

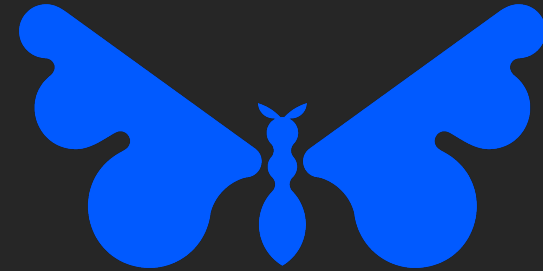
A Match Made In Heaven?

How MVNOs and MVNEs can work together to benefit the African consumer



MVNO Nation Africa 2026
Wesley Hellyar | Moth Innovate



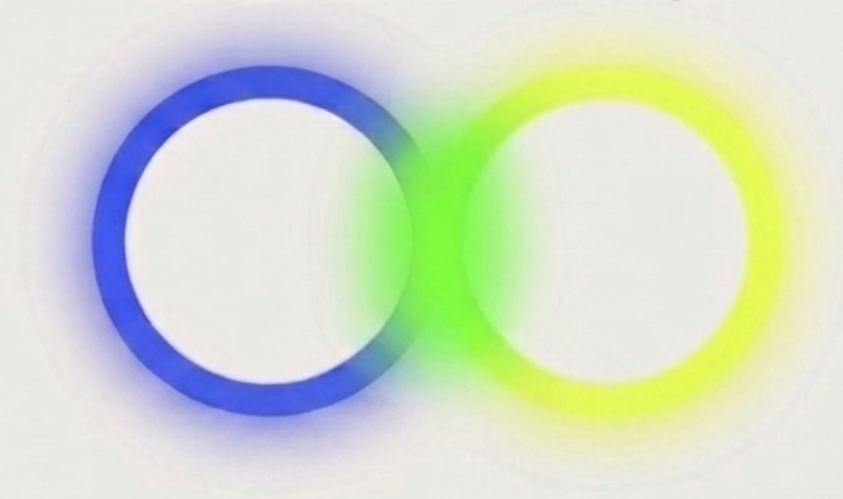


Moth
Innovate

MVNOs and MVNEs, A Match Made in Heaven - Or a Marriage of Convenience?



How MVNOs and MVNEs must evolve to unlock
the African consumer ecosystem.



What technology
are we buying?



What business
are we building?



Rethinking the RFP: From Illusion to Alignment

The Problem: The Traditional RFP Illusion



The Reality: The Traditional RFP is Fundamentally Broken

Rewards the MVNE (MVNO Enabler)

Slick Sales Team,
Glossy Pitch Deck



Lowest Race-to-the-Bottom Price



Result: Wastes Months



Rigid Features

Forced to buy
standardized
features vs. custom
requirements

Bureaucratic Limbo



The Solution: The Smart Shift to Rapid Design

The Agile Design Way

Rapid Commercial Design Sessions



Establish True Alignment

Partner capabilities Your business needs



Faster



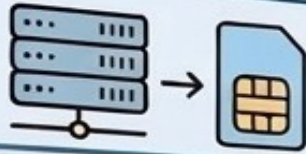
Faster
to Market

Build What is Required



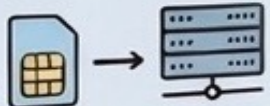
The Hard Truth About Tech

"Technology Seldom Kills an MVNO. Your Business Model Does."



The Commodity

In 2026, core telco infrastructure - billing, provisioning, SIM profiles, and connectivity - is just a basic utility. Anyone can buy it.



BASIC TELCO



The Partnership



You do not need a tech vendor who drops a platform on your lap and walks away. You need an **active business partner** willing to **hand-hold your** unique value proposition.



The Fatal Flaw

Launching a brand simply because you found an MVNE with a cheap, shiny platform is a fast track to failure.



The MVNE reality check

Customer needs are different.



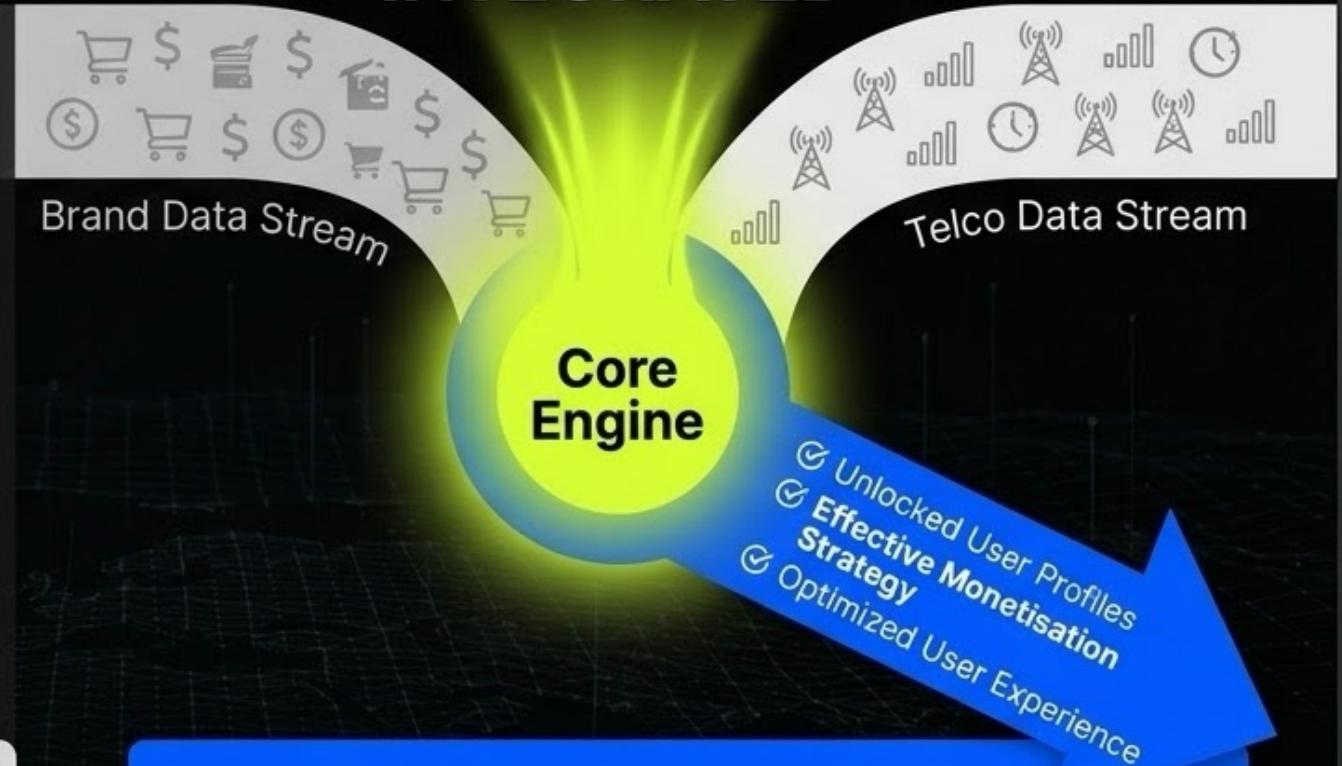
The Analytics Blindspot

CURRENT STATE: The Data Gaps

- **Rich in Brand Data, Starving for Telco Analytics**
- **The Paradox:** Top banking MVNOs have world-class financial analytics, deeply understanding users' spending profiles.
- Yet, MVNEs hand back basic, stagnant, out-of-date telco data.
- **Key Impact:** core engine stalls due to separation.

RESULT: If you can't see how mobile usage correlates with real-world spending, you cannot **monetise** the user effectively.

INTEGRATED



THE SOLUTION: Connect data streams for real-time insights and effective user monetization.



Case Study

The CVM Revolution

❑ Innovative CVM Project

❑ The MVNE/MVNO Blindspot

❑ The CVM Opportunity



Hard Questions to ask your MVNE

Before you sign anything, get answers to these technical questions:

- ☐ Can your platform ingest both our telco and non-telco data streams to trigger automated cellular rewards, churn prevention and upselling within seconds?
- ☐ What does the raw data hand-off look like, and can our internal BI tools access it via open APIs in real-time?
- ☐ Are your commercial KPIs tied to our total ecosystem growth, or do you only care if we buy more wholesale airtime?



Rules for a Profitable Partnership

- ❑ **The OPEX Shift:** Demand a digital-first agile MVNE. Eliminate heavy upfront CAPEX to allow for scalability
- ❑ **Commercial Transparency:** Enforce absolute visibility on actual platform costs and wholesale cellular margins. No hidden charges and data layer fees
- ❑ **Architectural Freedom:** Mandate an open-API ecosystem. Your product team must have the autonomy to shift campaigns in days, not weeks
- ❑ **Data Ownership:** Total transparency on telco reporting is non-negotiable. If they control the data stream, they control your business





The Strategic War Room (and Breakout Session)

The R0 Threat & Stress Test

The Unified Scenario:

A massive, deep-pocketed competitor enters your specific market segment and launches a rival MVNO. They treat mobile data as a R0 loss-leader - offering **completely free basic connectivity** to 'steal' your customer base. Price cutting is no longer an option. You cannot win on a cheaper per-GB rate.

The Debate Questions:

- ❑ **The Strategy (For Aspiring MVNOs):** If connectivity becomes completely free tomorrow, what is the single, non-telco reason your target audience stays with you? What is left of your value proposition?
- ❑ **The Execution (For Existing MVNOs):** Will your MVNE partnership actually let you pivot fast enough? Can their platform ingest your non-telco corporate data in real-time to trigger rewards dynamically, or are you dead in the water waiting on a contract amendment and months long IT change requests?



Summary & Panel Kick-off

The Takeaway

- From a technology perspective, the MVNE must be an invisible, highly flexible engine - not a commercial roadblock wrapped in a legacy IT framework.
- At the same time, the MVNE needs to also be your commercial and strategy partner.

The Launchpad

- You cannot build a modern loyalty ecosystem if your enabling partner is still stuck in a traditional telco mindset while only focusing on telco systems. Execution requires absolute commercial and technical alignment from day one.

The Transition

- Bringing up our panel we will debate:
In the African market, the boldest thing an MVNO can do is stop acting like a traditional phone company and start using the SIM card as a remote control for customer loyalty.





Wesley Hellyar
Moth Innovate

wesley@mothinnovate.com

“Stop Building Mini-Telcos. Start Building Ecosystems” ~ Wesley Hellyar



Panel Discussion