

Bitdefender[®]
SUBSCRIBER PROTECTION PLATFORM

Beyond Connectivity

How MVNOs Can Monetize Trust in the Digital Services Era





Price wars.

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How MVNOs Can Monetize Trust in the Digital Services Era



Market Landscape – Who do MVNOs Serve?



Budget conscious

Users who want "no-frills" service without paying for perks they don't use



Community Focused

Traditionally migrant focused but now also sports, religion and Fintech



Students/Youth

Digital-first brands target younger generations with contract-free, high-data plans and "social media data" whitelisting



Traveller/Roamer

A rapidly growing segment due to eSIM technology. Companies offer data-only plans for travelers, bypassing expensive MNO roaming fees



IoT/Enterprise

MVNOs are increasingly targeting B2B sectors, providing connectivity for fleet management, smart meters, and other Internet of Things (IoT) devices where MNO plans are too rigid or expensive

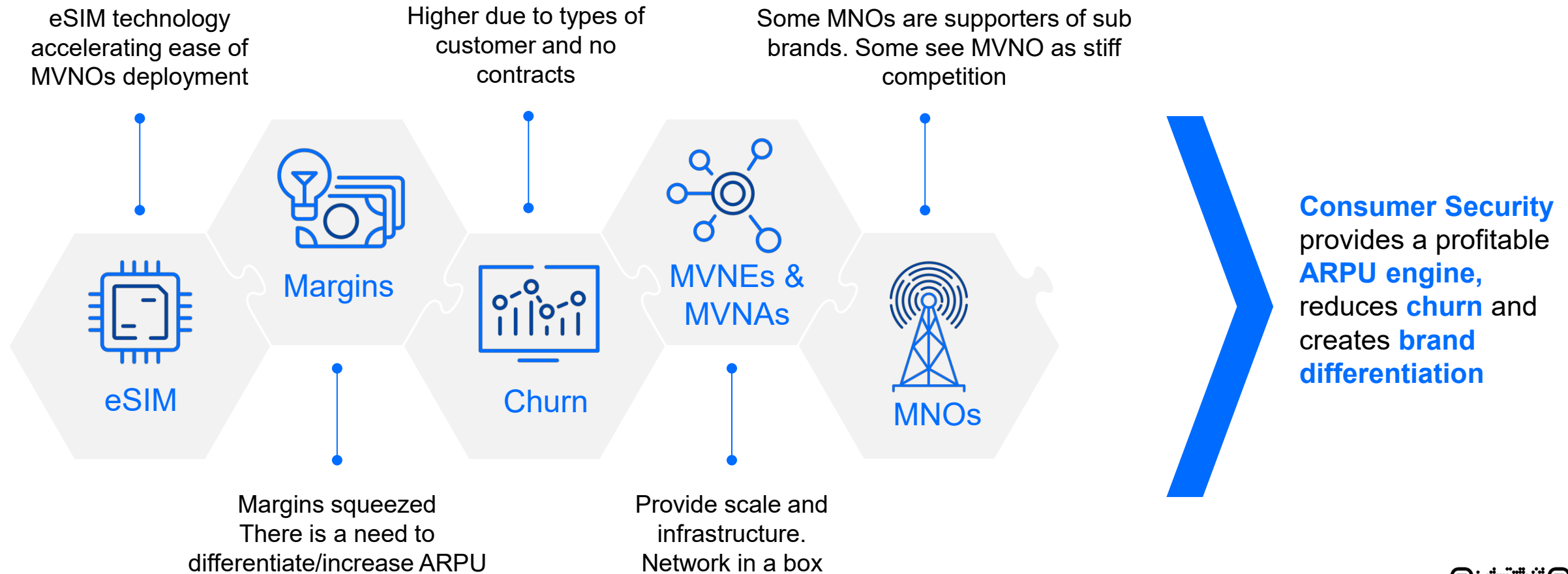


Second Line Users

Professionals or privacy-conscious users needing a secondary number for work or dating, often enabled via eSIM apps



Market Landscape Considerations



Cyberattacks are on the rise and your customers are becoming increasingly aware of the risks



6.5B malware attacks in 2024 ¹

79% users worried about being hacked ³

53% users fear financial loss most⁵

49% users say they expect a solution from their Operator ⁴

As the world continues to grow more connected, cyberthreats are becoming more sophisticated. They exploit factors beyond the user's control, such as security vulnerabilities in their smart devices and online services. Attacks are automated and frequent. Simply "being careful" isn't enough anymore.

1. Statista, Annual number of malware attacks worldwide from 2015 to 2024
2. Bitdefender, The 2025 IoT Security Landscape Report
3. Statista, Crimes Americans worry about most in 2024
4. Bitdefender Security and Privacy Study, Sep 2023



Cybersecurity has become standard in telco



45%

Think carrier should be responsible for their cybersecurity¹

53%

conduct transactions on their smartphones, yet almost half don't run a mobile security solution.³

46%

Users planning to switch to a provider with security are prepaid users²

\$6-10
month

Willingness to pay for better cybersecurity⁴

For MVNOs, offering cybersecurity is more than differentiation. It's a requirement to stay competitive and grow.

Moreover, Cybersecurity is not just an add-on, it's a scalable growth engine that improves ARPU, retention, and differentiation while preserving agility.

1, 2, 4 - Bitdefender US Security and Privacy Study

3, Bitdefender Consumer Cybersecurity Survey



The Opportunity

01

It's time to differentiate services – cybersecurity is one of the most in demand services by consumers

02

Elevate your brand by associating with best-in-class security providers. Ferrari does!

03

Work with the best. Consistently ranked No1 in performance and usability



04

Simple integration and fast time to market

05

Bitdefender continues to innovate introducing new technologies to stay ahead like scam alert and scam radar

06

Technology doesn't sell alone. Bitdefender will support you to ensure your business success



Consumer Cybersecurity Solutions for MVNOs

What we offer

A flexible, multi-tier cybersecurity portfolio that enables MVNOs to offer device-level and cross-platform digital protection, from mobile security to complete family protection, under trusted Bitdefender technology.

Designed for simple bundling, upselling, and tiered monetization.

Tiered monetization & ARPU growth

With three ready-to-deploy security tiers, MVNOs can:

- ↳ Launch an entry-level **Mobile Protection** add-on
- ↳ Upsell to **Mobile & Computer (multi-device protection)**
- ↳ Maximize ARPU with **Family Protection (VPN, Password Manager, Parental Control)**
- ↳ Increase retention through always-on digital protection
- ↳ Position themselves as a trusted digital safety provider



Product Portfolio for MVNOs

1 device



Bitdefender Mobile Protection

- ↳ Antimalware, browsing and anti scam protection for one mobile device
- ↳ Easy mental model for customers: *“Protect the phone tied to this SIM”*
- ↳ Aligned with what MVNOs sell: mobile connectivity
- ↳ Works best for prepaid users

Customer Value Proposition:

“For 1 euro per month, your phone is protected against scams, malware, and unsafe apps.”

3 devices



Bitdefender Mobile & Computer Protection

- ↳ Antimalware, browsing and anti scam protection for multiple devices.
- ↳ Cross-platform: Android, iOS, Windows, macOS
- ↳ Easier upsell for: families, Multi-SIM households, expat users
- ↳ No premium VPN positioning needed
- ↳ Lower price than premium

Customer Value Proposition:

“Protect your phone, laptop and other devices under one simple plan.”

5 devices



Bitdefender Family Protection

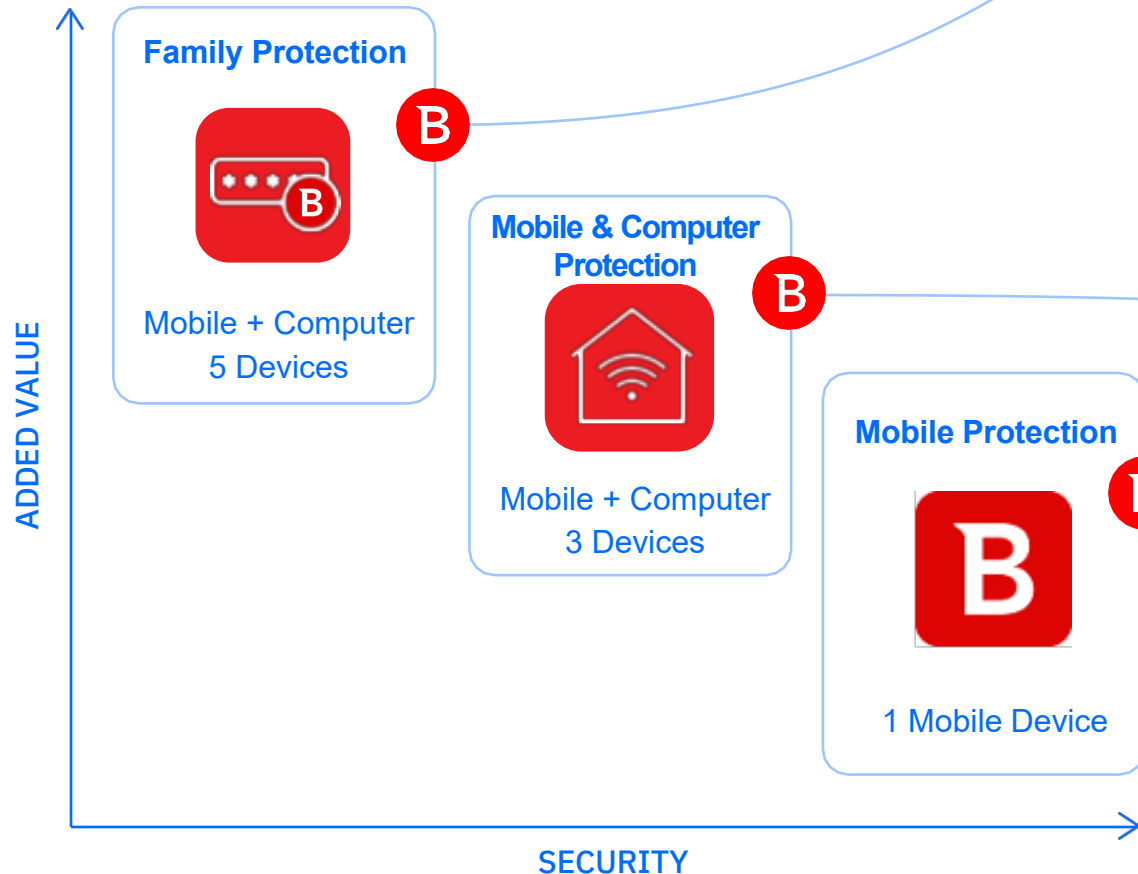
- ↳ Advanced protection for multiple devices (Includes VPN & Password Manager & Parental Protection)
- ↳ Ideal for families with multiple devices and shared plans
- ↳ Best suited for higher-value prepaid or hybrid users

Customer Value Proposition:

“Protect your entire family’s devices and online privacy under one premium plan.”



Best Product fit for Customers



Families

Families, parents, shared plans

Motivation: Cost control + safety

Value Seekers

Cost-aware but quality-focused

Motivation: Balance of price, trust, and added benefits

Digital Natives

Younger, urban, digitally savvy

Motivation: Convenience, UX, instant activation (eSIM)

Ethnic Users

Immigrant and diaspora communities. High voice usage, strong brand loyalty

Motivation: International calling, roaming, family connectivity

Budget Users

Highly price-sensitive, prepaid-first, often SIM-only

Motivation: Lowest possible monthly cost, no contracts



Thank you

Come and talk to us at **Booth No. 7** to find out more!

or visit our [MVNOs Solutions Portal](#)

