOs in monetising inbound roaming through eSIM

50% of consumers
are aware of eSIM



19% of eSIM-aware
consumers use eSIM



51% of eSIM users used
eSIM service while travelling
abroad for leisure or personal
reasons in the past 12 months



28% of travel eSIM users
purchased an eSIM service
provided by a global provider of
international roaming connectivity
services



Average figures across 11 countries: Australia, France, Germany, Italy, Japan, Poland, South Korea, Spain, UAE, UK, US.

Source: GSMA Intelligence Consumers in Focus Research – Global Consumer Survey 2024

The rise of Digital Industries

Our Global Digital Transformation Survey

10 Vertical sectors and
21 Countries in focus:
4,200 enterprises

Vertical sectors

-  Manufacturing and Industrial Sectors
-  Transportation, Logistics & Warehousing
-  Automotive and Mobility
-  Utilities and Energy
-  Financial Services
-  Healthcare
-  Retail
-  Media and Entertainment
-  Agriculture, Forestry & Fishing
-  Public Sector

Countries

Asia

-  Australia
-  China
-  India
-  Indonesia
-  Japan
-  Kazakhstan
-  South Korea

Europe

-  France
-  Germany
-  Italy
-  Spain
-  UK

Middle East and Africa

-  Egypt
-  Morocco
-  South Africa
-  Saudi Arabia
-  Türkiye

Americas

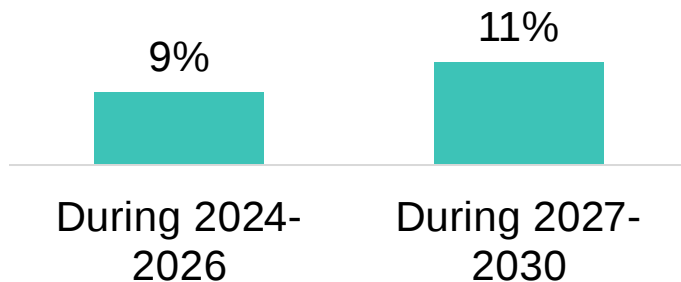
-  Argentina
-  Brazil
-  Mexico
-  US

The B2B opportunity for MVNOs

Enterprise spend on digital transformation is on the rise

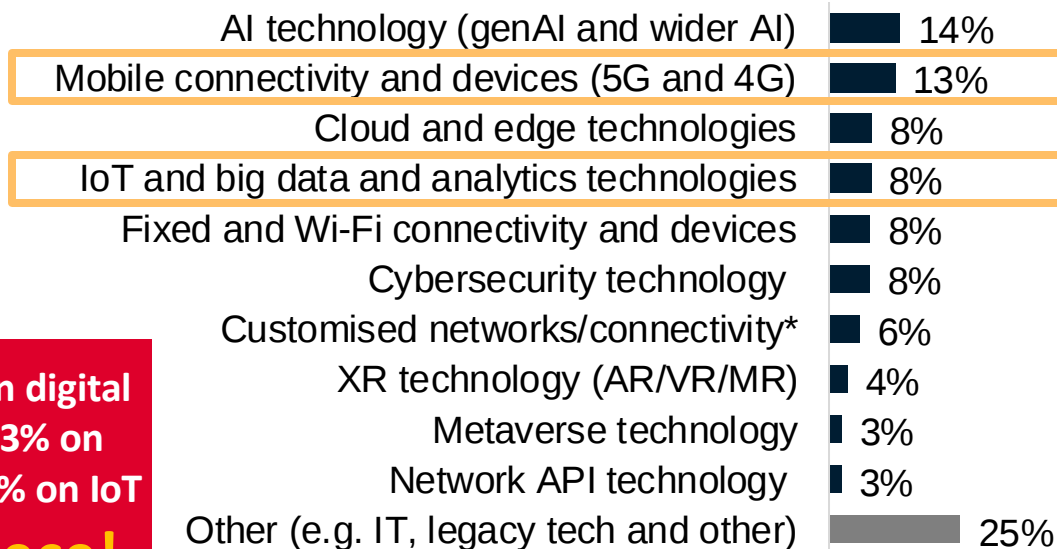
Enterprise spend on digital transformation

as % of revenue



Enterprises will spend 10% of their revenues on digital transformation during 2024-2030, of which 13% on mobile connectivity and devices (4G/5G) and 8% on IoT and Big Data & Analytics. **Grab your piece!**

Enterprise spend on digital transformation by technology (2024–2030)



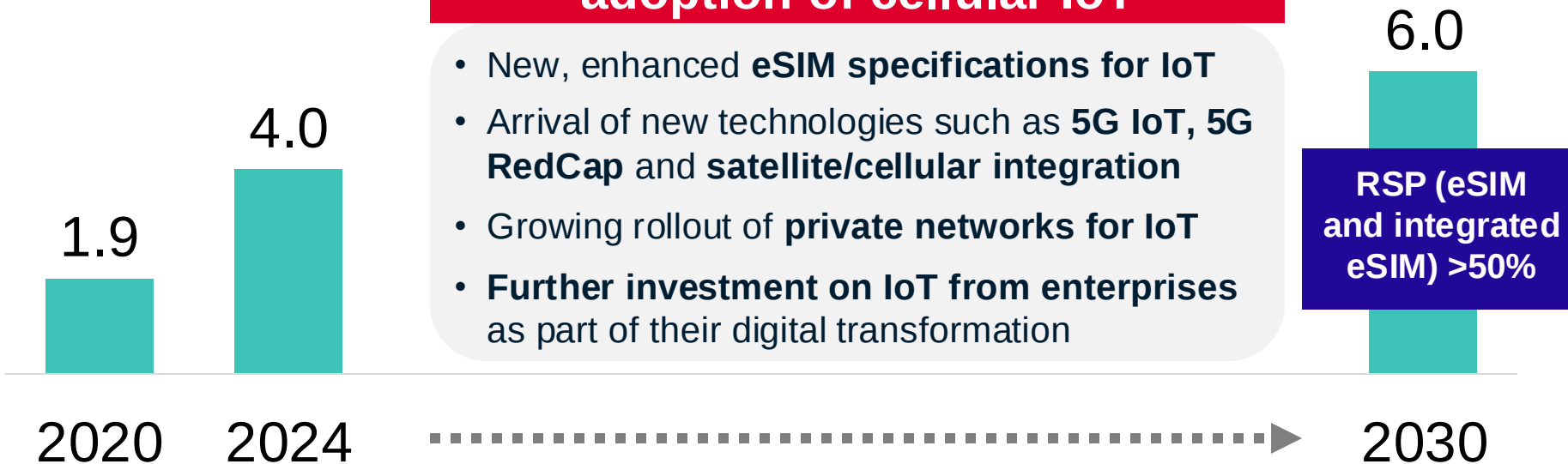
Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2024. Average figures across all vertical sectors and countries. Base is all enterprises undertaking digital transformation. * Private wireless networks and network slicing technologies.

IoT: the potential for growth is still big

Capitalising on a new wave of IoT innovation and growth

IoT cellular connections

Globally. Billion. Total, all SIM form factors



Enterprises working with MVNOs on IoT

Targeting the right vertical sectors is key

7%

Share of enterprises already **working with MVNOs for IoT deployments**. That leaves room for growth

Top five vertical sectors

1

Public Sector

2

Utilities and Energy

3

Agriculture, Forestry and Fishing

4

Healthcare

5

Automotive and Mobility

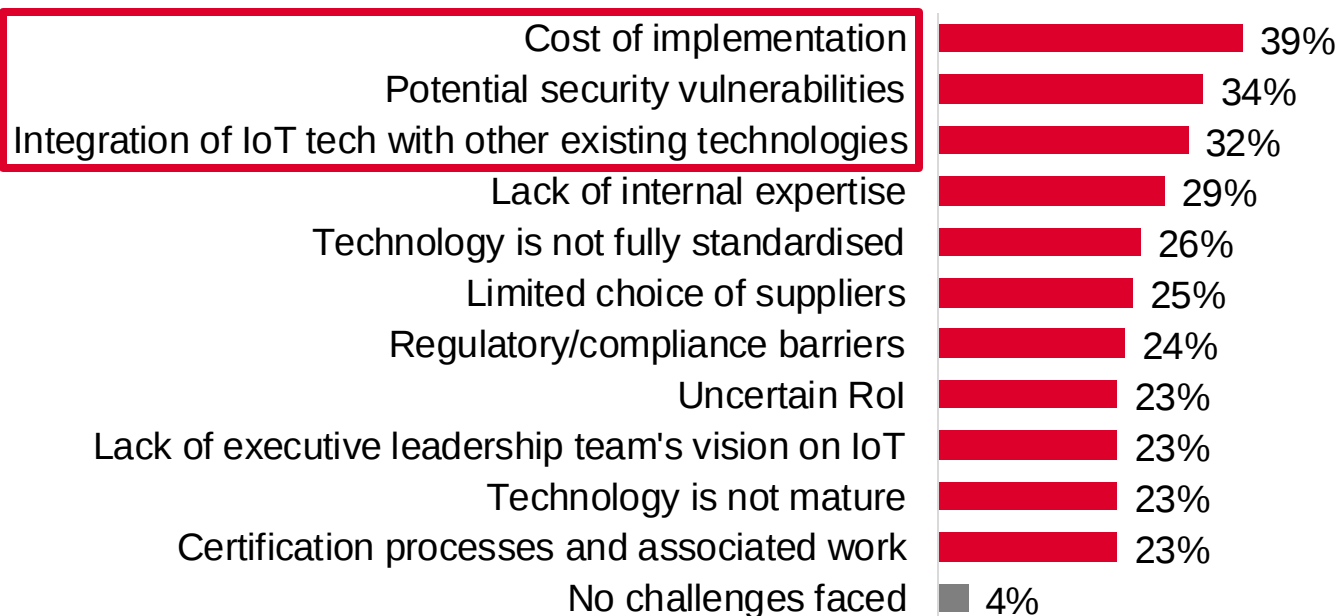
Other insights

- Enterprises with **global footprint** (50 or more countries of operations) are more likely to work with MVNOs

Enterprises need help (and long-term partners)

Helping enterprises address IoT deployment challenges is key

IoT deployment challenges faced by enterprises



Focus your B2B messaging on how your IoT solutions can address IoT deployment challenges

Tech integration is a challenge. Enterprises expect you to play a role!

An abstract background on the left side of the slide, featuring concentric circles and glowing points in blue, red, and yellow, resembling a stylized galaxy or data visualization.

THANK YOU!

Pablo Iacopino

Head of Research and
Commercial Content

piacopino@gsma.com

Up Next

Disrupting the telco industry
through eSIM

Hakan Koç

CEO and Co-Founder

1GLOBAL





**Disrupting the telco industry through
eSIM and our global core network**

Company Overview



17 offices



9 MVNOs



3,500+ corp.
customers



45+ million
eSIMs



2 GSMA
RSP sites



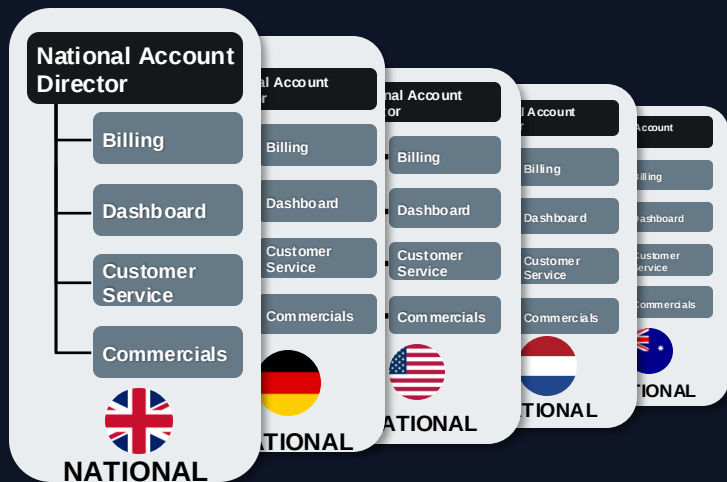
600+
networks

One of the world's only five
telcos that operates its own
fully GSMA-accredited
SM-DP+ platform for eSIM



Our global core network allows us to offer a **truly global** mobile service and simplify procurement

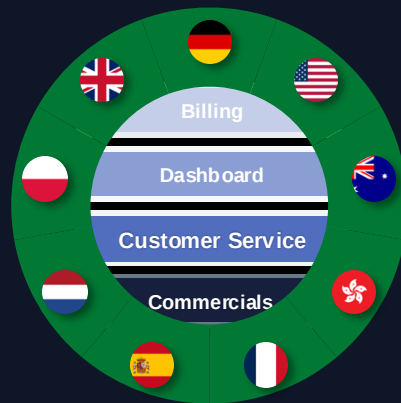
Other “global” providers
dis-aggregated and piecemeal



A federation of national networks that
don't speak to each other

1GLOBAL

One global core network

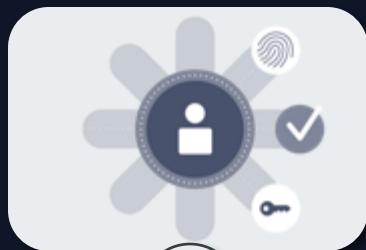


A network designed for
international mobility

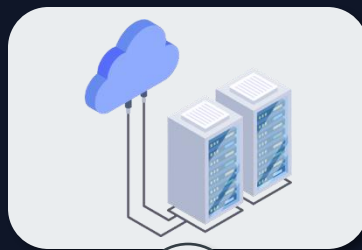
Zero-touch deployment for employee devices ensures they arrive fully set up and **ready to use**



1



2



3



4

Device Delivery ► IAM Enrolment ► Profile Assignment ► eSIM Installation

From wrapped box to functioning local phone number, in minutes



DE User



NL User



UK User

Businesses and Consumers struggle with roaming and bill shock due to unpredictable cost and usage



Downloading the right eSIM might be the right solution



Fast

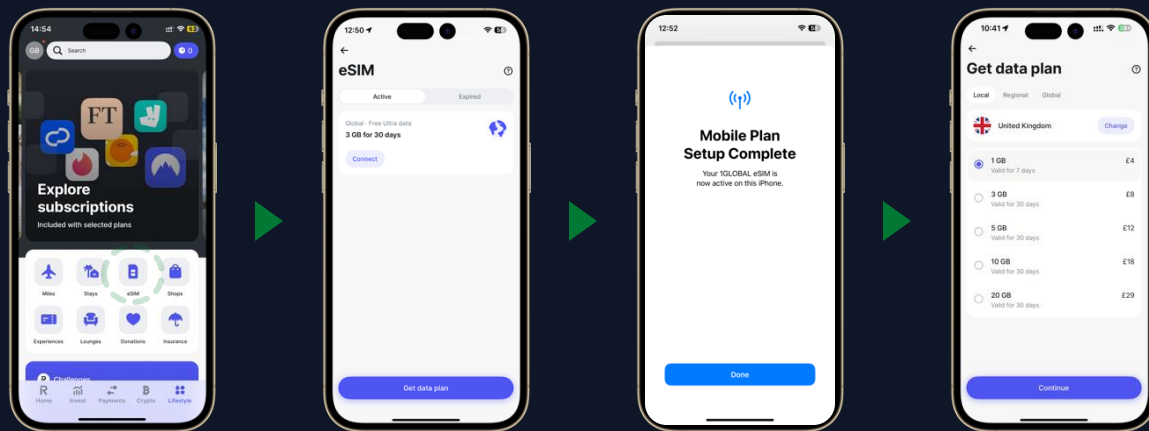


Convenient



Fair

The convenience of purchasing the best global connectivity from within your app or website



Our recent partnership with Revolut enables their 50M users to seamlessly access eSIM connectivity for global data



Download your eSIM

Use voucher code **MVNO-S2025**
for a MVNO Summit discount

Hakan Koç
Founder & CEO

Up Next

Next Generation MVNO

Andy Youé

Vice President, Sales

Wavelo





Next Generation MVNO

Andy Youé

Embracing the Future:

Next-Gen MVNO

Next generation MVNOs are poised to reshape the telecom industry

- Emerging Technologies
- Customer Centricity
- Innovative Service Offerings



Emerging Technologies

01

Impact of 5G on capabilities
and service offerings

02

Role of IoT and IoMT in enabling
connected services

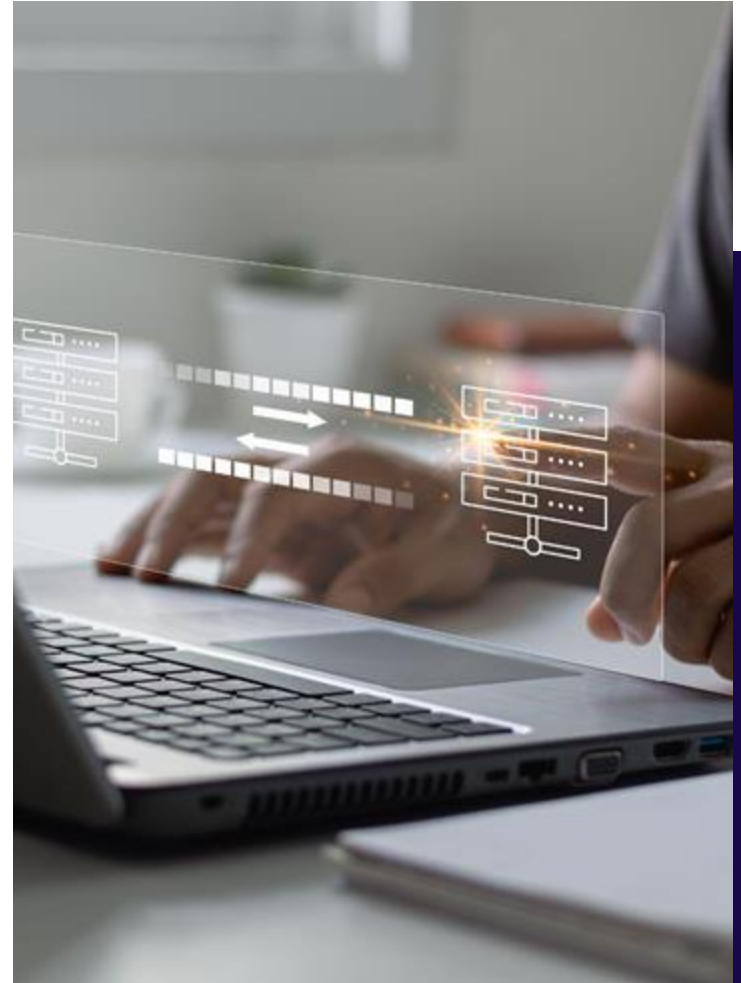
03

Integration of AI, cloud
computing and real-time
architectures

Customer Centricity:

Precision. Speed. Trust.

- Tailored plans via data insights
- Converged mobile + IoT bundles
- Flexible payment, personal edge, security



Innovative Service Offerings Beyond Basic Mobile

01

Stream, Game, Thrive - via
Partnerships

02

5G + AI = fast, fresh offerings

03

Instant customization at your
fingertips

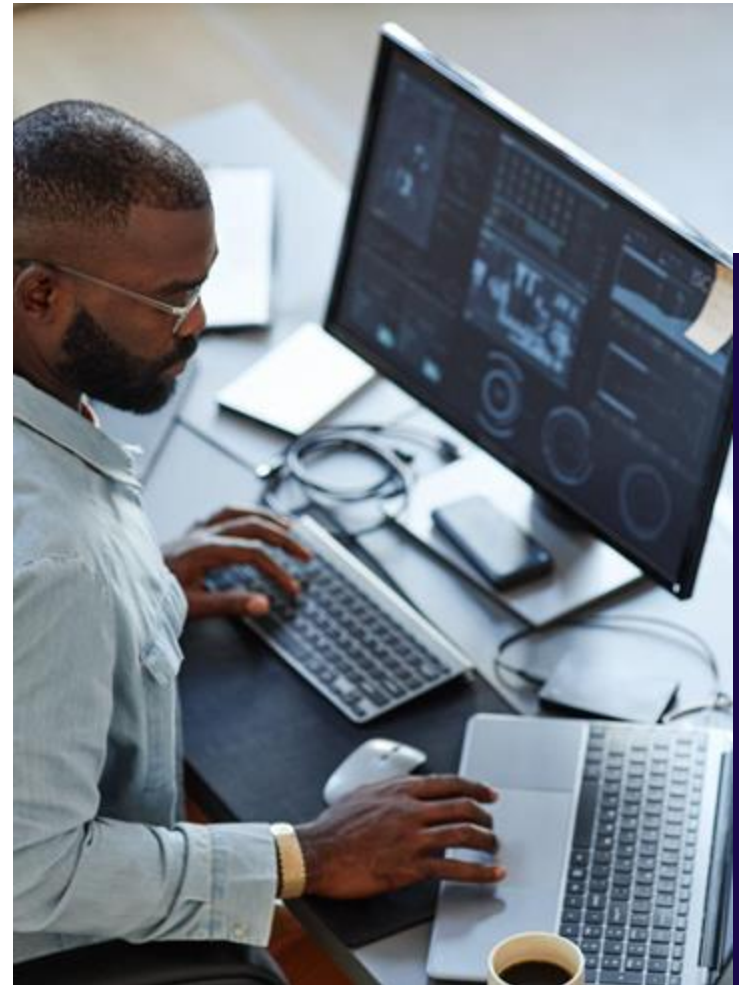
Dominating the Telecom Landscape

Stay ahead – win big!

- Next-gen tech and architectures
- Data-driven agility
- Dynamic ecosystems + strategic partners

Call to Action:

Partner with us to lead the future of mobile – now





Thank you

Up Next

Telecom should be joyful – why is it so difficult?

Martina Klingvall

CEO and Founder

Telness Tech



Martina Klingvall

Founder and CEO

Telecom should be joyful – why is it so difficult?



It took us 7 years, and we cracked the code

Telness Group have iteratively built our product since 2016, shown a product market fit with solid customers and revenues – currently scaling internationally.

Digital Telco serving Small Enterprises in Sweden (MVNO)

Award winning, fully digital and cloud-based operator that is loved by customers.



Telness

Ordered 500 x 10000

5.0



4/5 support
errands solved by
the customer



100% sales
completed
online

telness^T

Platform: The automated digital telco enabler

Automated, fully digital telecom solutions for maximised customer happiness and minimised OPEX.



Continues
innovation



Zero
downtime



Proprietary
technology

telness
tech^T

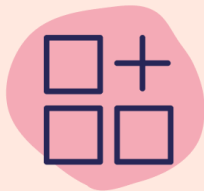
*Total Contract Value = Aggregation of all future monthly revenue rate of signed contracts.

The entire telecom industry is **shifting** - legacy business models are not holding up, profitability is plummeting, and customer demands are increasing - **something needs to change**.

- ✓ Regulatory interventions are driving pricing down, lowering ARPU, creating opportunity for massive OPEX optimization.
- ✓ Innovations such as e-SIM has eliminated entry barriers, opening for non-telco challengers and new digital MVNOs.
- ✓ Customers demand a Platform-based and bundled offering - all in one place, putting pressure on Telco to build converged offerings.
- ✓ Telecom remains boring and with poor customer experience, and 66% of customers are considering switching brands, loyalty is at an all time low.



Most operators are fumbling in the dark. As we did ourselves in 2016. IT Legacy leads to inefficient operations whilst end-user demand has accelerated the sense of urgency



Stacking hundreds of fragmented systems

- ✗ Operators run on between 500-2,000 external modules, making it impossible to build scalable platform-based offerings
- ✗ Using different systems that are not designed to work together destroys CX



Telcos have tried and failed to build inhouse

- ✗ Transforming legacy is expensive and time-consuming, and most telecom transformations have failed
- ✗ Different players in the telecom industry have previously tried and failed making complex systems modern



Unhappy customers

- ✗ Telecom is riddled by extremely bad user experience
- ✗ Complex non-value-added products and outdated unmodern interfaces
- ✗ Lack of functioning digital customer journeys and propositions

One size does not fit all





Telco is shifting, fast.

Forces shifting telecom



Consumer
preferences and
expectations



High OPEX legacy IT
systems



Commodity products
and services

Enabling value and
innovation is the only
way forward here





Legacy
Telco



New possibilities



Telcos are recommended*
to launch digital attacker brands to
grow market share and increase
profitability

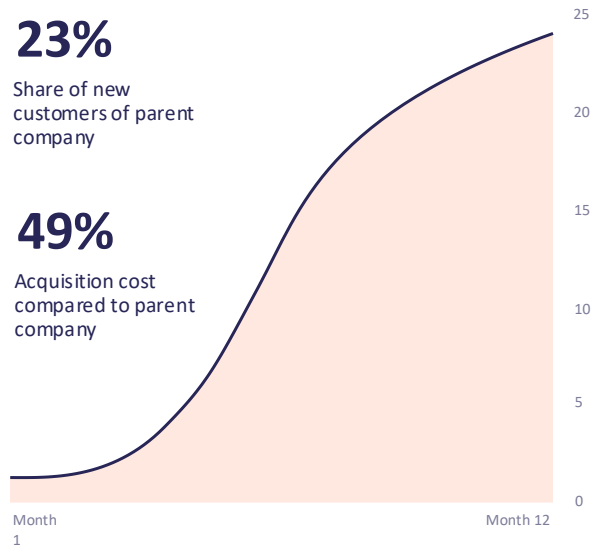
“Telecom operators’ average net promoter score (NPS), has typically been in the 20s, versus more than 50 for many digital powerhouses.”

23%

Share of new
customers of parent
company

49%

Acquisition cost
compared to parent
company



Average gross subscriber additions for digital attackers in the first year, % share by month

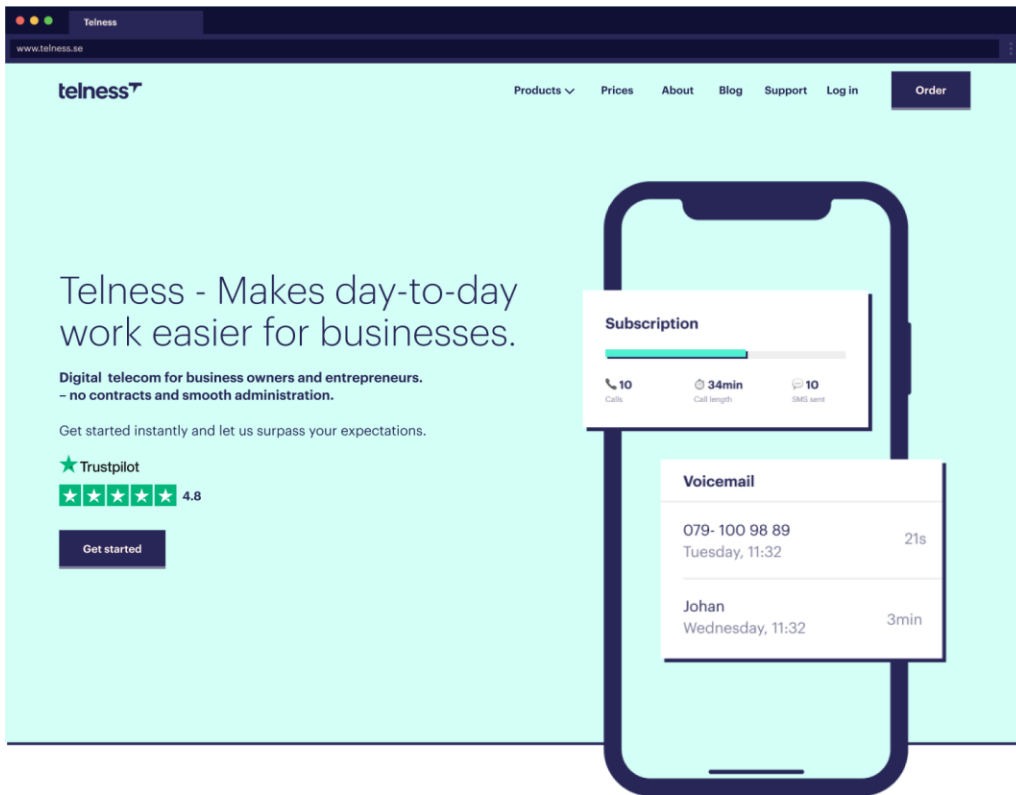


Make the cake bigger instead of fighting for the same customers as everyone else...



Highest rated B2B MVNO in Europe since launch in 2016.

A title we still hold today.

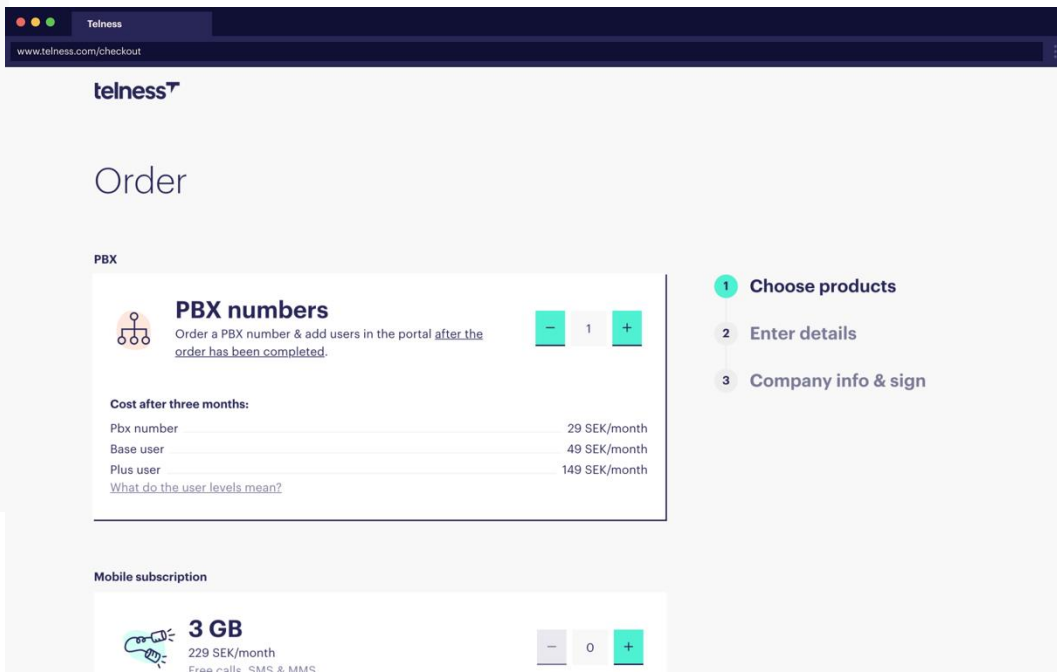
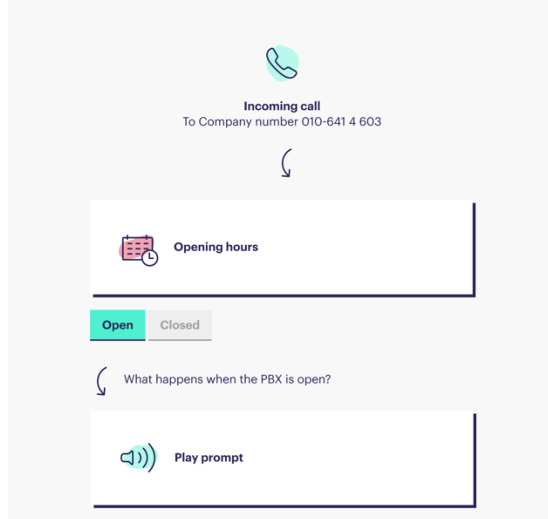


“Order in less than 1 minute”

Telness

www.telness.com/checkout

Enable 100% self-service



- 1 Choose products
- 2 Enter details
- 3 Company info & sign

Low OPEX enabled by self-service, yet customers love the solution

Telness Digital Telco is a clear #1 on Trustpilot of all Swedish operators.



Telness

Omdömen 340 • Utmärkt



4,8

Tele2

Omdömen 575 • Mycket dålig



1,4

3 Sverige

Omdömen 691 • Mycket dålig



1,4

Hallon

Omdömen 1 011 • Mycket dålig



1,7

Telia Sverige

Omdömen 1 755 • Mycket dålig



1,3

www.telenor.se

Omdömen 1 284 • Mycket dålig



1,3



Good customer experiences don't just happen....

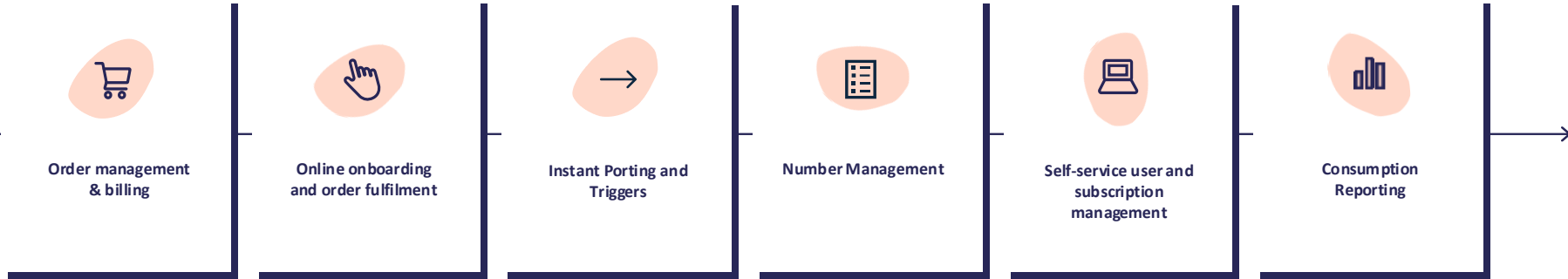
“Services built for
the large corporates,
not for us”

“I’m **never prioritized**
and need to call support
or stand in a store line
for every single thing”

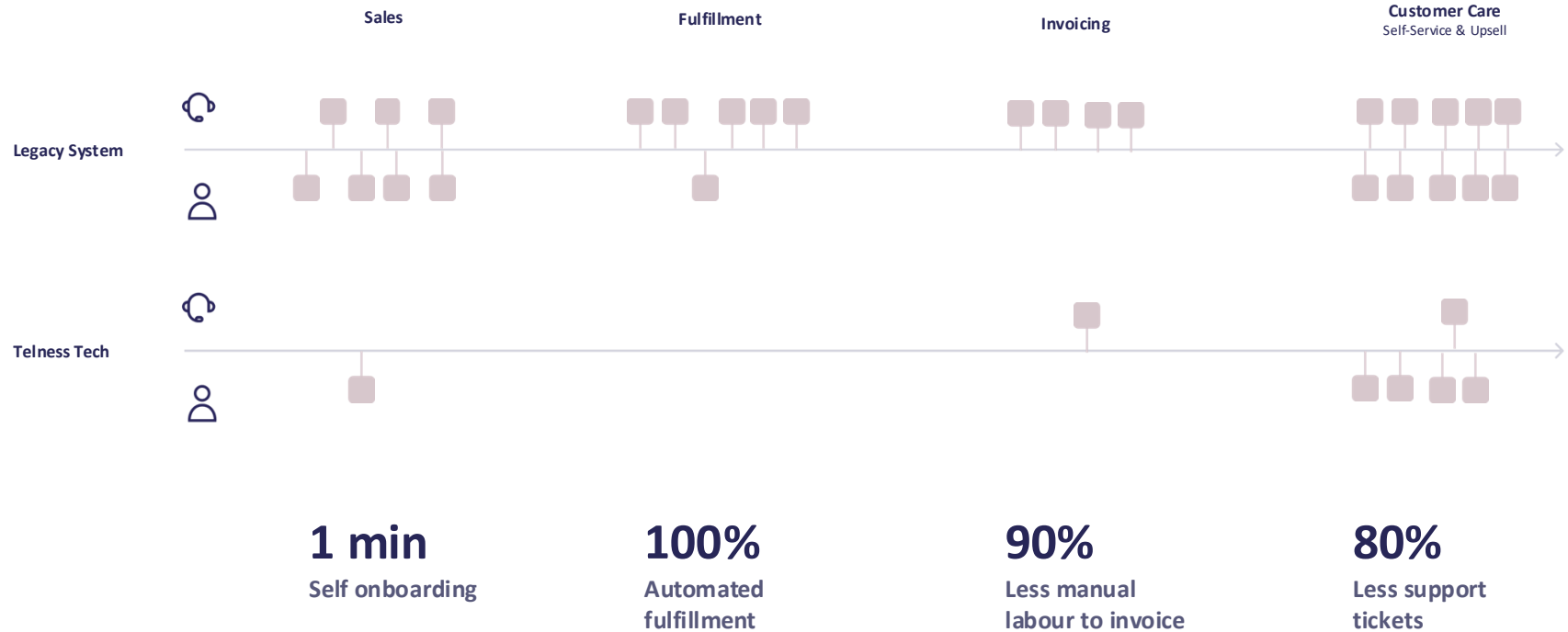
“I’ve been
scammed so
many times”

We designed over 200 customer journeys...

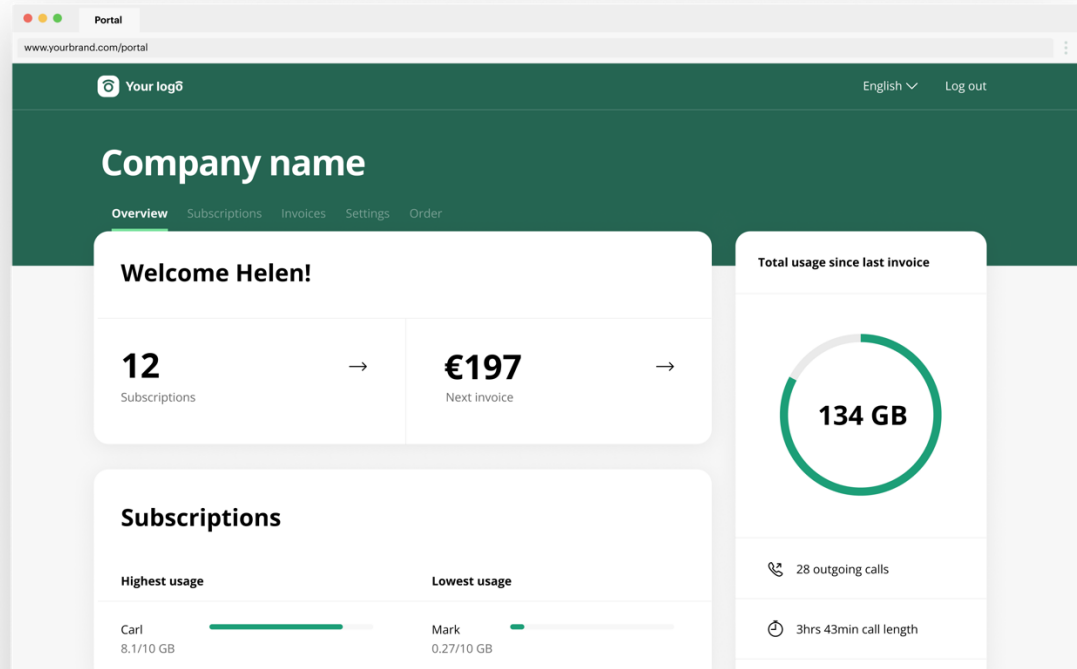
...and created a digital and automated experience



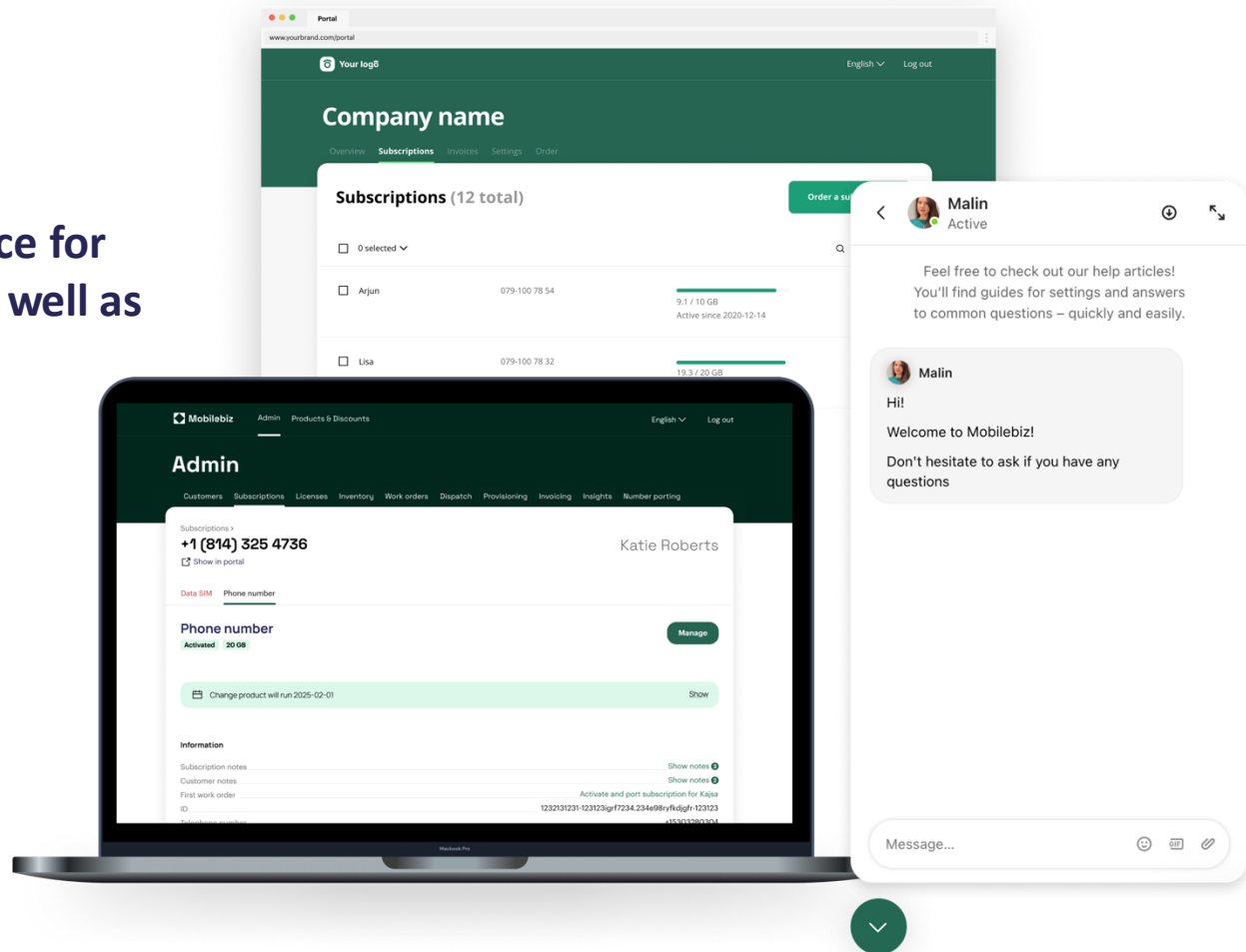
... We almost religiously removed manual interactions



Customer management
portal with different
access levels and
functionalities



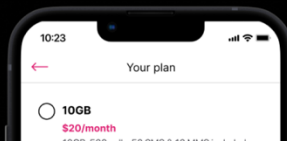
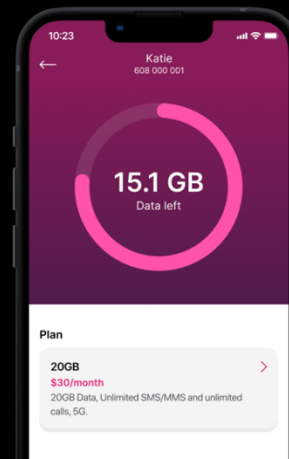
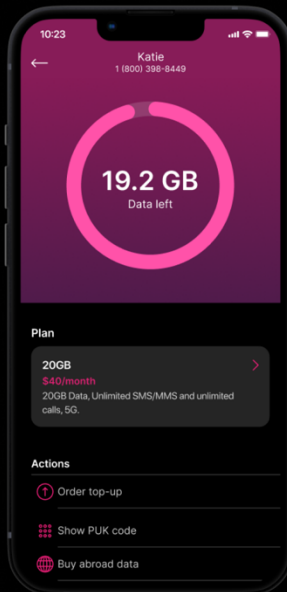
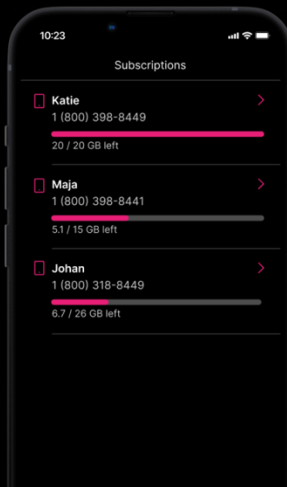
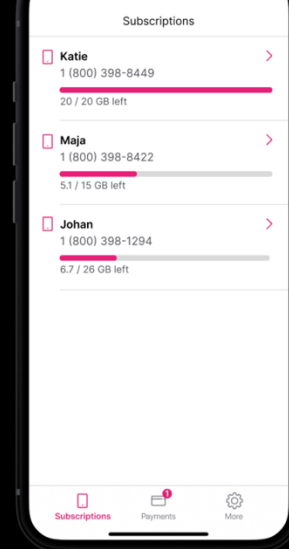
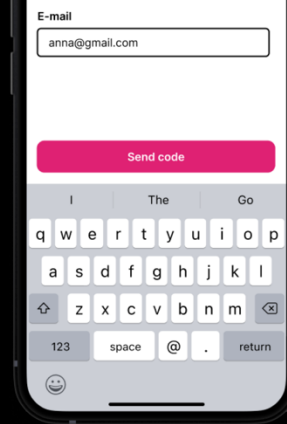
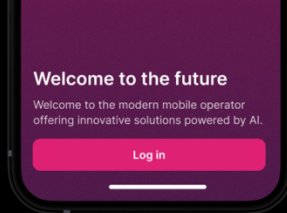
Omni channel experience for MVNO management as well as end user management



You want an app?

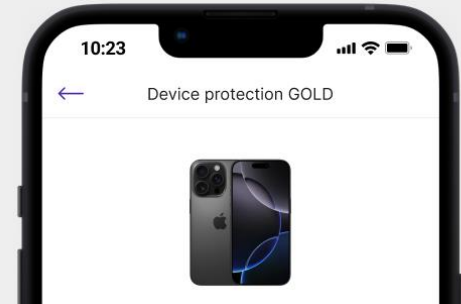
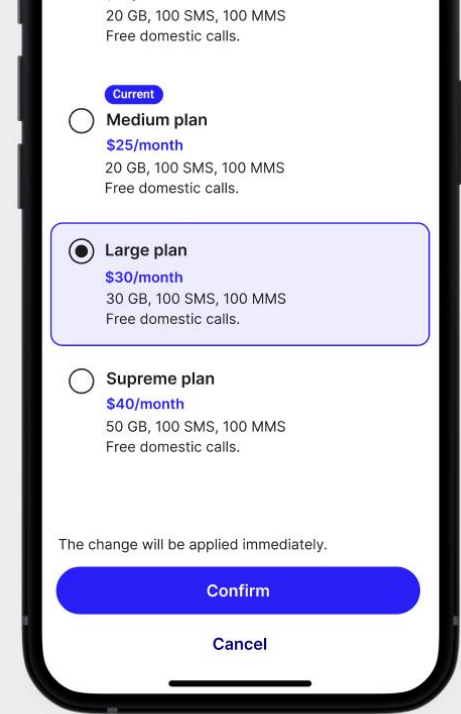
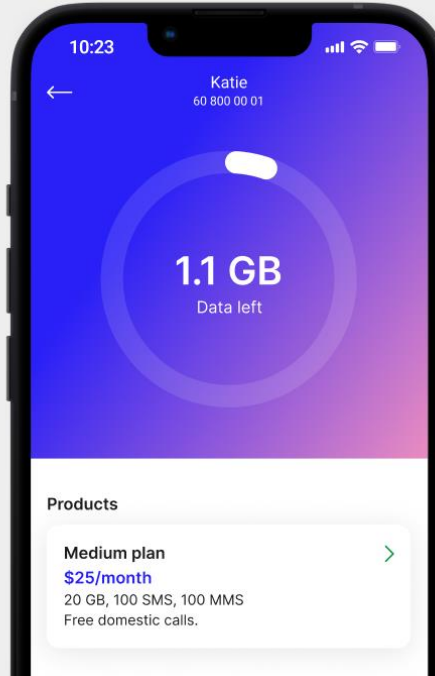
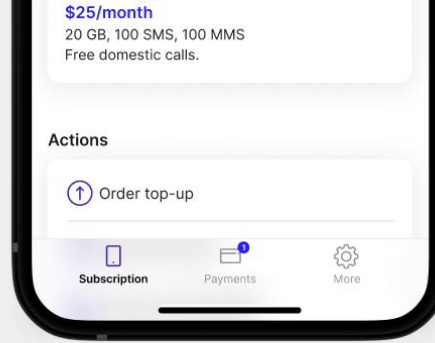
You got it.

No additional
development needed.



Products that support both
Mobile, PBX
and IoT

All with industry leading
UX.



Basically, we've had to build much more than expected...



... We built everything
needed to launch or run
a mobile operator, fully
automated.



Integrations



Softphone



Online PBX
configurator



App



Authentication



Cloud PBX



Connectivity



User plans &
management



Automatic
porting



Telness tech
core



Self service
portal



Consumption
& rating

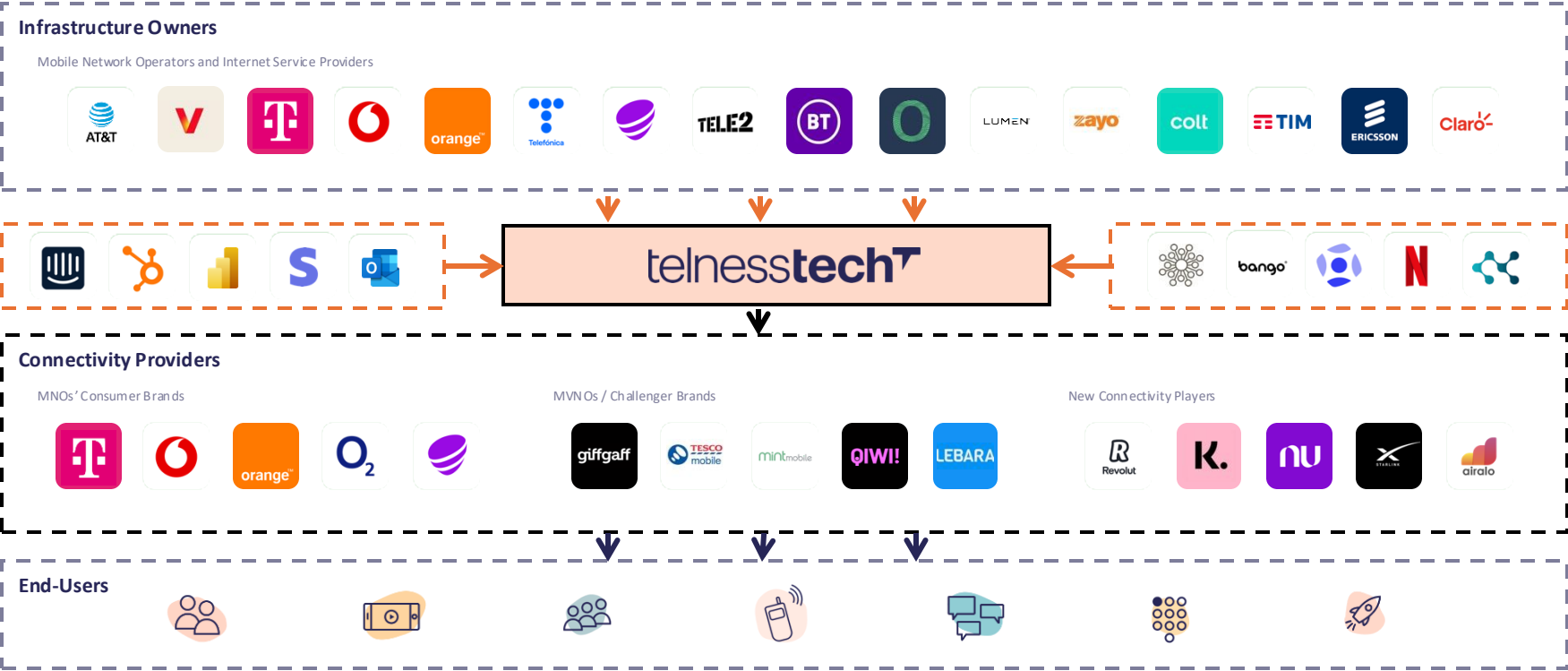


Provisioning



Online sales

And when I say we built everything, I really mean it.



Everything needed to launch and run
a mobile operator.

Powerful, fully automated, and
infinitely scalable.

Playfully easy. As Telecom should be.



And with this tech,
telcos can differentiate





33.3 million businesses in the United States qualify as small businesses, making up 99.9% of all U.S. businesses.

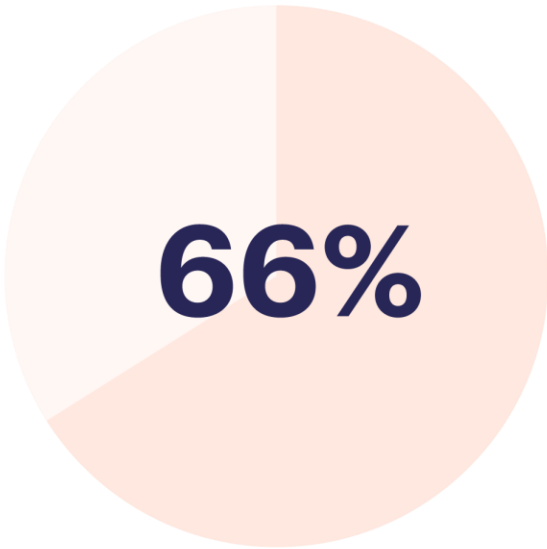
Yet most telcos focus on the enterprise segment in their B2B offerings!



Make the cake bigger instead of fighting for the same customers as everyone else...

Telco executives believe consumers are loyal to their brand but the data shows otherwise.

Telco executives believe consumers are loyal to their brand but the data shows otherwise.



66% of the consumers say they plan on switching operator within a year.

Those Telco executives,
that's you guys in the audience.

... Guys, it's 2025.

Any business can start or turn into a MVNO or connectivity provider.

You don't need 500-2000 vendors and massive infrastructure.

It scales and can create near instant new revenue streams and customer retention.



A perspective view of a modern, brightly lit subway tunnel. The tunnel has a high, arched ceiling with a grid of lights. The walls are made of large, reflective panels. Two escalators lead up and down the tunnel. A person is visible in the distance, walking on the upper level. The overall atmosphere is clean and futuristic.

The opportunity for telecom
challengers and entirely new non-telco
players to enter the market

... is now

"If you think you are too small to make
a difference...

... Try sleeping with a mosquito in your
bedroom!"



Create the teltech category

Enable the everyone to enter
the telco space

Making telecom a joyful
experience



Thank you!



[Linkedin](#)



www.telnesstech.com
www.telness.se



martina@telness.se

Up Next

The rise of 'Brand-MVNOs'

Omar Parreira

Co-Founder and CEO

Nova Mobile



The Rise of 'Brand-MVNOs', A Growing Trend in Mobile Services



Omar Parreira
COO/Co-Founder, Nova Mobile

MWC[™]
GSMA

BARCELONA
3 - 6 MARCH 2025



MVNOs



A Market on The Brink of Transformation?

Global MVNO market to reach:
\$149 Billion by 2030

The rise in eSIM adoption has
and will facilitate the rise of
non-traditional operators
offering telco services.

The Power of an Existing Customer Base

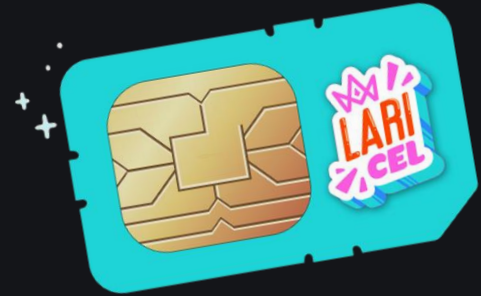


Case Study: Lari Cel

24 year old actress (and influencer) Larissa Manoela announced the launch of her own MVNO Lari Cel, in a post to her social media followers in 2021.

The MVNO is launched in cooperation with the Dry Company/ Surf Telecom as the enabler, using TIM as the network.

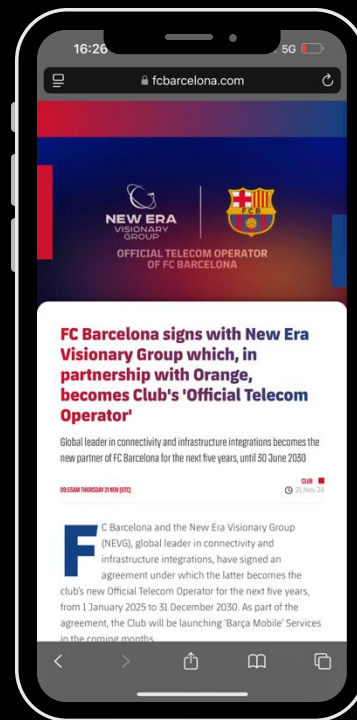
As of August 2024, Lari Cel had 10,000 Subscribers (Source: TechnoBlog Brasil)



Case Study: Barça Mobile

FC Barcelona and the New Era Visionary Group (NEVG), global leader in connectivity and infrastructure integrations, have signed an agreement under which the latter becomes the club's new Official Telecom Operator for the next five years, from 1 January 2025 to 31 December 2030.

As part of the agreement, the Club will be launching 'Barça Mobile' Services in the coming months. (Source: Barcelona FC)





Introducing Orbit, a telco-as-a-service platform

Out-the-box infrastructure:

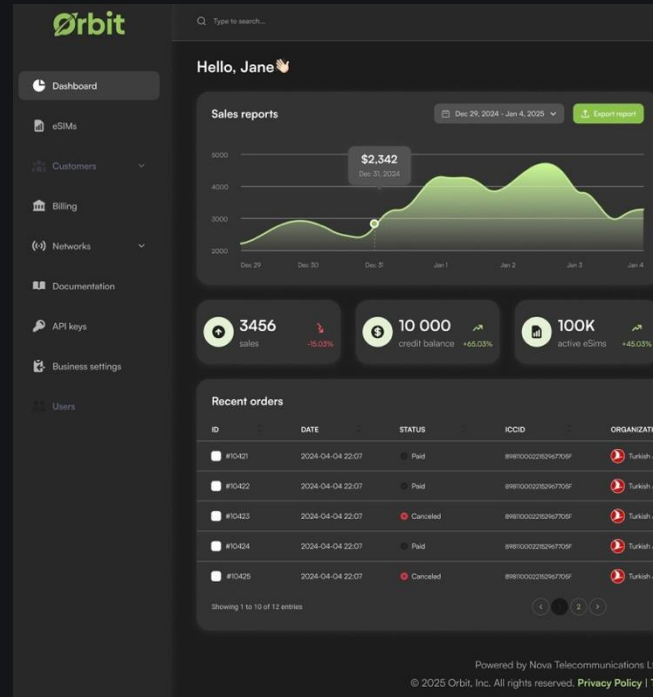
Everything you need to launch and operate your own telco, without the need for extensive development.

API integrations:

Effortless connections to MNOs and other essential service providers.

Billing solutions:

Streamlined billing capabilities to manage customer accounts and payments.



Thank you and keep connect with us



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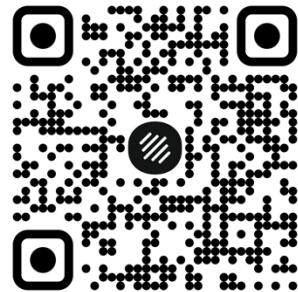
Up Next

MVNOs in an increasingly
delayed industry

Andrew Wright

Partner and Co-Founder

Aetha Consulting





MVNOs in a delayed industry

MWC MVNO Summit 2025

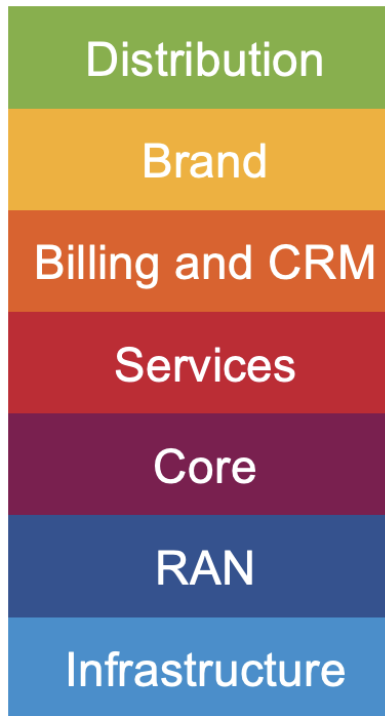
05 March 2025



Introduction

- How have MVNOs traditionally added value?
- What new challenges are there for MVNOs
 - Market
 - Industry
- How have MVNOs evolved
- What does it take to be an MVNO is a delayed industry?

MNO Components



How many ways can we split the MNO functions?

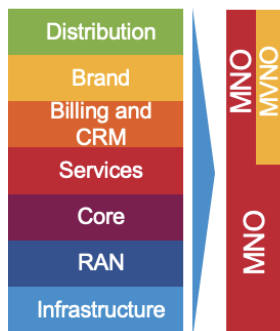


Driven by:

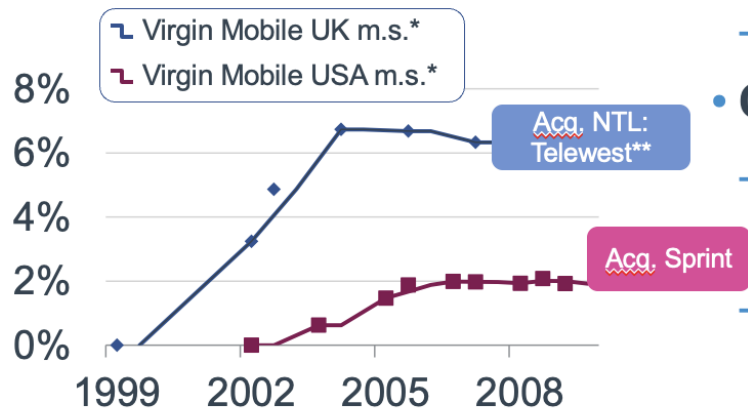
Market Effectiveness
(+ Regulation)

Capital Efficiency

All about brand: Virgin Mobile

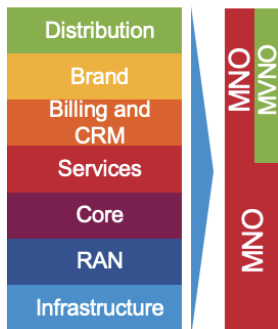


- **Launch:** 1999, UK, MVNO
 - JV with the MNO host
- **Selling point:** strong existing brand
- **Rapid growth:** early “viral” marketing
 - One million subs in 1.5 years
 - 2002 US entry + other markets
- **Outcome:**
 - Virgin Mobile UK / USA were discontinued in recent years (2023 / 2020)
 - MVNO in Chile, Colombia, Kuwait, Poland, Saudi Arabia, and the UAE



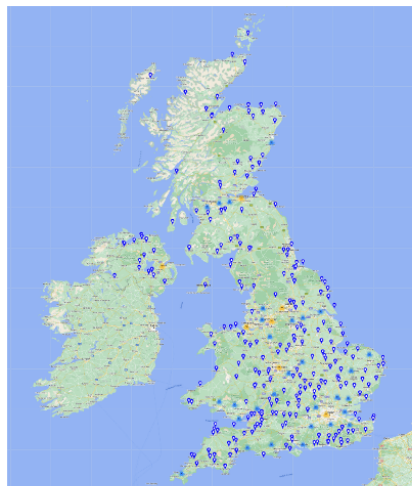
- Collected from press releases and news reports
- Later Virgin Media, now VMO2

All about retail distribution: Tesco Mobile

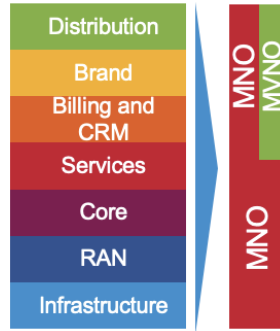


Over 500 of
Tesco's 800
superstores
have a Tesco
Mobile branch*

- **Launch:** 2003, UK
 - A JV with MNO host
 - Ireland, Slovakia, Czechia, Hungary (discontinued)
- **Selling point:** strong distribution, value for money
- **Market impact:**
 - Slow but steady subscriber growth
 - 5.5m UK subscribers after 21 years
- **Outcome:** Signed a 10-year extension to the UK JV agreement in 2024



Multiple hosts: Tracfone



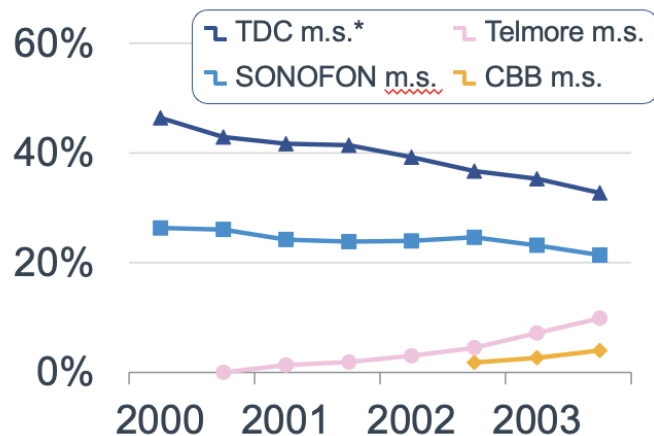
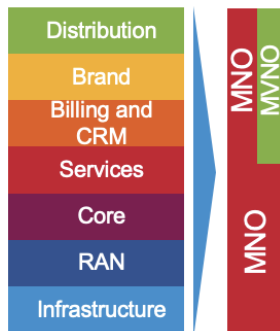
Brand portfolio



- **Launch:** 1996, USA, service provider
- **Selling point:** low-cost pre-paid phones, distribution in shops inc. 7-Eleven and Walmart
- **MVNO launch:**
 - Partnered with Walmart and Verizon to offer Straight Talk Wireless – a pre-pay MVNO
 - Created wholesale agreements with AT&T, Sprint, Verizon, and T-Mobile – rather than locking into one network
- **Outcome:** Verizon announced it would acquire TracFone in 2020, at which point it had 90 000 retail locations and ~6% market share

Cost and regulation: Telmore

TEL MORE

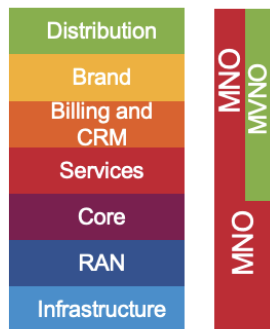


* National IT and Telecom Agency, Denmark (IT- og Telestyrelsen) | Telecom Statistics – Second half of 2003, via Allan Rasmussen

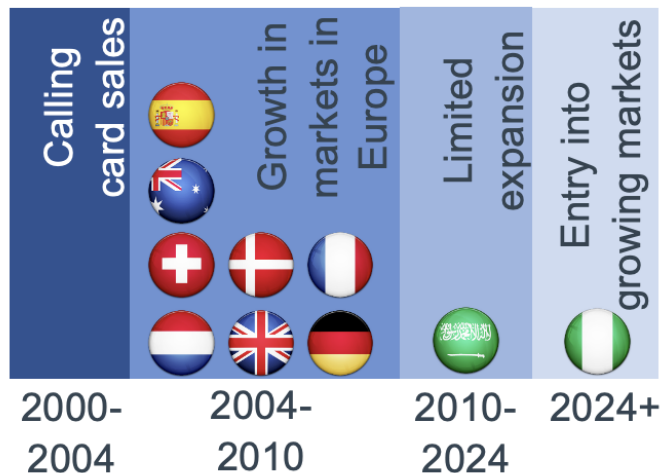
- **Launch:** 2000, Denmark, MVNO
- **Selling point:** online sales model, low prices
- **Market impact:**
 - MNP introduced June 2001
 - Telmore and CBB acquired 44% of new subs and 43% of porting requests in 2000-2003
 - Telmore had 460k subscribers by Q4 2003
 - Non-discrimination for MVNOs
 - Average price per minutes fell 54% in 2003
- **Outcome:** TDC acquired Telmore in December 2003, continuing to operate it as a separate entity, and still uses the brand today

Case Study: Lebara

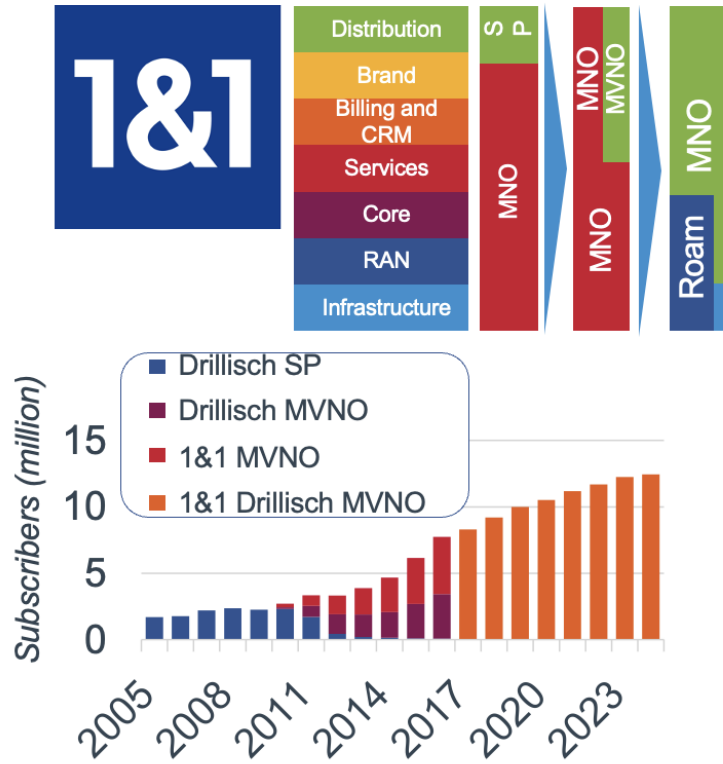
LEBARA



- **Launch:** 2001, UK, international calling cards
- **Selling point:** low-cost international calls – with call routing capability
- **International appeal:**
 - Lebara launched its first MVNO service in 2004 in the Netherlands, providing low-cost international calls
 - Lebara's brand targets international workers and has a strong presence in corner shops
- **Outcome:** Traditional voice positioning eroded by OTT voice
 - Increasing use of licensing agreements



SP to MNO: 1&1 (formerly 1&1 Drillisch*)

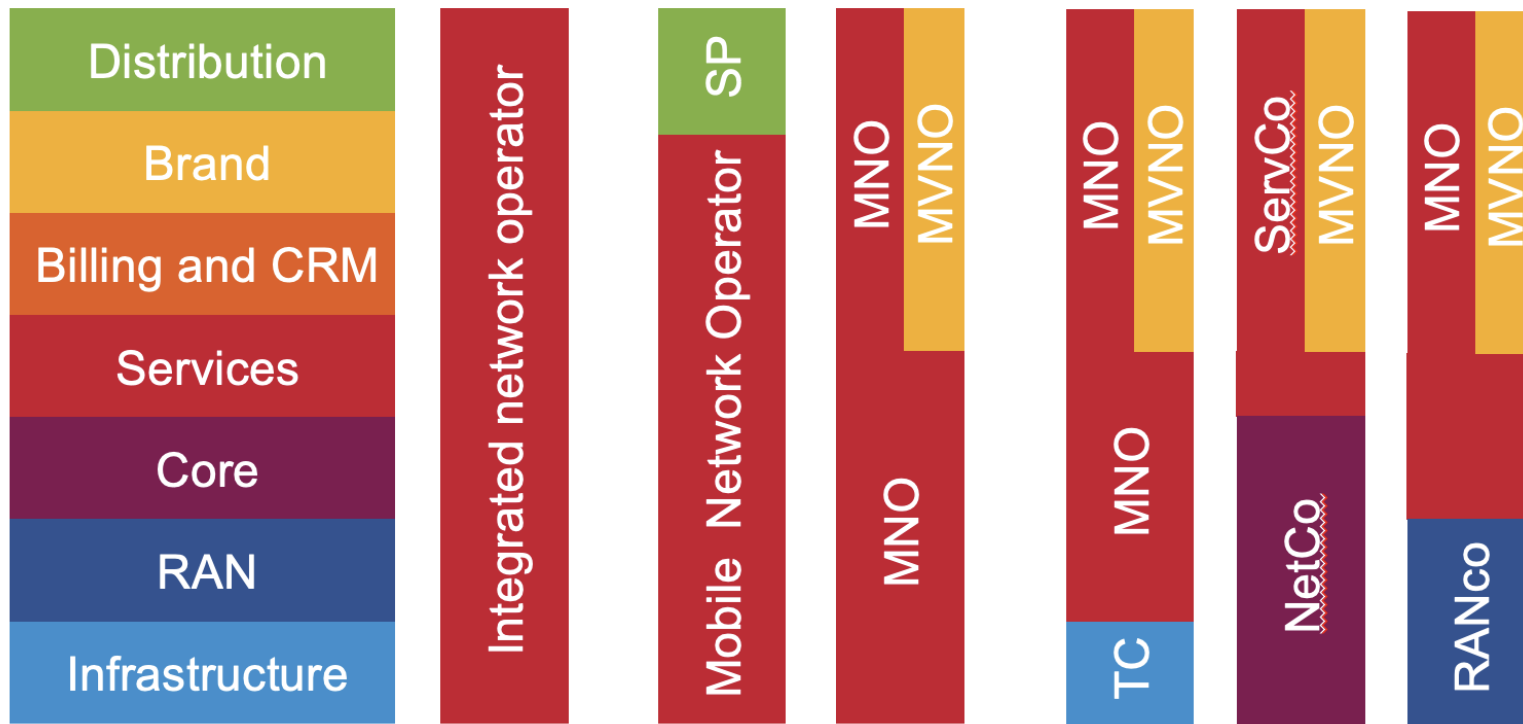


- **Launch:** 1997, Germany, Service Provider that became an MVNO
 - Large number of brands
- **Telefónica remedies:**
 - Following Telefónica's 2014 acquisition of E-Plus, Drillisch:
 - leased 20% of Telefónica's capacity
 - bought over 300 E-Plus and Telefónica shops
- **Transition to MNO:** In the 2019 5G auction, 1&1 acquired spectrum and leased 2.6GHz frequencies from Telefónica. It switched on its first sites in late 2023

* In 2017, Drillisch became 1&1 Drillisch following a reverse takeover by United Internet. From 2021 onwards, it has been known as 1&1

** Data collected from 1&1, 1&1 Drillisch, Drillisch, and BNetzA annual reports

How many ways can we split the MNO stack?



Driven by:

Market Effectiveness
(+ Regulation)

Capital Efficiency

Challenges and MVNO futures

- The market challenges
 - **Brand:** Operator sub-brands
 - **Distribution:** Digital channels
 - **Bundles:** Fewer 'mobile only' subs
- Industry challenges
 - **Capex cycles:** Delaying for capital efficiency
- The outcomes for MVNOs
 - Continuing growth for some
 - Many absorbed into MNO host
 - Evolution to MNO for one of the largest
- Some positives
 - NetCo and RANco could become ideal hosts for full MVNOs
 - eSIMs present opportunity
- MVNO competitive advantage
 - B2B niches: Application integration
 - Innovation alongside connectivity
 - Brands that can bundle with non-telco services
 - Regulatory opportunities in some markets

Next steps for the MVNO industry – some examples

eSIM Go (UK)



“MVNO-in-a-box” allows subscription-based organisations to offer MVNO services to customers

Revolut (International)



Banking app offers digital eSIM installation for international travellers

Cubic Telecom (International)



MVNO focussing on providing IoT connectivity in industries including automotive and transportation

Vitel Wireless (Nigeria)



Among first full MVNOs in Nigeria following issuance of licences by NCC – promoting local coverage

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