

Opportunities for MVNO growth in a changing connectivity landscape

A GSMA ebook

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The MVNO market has evolved significantly over the last decade, with operators continuing to expand into new markets, customer segments and service areas. As competition increases, many MVNOs are looking beyond traditional consumer propositions and exploring new ways to differentiate, attract customers and generate revenue.

At the same time, customer expectations are changing. Consumers increasingly expect seamless, digital-first experiences, while businesses are investing in technologies that enable greater connectivity, automation and operational efficiency. Together, these shifts are creating new opportunities for MVNOs willing to adapt and innovate.

Responding to changing customer needs

One area attracting significant attention is eSIM technology. For consumers, eSIM offers a convenient alternative to traditional SIM cards, enabling fast, digital activation and easier access to connectivity services when travelling internationally. For providers, eSIM can support new business models, improve the customer experience and create opportunities to reach new audiences through digital channels.

As demand for flexible and digital connectivity solutions continues to grow, many MVNOs are evaluating how eSIM-enabled services could complement their existing portfolios and support future growth objectives.

Looking beyond the consumer market

As reported by GSMA Intelligence, in the Enterprise Digital Transformation Survey insights, between 2024 and 2030, enterprises are expected to invest heavily in digital transformation initiatives, including investment in mobile connectivity, devices, IoT, big data and analytics solutions. As organisations modernise operations and connect more assets, devices and services, demand for connectivity expertise is expected to increase.

For MVNOs, these trends may create opportunities to develop connectivity propositions for specific enterprise needs, including:

- Enterprise mobility solutions
- IoT connectivity services
- Connected devices
- Industry-specific connectivity applications
- Managed connectivity services

These opportunities can help MVNOs to diversify revenue streams and develop propositions that address specific business challenges across a range of sectors.

Exploring new vertical markets

A number of industries are already embracing connected technologies to improve efficiency, enhance customer experiences and unlock new business models.

Key sectors include:

Public Sector

Supporting connected services, digital infrastructure and smart city initiatives

Energy and utilities

Enabling remote monitoring, asset management and operational efficiency.

Agriculture

Supporting precision farming, environmental monitoring and connected equipment.

Healthcare

Facilitating connected care, remote monitoring and improved service delivery.

Automotive and mobility

Powering connected vehicles, telematics and next-generation mobility services.

While levels of adoption vary by market and sector, the ongoing digitalisation of these industries continues to create opportunities for organisations capable of delivering reliable, scalable connectivity solutions.

For MVNOs looking to expand their reach, diversify revenue streams or enter new markets, understanding these emerging opportunities is only part of the equation. Success also depends on building the right industry relationships, developing strategic partnerships and staying connected to the wider mobile ecosystem.

An MVNO perspective: Why industry engagement matters

Every MVNO has its own priorities, challenges and growth objectives. To understand how industry engagement can support these ambitions, we spoke to Sonia Harjani, Director at Sona Business, a connectivity provider that recently transitioned to becoming a Full MVNO.

For Sona Business, joining the GSMA was driven by a practical business requirement: establishing roaming relationships and building the foundations needed to support international connectivity services.

"I think the first aspect is applying for a TADIG code because when you want to do roaming negotiation and roaming deals with other operators, you need to have a TADIG code, and that is included with GSMA Membership."

While access to operational resources was an important consideration, industry engagement was equally valuable.

"Secondly, it was also to attend the WAS event... doing proper roaming negotiations with the other operator, it was really easy."

As a new Full MVNO, Sonia attended a WAS event with a clear objective: to build relationships and begin commercial discussions with potential roaming partners.

"I basically had a goal of having at least 10 meetings in all of the three days that I was there."

The experience demonstrated the value of bringing decision-makers from across the mobile ecosystem together in a single place.

"I did have actually maybe even more than 10 meetings, but I also was able to secure 5 to 8 deals out of those meetings."

Reflecting on the experience, Sonia highlighted both the efficiency and practicality of the event format.

"For me, I think WAS was very beneficial, very straightforward... you sit with them and it's very quick, 15 minutes in and out. You tell them what do you want and they agree or they don't agree, you come to an agreement, then that's it."

Beyond commercial negotiations, participation also provided visibility into wider industry developments and emerging opportunities.

"Another interesting part of WAS in Dubai was the plenary session on travel eSIM. That was very interesting as well."

As Sona Business continues to develop its MVNO proposition, the company is also engaging with wider GSMA activities, including eSIM-focused collaboration.

"I have joined the eSIM Working Group because that is something that we are also launching right now. We're actually launching a travel eSIM."

Asked what advice she would give organisations considering GSMA Membership, Sonia pointed to the breadth of resources, expertise and opportunities available to members.

"I think becoming a member of GSMA gives you a very, very good value for your money."

"If you take everything into consideration, all the information provided, Member Gateway, the documents, you go to these events, the help from everybody, it is really, really beneficial."

For MVNOs looking to expand internationally, establish roaming partnerships or engage more closely with the wider mobile ecosystem, Sona Business's experience shows how industry relationships, operational resources and targeted events can support practical progress.

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Sonia Harjani
Director at Sona Business

GSMA tools, resources and expertise for MVNOs

As MVNOs grow and expand into new markets, access to trusted resources, industry frameworks and operational support can help simplify processes and accelerate progress.

Through GSMA Membership, organisations gain a wide range of tools, documentation and expert communities designed to support commercial, operational and technical activities across the mobile ecosystem. Many of these resources are available through the GSMA Member Gateway, where members can engage with Working Groups, access documentation and connect with industry peers.

Supporting roaming relationships

For MVNOs looking to establish or expand roaming partnerships, GSMA resources can help streamline negotiations and implementation.

Within the Wholesale Agreements and Solutions (WAS) community, members have access to industry-recognised roaming agreement templates, including documents widely used throughout the industry when establishing roaming relationships. These templates continue to be maintained and updated through member collaboration and support organisations entering into new agreements.

Members also gain access to commercial guidelines, charging principles and service implementation guidance covering areas such as roaming, interworking and new services.

Access to industry codes and operational resources

For many MVNOs, obtaining a TADIG code is an important milestone when preparing to establish roaming relationships with other operators. Access to TADIG codes is included with GSMA Membership and supports participation in the international roaming ecosystem.

Members can also access documentation and resources that support operational processes across wholesale and roaming functions, helping organisations navigate industry requirements and implement services more efficiently.

Technical guidance and industry frameworks

GSMA Working Groups bring together experts from across the mobile ecosystem to develop specifications, frameworks and best practices that support interoperability and industry collaboration.

Within the WAS community alone, members contribute to the development of agreement templates, commercial frameworks, charging models and service implementation guidelines covering technologies and services such as VoLTE, Open Gateway, billing and settlement evolution, quality management and future connectivity solutions.

Participation provides organisations with opportunities not only to access documentation, but also to contribute to industry discussions and help shape future developments.



From TADIG codes to technical frameworks, GSMA Membership provides access to the resources that support participation in the global mobile ecosystem.

Engage with expert communities

Beyond documentation and tools, GSMA Membership provides access to a network of specialist communities covering topics including roaming, eSIM, fraud and security, networks, devices and interoperability. These groups meet regularly through a combination of virtual and face-to-face activities, enabling members to collaborate throughout the year.

For MVNOs exploring new opportunities such as travel eSIM, international expansion or enterprise connectivity, participation in these communities provides access to knowledge, expertise and peer-to-peer learning from organisations facing similar challenges.

A platform for continuous learning and collaboration

GSMA Membership provides ongoing access to industry resources, expert communities, operational tools and collaboration opportunities that can support organisations at every stage of growth.

From establishing roaming agreements and accessing industry documentation to participating in Working Groups and connecting with partners worldwide, GSMA Membership helps MVNOs engage more effectively with the global mobile ecosystem and take advantage of the opportunities it creates.



Included with GSMA Membership

Collaborate with experts across roaming, eSIM, fraud & security, networks, devices and interoperability through a network of specialist communities and Working Groups.

Take the next step with GSMA Membership

As MVNOs explore new opportunities in roaming, enterprise connectivity and digital services, access to the right industry network and resources is increasingly important.

GSMA Membership provides access to a global community of mobile industry professionals, together with the expertise, events, documentation and Working Groups that support collaboration and growth.

As a GSMA Member, your organisation can:

- Participate in the GSMA WAS community
- Attend industry-leading WAS events
- Access roaming and interworking resources
- Apply for industry identifiers such as TADIG codes
- Engage with specialist Working Groups and task forces
- Access industry documentation, guidelines and agreement templates
- Connect with peers, partners and industry experts worldwide
- Contribute to discussions shaping the future of mobile connectivity

Connect with the global mobile ecosystem

GSMA Membership provides a platform for collaboration, knowledge sharing and industry engagement.

For MVNOs looking to strengthen existing partnerships, establish new commercial relationships or explore future growth opportunities, becoming part of the GSMA community can provide valuable access to the people, resources and forums that help turn ambitions into action.

Ready to learn more?



Discover how GSMA Membership can support your organisation's goals and help you engage with the global mobile ecosystem.

Find out more about GSMA Membership and speak with the Membership team about how it could support your business.

Join the GSMA. Connect with the industry. Explore new opportunities.