

FUNNEL BOOK · 01

# Cloud gaming: the *marketing engine* that unlocks your 5G.

You spent a billion dollars on 5G. This is how consumers finally feel it, and how your VAS line finally books against it. A playbook built with telcos, for telcos, by operators who've already shipped it in 9 markets.

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FOR

The CMO's office · VAS owner

FROM

Radian Arc · Lumin8 · Opratel

COMPANION TO

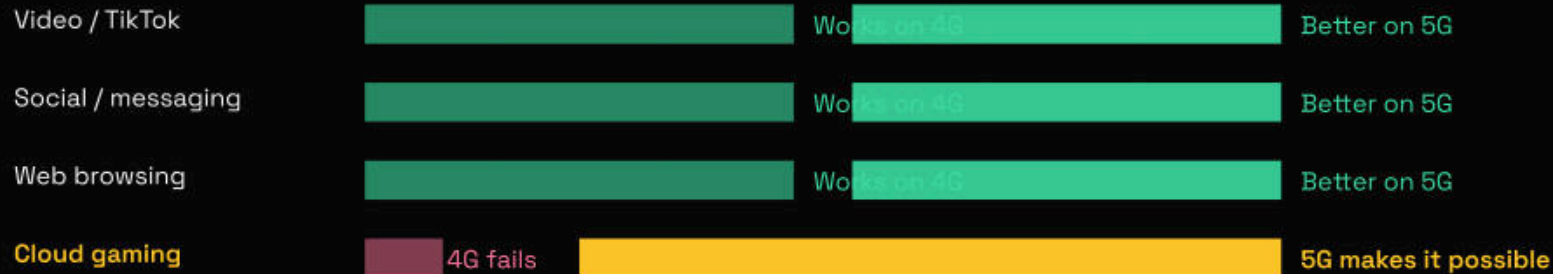
marketing-360 on the site

RUNS WITH

Tech Stack · SaaS Bible · White Paper

# Consumers don't need 5G to watch *the next TikTok*. They need it *to play*.

CONSUMER USE CASE · 4G vs 5G LATENCY



Cloud gaming is the only consumer category where 5G latency shows up in the experience

Every other consumer app works fine on 4G: video, social, messaging. Cloud gaming is the one consumer product that can't exist without 5G latency. That makes it the single use case your billion-dollar 5G investment actually monetizes at consumer ARPU.

· SK TELECOM'S 5G EXPERIENCE LAB · TWO FLOORS · ONE CONSUMER PRODUCT · CLOUD GAMING

# \$1B+

TYPICAL TELCO 5G CAPEX

Most 5G use cases monetize enterprise IoT. Gaming is the one that lands in the consumer P&L, because it's the one that actually needs the network.

THREE TRUTHS

CMO-FIRST BY DESIGN

# This isn't a tech pitch. It's a *monetization pitch*, and it starts on your desk.

## 01

### You own this decision.

In 80 telco engagements worldwide, 79 closed because the CMO told the CIO to deploy. Cloud gaming lives in the monetization column, not the infrastructure column. That's why it's your desk, not IT's.

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79 / 80 DEALS · CMO-LED, NO BAKE-OFF

## 02

### Gaming is your 5G story.

You need a consumer headline for your 5G capex, something a subscriber can feel, not a bullet on a roadmap. Cloud gaming is the only consumer product where 5G latency shows up in the experience. Everything else works on 4G.

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**LATENCY** · THE ONE 5G FEATURE CONSUMERS NOTICE

## 03

### Marketing decides who wins.

Hardware and catalog are baseline, the same across every Radian Arc deployment. The variable is marketing. The telcos that launched and faltered didn't lose on infrastructure. They lost because this category needs a specific muscle most haven't built: funnel ops, gamer-literate creative, user-path discipline, a holistic 360 plan. We run it play-by-play, inside the same package.

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**THE VARIABLE** · MARKETING AS THE THIRD PILLAR

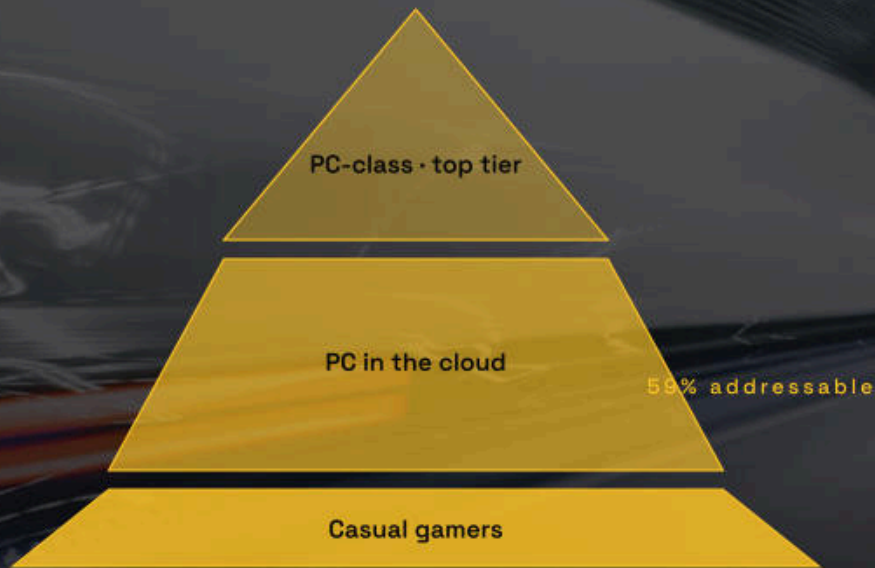
LIVE TODAY

80 telcos

9 markets. 5 continents. Already shipping the engine you're about to see.

LIVE DEPLOYMENTS • CHILE • PARAGUAY • COSTA RICA • URUGUAY • THAILAND • INDIA • MALAYSIA • ITALY • AND COUNTING

# The market is going from **\$1B to \$13B** in 36 months. Pick a side.



**2.5B**

Gamers · global

Newzoo. Half the connected planet plays games regularly. Cloud gaming is the delivery layer that finally serves them all.

**\$13B**

Cloud gaming TAM 2026

Up from \$1B in 2021. 48% CAGR. The only consumer 5G category with this growth curve.

**59%**

Addressable today

"PC in the cloud" + casual gamers. The two cohorts cloud gaming serves better than anything else on the market.

**43%**

5G CAGR · same window

Ericsson Mobility Report. 500M to 3.5B 5G subscribers, 2021 to 2026. Two curves moving in lockstep.

LIVE DEPLOYMENTS

9 NAMED TELCOS · 480M+ SUBSCRIBERS

# Already shipping with the operators *your peers benchmark against.*

OPERATOR	REGION	STATUS	SUBSCRIBER TAM	NOTE
Operator A	South Asia	POC · Jan 2023	354M	National 5G cloud gaming first
Operator B	Southeast Asia	Beta live	50M	Branded experience
Operator C	Indonesian archipelago	Live · Dec 2022	41.5M	Branded gaming product
Operator D	Gulf · KSA	Live · Jan 2023	21M	Premium tier
Operator E	Malaysia	Live · Nov 2022	10M	Mobile add-on at ~\$9/mo
Operator F	South America	Live · Mar 2023	4M	Local pricing · 400+ titles
Operator G	Singapore	Live · Sep 2022	2.1M	Branded · 500+ games
Operator H	Macau	Live · Nov 2022	600K	Beat target by 87% at \$0 CAC
Operator I	Brunei	Live · Dec 2022	500K	Gaming Private Network · ~\$9/mo

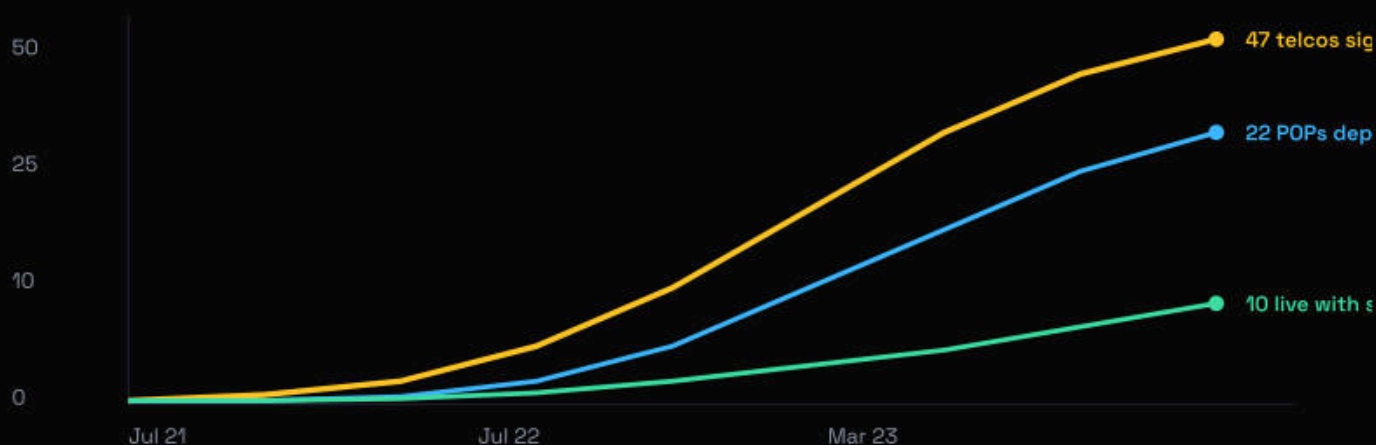
Aggregate subscriber TAM across the named footprint: ~480M+. Plus 38 more signed telcos working through deployment. Status as of Q1 2023 reference.

ADOPTION

JUL 2021 TO MAR 2023

# From *1 telco* to *47 signed* in 21 months.

ADOPTION • JUL 2021 TO MAR 2023



**47**

**Telcos signed**

Up from 1 in July 2021. Adoption curve has only steepened. The category has crossed the chasm.

**22**

**POPs deployed**

GPU POP infrastructure live, in-network, sovereign by design. Ready to take subscribers.

**10**

**Live with subs**

Telcos with paying gamers today. Real revenue, real ARPU, real churn data feeding the playbook.

"79 of those 80 deals closed because the CMO told the CIO to deploy. One bake-off in our entire history. The

# Four building blocks. One *go-to-market engine*.

## 01

### Hardware

AMD-powered POPs inside your network. One rack, 42RU, ~10kW. Sovereign by design.

CAPEX-FREE · OPERATOR LEASE

## 02

### Catalog

Blacknut subscription (1,000+ titles), OnePlay buy-and-stream, bonus games, bonus launches every quarter.

AGGREGATION MODEL · SUBS + STORE + HARDWARE

## 03

### SaaS

Three integration tiers, from branded-Blacknut app to full SDK white-label. You pick the ambition.

BASIC · BRANDED · GOLD

## 04

### Marketing

The engine most telcos haven't built. Programmatic acquisition, brand platform, retail activation, title partnerships, operated by embedded teams.

THIS BOOK · END TO END

# How deep do you want to *own gaming* in your market?

TIER · BASIC

## Blacknut app

Resell a ready-made gaming brand. Fast to launch. You inherit Blacknut's ceiling.

- Branded Blacknut app, swap your logo
- DCB billing integration
- Basic promo templates
- No brand build, no UX build
- Go-live in weeks

TELCO DEFAULT · WHEN GAMING ISN'T THE BRAND BET

TIER · BRANDED

## White-label

Your brand on top of the Blacknut and OnePlay platforms. Our marketing team runs the funnel.

- Reskinned UI, your logo and palette
- Both subscription and buy-and-stream
- Full marketing support (ATL + BTL + programmatic)
- Extended GPU stack options
- Better commercial terms

THE USUAL TARGET · WHEN YOU WANT A GAMING BRAND

TIER · GOLD

## Integrated

Full SDK build. Your app, your UX, our engine underneath. Embedded teams on your side of the table.

- SDK-integrated single experience
- Embedded Radian Arc / Lumin8 / Opratel team
- Custom UX, custom content logic
- Hardware marketplace on your platform
- Longer lead, bigger upside

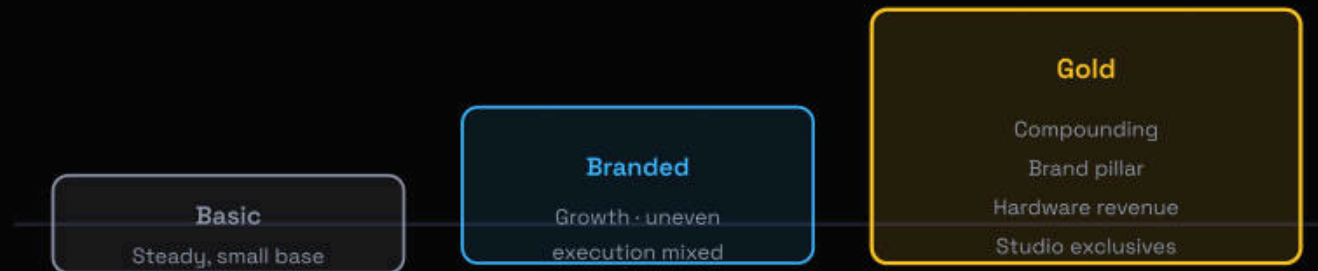
WHEN YOU'RE REALLY PLAYING · GAMING IS YOUR 5G BRAND

WHAT EACH TIER ACTUALLY PRODUCES

ANONYMIZED · LIVE DEPLOYMENTS

# Same engine. Three ambitions. *Three different outcomes.*

SAME ENGINE · DIFFERENT AMBITION · DIFFERENT OUTCOME



Pick your tier on outcome, not on spend. The platform is the same in all three. The difference is how much of the 360 you take, and how seriously you treat gaming as a 5G brand bet.

BASIC OUTCOME

## Operator A · mature urban market

Took the white-label app. No brand build, no embedded marketing team. Twelve months in: stable but small subscriber base, steady churn, no category narrative in-market. The platform pays for itself, but it doesn't anchor a 5G story.

SELF-SUFFICIENT · NOT A BRAND BET

BRANDED OUTCOME

## Operator B · regional Asia

Reskinned platform. Brand ambition present, internal execution mixed. Controller onboarding lingered past day 60. Marketing output uneven. Growth exists, but nowhere near the headline a 5G story needs. The case for taking the embedded layer next.

THE CASE FOR EMBEDDED EXECUTION

GOLD OUTCOME

## Operator C · national high-growth

Integrated build with full embedded team on brand, programmatic, retail, title partnerships. ATL brand platform live. National esports tournament hosted. Hardware marketplace built into the platform. Gaming positioned as the flagship 5G consumer bet. Subs compounding quarter on quarter.

GAMING AS A BRAND PILLAR · NOT A VAS SKU

AGGREGATION, NOT SUBSCRIPTION

AGGREGATION PLATFORM · NOT A SINGLE SUB

# You're not selling a gaming *subscription*. You're building the gaming *aggregation platform*.

FOUR REVENUE STREAMS · ONE PLATFORM

## Subscription

Always-on library  
Recurring revenue

## Buy and rent

Per-title revenue  
Steam library access

## In-game purchases

Diamonds, V-bucks  
Skins, season passes

## Hardware

Marketplace cut  
Controllers, VR, more

Same login. Same wallet. Same brand. The aggregation play.

A subscription gives you one library and one bill. An aggregation platform is bigger: a curated subscription tier for the always-on catalog, a store for buy-and-rent of blockbuster AAA, a place to play the games subscribers already own on Steam, and the hardware layer that pulls it together. The telco that runs cloud gaming as a single subscription is one product. The telco that runs it as an aggregation platform is a gaming service AND a media service. Subscribers depend on you for their Steam library, their AAA titles, their subscription catalog, and their hardware. That's a moat, not a SKU.

## SUBSCRIPTION

### Blacknut

1,000+ cleared titles. Family, mobile, indie, retro. Monthly or annual. Five profiles per household. Your always-on library.

## BUY AND STREAM

### OnePlay

BYOG: bring your Steam library to the cloud. Or buy and rent AAA directly. The GeForce Now / Boosteroid lane in our stack.

## DIRECT STUDIO DEALS

### AAA exclusives

Activision, EA, Konami. We help you pitch directly. Studios trade exclusivity for marketing muscle: community, activation, eSports.

## HARDWARE ECOSYSTEM

### Controllers + beyond

Controllers are step one. Then wheels, headsets, VR, treadmills, sim rigs. A full marketplace, your storefront, your cut.

# Four content partners. *Pick the mix that matches your market.*

The catalog isn't one provider. It's a stack of four content partners we've already integrated and operated across markets. Mix them by market, by audience cohort, by price point. Each one is a different shape of demand.



## Blacknut

Subscription. 1,000+ titles. Family / mobile / casual. The always-on library that drives recurring revenue.

**SUB MODEL** · ALWAYS-ON LIBRARY



## OnePlay

Buy-and-stream. Bring your own Steam library. Fortnite, COD, FIFA, the headliners that drive acquisition.

**STORE MODEL** · ITUNES-SHAPE



## OnMobile

Mobile-first casual. Hyper-casual. Daily / weekly engagement. Strong for prepaid markets and emerging-market price points.

**CASUAL LAYER** · PREPAID-FRIENDLY



## AntStream

Retro / arcade. Cult library of classics. The nostalgia tier. Powerful for Gen X / millennial dads, family rooms.

**LONG-TAIL LAYER** · RETRO

# The Blacknut catalog now ships with a *bonus games* layer. Positioning brief in flight.

Blacknut's bonus-games tier sits on top of the standard subscription as a curated drop layer: limited-time exclusives, new-release windowed access, marquee titles released as a "bonus" reward inside the subscription. We're aligning with Chris (Blacknut) on the positioning ahead of locking this slide.

## What it is · today

Premium titles released into the standard Blacknut sub for limited windows. The "bonus" framing converts new-title hype into sub stickiness.

## Positioning question

Is "bonus" the right consumer-facing framing? Or "new release rotation"? Or "premium drop"? Blacknut's input lands here once Chris's notes arrive.

## Marketing angle

Whichever framing wins, the marketing job is the same: surface the new bonus drop on home, push it through retention beats, treat each bonus as a tentpole event.

Placeholder slide. Final positioning copy to land once the Blacknut team confirms.

# Mobile is where *most of your subscribers actually play.*

In every emerging market, the mobile catalog isn't an extension. It's the primary acquisition vehicle. Android handsets are how new subs first discover cloud gaming. iOS is the upsell. Both run the same platform, the same library, the same flows.

## Android catalog

Hundreds of mobile-first titles. Touch-control native, controller-aware, low-bandwidth tuned. The everyday session.

## Cross-screen library

Same account, same progression, same controller pairing. Start on the BTS, finish on the TV.

## Why it matters

In a prepaid-led market, the first session has to be on Android. If it isn't, you don't acquire. We optimize the entire entry flow around it.

# The four partners are *modular*. The right mix changes by market.

No single content combination wins everywhere. ARPU bands, prepaid / postpaid split, competitive set, smartphone penetration, age curve, all of it shifts the recipe. We rebaseline the four-partner mix in week one against your DMP and your competitive position.

## PREMIUM GULF OPERATOR

### Blacknut + OnePlay + AAA direct

Mid-size premium TAM, high ARPU, AAA-skewed, iPhone-heavy. Lead with premium subscription + buy-and-rent + studio-direct. Hardware marketplace day one.

MAXIMALIST · FULL AGGREGATION

## PREPAID EMERGING ARCHIPELAGO

### Blacknut + OnMobile + AntStream

Large prepaid-led TAM, low ARPU, family-tilted. Hyper-casual + retro stretches catalog across price points. Zero-rating essential. Buy-and-stream phased Year 2.

VOLUME · PREPAID-FRIENDLY

## MASS-MARKET HYBRID · SOUTH ASIA

### Blacknut + OnePlay + OnMobile

Massive mixed prepaid / postpaid TAM. Mobile-led with PC-in-cloud upsell. Hard bundles into 5G plans. Cricket and FIFA tentpoles. National COD tournament Year 1.

HYBRID · 5G HEADLINE

## MATURE URBAN ISLAND OPERATOR

### Blacknut + OnePlay + AAA direct

Compact TAM, premium ARPU, sophisticated audience, strong console adjacency. Quality over volume. Studio-direct AAA + buy-and-stream lead. Family-tier optional Year 2.

## ESPORTS-SATURATED MATURE MARKET

### OnePlay + AAA direct + Blacknut

Mature PC-gaming culture, esports baked into mainstream. Lead with BYOG and studio-direct exclusives, subscription as the family bridge. Tournament-grade hardware tier mandatory. Brand platform anchored on pro circuits.

## LATIN AMERICA RETAIL-LED MARKET

### Blacknut + OnMobile + AntStream + STB

Prepaid + cable IPTV mass market. AntStream pulls Gen X dads, OnMobile picks up the prepaid base, Blacknut anchors the family. Retail bundle is the volume engine. FIFA tentpoles around national football moments.

# The catalog now plays in the *top tier*.

01

## Activision

Just launched in the Blacknut catalog. Call of Duty, Crash, Tony Hawk, the cultural anchors.

02

## Fortnite

Coming via Buy-and-Stream on OnePlay. The game every CMO's son asks about.

03

## Cricket 2026

In-flight with Tencent for the True and Jio territories. Culture-specific must-haves.

04

## FIFA

World Cup tie-in ready. Stadium activations, meet-and-greets with Ryan Giggs, Eden Hazard in the pipeline.

“The catalog is making leaps and bounds every quarter. New deals, new genres, new exclusives. The slate looks materially different every 90 days, and that pace is structural, not seasonal.”

DAVID COOK · CEO RADIAN ARC · APRIL 2026

# Every *90 days*, the catalog story gets sharper. We refresh it with you.

Content moves faster than any other telco VAS category, and that's a feature, not a problem. Every quarter brings new titles, new exclusives, new tentpoles. We run the refresh on three tracks so your marketing always rides the front edge of the slate, not the back.



## Catalog desk

Every quarter, a refreshed positioning document: what's in, what's hero, what's tentpole, what to lead with by market and demo.



## Creative refresh

New hero creative per tentpole. Edits for ATL and social. TVC, OOH, in-app banners, STB promo reels on a shared drop.



## Media weight shift

Performance engine reallocates spend behind the new tentpoles within 7 days. No lag between title drop and acquisition push.

THE CONTROLLER IS THE PRODUCT

HARDWARE · REVENUE · ADVERTISING

BRANDED CONTROLLER · DEVICE ANIMATION

THE FULL MARKETPLACE

# Every branded controller in the city is an *ad that pays its own way.*

Hardware isn't an accessory to cloud gaming. It's the product on day one, the revenue layer on day 30, and the walking billboard on day 90. Telcos that skip hardware launch without a controller and churn without one.

## Controllers

Mobile, STB, console. Bluetooth pairing out of the box. On-brand with your gaming platform.

## Steering wheels

Racing titles, sim communities, tournament hardware. High-ticket upsell in-basket.

## Mobile remotes

Razer-style clip-ons. Every commuter with one on the BTS is an ad the rest of the car reads.

## VR, headsets, treadmills

Third-party brands, your storefront, your cut. A marketplace, not a SKU list.

# Three form factors. *Three audiences.* Lead with the right one for your market.

"Controller" isn't one product, it's a strategic choice. Each form factor unlocks a different market entry, a different price point, a different type of subscriber. Pick wrong and the launch underperforms regardless of the marketing.

## STB / TV

Living room. Family audience. Higher ARPU, lower volume. Bundles into broadband + TV plans. Premium tier of the platform.

PREMIUM · ARPU-LED

## Mobile

Phone + clip-on remote. Gen Z volume play. Lower ARPU, much higher reach. The acquisition engine in any prepaid-led market.

VOLUME · REACH-LED

## Onscreen / touch

No hardware needed. Instant entry. Best for trial flows and casual mobile titles. Lowest friction onboarding path.

TRIAL · FRICTION-FREE

**Most launches go wrong here.** The default reflex is "let's launch on STB because we control it." That's a low-volume start. The right primary in 8 of 9 markets we operate is mobile + clip-on, with STB as the upsell tier and onscreen as the trial gateway.

# The living room. *Your free media inside the home.*

Where you already have a set-top-box footprint, you already have free, daily, in-home media. Home screen, idle screen, EPG promos, billing prompts. Plus the biggest screen in the house has your logo on it. The STB lane doesn't drive volume by itself, but it pays for itself fast on an existing IPTV base.

## Home screen tile

Cloud gaming app pinned to row 1. Visible to every household member every session.

## Idle / screensaver

Title trailers in idle mode. Catches the gamer in the room before they switch to console.

## EPG promo

Branded promo cards inside the channel guide. Free placement, daily reach.

## Bundle bind

STB + fiber + cloud gaming as a single bundle. The hardest-to-cancel SKU you can build.

# The TV is already in the living room. *And it's already an ad platform.*

Samsung Tizen, LG webOS, Sony Bravia, Hisense Vidaa: every modern smart TV runs an OEM ad platform that accepts cloud-gaming creative. We use it as a free or low-cost acquisition lane in mature markets. Strong unit economics, especially when paired with a controller bundle promo.

**5%**

**CR · Samsung TV**

Trial-to-paid on the Samsung Tizen ad surface in benchmarked deployments.

**80%**

**Engagement on launch**

Of subscribers who see the OEM ad and trial, percent who complete a session.

**5x**

**Session-time lift with gamepad**

Trialists who pair a controller play 500% longer in their first session than those who don't.

**10%**

**Sessions 3hr+**

Post-launch tail: roughly one in ten sessions runs three hours or more. The high-LTV signal.

# ATLAS FALLEN REIGN OF SAM

## The infrastructure side of the marketing engine. *Where the gamers actually play.*

Marketing without infrastructure is overspend. Each Radian Arc GPU POP is a sovereign rack inside the operator's data center, sized for the demand the marketing engine is generating. Demand and capacity move together: the dashboard predicts CCU draw from the funnel, the POP scales to meet it.

POP	CAPACITY (CCUS)	STATUS
Mumbai	88 / 128	Live · 69% utilization
Bangkok	76 / 128	Live · 59%
Singapore	100 / 128	Live · 78%
Riyadh	82 / 128	Live · 64%
Jakarta	58 / 128	Live · 45%
Kuala Lumpur	44 / 128	Live · 34%
+ 16 more POPs	Various	Live or commissioning

22 POPs deployed across 9 markets. Each rack: 42RU, ~10kW, AMD-exclusive GPUs, sovereign-by-design. Live capacity utilization snapshot.

THE PILLAR THAT DECIDES THE LAUNCH

HARDWARE + CATALOG ARE BASELINE · MARKETING IS THE VARIABLE

# Hardware and catalog are *givens*. Marketing decides *who wins*.

WHAT'S SOLVED · WHAT DECIDES THE LAUNCH

## GIVENS · same baseline every deployment

Hardware · AMD-exclusive GPU POPs in your DC

Catalog · 4-partner stack, 1,000+ titles

Solved problems. Not the variable.

## THE VARIABLE · Marketing

Funnel ops · gamer creative · user paths

Holistic 360 plan · day-by-day execution

The muscle most operators haven't built. Yet.

The launches that compound have all three. The launches that flatline are missing the third.

Our hardware is powerful, tested, accurate. Our SaaS and gaming catalog are best-in-class. Those parts are givens, the same baseline every Radian Arc deployment starts from. What separates the launches that compound from the launches that flatline isn't infrastructure or content. It's marketing. The telcos that launched and faltered didn't lose for lack of trying. They lost because this category demands a specific muscle that's almost impossible to build overnight: funnel ops, creative that speaks to gamers, user-path discipline, a holistic 360 plan. That's the muscle we run play-by-play, alongside everything else you're already buying or looking at for the first time.

### What's solved · hardware + catalog

AMD-exclusive GPU POPs in your data center. Four-partner content stack ready to deploy. Same baseline across every Radian Arc launch. You don't have to worry about it. Neither does your CTO.

### The universal failure mode · marketing

Telco marketing teams are world-class at brand and airtime. Cloud gaming demands a different discipline: programmatic acquisition, gamer-literate creative, user-path instrumentation, daily CR and CAC optimization. That muscle takes years to build. Most telcos don't have years.

### How we close it · 360 inside the package

Marketing isn't a side service we tack on. It's the third pillar of the same 360 you're either already running with us, or evaluating for the first time. Funnel ops, brand platform, retail, community, hardware activation, run as one team alongside the platform.

THREE COMPANIES, ONE OFFERING

PLATFORM · CONTENT · MARKETING

# You get the *full stack*, on your side of the table.



## Radian Arc

The platform, the GPU POPs, the commercials, the hardware ecosystem, the integration. The engine under the hood.

PLATFORM + HARDWARE · 9 MARKETS LIVE



## Blacknut

The SaaS layer and the cloud catalog. 1,000+ titles, family / mobile / indie / retro mix, monthly subscription tiering. Ready to white-label, ready to integrate.

SAAS + CATALOG · ALWAYS-ON LIBRARY



## Lumin8 + Opratel

The full marketing engine, ATL through BTL. Brand platform, creative, title partnerships, community, creator programs, programmatic, DMP, funnel ops, CAC discipline. The voice, the face, and the engine that converts.

MARKETING · ATL + BTL · HONED ACROSS 5+ TELCOS

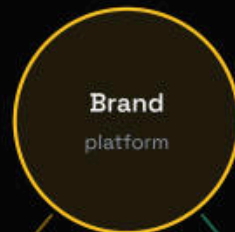
THREE ENGINES

BRAND · ACQUISITION · PARTNERSHIPS



One growth system. *Three compounding engines.*

THREE ENGINES · ONE GROWTH SYSTEM



# You can take just the platform. *The 360 is what makes it compound.*

Hardware and content are ours either way. The choice is whether we run the marketing layer alongside, or you run it yourself. A 360 marketing package is the only sustainable way to acquire and keep cloud-gaming subscribers. Not because any one tactic is hard. Because no one tactic works alone. Brand without funnel is reach without conversion. Funnel without brand is paid clicks at competitor CACs. Retail without flow design is dead inventory. Performance without theme is wasted spend. The whole only works as a whole.

## What "white-label only" looks like

You take the SaaS. You launch the app. Your team runs the marketing. Six months in: high CAC, weak retention, low brand awareness, sub growth flatlines.

COMMON · MOST LAUNCHES

## What 360 looks like

One embedded team. Brand platform live in week 6. Funnel running in your accounts in week 4. Retail rolled in week 14. Community + creators by month 4. Hardware revenue by month 9. Compounding.

LIVE · JIO · CELCOM · CTM

## Why it has to be 360

Because the metrics interlock. ATL drives warm audience that lifts BTL CR. Retail bundles drive offline reach that lowers digital CAC. Community drives retention that funds reinvestment. Pull a piece, the whole slows.

COMPOUNDS · SYSTEM-LEVEL

# Targeted and themed. *Not spray and pray.*

There's a huge difference between programmatic that follows a theme and a strategy, and programmatic that doesn't, regardless of whether there's a TVC running alongside. Themed programmatic is anchored to a creative idea, an audience cohort, a content tentpole, a moment in the calendar. It compounds. Untethered programmatic is just paid clicks. Same channels, very different economics.

## UNTETHERED PROGRAMMATIC

### Programmatic without theme

Bid on intent keywords, run lookalikes, optimize the auction. CAC drifts to category average. Retention is a coin flip. Creative refresh costs more than incremental spend can recover.

#### INDUSTRY-AVERAGE OUTCOMES

## THEMED PROGRAMMATIC

### Programmatic with strategy

Every quarter has a theme (a tentpole title, a cultural moment, a creator drop). Audience cohorts mapped to the theme. Creative refreshed against the theme. Channels weighted to the theme. Retention loops built around the theme. Same media spend, materially different CR and LTV.

#### WHAT WE RUN · ACROSS MARKETS

TURN-KEY, NOT DIY

ONE CONTRACT · ONE TEAM · ONE P&L

# Sign once. Launch once. *Run forever.*

ONE CONTRACT · FIVE THINGS UNDERNEATH



No vendor stitching. No procurement loops. Sign once, run forever.

The 360 package is turn-key by design. One contract covers platform, content, marketing, retail, hardware. One embedded team runs all of it. One dashboard reports it. One P&L tracks it. Your job is governance and direction, not operations.

### One contract

Platform + content + marketing + retail + hardware. A single MSA. No vendor stitching.

### One team

Embedded performance + brand + retail + creator. Named counterparts on your side.

### One dashboard

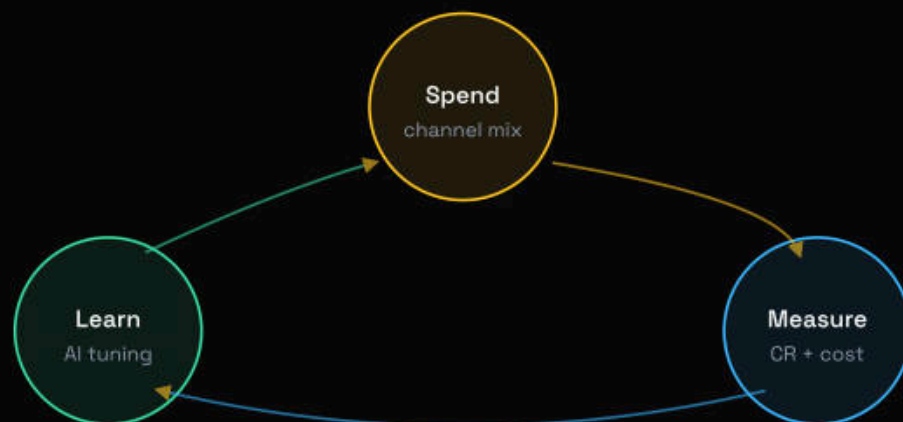
Acquisition, retention, ARPU, churn, GPU utilization, retail throughput. Live, daily.

### One P&L

One revenue line. One marketing spend line. One gross margin. CFO-friendly.

# The CFO's first question: *"What stops you blowing my budget on tests?"*

DAILY OPTIMIZATION LOOP



Continuous tuning against 1st + 3rd-party signals

Two answers. First, an AI optimization layer that runs against first-party telco data and third-party signals continuously, tuning click-through messaging and landing-page conversion in parallel. Second, a 70 / 20 / 10 budget-discipline rule that caps experimentation by design.

AI OPTIMIZATION LAYER

## First-party + third-party in real time

Click-through messaging tuned per cohort. Landing-page conversion tuned per session. Daily reweighting against the 24-hour CR / CAC. The model never stops learning.

70 / 20 / 10 BUDGET RULE

## Tested · moderate · opportunistic

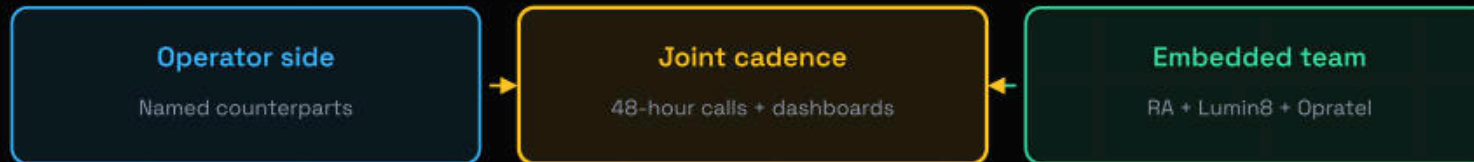
70% of variable spend on tactics with proven CR / CAC. 20% on moderate-risk experiments with a hypothesis. 10% on opportunistic high-risk plays. Budget caps experimentation. CFO sleeps.

EMBEDDED, NOT OUTSOURCED

ON YOUR SIDE OF THE TABLE

# Campaigns run *inside your walls*. Your data never leaves.

EMBEDDED TEAM · INSIDE YOUR WALLS



Same operating system. One playbook. One dashboard. One P&L.

The reason most performance marketing stalls inside telcos isn't skill, it's data policy. Subscriber data can't leave the network. Good. We designed the operating model around that reality.

- 1**

**Your ad accounts**

Google Ads, Meta, TikTok sit on the telco side. The media account and the targeting data never leave your perimeter.
- 2**

**Our directive**

Opratel's performance team writes the campaign plan, channel mix, creative brief, audience logic, optimization rules.
- 3**

**Your team executes**

Your operators click the buttons, in your accounts. A named counterpart per discipline on your side, trained by us.
- 4**

**Shared cadence**

Call every 48 hours between Opratel's head of performance and your named counterpart. Shared dashboards. Weekly QBR-lite.

# How we unlocked operator targeting data *without ever touching it.*

OPERATOR-SIDE EXECUTION · DATA STAYS IN PERIMETER



Subscriber data never crosses the operator perimeter. Targeting unlocked. Compliance held.

Some operators have the most conservative data policies in the market. The rule: subscriber data does not leave the operator's perimeter. Period.

Most performance marketing pitches die here. Ours didn't.

Operator-side employees run Google Ads inside the operator's own account, using operator targeting data,

## THE BREAKTHROUGH

**"Winning that battle is the difference between success and failure on performance marketing. It's the first time we've ever done that."**

DAVID COOK · APRIL 2026

BUNDLE PRICING

LIVE SKUS · MACQUARIE FINANCED

# Two SKUs. *One marketing line.* Both built to walk out the store working.

WHAT'S IN THE BUNDLE · MONTHLY · MACQUARIE FINANCED

## Mobile bundle

**\$56**

Controller + 5G data + Blacknut

Volume SKU · Gen Z primary

24-month plan · ~\$9 controller value · ~\$30 data · ~\$17 sub

## STB bundle

**\$59**

Controller + STB + fiber + Blacknut

Premium SKU · family / household

Lowest churn tier · highest ARPU · longest LTV

MOBILE BUNDLE · 24-MONTH

**\$56** per month

Controller + 5G mobile plan + Blacknut subscription. Unlimited gaming. Provided by Macquarie. The volume SKU.

STB BUNDLE · 24-MONTH

**\$59** per month

Controller + STB / dongle + fiber + Blacknut. Living-room tier. Premium ARPU, lowest churn. Provided by Macquarie.

# Two splits. *You pick the engine.*

Rev share differs based on whether we're running the user acquisition for you. With UA service, the split allocates a share to the marketing engine that's making the revenue happen. Without, the cost stays on your side, the share stays on yours. Either path is commercially sound.

## WITH UA · 360 PACKAGE

**15% · 15% · 40% · 30%**

Telco 15% · Opratel 15% · Application provider 40% · Radian Arc 30%. The 360 package: marketing engine baked in.

**THE DEFAULT** · FOR TELCOS THAT WANT THE ENGINE

## WITHOUT UA · PLATFORM ONLY

**30% · 40% · 30%**

Telco 30% · Application provider 40% · Radian Arc 30%. You bring the marketing. We bring the platform.

**AVAILABLE** · FOR TELCOS WITH PROVEN GAMING MARKETING

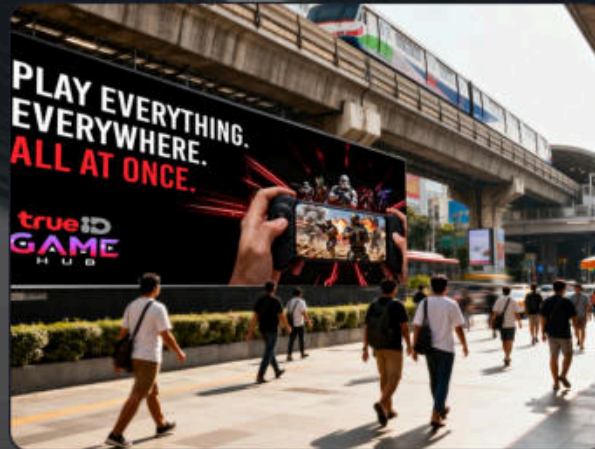
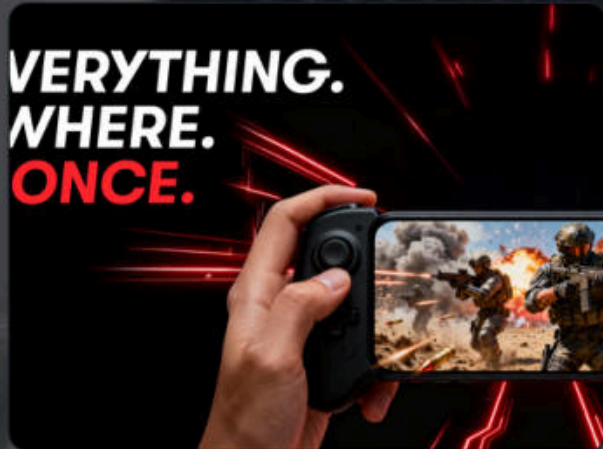
3-year term. Automatic renewal. Termination fee. CFO-shareable structure available in companion White Paper.

# Build a *gaming brand*. Own the category.

Before the funnel, before the flows, before the CAC: the brand. Gaming in your market belongs to whoever claims it first, loudest, and with the best creative. That's the table-stakes.

OWN THE CATEGORY

FIRST MOVER TAKES THE DECADE



# Whoever moves first *owns the next decade.*

FIRST MOVER TAKES THE DECADE

Late mover

Re-sells someone else's gaming app, forever.

Move now



Year 1

Brand built  
Category claimed



Year 2

Subscriber base  
compounds



Year 3

Hardware revenue  
+ studio exclusives

Compounds



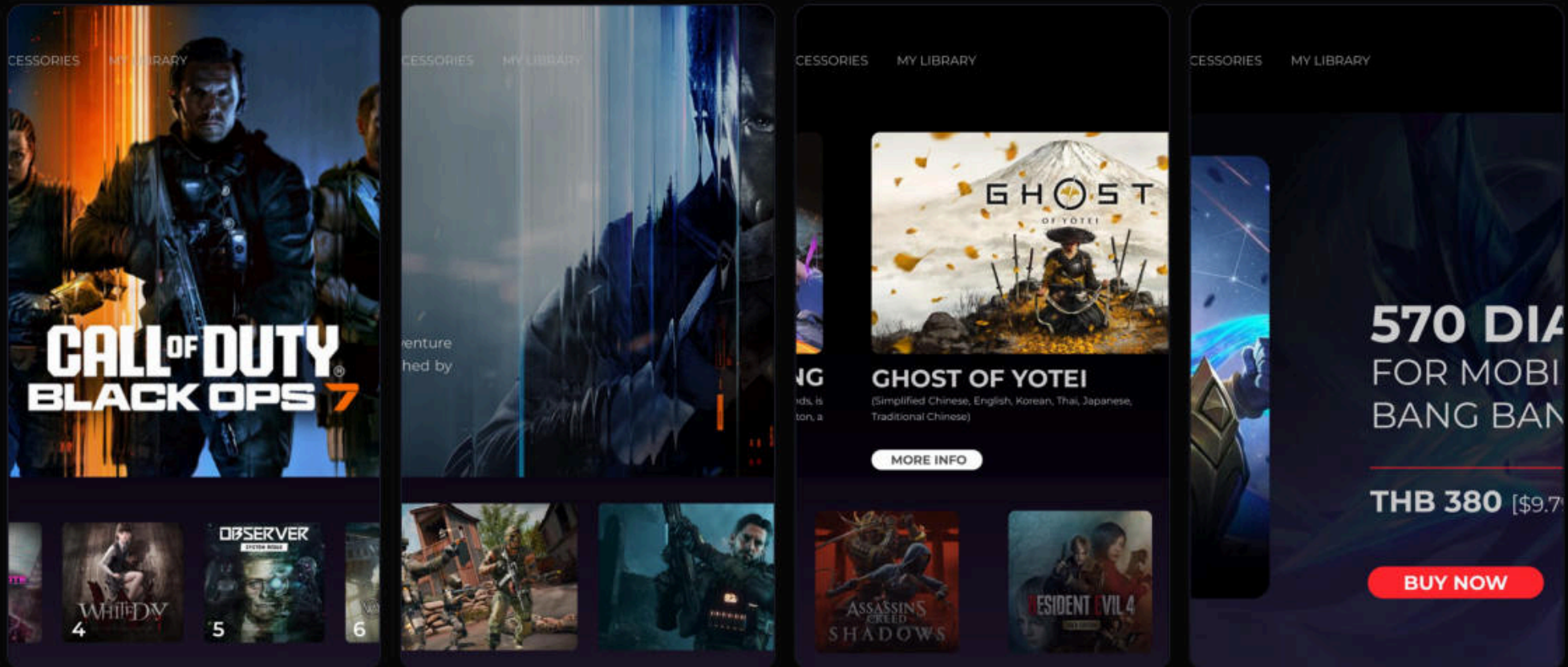
Decade

Market category  
owned

Gaming in most telco markets is unclaimed brand territory. The operator who moves first, with a full brand platform and a media fist to back it, locks in the category for a decade. The operator who moves second is re-selling somebody else's gaming app, forever.

THE APP IS THE BRAND

WHITE-LABEL · SDK



# A branded UI isn't a skin. *It's the first impression.*

Every session, every launch, every idle screen is brand impression. We rebuild the UI in your design system: typography, palette, motion language, copy voice, onboarding, home feed, library, store, profile. The experience is yours. The platform is ours.

## Home feed

Curated in your voice. Tentpoles, weekly heroes, your

## Onboarding

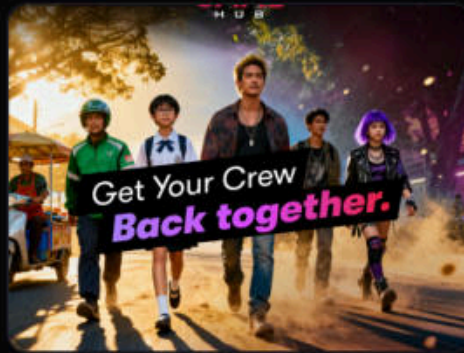
Branded sign-up flow, DCB or card, your value props, your

## Library + profile

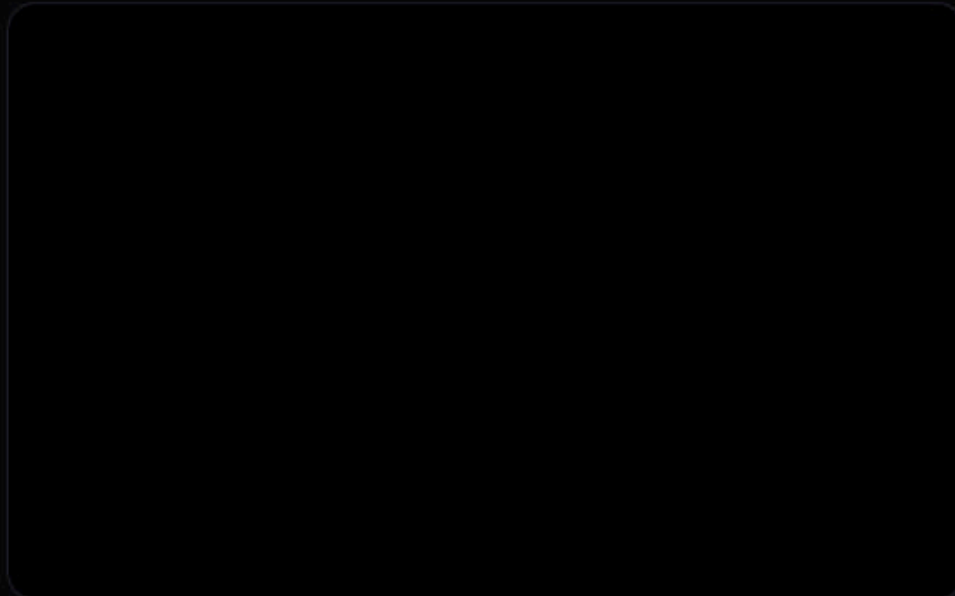
Five profiles per household in your look. Kids mode, family

## Store + hardware

Your marketplace. Your cut. Your accessories alongside third-party



# When the brand has a soul, *every ad works harder.*



## What it travels on

A 60-second hero film. Title-specific cutdowns. OOH on transit, malls, stadium. Pre-roll and social cutdowns native to each platform. In-store, in-app, on hardware packaging.

## Why it works

Gamers don't lapse because they stop liking games. They lapse because life gets in the way. The platform's promise, any screen any time, is the answer. The campaign carries the promise.

## Adapts per market

Same architecture. Local idea. The friend group. The crew. The

TENTPOLE TITLE DROPS

ONE TITLE CARRIES THE QUARTER

# When the catalog drops a hero, *the platform drops a campaign.*

Every quarter, one title carries the marketing. We help you pick the hero from the slate. We help you build the creative drop, hero film, social cutdowns, in-app takeover, national leaderboard. We help you stage the moment so the whole market hears it land. The image on this page is what a tentpole creative drop looks like.

OOH • BTS PANELS

NATIONAL TOURNAMENT FINALS

IN-GAME • CREATOR OVERLAY

## 60s hero film

Cinematic drop-in for TVC, pre-roll and OOH motion. Lumin8 creative.

## Social cutdowns

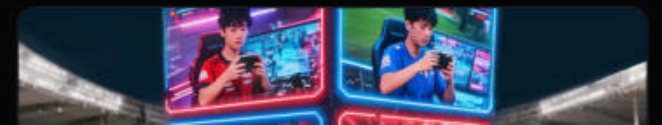
15s, 9s, 6s. TikTok Playable, Reels, Shorts, Stories. Native-framed per channel.

## Creator tier

Top 20 creators in-country. First-look keys, branded overlay, launch-day stream commitments.

## National tournament

Tentpole edition: qualifiers in cafes, finals on stage, prize pool under the platform brand. Run quarterly around the biggest title in the slate that quarter.



FOOTBALL TENTPOLE

FIFA + THE EVENT WINDOW

# When football eats the calendar, *gaming gets a seat at the table.*

Every four years, football eats the calendar. FIFA is pre-built tentpole. Stadium-scale tournaments before kickoff, legend meet-and-greets, fan-zone activations tied to the national team. Telco as patron of gaming, patron of football, patron of the moment.

### Stadium tournaments

Live FIFA in concourses pre-match.

### Legend meets

Giggs, Hazard, named talent.

### Cafe screenings

Co-op around match nights.



LAUNCH PHASING

SOFT · PUBLIC · SCALE



# Four phases. *Twelve months. One plan.*

PHASE 01 · LAUNCH CAMPAIGN

**Brand platform rollout**

TVC, OOH, hero creative, social seeding. Land the idea before the product is widely live. Build anticipation.

PHASE 02 · SOFT LAUNCH

**Physical activations**

Arcades in malls, cafe mode, Sunday School classes with streamers. Product proof at human scale.

PHASE 03 · PUBLIC LAUNCH

**Mass activations**

OOH, TVC at scale, tournaments, hardware drop, stadium moments. Platform is live, category is opened.

PHASE 04 · SCALE

**Export to neighbors**

Package the entire system as P/SaaS to other telcos in the region. Your market win becomes the sales asset.

TITLE  
PARTNERSHIPS

TOURNAMENTS · COMMUNITIES ·  
FUNNELS

# When titles partner with the platform, *communities follow.*

Title partnerships compound. We help you stand up the tournament series quarterly, qualifiers in cafes and universities, creator streams in the week before, finals on stage with the platform's logo on the podium. We help you book the creator network. We help you run the casting. The platform becomes a brand moment and a funnel feeder at once. The image on this page is what one looks like.

### Qualifier weekends

Cafes + campuses. Free play on your platform.

### Creator streams

Top 20 in-country streaming qualifiers.

### National final

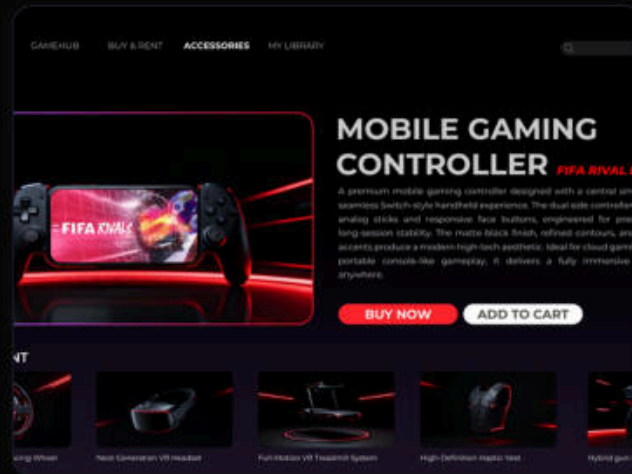
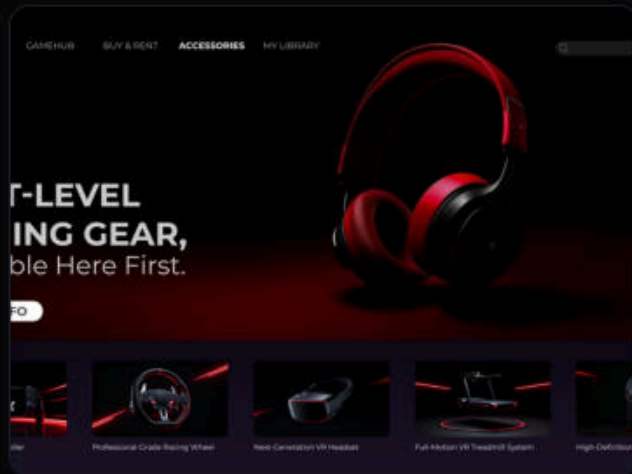
Stage event, TV coverage, your brand on LED.

### Year-round league

Tournaments evolve into leagues. Recurring.

COMMUNITY PROGRAMS

ONLINE + OFFLINE



Churn is a loneliness problem. *Community is*



# Gamers don't trust ads. *They trust creators.*

Gamers don't trust ads. They trust creators. We help you build the creator stack: established coach networks at the foundation, top in-country creators on hero contracts, the long tail on referral. We help you scope the deliverables. We help you run the program day-to-day. The image on this page is what a creator-led activation looks like.

TIER · HERO

## Top 5 creators

Biggest local names. Launch films, tournament hosts, platform-first exclusives. Revenue share plus retainer.

AUDIENCE · 1M+ EACH

TIER · PRO

## Next 20 creators

Title-specific leaders. Quarterly campaigns, in-app takeovers, ladder talent, tutorial series.

AUDIENCE · 100K-1M EACH

TIER · GRASS

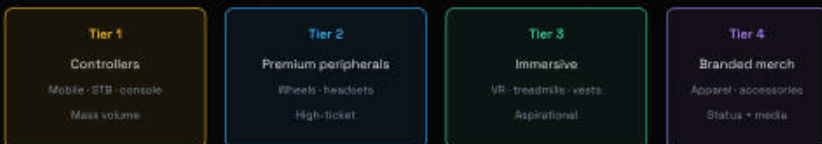
## Next 200 creators

Community-led. Referral codes, free subscription tier, tournament entries. Scale + long tail.

AUDIENCE · 10K-100K EACH

# When the audience carries the brand, *the audience is the media.*

REVENUE LAYERS - BEYOND CONTROLLERS



Branded hardware is advertising at scale, in the real world, carried by the audience we want. Revenue stream on the way out. Media on the way in.

### Mobile remotes

Razer-style clip-ons. Gen Z priced.

### Racing wheels

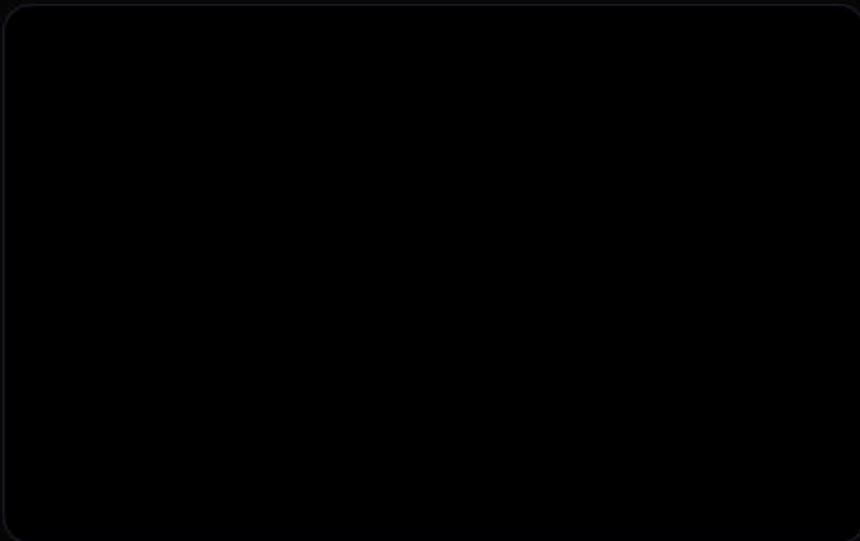
F1, Forza crowd. High-ticket upsell.

### Controllers

Xbox + PS layout. BLE pairing.

### Keyboards + mice

Razer / Logitech / HyperX collabs.



”

The operator who *owns gaming* in this market will own the *5G story* for a decade.

THE BRIEF, IN ONE LINE



# Brand makes the funnel *convert harder*.

The same media spend converts at very different rates depending on whether the audience has already seen the brand. People who've been exposed to a brand idea, a creator drop, an OOH push, a tournament, then later see your ad in feed, sign up at a much higher rate than a cold audience. Brand work isn't decorative. It makes every paid ad work harder.

## Cold ad spend

The audience has never heard of you. Sees the ad for the first time, decides on the spot. Conversion drifts to industry average. Cost per signup climbs.

## Audience exposed to a theme

People in the audience have seen a creative theme for 30+ days, on a billboard, in a tournament stream, on a creator's channel. Same paid ad. Higher signup rate. Lower cost per signup.

## Audience inside the brand world

Full brand platform: hero film, big-screen advertising, creator content, retail signage, branded hardware on the street. Ads convert at the top of their range. Subscribers stay longer. Compounding return.

# *Physical activations.* The brand meets the street.

ATL builds the idea. BTL makes it real. Arcades, cafes, campuses, stadiums, merch drops. Every touch is an acquisition event and a community event at once.

MALL ARCADE  
ACTIVATION

TRY-FIRST · SUBSCRIBE-  
SECOND



When they play first,  
*they subscribe  
second.*

Cloud gaming sells itself once somebody tries it. The strongest demo isn't an ad, it's a 30-second free session on a controller in a mall. The activation: branded arcade zones in partner malls and flagship operator stores. Free play, 15-minute limit, QR code to the app, sign-up in three taps. The image on this page is what the activation looks like in a mall environment.

**Mall pods · 6 stations**

High-traffic mall placements. Branded staff. Free play, QR to subscribe in three taps.

**Flagship retail stores**

Permanent demo pods inside the operator's top-50 stores. Trained staff close on the spot.

CAFE NETWORK  
ACTIVATION

WHEN THE OPERATOR ALREADY  
OWNS THE CAFE

# When the operator owns the cafe, *gaming gets Friday night.*

When the operator already runs branded coffee shops or co-located retail, those spaces flip into gaming community hubs with minimal lift. Order a coffee, pick up a controller, play for an hour. Free play for subscribers, pay-as-you-go for trialists. The cafe becomes a weekly destination. The image on this page shows what that activation looks like in a cafe environment.

### Weekly events

Themed nights, tournaments, new-title trials.

### Loyalty crossover

Subs get cafe hours, regulars get platform trial.

### Creator bookings

Local creators stream from cafes.

### Coffee + controller drops

Co-branded limited merchandise.



CAMPUS ACTIVATION

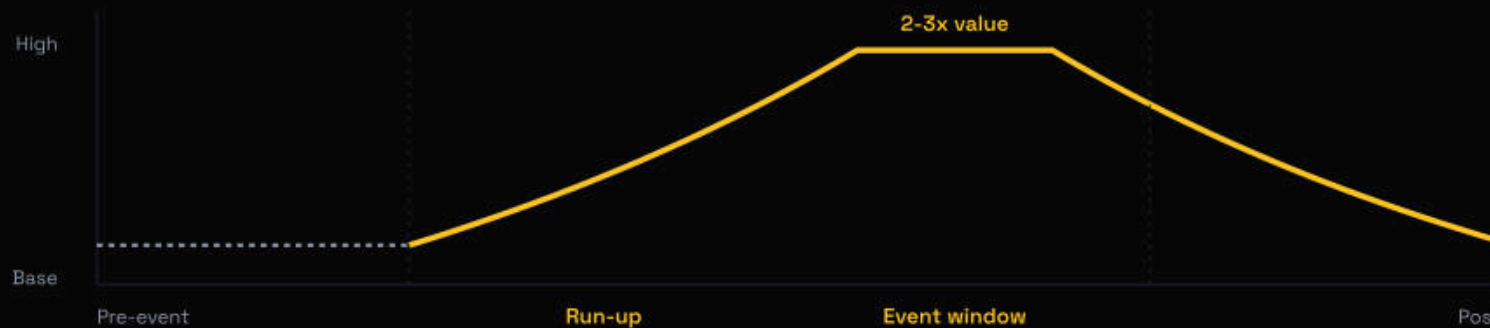
DORM + FACULTY + AMBASSADOR





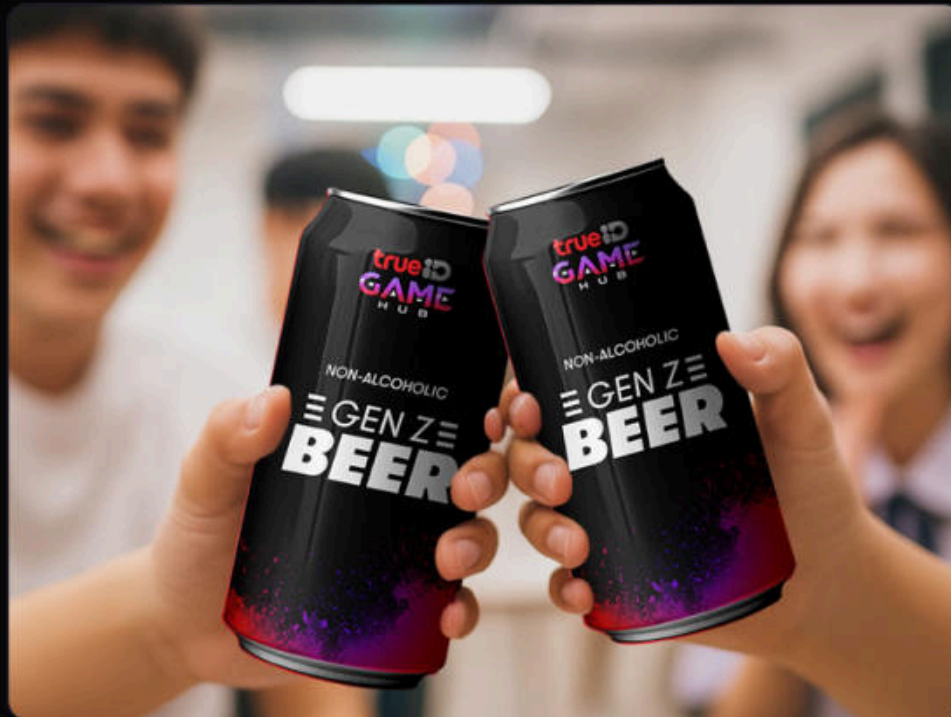
# When the culture peaks, *games cash the check.*

EVENT-WINDOW VALUE · TITLES SPIKE WITH THE MOMENT



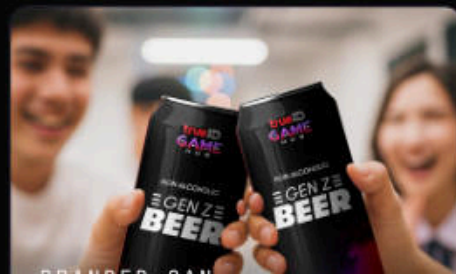
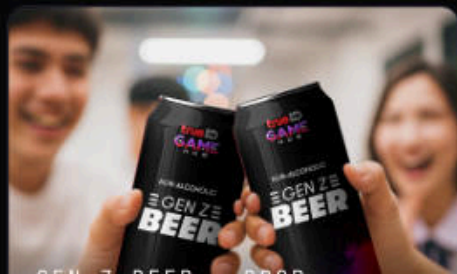
FIFA before/during a World Cup. Racing titles around F1. Basketball around the Finals.

Major events compress months of national attention into a single window. We help you put on the e-sports tournaments that correlate to the event. We help you secure region-exclusive titles whose value spikes inside that window: FIFA by EA around a World Cup, racing titles around F1, basketball around the Finals. We help you wrap a 360 campaign around your hero game and the event, so the platform cashes the cultural check the moment writes.



# When the merch drops, *the media beat lands.*

You can't buy attention with Gen Z. You can earn it with a drop culture they already participate in. Co-branded cans (non-alcoholic, limited run), hoodies tied to tournament editions, controller colorways that come out once and never return. Scarcity is the marketing.



# The *programmatically* *engine.* Honed across 5 telcos.

Now the numbers. The funnel. The CAC. The flows. The DMP. The dashboards. The piece most telcos can't operate because they've never built the muscle. We have.

# Three commercial channels. *Three engines.* One dashboard.

Every telco deployment runs on three simultaneous commercial engines. Retail bundles sell hardware plus subscription through your store footprint. Digital marketing runs acquisition through programmatic, DMP and social. Prepaid bundles extend the product into data-pack economics for emerging-market subscribers. We run all three in parallel.

01

## Telco retail bundles

Hardware + 5G + Blacknut + controller at the POS. Pilot with Macquarie financing. Multi-month contract, walks out working.

**REVENUE** · \$16.8M TO \$84M  
ANNUALIZED

02

## Digital marketing

Agency services plus DMP optimization. 12 channels, daily spend reallocation, four subscription flow variants.

**BLENDED CR** · 0.58% TO SIGNUP

03

## Prepaid bundles

Data plus daily / weekly plans through dealer networks. Scratch cards, SIM refills, in-store wallet top-ups.

**REACH** · PREPAID 6M DMP COHORT

10M SUBS · 800K PAID GAMERS

LOW · MID · HIGH SCENARIOS

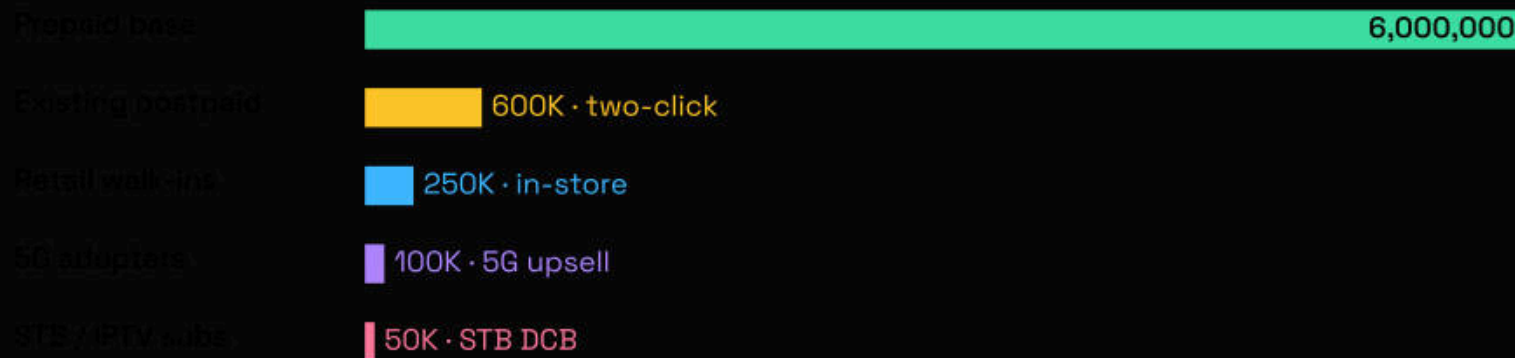
# The scenario math, on a *10M-subscriber* telco.

CHANNEL	LOW	MID	HIGH	YEAR-1 TELCO ARR (MID)
Retail bundle subs	160,000	260,000	400,000	<b>\$37.2M</b>
Digital direct subs	40,000	80,000	130,000	<b>\$11.5M</b>
Prepaid bundle subs	60,000	120,000	220,000	<b>\$10.3M</b>
<b>Total paid gamers</b>	<b>260k</b>	<b>460k</b>	<b>800k</b>	<b>\$59.0M</b>

Based on the Radian Arc / Opratel model. 10M-subscriber telco, Year-1 paid conversion, ARPU blended across the three channels. Indicative; market-specific re-baseline in week 1.

# Your DMP already knows who the gamers are. *We just need permission to reach them.*

FIVE COHORTS · YOUR DMP ALREADY KNOWS THEM



COHORT	DEFINITION	INDICATIVE SIZE	BEST FLOW
Existing telco customers	Postpaid subs with data heavy usage	600,000	Two-Click (5-7% CR)
Prepaid base	Monthly top-ups, data bundle adopters	6,000,000	PIN + HE (3-5%)
Retail walk-ins	Visited a store in the last 30 days	250,000	In-store bundle
5G adopters	Currently on 5G plans	100,000	Two-Click + upsell
STB / IPTV subs	Active set-top-box users	50,000	STB + DCB prompt

Size ranges from Opratel's typical telco deployment. Rebased to your DMP in week 1.

# Three layers, zero data-export. *Compliant by architecture.*

The targeting happens inside your walls. Opratel writes the audience logic. Your DMP team executes. Customer Match feeds your Google Ads account. No subscriber identifier ever crosses the perimeter.

## 01

### Your DMP

Telco-owned. Subscriber profiles, data usage, device, billing state, location clusters. Stays inside your network.

## 02

### Audience logic

Opratel writes the queries. Your team runs them. Cohorts pushed to Customer Match as hashed identifiers. No PII leaves.

## 03

### Your Ad accounts

Google Ads, Meta, TikTok. Sitting in your name. Matched audiences ready to activate. Spend from your wallet.



# Every campaign needs a landing page. *Every quarter needs new ones.* Both happen without IT.

The Opratel landing-page platform is built so the marketing team can ship pages, run A/B tests, swap title art, and re-segment without a single engineering ticket. New game drops in the catalog Tuesday; new pages live by Wednesday. That's the operational moat that lets quarterly title refresh and themed programmatic ship on rhythm instead of waiting on telco IT cycles.

### No-code editor

Marketing edits copy, art, CTAs, and pricing in a browser. No deploy. No ticket.

### A/B + multivariate

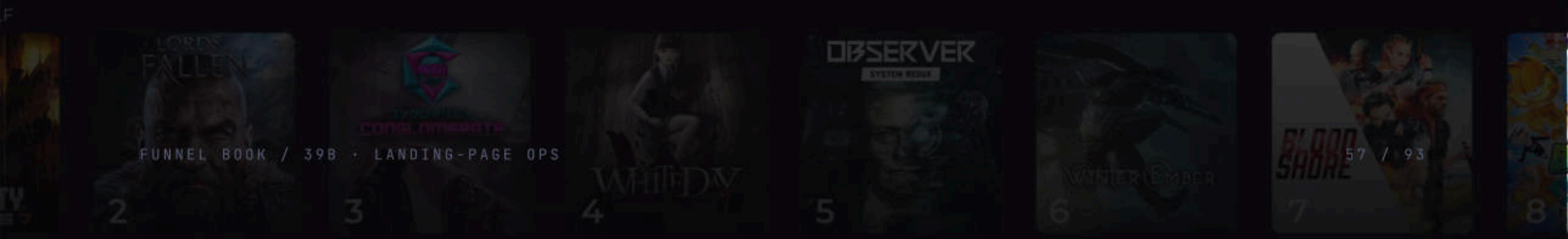
Two-page or four-page splits run continuously. Winners promoted automatically.

### Segment-level versions

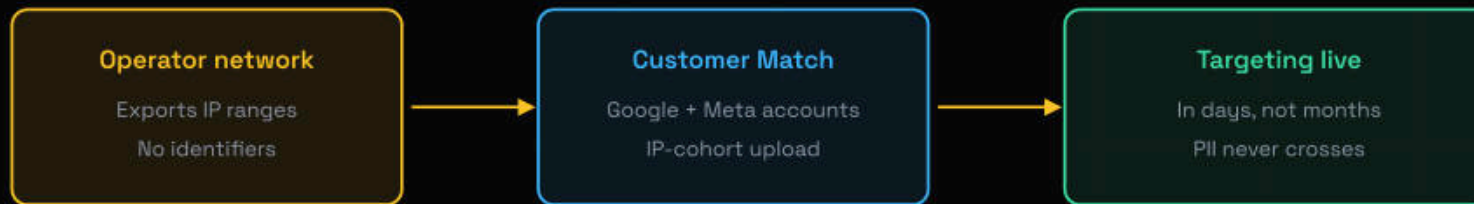
One URL, different page per cohort. Postpaid sees premium framing, prepaid sees daily-pack framing.

### Conversion instrumented

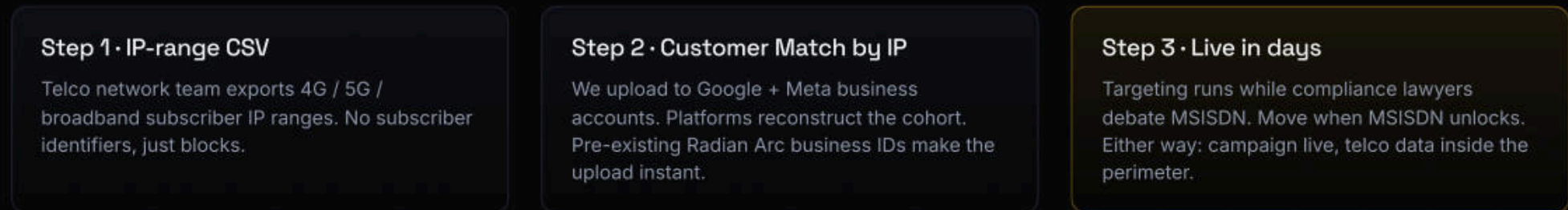
Every CTA, every flow step, every drop-off captured to the dashboard. Nothing flies blind.



# If compliance won't release MSISDNs, *we still target*. Without exporting one identifier.



In a perfect world, hashed MSISDNs flow into Customer Match. In the real world, that argument runs into legal for six months. We have a fallback that ships in week one: the operator hands us a CSV of 4G/5G/broadband subscriber IP ranges. We upload to Google and Meta. The platforms reconstruct the cohort by IP. Not as precise as MSISDN, but materially better than open auction, and zero PII crosses any boundary.

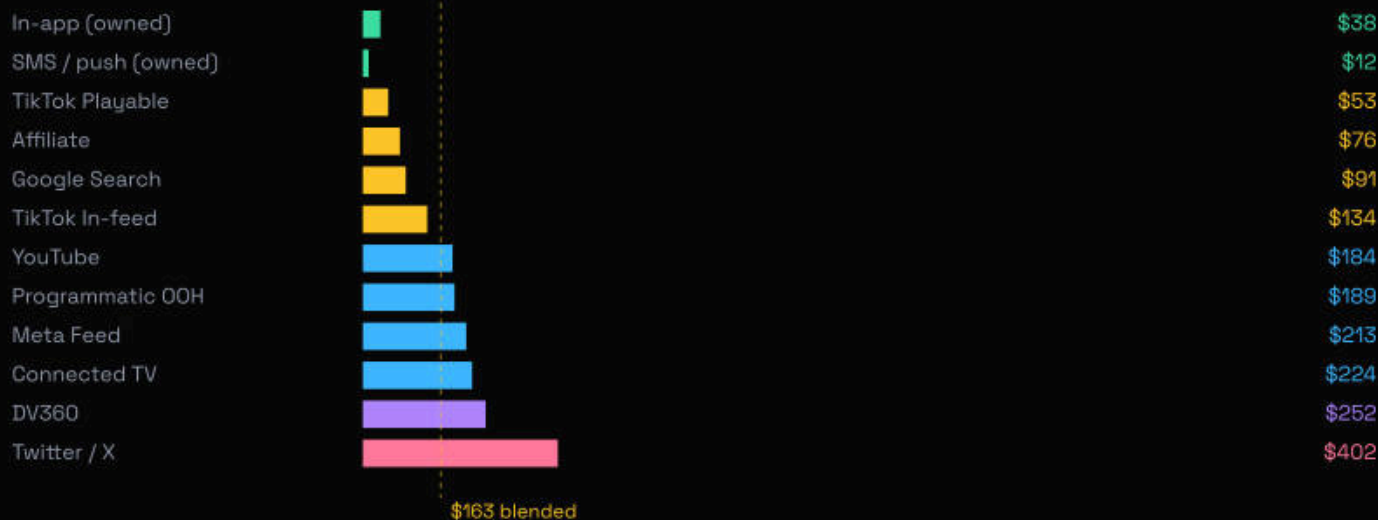


TOP OF FUNNEL

12 CHANNELS · DAILY WEIGHT

# The media plan, *channel by channel.*

CAC BY CHANNEL · TOP OF FUNNEL



CHANNEL	PRIMARY USE	SPEND SHARE	INDICATIVE CAC
Google Search	Intent capture, brand defense	15%	\$91
Google Display / DV360	Programmatic reach, DMP cohorts	12%	\$252
YouTube pre-roll	Creator content, trailers	10%	\$184
Meta feed + stories	Social acquisition, lookalikes	14%	\$213
TikTok in-feed	Gen Z reach, creator content	10%	\$134

THE CHEAPEST CAC IN THE TOOLKIT

WHATSPAPP · LINE · WECHAT · VIBER · TELEGRAM

# WhatsApp Business sits at **\$3 to \$4.50 per signup**. Nothing else gets close.

WHATSPAPP vs PAID MEDIA · COST PER SIGNUP



In every SEA, MEA, and LatAm telco footprint, messenger apps eat the daily attention budget. The platforms allow templated business-API messages at a fraction of paid-media cost. We use them as a primary acquisition channel, not a service notification line. Counter-positions cleanly to the Meta and Google ad-tax in markets where the messenger is the actual home screen.

METRIC	WHATSPAPP BUSINESS	BEST PAID CHANNEL COMPARATOR
Per-message cost	\$0.08	\$0.40 to \$2.00 (CPM dependent)
CTR	35 to 40%	0.45 to 1.5% (display, social)
CR to subscription	5%	0.5 to 1.5%
Blended CAC	\$3 to \$4.50	\$50 (Search) to \$402 (Twitter)

MID + BOTTOM FUNNEL CAC \$216 TOF · \$109 MOF/BOF · TIKTOK PLAYABLE \$53

# The blended CAC *halves* as cohorts mature. *That's the engine paying off.*

Top-of-funnel CAC reflects cold reach. As audience cohorts pass through the funnel, retargeting and lookalike layers kick in. Mid and bottom-of-funnel CAC drops by half. This is the math the CFO will ask about on slide one of the conversation: how does CAC actually move once the engine is on?

FUNNEL STAGE	IMPRESSIONS / MONTH	CTR	CR	SUBS	SPEND	BLENDED CAC
Top of funnel · cold	19,350,000	0.45%	0.80%	698	\$150,988	\$216
Mid + Bottom · custom audiences + lookalikes	10,825,000	0.72%	1.28%	998	\$108,344	\$109

**\$53**

TikTok Playable

522 subs / mo. Custom audiences + purchase intent. Best per-channel CAC across the entire portfolio.

**\$50**

Google Search

86 subs / mo. In-market + similar audiences. Tightest intent capture.

**\$105**

TikTok In-feed

119 subs / mo. Lookalike 3% + 5% layered. Mid-funnel workhorse.

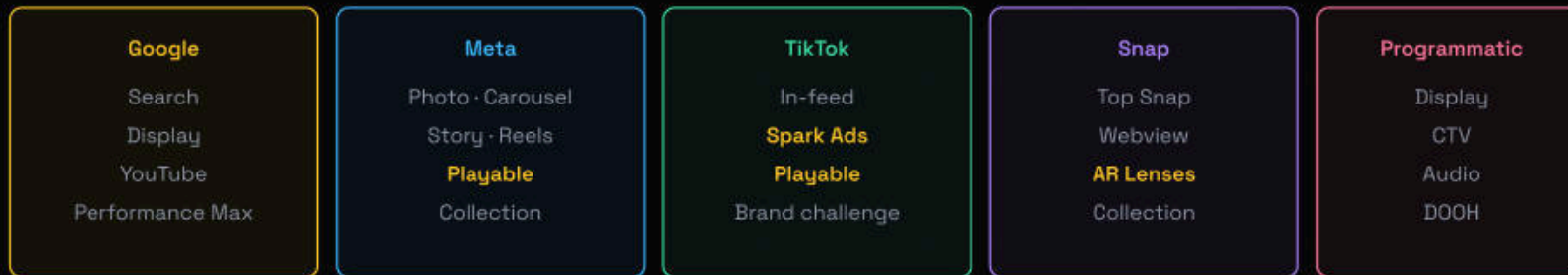
**\$202**

Facebook Video

30 subs / mo. Interest + life-events. Higher CAC, but feeds higher LTV cohorts.

# Channel mix is half the answer. *Format mix is the other half.*

FORMATS THAT WORK FOR GAMING · BY PLATFORM



**Bold = gaming-specific high-performers**

Gaming creative doesn't convert in a generic banner. It needs Playables, Spark Ads, AR Lenses, branded hashtag challenges, gameplay-cut TVCs, OTT pre-roll. We run the format catalog per platform as the first creative scoping step, before any media plan locks.

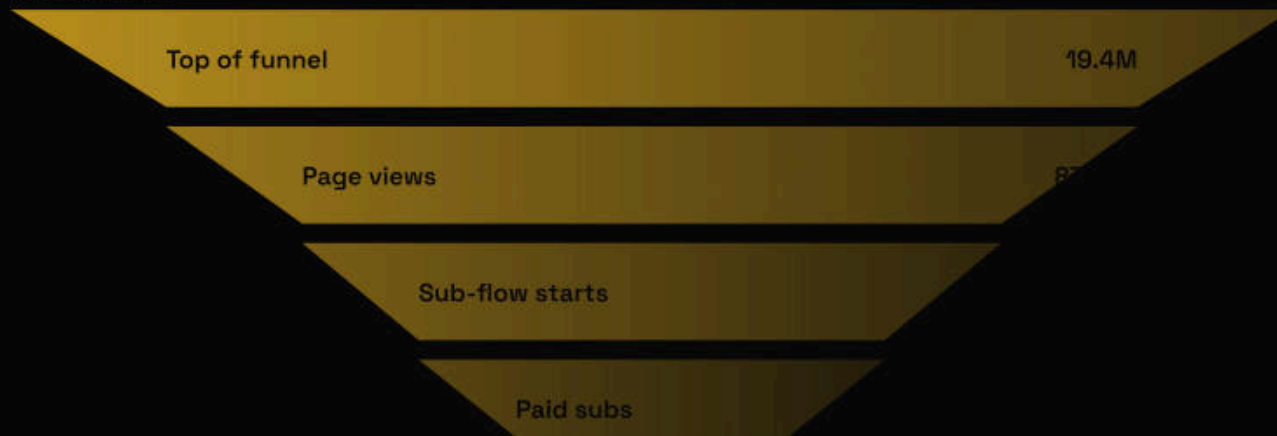
PLATFORM	FORMAT CATALOG WE RUN
Google	Search · Responsive Display · Image · Video · Performance Max · YouTube Shorts · Bumper
Meta	Photo · Carousel · Slideshow · Story · Reels · Video · <b>Playable</b> · Collection
TikTok	In-feed · Branded Hashtag Challenge · Branded Effects · <b>Spark Ads</b> · <b>Playable</b>
Snap	Top-Snap · Webview · Deepview · Collection · <b>AR Lenses</b>
Programmatic	Display · OTT pre-roll · CTV · Audio · Native · DOOH
Connected TV	CMS · Direct · VOD · Email · OTT · Connected TV · Connected TV · Connected TV

END TO END

19M IMPRESSIONS • 1,696 PAID

# From *impression* to *first charge*. Every number, every stage.

IMPRESSIONS

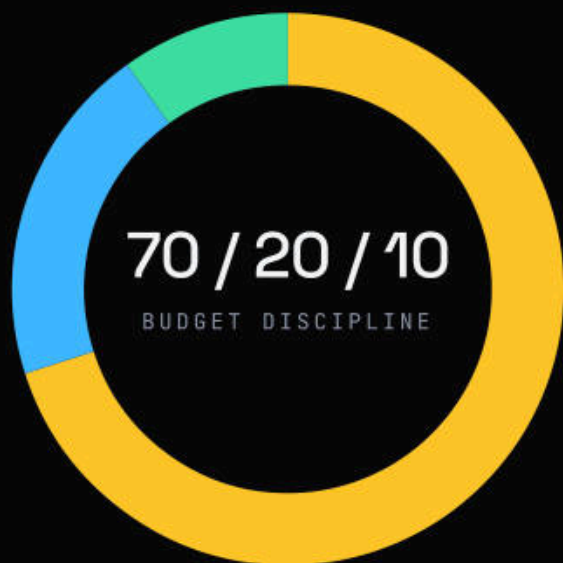


STAGE 01	Top of funnel · impressions	<div style="width: 100%;"></div>	19.4M
STAGE 02	Landing page views	<div style="width: 0.45%;"></div>	87,000
STAGE 03	Sub-flow starts	<div style="width: 0.064%;"></div>	12,400
STAGE 04	Paid subscribers · first charge	<div style="width: 0.0036%;"></div>	698

TWO ENGINES · ONE DASHBOARD

FIXED = FREE REACH · VARIABLE = PAID

# Your *owned reach* is the free half. Variable is the scale half.



70% Tested tactics

20% Moderate-risk experiments

10% Opportunistic plays

FIXED ENGINE · OWNED

## 94.2M impressions / month

In-app banners · push notifications · SMS · email · STB home-screen cards · IVR prompts · outbound WhatsApp · web portal · POS screens · bill inserts · loyalty portal

VARIABLE ENGINE · PAID

## \$259k spend / month

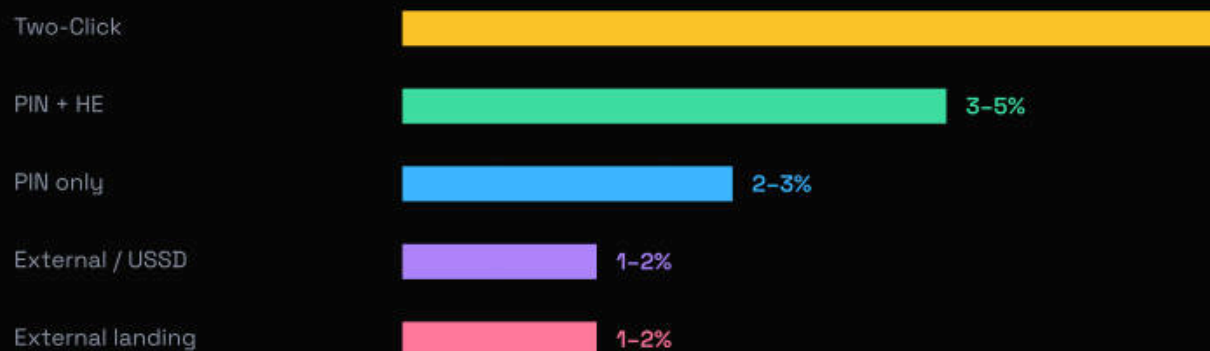
Google Search · DV360 · Meta · TikTok · Twitter · Affiliate · Programmatic OOH · Connected TV · creator payouts · retargeting

FOUR SUB-FLOW VARIANTS

RANKED IN WEEK ONE

# Four flows, four markets, *real live-ops numbers.*

## CONVERSION RATE BY FLOW



Every telco deployment gets all four flows in production from day one. We A / B them for two weeks, pick the winning primary per market, keep the runner-up live for the tail. The numbers below are the actual live-ops results from the Opratel-operated markets.

FLOW	CONVERSION	PAYOUT PER SUB	DAILY SUBS (MATURE)	REFERENCE MARKET
Two-Click	5-7%	\$0.70	600	Chile
PIN + HE	3-5%	\$1.00	400	Chile
PIN only	2-3%	\$1.50	150	Paraguay
External / USSD	1-2%	\$3.00	100	Costa Rica
External landing page	1-2%	\$1.50	70	Uruguay

# Two taps. *One sub.* The fastest conversion path we operate.

Telco-integrated header enrichment identifies the subscriber before they ask. They see their phone number pre-filled. Tap once to confirm. Tap twice to charge. 5–7% of landing page views become paid subs on this flow. That is a banner number in any subscription category.

**5–7%**

### Conversion rate

Impression-to-paid on landing page views. Best-in-class across all of Opratel's operated markets.

**\$0.70**

### Payout per sub

Effective acquisition cost on this flow. Ten-to-twenty times better than external USSD routes.

**600**

### Daily subs

Mature deployment run-rate in Chile. Rebaselines by market penetration and DMP cohort size.

**2**

### Taps to convert

Header enrichment pre-fills MSISDN. One confirm, one charge. That's the whole UX.

# Not every market has *HE or DCB* from day one. We still convert.

## PIN + HE

Header enrichment identifies MSISDN, user enters confirmation PIN. Chile deployment: 3–5% CR, \$1 payout, 400 daily subs.

WHEN HE AVAILABLE · DCB OPTIONAL

## PIN only

User enters full MSISDN plus PIN. Paraguay deployment: 2–3% CR, \$1.50 payout, 150 daily subs.

WHEN HE NOT AVAILABLE

## External / USSD

USSD-triggered, SMS-confirmed. Costa Rica deployment: 1–2% CR, \$3 payout, 100 daily subs.

EMERGING MARKETS · LOW SMARTPHONE

# 3x daily subscribers. Same channel. Just segmented.

When we started in Chile, Google Ads ran open-market: 15 subs per day. We connected the telco DMP to Customer Match, rebuilt the audience as in-footprint data-heavy users on 4G and above. Same media, same spend, same creative. 45 subs per day. Three-fold.

**15**

Daily subs • untargeted

Starting baseline. Google Ads, open-market audiences, no telco data cohort.

**45**

Daily subs • DMP targeted

Same media, same spend, same creative. Customer Match fed from telco DMP.

**-23%**

CPA • moved

Costs dropped as conversion rose. Total campaign revenue up 15% at the same spend level.

# From **\$129** to **\$3.60**. *3 weeks.*

CAC COMPRESSION · 21 DAYS



## \$129.35

Week 1 CAC

Cold launch. Open-market programmatic. Default audiences. The starting baseline.

## \$39.75

Week 2 CAC

DMP cohorts plugged in. Audience tightened. Creative re-themed against the winning cohort.

## \$3.60

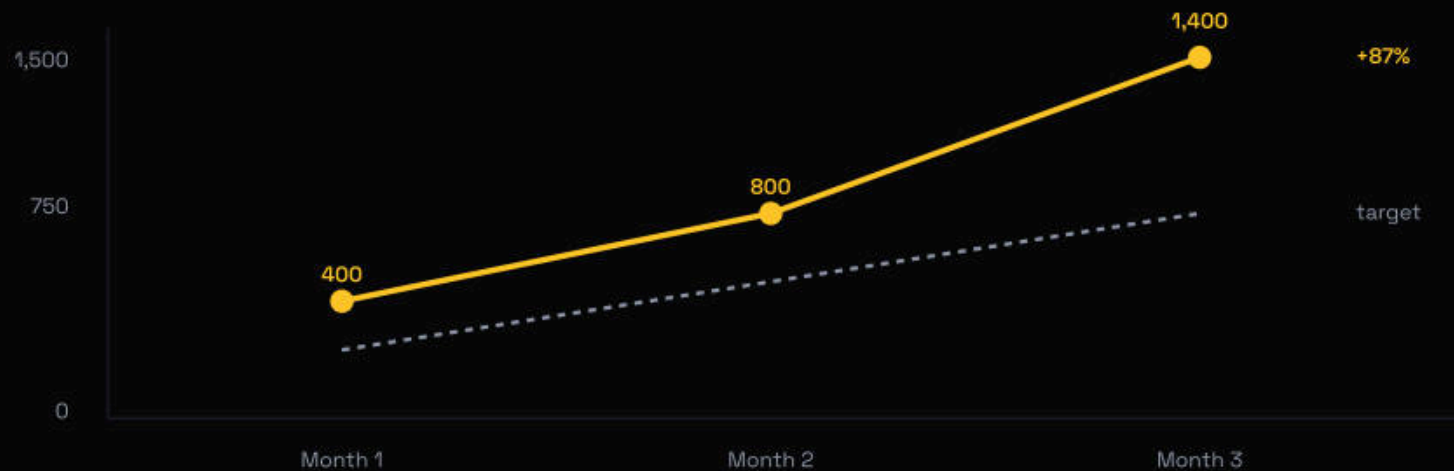
Week 3 CAC

Telco-segmented audiences live. Flow A/B winner picked. Themed creative compounding. Below-target by quarter-end.

**36x compression in 21 days.** The single most-cited proof point in the deck. Same channels, same spend envelope, the difference is theme + segmentation + flow ranking. The 360 engine in motion. Operator addressable: 4M out of 7.5M total

# Beat target by **87%** in three months. At **zero** variable CAC.

SUBSCRIBER TAKE-UP · 90 DAYS · ACTUAL vs TARGET



MONTH	SUB TARGET	SUBS ACTUALLY ACQUIRED	VS TARGET
Month 1	250	400	+60%
Month 2	500 (cum)	800 (cum)	+60%
Month 3	750 (cum)	1,400 (cum)	+87%

The setup

The result

# Same media. Themed match campaigns. *Four different KPIs lifted.*

**69%**

## Mobile plan upgrades

Of all upgraded mobile plans came from match-themed campaigns specifically. Themed creative dominated the conversion path.

**+22%**

## Conversion rate lift

vs. the channel average. Same auction, same audience pools, themed creative. Theme >> non-theme.

**-23%**

## CPA reduction

Cost per acquisition fell by nearly a quarter. Same media spend, lower cost per sub. The DMP-segmentation dividend.

**+15%**

## Revenue lift

Operator product-line revenue lifted 15% off the back of the campaign. Themed programmatic compounds.

**The point:** themed programmatic isn't a creative preference. It's a measurable CR / CPA / revenue lift. Untargeted programmatic doesn't produce these numbers, even at the same spend.

# This is what the engine looks like running. *Daily.*

**\$572K**

**Gross income · MTD**

Local currency converted.  
From a single market  
deployment running on the  
standard 360 package.

**\$37.4K**

**Marketing investment**

Variable spend in the same  
period. Roughly 6.5% of  
revenue going back into  
acquisition.

**39,500**

**Active users**

Live count, +0.15% day-on-day.  
The engine compounds slowly,  
daily, in the right direction.

**40,552**

**Subscriptions**

vs. 18,690 unsubs. Net add still  
positive. TodosGamers product  
mix at 98.96% of active users.

Source: live Opratel / Radian Arc dashboard, Latin American operator deployment.

WHERE THE 998 RETARGETED SUBS COME FROM

OWNED + PAID · SAME ENGINE, DIFFERENT AUDIENCE

# Acquisition is one half. *Win-back is the other.*

Cloud-gaming churn is structural: titles get exhausted, life intervenes, the bundle expires. Win-back isn't a quarterly campaign. It's a continuous retargeting layer that runs in parallel with acquisition. The 998 retargeted subs per month already on the funnel slide come from this engine. Below is exactly how.

## OWNED WIN-BACK · ZERO VARIABLE COST

### Triggered messaging stack

- Email triggered at lapse + 3 / 7 / 14 / 30 days
- Push notifications tied to new content drops
- SMS for the highest-LTV cohorts only
- STB home-tile takeover for IPTV subs
- In-store reactivation prompt at till
- Outbound call-center for high-value lapsed

## PAID WIN-BACK · FUNDED RETARGETING

### Retargeting + look-back layer

- Display + social retargeting on lapsed cohort, 30 / 60 / 90 day windows
- TikTok Spark Ads to lapsed Gen Z
- Title-drop reactivation creative (new COD season, new FIFA edition)
- Discounted reactivation flow tied to seasonal moments
- Look-back beyond churn into matched lookalikes who never converted
- Daily optimization against reactivation CR

**The compound effect:** 698 net new + 998 win-back = 1,696 total monthly subs at \$163 blended CAC. The win-back layer accounts for 59% of monthly volume. Acquisition without win-back leaves more than half the revenue on the table.

PART V / V

# Retail bundles. The *highest-* *volume* acquisition channel in telco.

Your stores already sell hardware. They already sell data. The cloud-gaming bundle slots next to the SIM and the handset. Walks out working. Walks out paying. Highest throughput, lowest CAC, biggest revenue line in Year 1.

# From **\$16.8M** to **\$84M** annualized on the same footprint.

STORE THROUGHPUT	MONTHLY UNITS · TOTAL	AVG ORDER VALUE	ANNUALIZED REVENUE
5 units / store / month	4,000	\$350	<b>\$16.8M</b>
10 units / store / month	8,000	\$350	<b>\$33.6M</b>
15 units / store / month	12,000	\$350	<b>\$50.4M</b>
20 units / store / month	16,000	\$350	<b>\$67.2M</b>
25 units / store / month	20,000	\$350	<b>\$84.0M</b>

800-store telco footprint, bundle AOV \$350, includes controller, 3mo Blacknut, 5G activation. Scenario range from Opratel retail model.

# The 5G launch with a gamepad bundle. *It sold out.*

When a major European operator launched 5G in July 2019, they didn't sell the network. They sold a 5G plan with a gamepad attached, pricing tiers around \$9, \$10, \$13 per month. It was the most aspirational product on the shelf and the proof point that a controller can anchor a 5G narrative.

**\$9**

**Entry tier**

Base 5G data plan with an entry-level gamepad bundled. Walked out working.

**\$10**

**Mid tier**

Upgraded plan, premium gamepad, cloud gaming trial. Highest-volume bundle.

**\$13**

**Premium tier**

Unlimited plan, premium gamepad, subscription included. The headline SKU in TIM's stores.

# \$0 CAPEX to the operator. *NPV-positive on day one.*

Hardware + catalog + GTM ride on the Macquarie MRA behind Radian Arc. Operative lease 18–36 months. Telco carries subscriber credit risk, Radian Arc carries platform risk. One 24-month contract covers data, controllers and cloud gaming.

## With financing

Hardware, catalog, marketing rolled into a single Macquarie lease. Month-1 NPV positive.

NPV · \$232

## Without financing

Telco buys hardware, licenses the catalog and marketing. Longer payback.

NPV · \$202

## Either way

CAPEX burden stays off the telco balance sheet if the financing path is taken. Revenue recognizes from first subscriber.

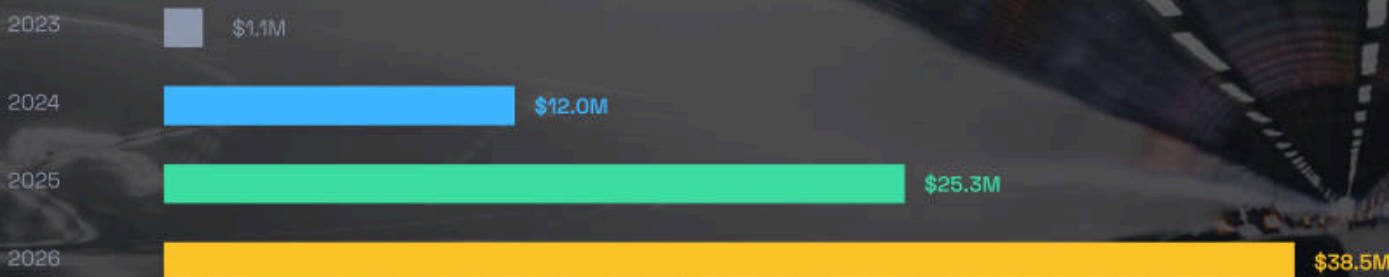
MASTER RENTAL AGREEMENT  
MACQUARIE CAPITAL

4-YEAR FORECAST · MATURE MARKET

2023 TO 2026 · SINGLE OPERATOR DEPLOYMENT

# From **35K** subs to **1.27M**. \$1.1M to \$38.5M revenue.

4-YEAR REVENUE FORECAST · MATURE MARKET



35K subs (2023) → 1.27M subs (2026) · 7 → 61 GPU servers

YEAR	CUMULATIVE SUBS	CUMULATIVE MONTHLY UA	TOTAL CUSTOMER REVENUE	NET REVENUE (AFTER MARKETING)	GPU SERVERS
2023	35,493	24,524	\$1,101,487	\$730,010	7
2024	259,365	89,524	\$11,986,674	\$10,693,240	25
2025	673,363	154,524	\$25,267,860	\$23,339,888	43
2026	<b>1,277,486</b>	219,524	<b>\$38,549,046</b>	<b>\$36,003,787</b>	61

4-YEAR FORECAST · MASS MARKET

5-STAGE ACQUISITION · 24-MONTH REPAYMENT

# The **\$1.7M to \$17.7M** annual revenue arc, on a single operator.

4-YEAR REVENUE FORECAST · MASS MARKET



75K subs (2023) → 1.14M subs (2026) · \$35.2M net after marketing + interest

YEAR	CUMULATIVE SUBS	ANNUAL REVENUE	CUMULATIVE CUSTOMER REVENUE
2023	75,163	\$1.7M	\$1,700,000
2024	293,083	\$6.9M	\$8,600,000
2025	647,352	\$12.3M	\$20,900,000
2026	1,137,972	\$17.7M	\$38,634,888

18 WEEKS TO "WALKS OUT WORKING"

DISCOVERY TO LAUNCH

# Eighteen weeks. From *zero* to a bundle selling in every store.

## WEEKS 1-3 · DISCOVERY

### Store audit

Footprint survey, staff capability, POS systems, planogram mapping, bundle SKU design.

## WEEKS 4-7 · EMPLOYEE TRAINING

### Walks Out Working

Every store associate signs up themselves, completes training, receives demo kit. Staff are the first users.

## WEEKS 8-11 · OPS SETUP

### Supply + POS

Hardware supply chain, POS integration, in-store signage, planogram rollout, bundle pricing locked.

## WEEKS 12-15 · PR + SOFT LAUNCH

### Media + demo zones

PR drop, mall demo zones activate, creator previews, VIP soft-launch to top-200 store network.

## WEEKS 16-18 · LAUNCH

### Full retail live

National POS activation, every store selling, incentive scheme running, weekly leaderboards.

# Seven touchpoints. *From window to till.*

Every store gets a standard seven-zone planogram. Window graphic, entry banner, demo pod, controller wall, bundle table, till prompt, exit receipt. Each zone has a conversion metric, each metric feeds a weekly store leaderboard.

01

Window

Graphic, message of the week

02

Entry

Banner + floor decal

03

Demo pod

Playable 5-min trial

04

Controllers

Wall of branded hardware

05

Bundle

Hero SKU table, price tags

06

Till

Last prompt · staff pitch

07

Exit

QR receipt · trial code

# Hard bundles drive revenue. *And they start a fight.*

Bundling gaming with the core mobile plan outperforms every other acquisition tactic we operate. Telcos know this. Most still resist it, because bundling puts gaming on the critical path of the flagship plan, and that requires data to move across departments. This deck is the ammunition for that fight.

## The objection you'll hear

"Data access is blocked by compliance."  
"Why should my flagship plan promote this one product?" "Gaming has never been hard-bundled here."

## The answer

Show the RJIL architecture. Show the retail sensitivity numbers. Show the TIM 5G bundle. The deck exists so the CMO has a defensible story for every peer in the room.

## The outcome we need

One flagship plan, one bundled entry SKU, one soft-bundle upsell SKU, in every store in the country. Measured monthly.

# Hard bundles drive adoption. *Soft bundles drive trial.* You need both.

TAKE-UP · BY BUNDLE TYPE

## SOFT BUNDLE · opt-in upsell

~12% take-up · low friction · ships fast

## HARD BUNDLE · included in flagship plan

~70%+ take-up · plan-level inclusion · the volume engine

"Bundle" is a loaded word inside a telco. The fight inside the building is usually over the wrong type. Hard bundles (gaming included in the flagship plan) are the volume engine: revenue adoption rises sharply, internal politics hate them. Soft bundles (gaming as a one-tap upsell) are the trial engine: lower friction, weaker take-rate, easier to ship.

### HARD BUNDLE

## Gaming included in the flagship plan

Cloud gaming is part of the headline mobile / fiber / TV plan. Subscribers don't choose to add it. They get it. Take-up is automatic at the plan level. Drives the highest adoption curves we operate.

### SOFT BUNDLE

## Gaming as a one-tap upsell

Cloud gaming sits next to the plan as an opt-in upsell. Take-rate is lower but resistance is too. Useful as a Phase 1 launch SKU before the org is ready to commit to a hard bundle.

# Don't charge gamers for the data. *Charge them for the experience.*

Zero-rating cloud-gaming traffic at the network level removes the single biggest psychological barrier to subscription growth in prepaid markets: data anxiety. With PCRF / PCEF policy in place, cloud-gaming sessions don't tick down the data balance. The session feels free. Subs feel safe. Adoption climbs.

## Network policy · PCRF

Policy + Charging Rules Function flags the cloud-gaming SDP / SNI as zero-rated. No code change for the subscriber, no app change for the platform.

## Enforcement · PCEF

Policy + Charging Enforcement Function meters traffic flagged by PCRF and excludes it from the bill. Standard 3GPP plumbing.

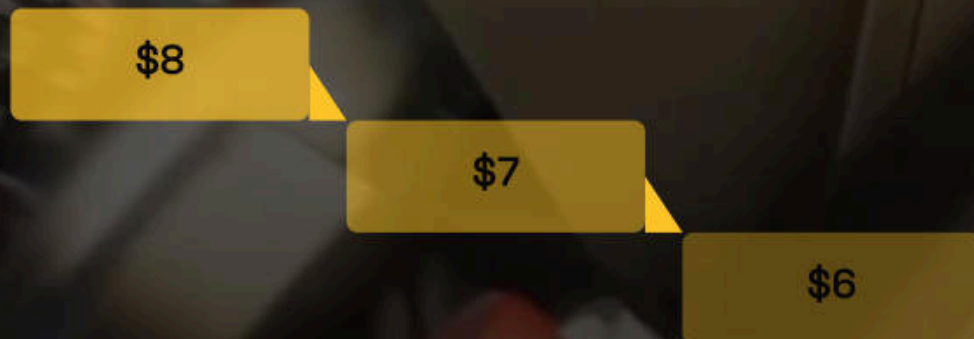
## The dividend

Subscribers stop worrying about data, sub adoption rises, churn falls. Strongest impact in prepaid markets, but every bundle benefits.

Network integration scope detailed in companion Tech Stack Overview. Marketing-layer impact: removes data-anxiety as a friction in every funnel touchpoint.

# Your prepaid base wants to subscribe. *Their wallet says no.*

PREPAID PRICE FALL-BACK · MONTHLY



Each retry steps the price down before stepping the cycle down (weekly \$5/\$4/\$3, daily \$1.50/\$1.15/\$1)

In an emerging-market prepaid base, asking for a \$10 monthly subscription up front kills the conversion. Wallets are thin. Top-ups are weekly or daily. The Celcom data point we live with: tried to bill \$8 to 250 customers, only 15 had funds. That's 6%. So we don't bill that way.

CYCLE	STANDARD TIER	FALL-BACK TIER 1	FALL-BACK TIER 2
Monthly	\$8	\$7	\$6
Weekly	\$5	\$4	\$3
Daily	\$1.50	\$1.15	\$1.00

# Float subscriptions *before* the wallet refills. *Get paid back later.*

When a prepaid subscriber has a clean track record but a temporarily empty balance, we let them keep playing. The AI credit-score engine consumes the operator's VAS purchase history, current balance, and our pass / fail charge log to compute a programmatic float ceiling. Cash-flow neutral over the cycle, materially additive to subscriber retention.

## Inputs

Telco VAS-purchase history (12 months) · current prepaid balance · Opratel pass / fail charge log · top-up cadence · subscription tenure.

## Output

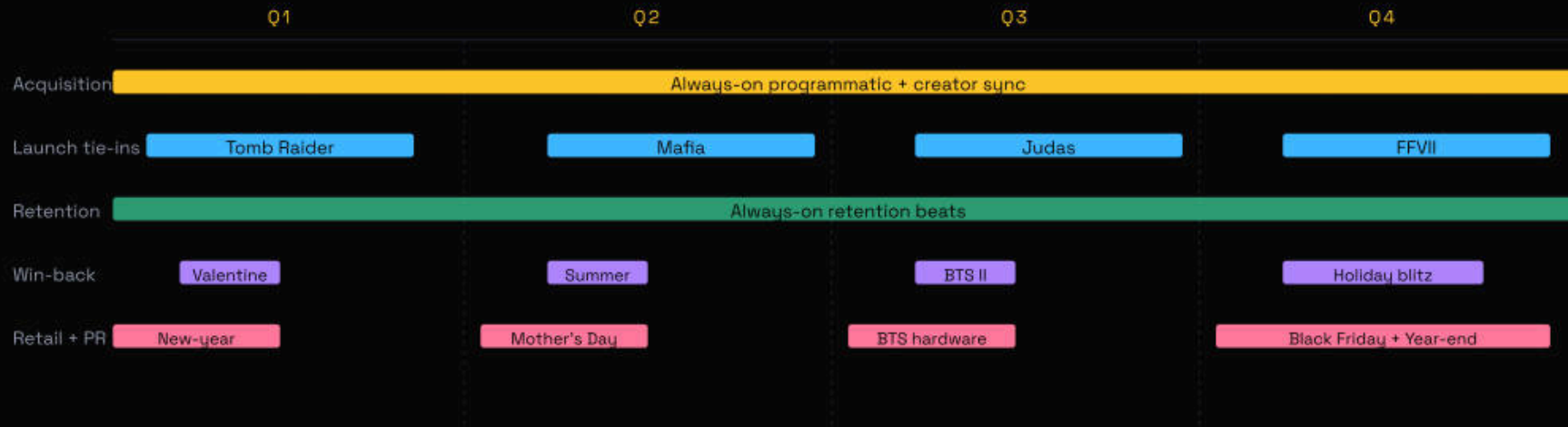
Per-subscriber float ceiling. The engine clears the daily / weekly / monthly charge against the ceiling. Charge balances when the next top-up lands.

## Why it matters

Lifts retention in the largest cohort the deck operates: the 6M-subscriber prepaid base. Defensible IP, runs on AMD ROCm, calibrated per market.

# A marketing calendar *locked 12 months* out. Five rows, every week.

12-MONTH CALENDAR · ROW PER TRACK



TRACK	Q1	Q2	Q3	Q4
Acquisition	Always-on programmatic + creator sync	Ramp through launch tie-ins	Summer gaming + World Cup lead	Holiday + back-to-school
Launch tie-ins	Tomb Raider · April	Mafia · May	Judas · August	FFVII · November
Retention	Always-on · weekly beats · missions	Always-on · mid-year save	Always-on · tournament season	Always-on · holiday gifting
Win-back	Valentine's reactivation	Summer mid-year promo	Back-to-school II	Holiday winback blitz

# From *signed contract* to *live revenue*. 90 days.

## WEEK 1 · EMBED

### Team on site

Opratel embeds with your performance team. Lumin8 with your brand team. DMP audit. Flow A/B scoping.

## WEEKS 2-4 · RANK

### Flows + cohorts

All four flows in production. Two weeks of live A/B. Winning primary flow locked. DMP cohorts connected to Customer Match.

## WEEKS 5-12 · SCALE

### Variable ramp

Paid channel weight reallocated daily against 24-hour CAC. Retail bundle rollout week 8. Creator tier activated week 10.

## QUARTER 2 · COMPOUND

### Brand platform live

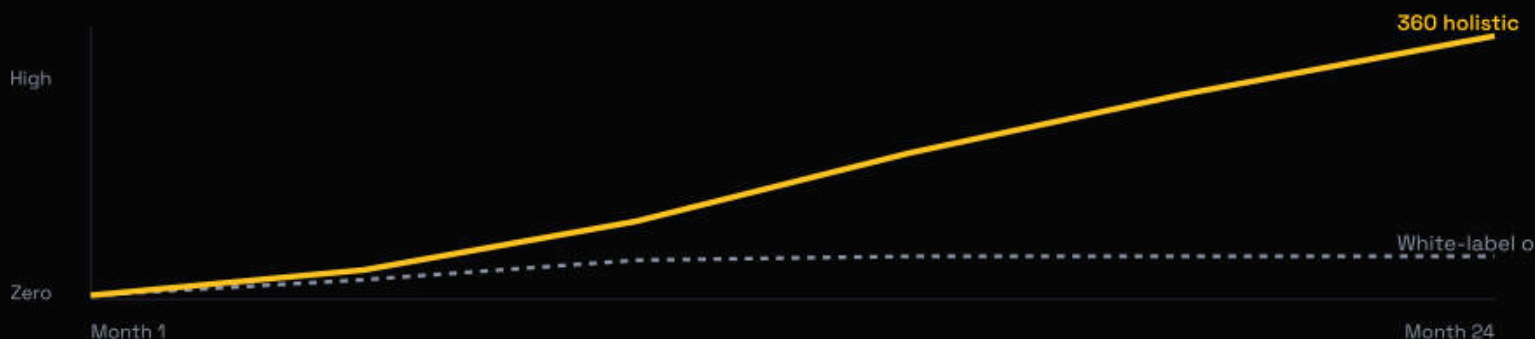
ATL brand platform launches. National tournament qualifier round. Retail in 100% of footprint. Win-back cohort running.

THE CHOICE IN FRONT OF YOU

SAAS-ONLY · 360 HOLISTIC

# You can take the SaaS. *Or you can take the system.*

SUBSCRIBER GROWTH · TWO PATHS



The platform exists. We can hand you the SaaS, you white-label it, you launch. That works. But the platform alone is the appliance, not the kitchen. The 360 package is what makes the appliance produce something subscribers actually want, every day, for years. Same platform underneath. Very different economics on top.

SAAS-ONLY

## White-label and run it yourself

Platform, content, billing, GPU POPs. Your team takes it from there. You build the brand, the funnel, the retail rollout, the community. We support, you operate.

- Lower commercial commitment
- Heavier internal lift

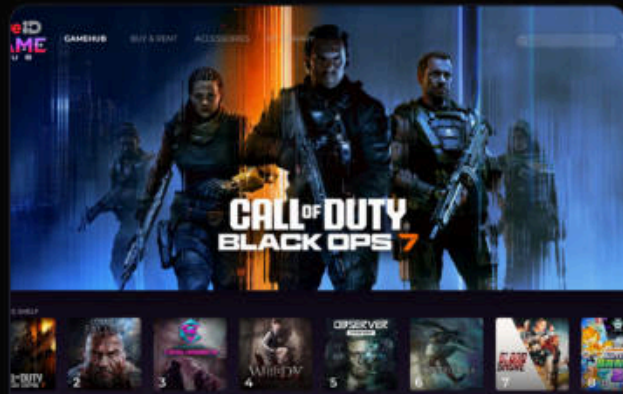
360 HOLISTIC · WHAT WE RECOMMEND

## Platform plus the engine that makes it work

Platform + brand platform + performance marketing + retail rollout + community + creator program + hardware ecosystem + data dashboards. One embedded team. One contract. One P&L. Turn-key.

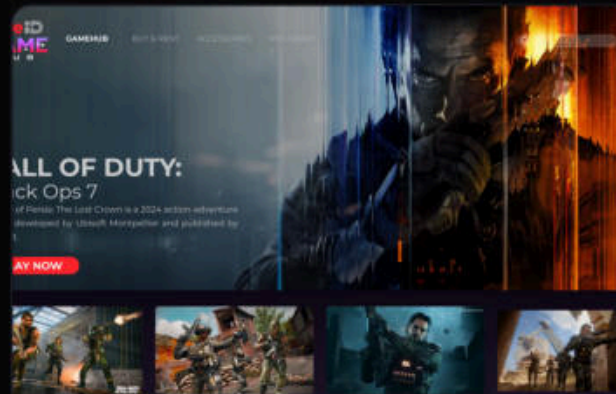
# One product. *Four revenue streams.* One brand experience.

Not where you start. Where you're going. At maturity, the platform pulls four revenue streams into a single subscriber experience: cloud subscription, buy-and-rent + studio AAA, in-game purchases, and hardware accessories. Same login, same wallet, same brand. The full aggregation platform, with your name on it.



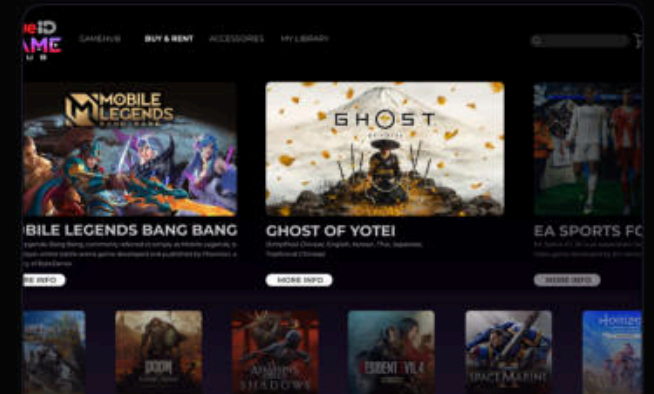
### Cloud catalog

GameHub home · Blacknut subscription titles, your hero shelf, your trending row.



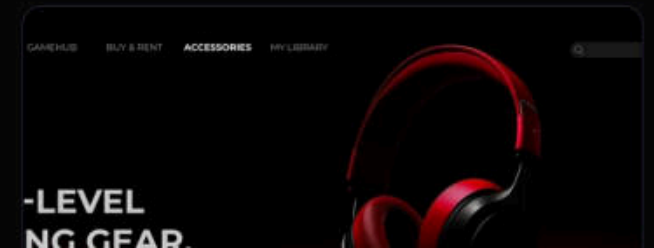
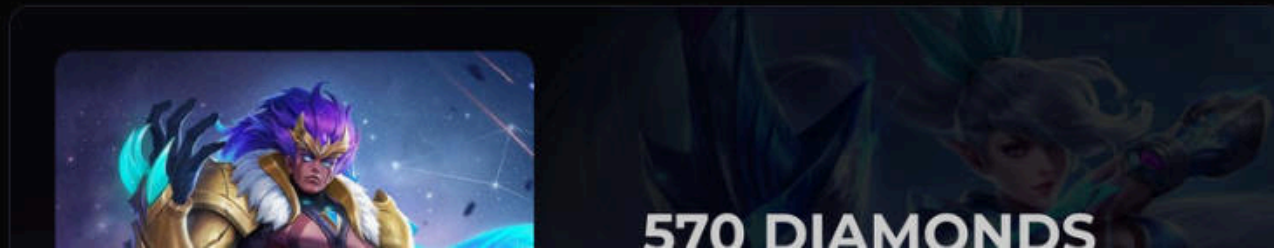
### Buy & Rent · AAA

OnePlay buy-and-stream + studio-direct exclusives. Mobile Legends, Ghost of Yotei, EA Sports FC, Assassin's Creed, Resident Evil.



### In-game purchases

Diamonds, V-bucks, skins, season passes. The recurring micro-transaction layer. New revenue line, near-zero marginal cost.



# Marketing. *Better product.* Market domination.

As a telco, you must have marketing. Marketing creates demand. Demand reveals what the product needs to become. The product evolves. Better product compounds the demand. Eventually, you don't share the gaming category in your country. You own it.

## 01

### Marketing

A 360 engine the telco hasn't had to build alone. Brand, performance, retail, community, hardware. Demand on tap, in your country, in your accounts.

## 02

### Better product

Demand data flows back into the platform. Catalog reshuffles, flows tighten, hardware extends, studio deals follow. The product gets sharper because the marketing is sharper.

## 03

### Market domination

By Year 3, you're not the telco that "added gaming." You're the gaming brand of your country. Subscribers don't pick another platform because there isn't another platform that does what yours does.

## THE ASK

# Let's turn your **\$1B** 5G investment into a **consumer brand** your subscribers **actually** feel.

One contract. One embedded team. One 24-month rollout. Three revenue streams: subscription, store, hardware. One brand position we'll own together: the operator who runs gaming in your country. Not a SaaS. A 360 marketing operating system, turn-key by design, proven across 9 markets.

## NEXT STEP

60-minute working session · your team  
+ ours

## COMPANION BOOKS

Tech Stack · SaaS Bible · White  
Paper

## LIVE ON THE SITE

radianarc · marketing-  
360

## CONTACT

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