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MVNO Directory

(Europe, North America and the Rest of the World)

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The MVNO Directory (Europe, North America and the Rest of the World)
Blycroft Publishing is pleased to announce The MVNO Directory
Featuring over 200 profiles of active MVNOs with named individuals

The wireless carrier world has enjoyed lengthy periods of unchallenged and monopolistic growth around the world. In 1999 The Virgin Group partnered with One2One in the UK and launched what is now looked upon as the ultimate MVNO model. Since then many onlookers have tried to launch their own MVNO operation, some with great success and others with dramatic failure before even announcing their existence to the market. Blycroft Publishing is pleased to announce *'The MVNO Directory'*, the resource where the telecommunications world can find the world's MVNO details in one place.

We have examined the global MVNO arena and profiled MVNOs around the world. *'The MVNO Directory'* seeks to put you in touch with the key management and decision-makers for hundreds of MVNO operations.

We have researched almost every MVNO to provide you with:

- *Name of each MVNO profiled*
- *The physical / postal address of each MVNO*
- *A central telephone number so you can make contact with the MVNO*
- *...at least one NAMED contact with job title for each MVNO in our full profile sections*

For most MVNO profiles we have also provided, where applicable:

- *Multiple contacts within the MVNOs' management team (we do not provide direct lines or personal e-mail addresses unless published by the MVNO)*
- *A central fax number and company e-mail address*
- *Carrier(s) (mobile network operator) utilised and MVNE relationship*
- *Operation launch date, geographic focus and target market(s)*
- *Handset(s) promoted*
- *The parent company in charge of the MVNO operation*

We have also found additional profile information for some MVNOs, this can include (these figures are generally not made available by MVNOs):

- *Indicative subscriber stats*
- *Revenue figures*

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Quality of the Data

Research for *'The MVNO Directory'* began March 2006 and continues to date. The primary resources for data gathering are the actual MVNO operations, their parent companies and the carriers and MVNEs used. Web research and direct e-mail / telephone research have taken place – where possible we have verified profile information with the MVNOs. We have also extracted information from official government and regulatory resources. By closely following a plethora of traditional and new media wireless and non-wireless news resources we fully believe that *'The MVNO Directory'* can offer all potential buyers peace of mind.

We continually update *'The MVNO Directory'*, when you order you will receive our latest research. If you are still unsure please contact us to discuss your needs.

What Does 'The MVNO Directory' Cover?

Our research has been split into three sections: *Europe / North America The Rest of the World*. We have also provided market insights based upon our own research.

Case Studies

- *Virgin Mobile UK – Quoted as the world's first real MVNO*
- *telSPACE – Leading USA based MVNE*
- *AUSTAR Mobile – MVNO launched to exploit existing subscription customer base potential, the non mobile customers of AUSTAR Entertainment Pty Ltd*

Who Should Buy 'The MVNO Directory'?

- *Carriers (MNO) – Aids in researching acquisitions of MVNO operations to enable access to regions where a spectrum license has been turned down or proven too costly to purchase*
- *Carriers (MNO) – Provides a global insight into the success and failure of MVNOs and allows for research into whether or not a carrier should allow MVNOs on its network*
- *MVNEs / OSS / BSS / Systems Integrators – Opens up new markets where traditional carriers have lacked interest in their product offerings*
- *Analysts – Ability to quickly contact senior management to discuss critical research*
- *Existing MVNOs – Evaluate their own market and further markets for expansion*
- *Prospective MVNOs – Evaluate the existing and potential market to provide the ground work for a feasibility study*
- *Emerging Markets Carriers – Contribute towards judging whether to work with an mvno offering and whether or not to actively seek MVNO partnerships*

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MVNO Definition

What constitutes an MVNO varies depending on the research house and the analyst you ask. Take the SIMYO "MVNO" operation within Europe. SIMYO operates in Belgium, The Netherlands and Germany. The industry refers to SIMYO as an MVNO. We have classified SIMYO as a branded operation, not an MVNO.

MVNO – Mobile Virtual Network Operator

Our interpretation of this term is as follows:

1. There must be a mobile voice / data service
2. The owner of the operation does not own the physical network, specifically base stations, which the mobile service operates on
3. The operation must run in a geographic area utilising a physical network
4. The user relationship with the MNO (mobile network operator / wireless carrier) is operated and maintained by the MVNO
5. Roaming agreements are not MVNO operations

Referring back to the SIMYO operation, we have classified SIMYO as a brand. The SIMYO operation in Belgium is owned by BASE. The latter is also the carrier for SIMYO Belgium. SIMYO Germany utilises the German network operator E-Plus, similarly E-Plus is the owner of SIMYO Germany. In The Netherland SIMYO operates on the KPN network, KPN owns the SIMYO Netherlands operation. Delving deeper into the operation, E-Plus and BASE are both owned by KPN.

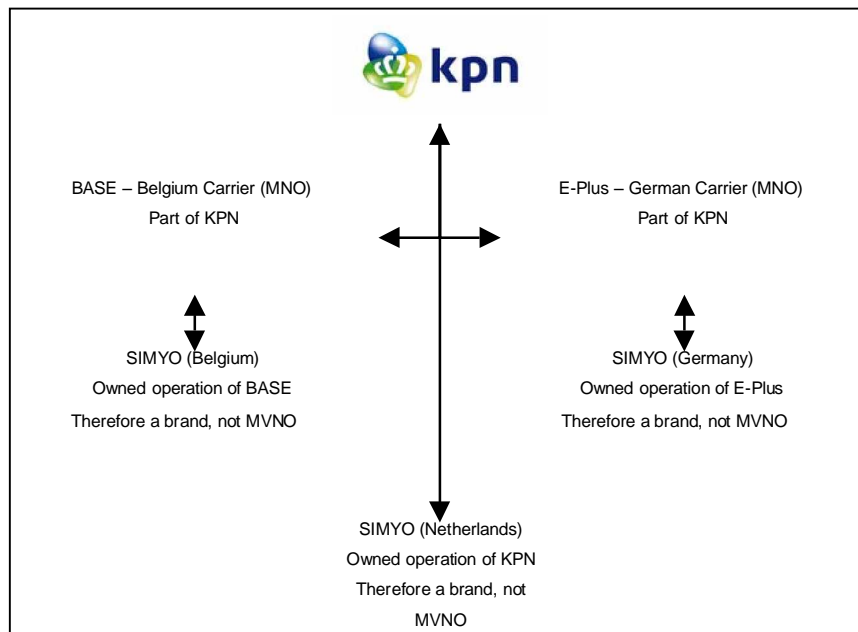


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Brief Market Overviews

Australia and New Zealand

Australia is an advanced MVNO market with close to 20 MVNOs. The overall mobile market is at near saturation point. Operators are now looking to new business models to sustain growth. To note, Boost Mobile launched their first MVNO operation in Australia, successfully targeting the youth market, which then saw their operation expand into New Zealand.

New Zealand has two MVNO operations; this reflects the size of New Zealand's population, just over 4,000,000.

Austria

There are few active MVNOs in Austria, which reflects its population size of 8,100,000. Two of the MVNOs, Schwarzfunk and Tele2, also operate outside of Austria, utilising international branding.

Belgium

BASE, a Belgian MNO, openly works with MVNOs as part of its core business strategy. BASE supports over 10 MVNO operations and with general mobile market saturation levels it is hard to see if there is enough room for the existing operations, let alone new entrants to the market. Following the historical and political traditions of Belgium, there are close links with French operations. Such as Normaction, who has operations in both Belgium and France.

Bolivia

According to our research, Bolivia hosts the only South American MVNO, namely COTAS Móvil.

Canada

The Canadian mobile market has not reached saturation point and their MVNO market has seen few willing entrants. This may be due to the overall population size of Canada (32,000,000) compared to its neighbour, the USA (295,000,000), and a lack of capital to invest based upon greater rewards to be had elsewhere. Within Quebec, Videotron may offer Rogers Communication a channel to gain subscribers, utilising a quad-play MVNO offering. Other MVNO operations tie in closely with the USA, namely 7-Eleven and Virgin Mobile.

Futur Telecom



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Futur Telecom
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Les Docks Atrium 10.7 - B.P. 35214
13567 Marseille Cedex 2
France

Job Title	Name	Telephone
CEO	Luc d' Urso	

Launch Date	February 2005
Geographic Focus	France
Target Market	Convergence Market Enterprise Market
Subscribers	
Revenue	

Parent Company	CID (Company of Diversified Investments)
MVNE Relationship	
Carrier(s)	SFR
Handsets	

NOTES

CID (Company of Diversified Investments) is 40% owned by SFR

Helio



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Fax: +1-310-445-7001
URL: <http://www.helio.com>
E-mail: rheineman@helio.com

Address:
HELIO
10960 Wilshire Boulevard, Suite 700
Los Angeles
CA 90024
USA

Job Title	Name	Telephone
CEO	Sky Dayton	
President & COO	Dr. Wonhee Sull	
CFO	Todd Tappin	
EVP, Marketing	Stuart Redsun	
EVP, Sales & Distribution	Ali Zanjani	
VP, Operations	Terry Boyle	
VP, Products & Services	Jay Lee	
VP, Technology	Inho Shin	
VP, Business Development	Michael Grossi	
Director, Media & Analyst Relations	Rick Heineman	

Launch Date	2 nd May 2006
Geographic Focus	USA
Target Market	Youth Korean-American
Subscribers	
Revenue	

Parent Company	Joint Venture between SK Telecom and EarthLink
MVNE Relationship	
Carrier(s)	Sprint Verizon
Handsets	Pantech (Hero) VK Mobile (Kickflip)

NOTES

Helio was to originally be called SK-Earthlink.

ZUMA Prepaid Wireless



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Fax: +1-626-844-2816
URL: <http://www.zumafone.com>
E-mail: lrvivas@ConexOne.com

Address:
 ConexOne Communications, Inc.
 150 S. Arroyo Parkway
 Pasadena
 CA 91105
 USA

Job Title	Name	Telephone
Marketing Director, ZUMA Prepaid Wireless	Lupe Rivas	

Launch Date	
Geographic Focus	USA
Target Market	Hispanic Community Pre-Paid Market
Subscribers	
Revenue	

Parent Company	Horizon Mobile (ConexOne Communications, Inc.)
MVNE Relationship	
Carrier(s)	
Handsets	

NOTES

Contact details relate to ConexOne.

Telispire



Tel: +1-940-397-9600
Fax:
URL: <http://www.telispire.com>
E-mail:

Address:
Telispire
4309 Jacksboro Hwy
Suite G
Wichita Falls, TX 76302
USA

Job Title	Name	Telephone
Chief Executive Officer	Curtis M. Knobloch	

Telispire was established in 2000 to provide private labelled nationwide wireless resale solutions for Independent Local Exchange Companies (ILEC's), Competitive Local Exchange Companies (CLEC's) and Universities.

It has an agreement with Sprint and provides services for Global Talk PCS and SDSU in the USA. Its services include a turn-key wireless resale solution, private label branding and distribution, multi-brand/location support, web browser interface, PoS system, flexible billing system, marketing and graphic design support.

telSPACE



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Fax: +1-425-799-7555
URL: <http://www.tel-space.com>
E-mail: info@tel-space.com

Address:
telSPACE
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Redmond
WA 98052
USA

Job Title	Name	Telephone
CEO	Paris Holt	+1-425-284-1775
CTO	Ryan Reed	+1-425-284-1774
CFO	Cody Hershey	+1-425-284-1777
VP of Development	George Chung	+1-425-284-1776
VP of Marketing	Jeremy Sands	+1-425-284-1773
VP of Technology	Pankaj Dhingra	+1-425-284-1772
VP of Sales	Jeremy Gies	+1-425-284-1778
Director, Customer Service & Fulfilment	Mia Mueller	+1-425-284-1771

The telSPACE telecom billing systems platform has been eight years in development and is a product that allows any company to private label communication services and become a Virtual Network Operator in a matter of 2-4 weeks with minimal start-up costs. telSPACE provides MVNE services to clients such as Payless Cellular and Lucky Wireless in the USA.

telSPACE can offer access to multiple carriers, automated carrier functions for customer support and activation, integrated PINs or PINless marketing strategies, post-paid and or prepaid billing and rating, revenue assurance, internal company owned customer service call centre, CRM module, MIS system, amongst others.

Defunct MVNOs and Operations Not Profiled

Our research has found many operations that either no longer exist or cannot be classified as MVNOs. To aid your use of this directory we have listed these operations in this chapter in alphabetical order.

ACN Finland <i>Acquired by TeliaSonera</i>	Finland
ALLO <i>Terminating August 2006</i>	The Netherlands http://www.allo.nl
Americas PCS <i>Terminated May 2005</i>	USA
AT&T <i>Acquired by Cingular</i>	USA http://www.att.com
Ay Yildiz <i>Part of BASE (MNO)</i>	Belgium http://www.ayyildiz.be
Ay Yildiz <i>Part of E-Plus (MNO)</i>	Germany http://www.ayyildiz.de
BASE <i>Part of E-Plus (MNO)</i>	Germany http://www.base.de
Bugal <i>Mobile content company</i>	Australia http://www.bugal.com.au
Call Plus Wireless <i>See Locus Mobile</i>	USA
Campuz <i>Part of Vodafone (MNO)</i>	Sweden http://www.campuzmobile.com
Cellcom <i>Acquired by The Carphone Warehouse</i>	UK
Cellhire <i>Reseller of MNO services (Optus)</i>	Australia http://www.cellhire.com.au
Cellular 3 <i>MNO (Eircell) terminated the agreement</i>	Ireland
Cellway <i>Acquired by mobilcom</i>	Germany http://www.cellway.de
CMC - De Mobile Cellulaires SA <i>Acquired by The Carphone Warehouse</i>	France http://www.cpwplc.com/cpw/media/press/2001/2001-05-29