



IoT Propositions for VNOs/MVNOs

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A graphic on the right side of the slide features a glowing orange globe with a network of white lines and dots. Below the globe is a grid of glowing orange squares. The letters "IOT" are prominently displayed in a large, white, bold, sans-serif font, with a glowing orange shadow beneath them.

IOT

MVNOs/VNOs are a major opportunity for India.



There was latent demand for MVNO licenses from the first decade of this century as even before an MVNO policy was announced, International MVNO major Virgin Mobile, which is focused on the youth segment, launched its brand in India under a franchising agreement with Tata Teleservices in 2008.

Future Group followed soon in a similar franchising agreement with Tata, replicating the supermarket MVNO concept in India with the launch of T24 in 2010. However, these could not succeed due the lack of MVNO regulations & mobile scenario in India.





TRAI issued its first MVNO policy recommendations in 2008 followed by fresh recommendations in 2015.



Thereafter, DoT announced its Virtual Network Operator (VNO) license policy in May 2016. Since then, DoT has issued 125 VNO licenses till March 2021. However, very few Unified service access i.e. Mobile VNOs (MVNOs) licenses have been issued.



However, due to some of the VNO licensing regulations coupled with lack of interest of Mobile Network Operators, the VNO sector has not really taken off in terms of operations.

IoT is one area where they can be a win-win relationship between MNOs and MVNOs especially with emergence of 5G!

WHY IS THE IoT SECTOR LUCRATIVE FOR MVNOs?

5G and eSIM technology will catalyse huge growth in the IoT sector and spur new use cases in a number of segments.

Demand for IoT connected devices is bound to go up exponentially with the emergence of 5G

Enhanced mobile broadband (eMBB)

Ultra-low latency (URLLC)

Massive Machine Type Communications (mMTC)

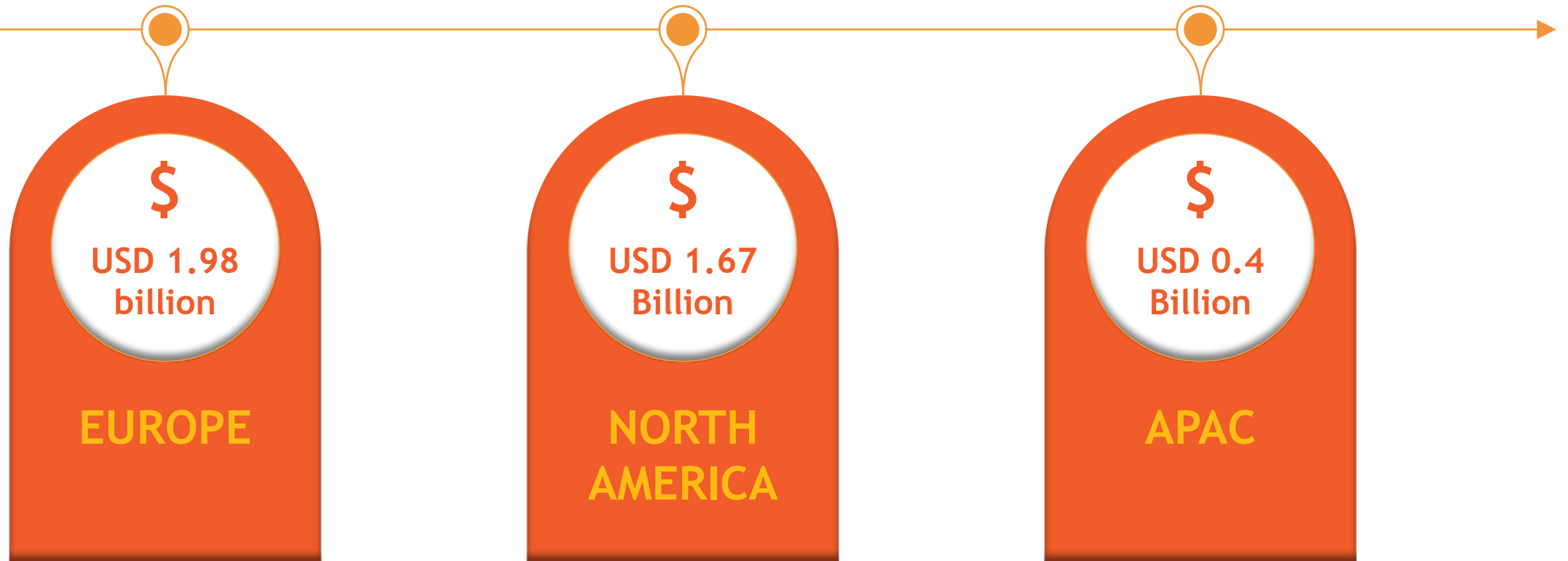
It's a game-changer! 5G enables faster, stable, & secure connectivity with reduced latency that's advancing everything from self-driving vehicles, to smart grids for renewable energy, to AI-enabled robots on factory floors.



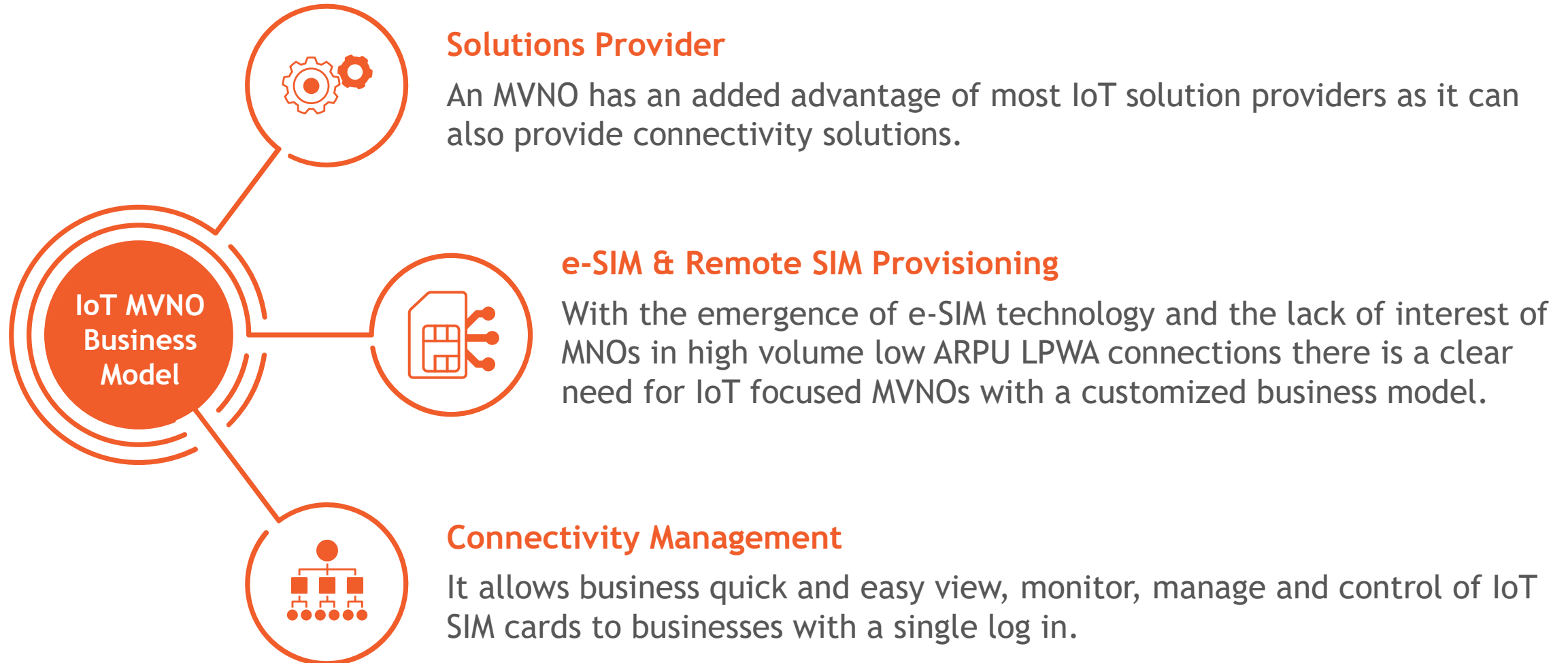
eSIM opens the door to added value services and enhanced flexibility. Network subscriptions can be provisioned and updated remotely over the entire device lifecycle.

THE IoT OPPORTUNITY

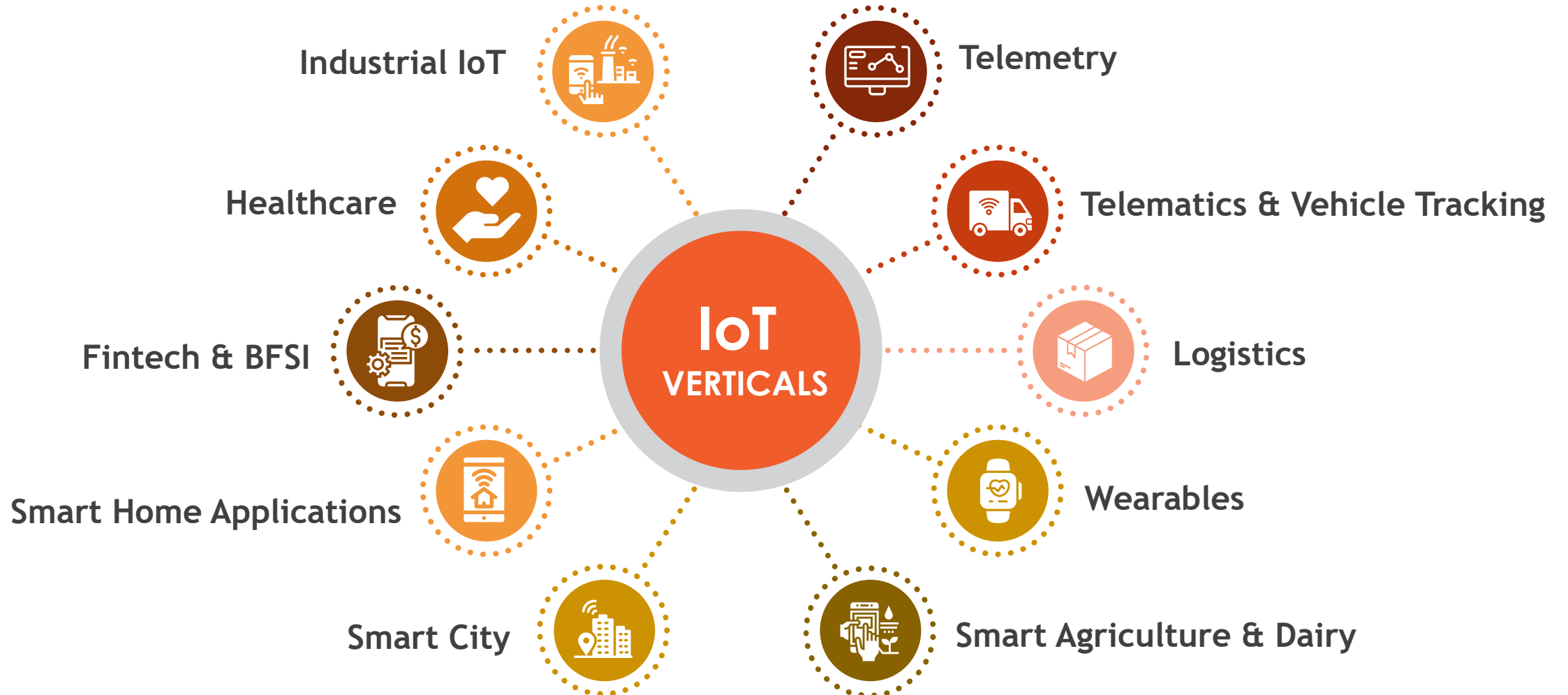
The IoT/M2M Opportunity is currently valued at USD 4.29 Billion and will grow to USD 6.41 billion in the next 5 years at a CAGR of 8.9%.



ROLE OF IoT MVNOs



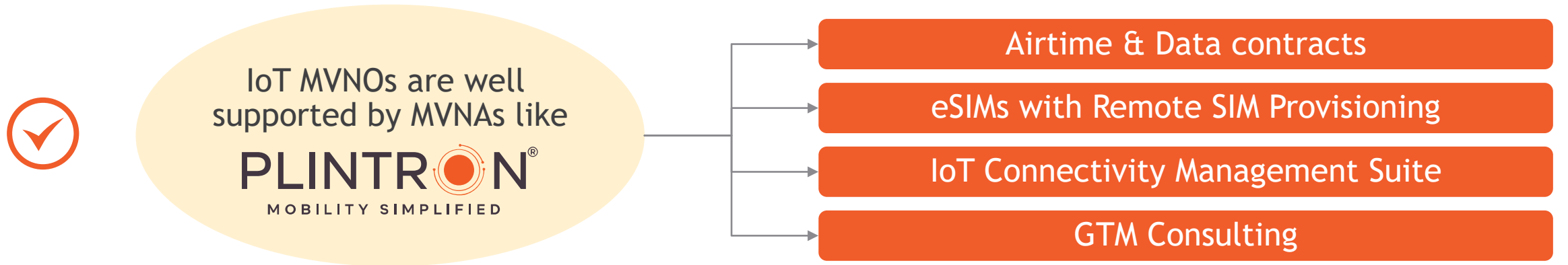
IoT VERTICALS WHERE IoT/M2M MVNO ADDS VALUE



CONCLUSION

✔ IoT has been transforming the telecommunications industry and with the emergence of 5G with eMBB, mMTC and URLLC will see further growth

✔ MNOs partnering with MVNOs = To work on Low ARPU High volume LPWA segments like **Telemetry**



✔ With 5G SA deployments enabling network slicing in the future, we will see a new breed of MVNOs target specific use cases with solutions that bundle their specific connectivity needs with cloud services and AI/big data solutions

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IOT