



Whalebone

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Our Mission and North Star



User-centric cybersecurity
for 1 billion people

Have you ever...

- Received a suspicious link via SMS, WhatsApp, Messenger or email?
- **Felt unsafe visiting a new website?**
- Suspected that some of your apps were sending data somewhere you did not want them to?
- **Experienced a device slow-down for no apparent reason?**
- Wondered if any of your passwords, payment card number or social security number has leaked to criminals?



The Necessity of User-Centric Security



Whalebone multiple protection layers

Adding new protection layers on top of initial DNS level security at speed



Business results of our approach

>50%

adoption

On average, over 50% of the user base subscribes to the new cyber security product.

<2%

churn

Telcos can expect very low product churn below 2% on average.

>5%

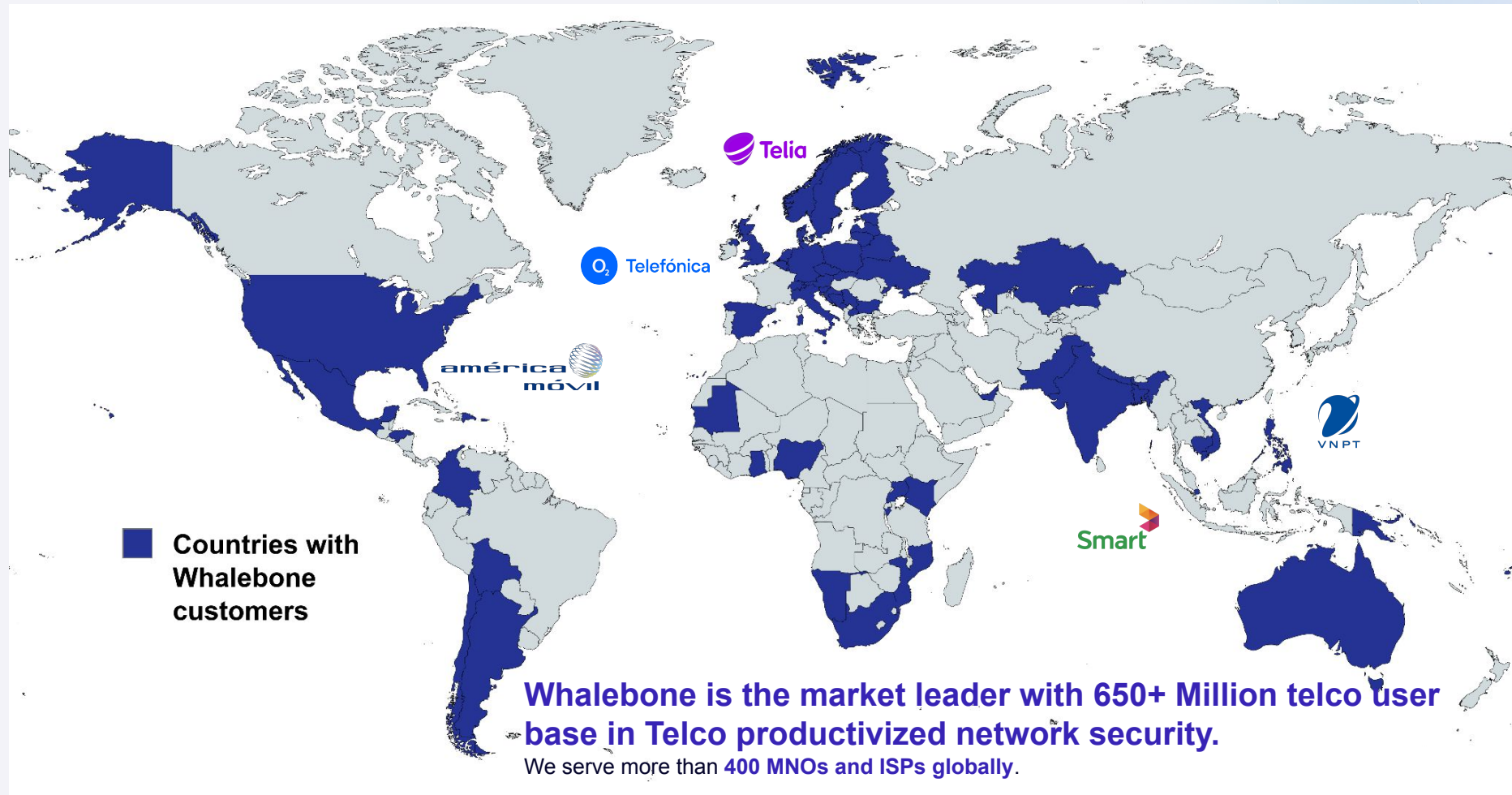
ARPU

Such an amount of users increases the telco ARPU by more than 5%.

Telcos have huge “unfair” advantage.

Telcos are to become the global leaders in cyber security.





The rise of #ConnectedMeansProtected

1b

By end of 2025 we expect
to work with 75 Telcos
altogether representing
about 1b user base.



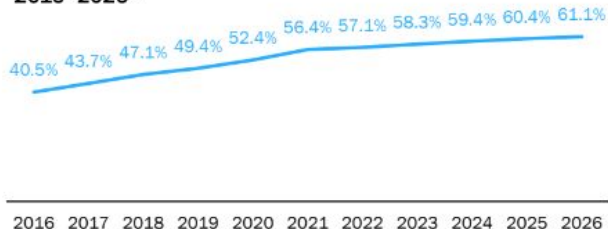
1.6b

By 2026 we expect the
portfolio to grow to 130
Telcos representing about
1.6b user base.

Join the force!

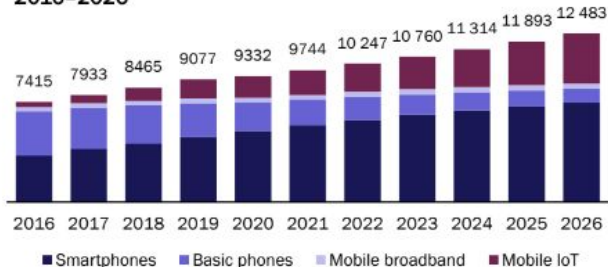
The Opportunity

Figure 9: Fixed broadband household penetration, worldwide, 2016–2026¹



Source: Analysys Mason

Figure 10: Mobile connections by type, worldwide (million), 2016–2026



Source: Analysys Mason

¹ Based on residential fixed broadband connections only.

Figure 11: Telecoms revenue and growth rate by service type, worldwide, 2016–2026

Service	Revenue (USD billion)		CAGR	
	2020	2026	2016–2020	2020–2026
Mobile handset and broadband	736.4	856.7	0.2%	2.6%
Mobile IoT	8.58	15.5	19.1%	10.4%
Mobile value-added services	38.1	67.1	18.8%	9.9%
Mobile equipment	150.5	197.4	–0.9%	4.6%
Fixed voice and broadband	363.5	416.4	–0.2%	2.3%
Dedicated connections	93.9	98.5	2.5%	0.8%
ICT services	52.5	97.2	14.9%	10.8%
Pay TV	207.6	192.8	–0.7%	–1.2%
Total retail	1500.6	1744.2	0.9%	2.5%
of which is residential	1141.1	1325.0	0.7%	2.5%
of which is business	359.4	419.1	1.4%	2.6%
Total wholesale	132.4	142.9	–2.7%	1.3%
Total service	1633.0	1887.1	0.5%	2.4%

Source: Analysys Mason



Mobile VAS + ICT to grow to 241bn USD by 2030. 84bn would represent 39% yet we expect those categories to grow much faster than predicted by AM especially thanks to cybersecurity (as proven by our successful Telcos)

incl. Consumer Digital Life Protection CDLP

incl. Cybersecurity Services for SMB and Enterprise

Worldwide example: PayTV 12.7% of Total Telecom revenues from Services, expected to fall to 10.2%

Whalebone cybersecurity offering (segments)



Consumer

Nearly everywhere live & scaling



Small/Medium Business

Many countries already live



Enterprise & GOV

Emerging

Protect whole digital lives of people

Address Mobile and Fixed households.

Automate provisioning at scale to masses.

Offer enterprise-grade protection with no extra effort to businesses.

Suitable for SoHo, SMB up to 100 employees.

Automate provisioning at scale to businesses.

Show and secure blind spots traditional security measures miss.

Provide value to Enterprises with more than 100 employees.

Provision at scale and/or on click or via deployment on customer premises.

All based on telco ready made **Whalebone Aura** product to simply implement, offer and sell.

Whalebone Aura and/or Whalebone Immunity

The Whalebone Line Up: 6+ teams working on commercial success as part of the subscription

Product Excellence → Service Excellence



**CUSTOMER
SUCCESS TEAM**



**SERVICE
GTM &
GROWTH
TEAM**



**TECHNICAL
CONSULTANTS**



**PRODUCT
EXPERIENCE
TEAM**



**CONTENT
MARKETING
TEAM**



**COUNTRY
SPECIFIC
THREAT
INTEL TEAM**

Whalebone in a nutshell

Name and date of incorporation

Whalebone, s.r.o.
Incorporated 05/2016
HQ Czech Republic

Team size

150 (⅔ CZSK, ⅓ globally), expected 200 in 2025

Status

Growth, Scaling up

Industry

Subscription/SaaS, Network & ID Protection, B2B

Most active Customer Segments

Telecoms, ISPs, Corporates & Government

One sentence pitch

Whalebone provides a no device software installation cyber security. The main business is in Telco, where it gets monetized and lifts the Telco company revenue by up to 3-5%.

Market

Tapping into combined annual €92b consumer, smb and b2b network security.

Security Problem/Opportunity

- 90 % attacks use internet domain request, Whalebone blocks device access to malicious domains on the DNS level
- 70% people have identity leaked to darknet
- Telecoms are security suitable and hungry
- Whalebone unlocks multiple of the current TAM for consumer and network security

Current customer base

500 customers in 40 countries, incl

