



10:00 Registration & Coffee

10:45 Chair's Opening Remarks

11:00 Analyst Address

MVNO Market Outlook

11:20 Presentation

The Customer Relationship Is Up for Grabs: Who Will Own the Next Billion Mobile Connections?

- How fintechs, retailers and digital platforms are reshaping customer ownership
- What this means for operators, MVNOs and the future value chain
- Why network ownership no longer guarantees customer ownership

11:50 Panel Discussion

The Great MVNO Rebuild: If Connectivity Is Free, What Business Are You Really In?

- The shift from telecom provider to digital service platform
- Creating value beyond data, voice and connectivity
- Which business models will thrive in the next decade?

12:10 Panel Discussion

The Takeover of the Non-Traditional MVNO: Why Brands Want to Own Connectivity

- Why retailers, fintechs and consumer brands are entering telecoms
- Using connectivity to drive loyalty, engagement and customer insight
- Lessons from the companies reshaping the MVNO landscape

12:50 Lunch

13:50 Panel Discussion

The Profitability Reckoning: Winning Beyond Subscriber Growth

- Has the race for subscribers reached its limits?
- Retention, ARPU and loyalty: the new growth levers

- What separates profitable growth from growth at any cost

14:30 Panel Discussion

Open Gateway: Can MVNOs Turn Network Capabilities into Revenue?

- Separating Open Gateway promise from commercial reality
- Which API use cases are gaining genuine market traction?
- What role can MVNOs play in the API ecosystem?

15:10 Presentation

Bold Predictions: What Will Be the Biggest MVNO Story of 2027?

- Which business models will define the next wave of MVNO growth?
- AI, eSIM, satellite or embedded connectivity: where will the next disruption emerge?
- The opportunities, threats and market shifts set to shape 2027

15:30 Chair's Closing Remarks

15:35 Networking Drinks

16:35 MVNOs Connect Networking Party