

SIMPLIFYING SECURITY FOR SERVICE PROVIDERS

F-Secure Consumer Security | November 25, 2021



PROTECTION EVERYWHERE. SIMPLIFIED.

+30

Pioneer with **+30 years** of experience in cyber security



Leveraging artificial intelligence **+10 years** in cyber security

+200

Global leader for Service Providers with **200+ partners** and **500+ launches**

€10_{bn}

Value created for Service Provider partners in +15 years

96%

Satisfied with our local teams supporting **Service Provider outcome-based commercial** success

NPS 55

Superb end customer experience and **NPS 63 for our partnership model**



Best Protection Award 7 years out of 10 - no other vendor can show this track record



Revenue €220M, Adj. EBITDA €36M in 2020
NASDAQ/OMX listed
100+ countries, 1700 cyber security experts



F-Secure.

F-Secure

PROTECTION EVERYWHERE. SIMPLIFIED.



Global leader for Service Providers with **200+ partners** and **500+ launches**





PROTECTION EVERYWHERE. SIMPLIFIED.

Award-winning portfolio

to protect devices, identity, family and the connected home



Turn-key co-branded solutions, SDKs and Cloud APIs



PROTECTING CONSUMERS' CONNECTED LIVES

Business services

to ensure partner success



Platforms

to integrate with key partner business processes



Business model flexibility

Billing & CRM integration

Support

Business Intelligence



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SERVICES DRIVING YOUR COMMERCIAL SUCCESS

ENGAGE

ENABLE

EXTEND



Consumer Insight

- Segmentation, market positioning and marketing messaging recommendations and best practices
- Mystery shopping & Focus groups, segmentation alignment



Service Marketing

- Security go-to-market best practices (collateral, campaign & support materials)
- Training materials and local training resource for sales channels



Customer journey optimization

- Analytics audit of onboarding steps (existing user flows, cost-benefit analysis)
- Best practice onboarding processes
- Implementation support



Lifecycle & Campaign Messaging

- Best practice messaging templates
- Automated delivery for “welcome/reminder/use more” messages
- Marketing messaging (up/cross-sell and value messages), also as in-app campaign messages



Customer Feedback

- Partner specific consumer security surveys: design, implementation and recommendations



Predictive Modelling

- Predictive modelling based on different parameters around the security service to identify factors preventing or causing churn

F-SECURE CONSUMER PORTFOLIO PROTECTION EVERYWHERE. SIMPLIFIED.



F-Secure **TOTAL**

Security and privacy

Protect your phones and computers against online threats wherever you go, on any network, even on public WiFi



F-Secure **ID PROTECTION**

Password manager and identity protection

Protect your identity by creating strong passwords, and receive alerts and help if your online identity and accounts are at risk



F-Secure **SENSE**

Connected home security

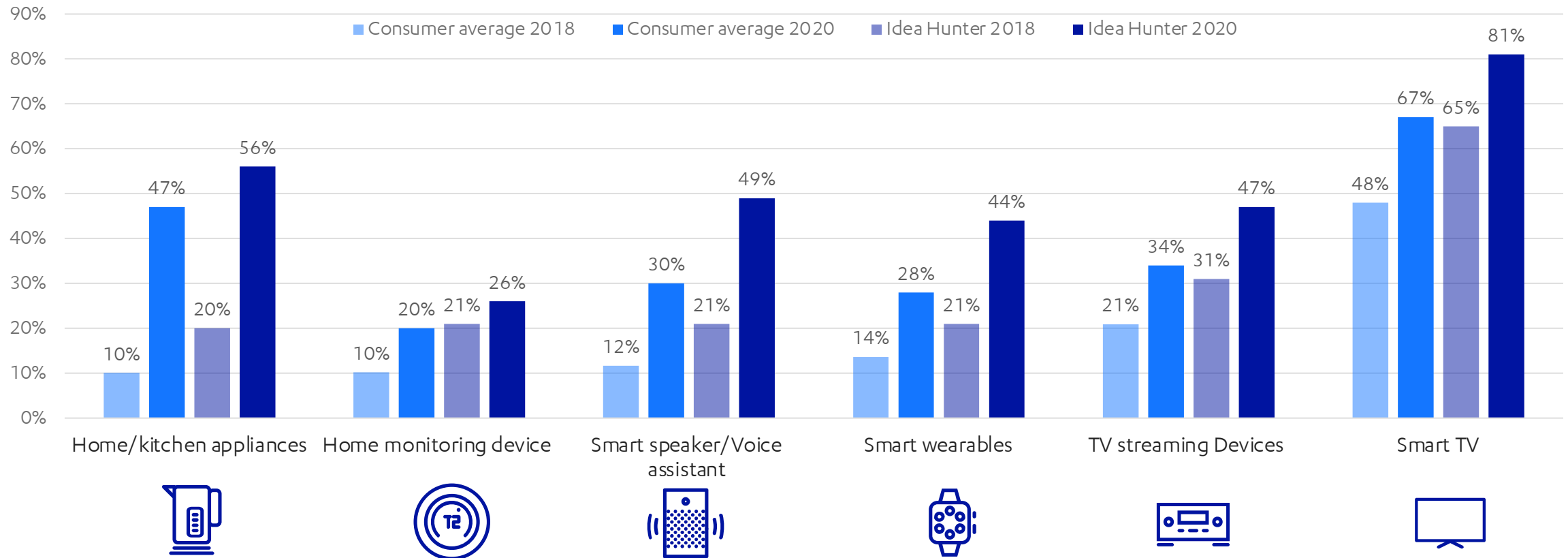
Protect all internet-connected devices in your home against hacking, intrusive tracking attempts and cyber threats

RESTRICTED

POSITIONING SECURITY TO CONSUMERS

SMART DEVICES ARE FILLING UP OUR HOMES WITH INCREASING SPEED

SMART DEVICE OWNERSHIP, 2018 vs. 2020



Source: F-Secure Connected Home consumer survey, April 2020 (11 country data, n=4 400)

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78%

WORRIED ABOUT SOMEONE HACKING INTO THEIR SMART HOME DEVICES

Source: F-Secure Connected Home consumer survey, April 2020 (11 country data, n=4 400)



80%

**FEEL SMART HOME DEVICE
MANUFACTURERS ARE NOT DOING
ENOUGH TO ENSURE THEIR ONLINE
SECURITY AND PRIVACY**

Source: F-Secure Connected Home consumer survey, April 2020 (11 country data, n=4 400)



WHO DO YOU TRUST?

60%

**TRUST THEIR SERVICE PROVIDER PARTNERS
FOR PROVIDING SECURITY**



49%

WILLING TO PAY FOR CONNECTED HOME SECURITY*


* Protection for all internet connected devices at home against hacking and malware
Source: F-Secure Connected Home consumer survey, April 2020 (11 country data, n=4 400)



**33% WILLING TO PAY FOR PREVENTING
THEIR KIDS FROM SEEING
UNSUITABLE ONLINE CONTENT**

* Families with kids < 15 years

Source: F-Secure Connected Home consumer survey, April 2020 (11 country data, n=4 400)




A woman with long brown hair, wearing a light grey t-shirt and grey leggings, is sitting on a bed. She is looking down at a laptop computer that is open in front of her. The background is a blurred indoor setting with a window showing a cityscape.

€5-10

**PER MONTH
OPTIMAL PRICE RANGE FOR
CONNECTED HOME SECURITY**

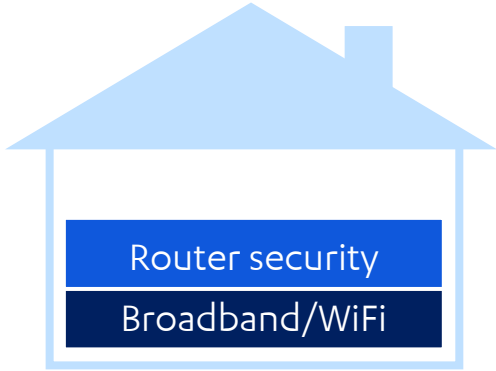
Source: F-Secure Connected Home consumer survey, April 2020 (11 country data, n=4 400)

SERVICE PROVIDER SECURITY STRATEGIES

-  F-Secure
-  Service provider
-  Not offered



PEACE OF MIND

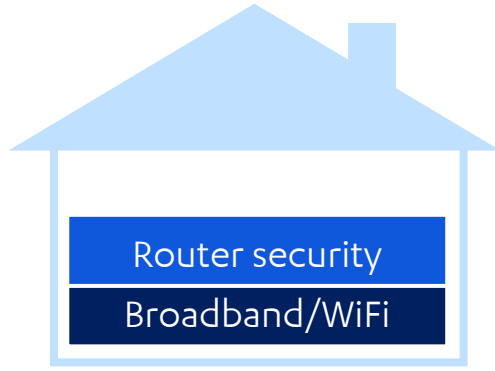


VALUE DRIVER

Topline, Brand



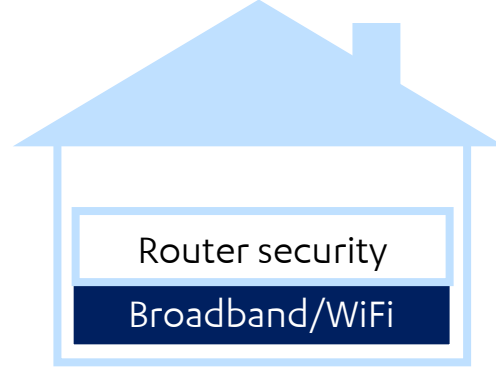
FAMILY PROTECTION



Loyalty, ARPU



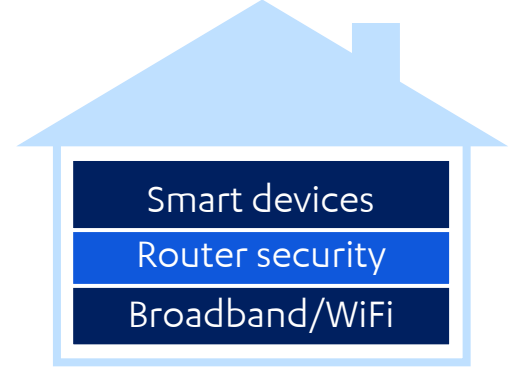
IDENTITY PROTECTION



Topline, ARPU



SECURE HOME



ARPU, Brand



GO-TO-MARKET MODELS FOR SEAMLESS SECURITY OFFER

DESCRIPTION

BUNDLE

- Security is bundled with core product, broadband/mobile contract or other service
- One price for end customer

VAS

- Security is offered as a value-added service (VAS) on top of core product, broadband/mobile contract
- Separate price for end customer

BUNDLE & VAS

- Part of security offering is bundled with core product with one price
- Value add security is offered as VAS upsell offer with separate price

EXAMPLES

Broadband comes with security at home and on-the-go



Broadband



Secure your digital life at home and on-the-go



High speed and security for your home



Secure your digital life also on-the-go



POSITIONING EXAMPLES

Example: Banking and Shopping positioning



SECURE YOUR CONNECTED LIFE

- 
STOP VIRUSES & THREATS
 Protect your devices and your digital life from online threats
- 
PROTECT YOUR MONEY
 Extra layer of security for online shopping and banking
- 
SECURE INTERNET CONNECTION
 Prevent hackers and data collectors from spying on your online activities
- 
PREVENT IDENTITY THEFT
 Storing your passwords securely and find out instantly and get help if a hacker has stolen your information

TOTAL & ID PROTECTION

Example: Complete protection positioning



SECURE YOUR CONNECTED LIFE

- 
STOP VIRUSES & THREATS
 Protect your security and privacy on your desktop and mobile devices
- 
SMART HOME SECURITY
 Secure router that protects every internet-connected device in your home from hackers
- 
PROTECT YOUR MONEY
 Extra layer of security for online shopping and banking

SENSE & TOTAL

RESTRICTED

Example: Complete protection positioning



SECURE YOUR FAMILY

- 
STOP VIRUSES & THREATS
 Protect your security and privacy on your desktop and mobile devices
- 
SMART HOME SECURITY
 Secure router protecting every connected device in your home
- 
PROTECT YOUR MONEY
 Extra layer of security for online shopping and banking
- 
PREVENT IDENTITY THEFT
 With secure passwords and find out instantly and get help if a hacker has stolen your information

TOTAL & ID PROTECTION & SENSE

F-SECURE SENSE CONNECTED HOME SECURITY

CONNECTED HOME SECURITY



CONNECTED HOME SECURITY

F-SECURE SENSE

SMART HOME SECURITY

Protect your connected devices against online threats and hacking



BOTNET PROTECTION

Keep your devices safe from viruses, trojans, spyware, and ransomware

BROWSING AND MALWARE PROTECTION

Explore the Internet, and do banking and shopping worry-free



FAMILY RULES

Protect your entire family with a single service. Set healthy boundaries for your children

TRACKING PROTECTION

Stop advertisers from tracking you, and stay anonymous online



PROTECTION ON THE GO

Protects your mobile devices everywhere you go (*separate product*)

HYPER SPEED

Minimizes security impact on your broadband speeds



DEVICE RECOGNITION

Easy management of devices in your home network

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IDENTITY PROTECTION

Protects your online identity with monitoring and breach alerts when using smart home device cloud services (*separate product*)

EXAMPLES ON HOW SENSE BENEFITS BOTH CONSUMERS AND SERVICE PROVIDERS



END USER



SERVICE PROVIDER

1



SECURE THE CONNECTED HOME

Consumers are concerned about the security of their IOT devices. With SENSE they're safe. Fully in control with the smartphone app.



'CLEANER PIPES'

By blocking malicious traffic close to the source and keeping it off the service provider's network, SENSE reduces Botnet traffic reducing service provider cost and improving network reputation

2



SURF TROUBLE-FREE

Browsing protections protects all devices against malicious websites. All browsers on the home Wi-Fi covered, without installing anything.



DEVICE ANALYTICS

Gain great insight into devices connected installed in end user's homes. Less guesswork for support staff and invaluable data for customer insights teams.

3



PARENTAL CONTROLS

Create profiles for the kids and their devices, making sure they don't spend too much time online or stumble across the wrong things. And when it's dinner time, you can switch the Wi-Fi off.



INCREASED CUSTOMER LOYALTY

Customers with active security products are more loyal and churn significantly less.

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SENSE MANAGEMENT APP

SECURE YOUR HOME NETWORK

With a powerful app, you are always in control of your devices and their security in your connected home.



EASY SECURITY

All your connected devices at home are automatically protected, and you can monitor their individual online activity.



THREAT ALERTS

SENSE will block malicious websites, detect infected smart home devices and block their internet connection.



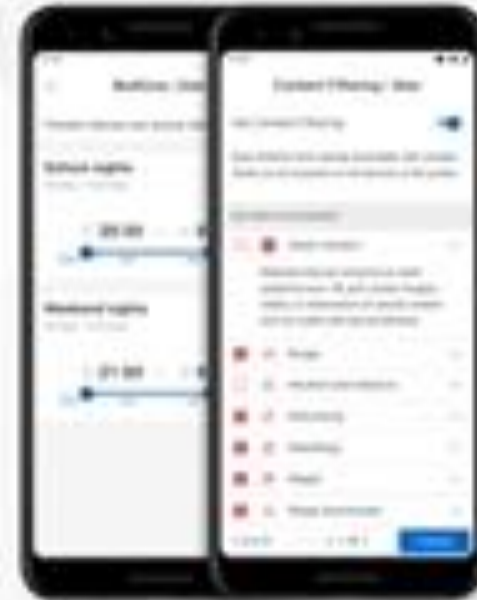
ORGANIZE DEVICES

You can group devices by their room, category or who uses them. This makes managing their online activity much easier.

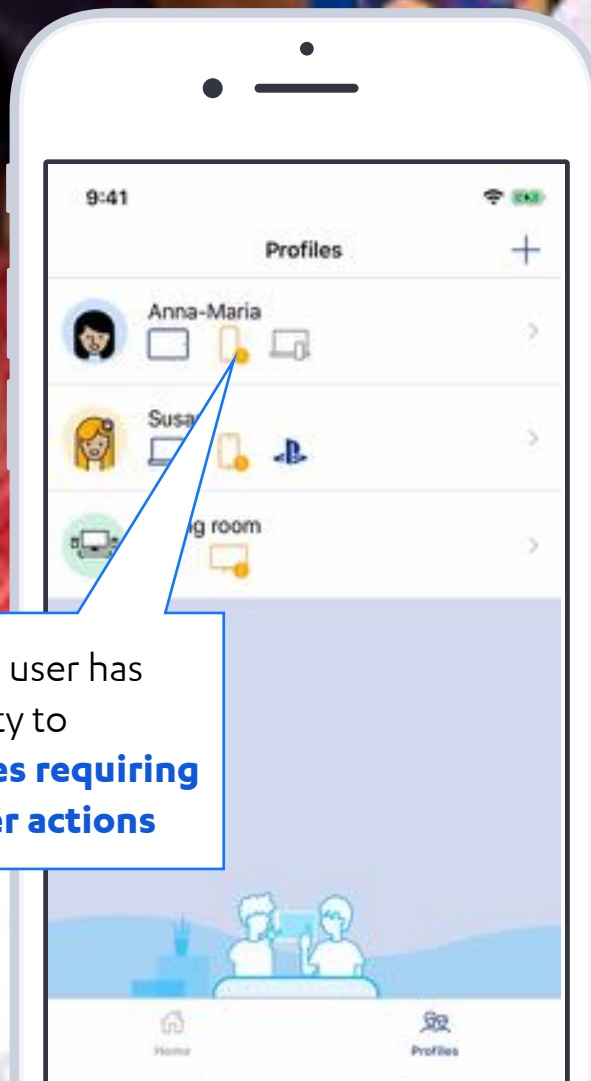


FAMILY PROTECTION

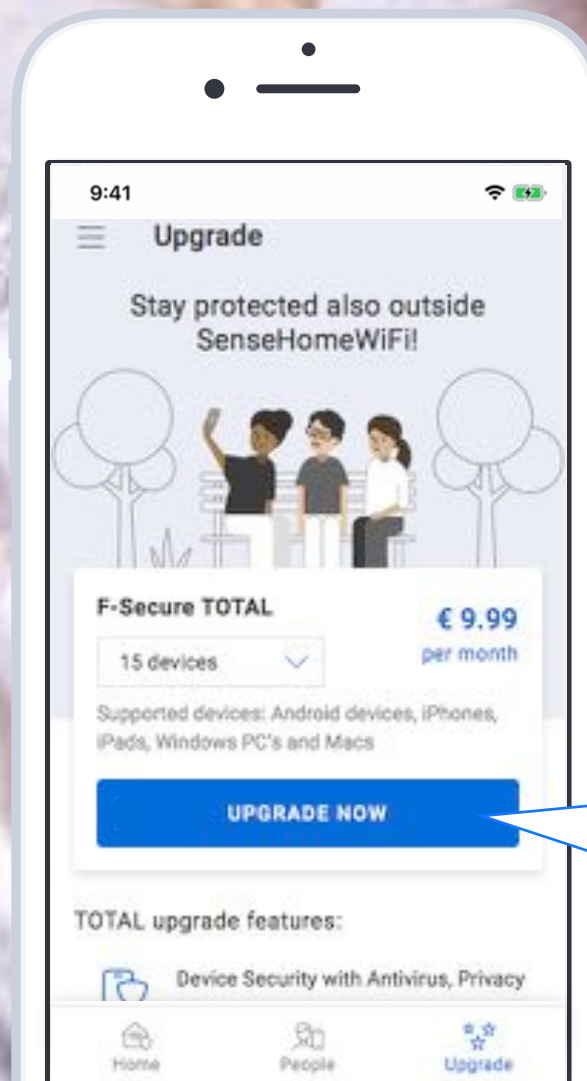
Set healthy online boundaries for your children, blocking harmful content and setting internet breaks when needed.



SMOOTH CUSTOMER JOURNEY TO ENDPOINT PROTECTION



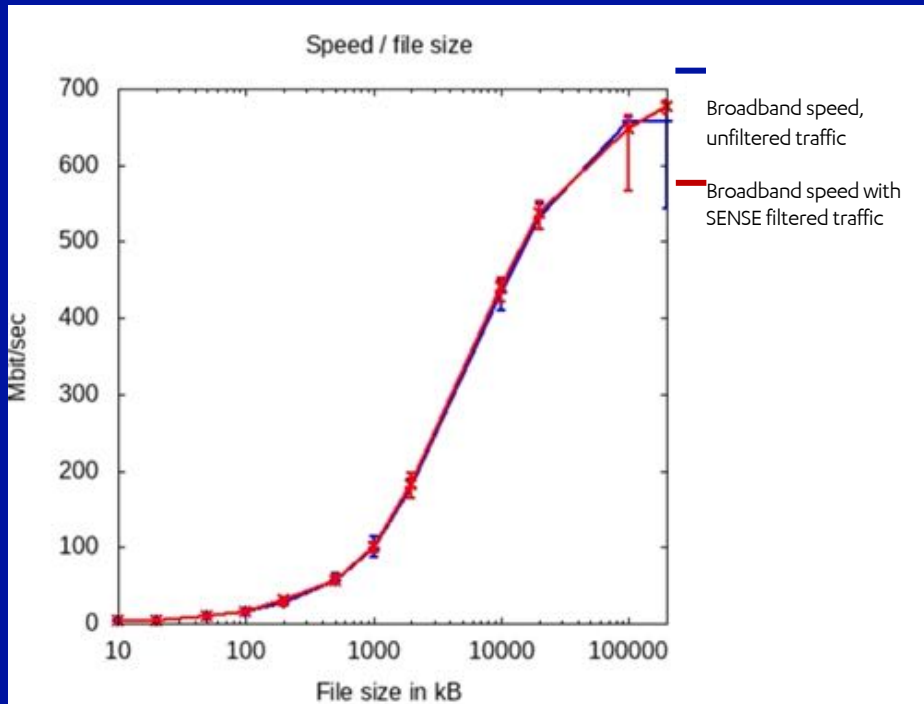
Admin user has visibility to **devices requiring further actions**



Proactive push of endpoint security at service provider's discretion

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SENSE DESIGNED FOR BEST INTERNET EXPERIENCE



F-SECURE HYPER SPEED



- F-Secure SENSE Router SDK minimizes impact on consumer broadband speeds
- Most recent test outcomes have confirmed that there is no noticeable performance impact of deploying SENSE onto the CPE.
- **Extensive performance tests by our customers has shown 960Mbps throughput (up and down) on a 1Gbps FttH connection, regardless of SENSE being deployed.**
- See SENSE System Requirement Documentation for further requirements

ID PROTECTION ADDING A UNIQUE LAYER OF ADDITIONAL PROTECTION TO SENSE

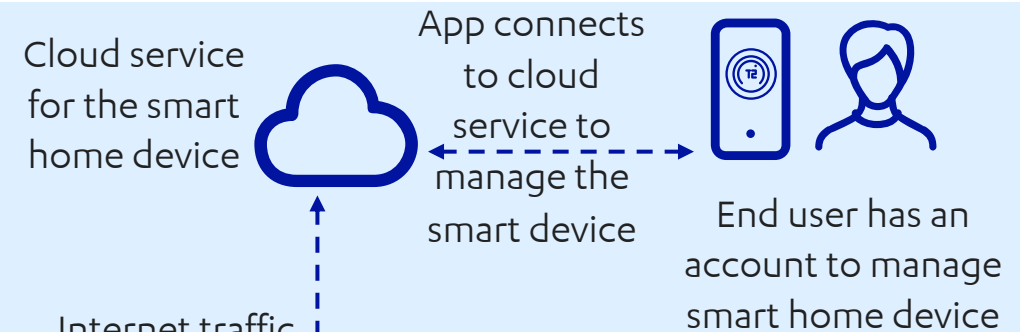
PROTECTION LAYER

Protection for using online services



F-Secure ID PROTECTION

24/7 monitoring and breach alerts for your online identity when using online services to manage your smart home devices

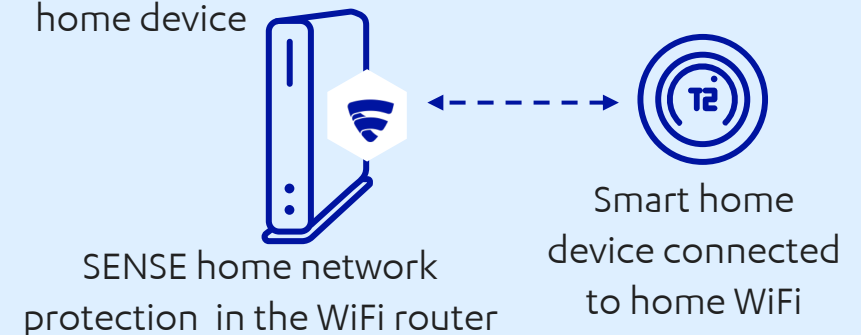


Protection for home network devices



F-Secure SENSE

Protects every internet connected device in the home network against cyber threats



MAKING IT HAPPEN

SENSE MANAGEMENT APP OPTIONS

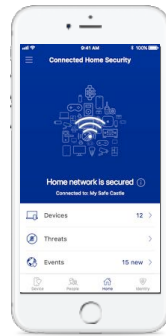
RECOMMENDED

ROADMAP

OPTIONAL

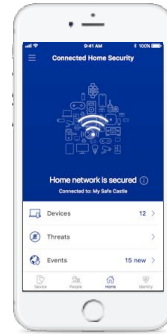
CASE BY CASE

AT HOME



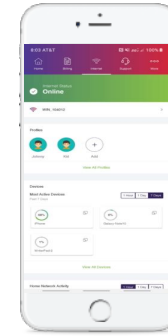
F-Secure SENSE app*

- F-Secure provided app for connected home security management
- Block pages



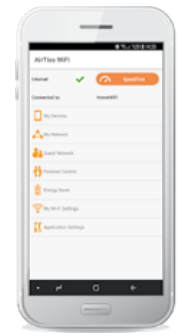
F-Secure "One App"

- F-Secure provided combined app for endpoint protection and connected home security management (TOTAL 4.0, roadmap item 2022)



Service Provider App

- Service Provider app incl. connected home security management
- Family rules aligned via cloud
- Protection on-the-go with SAFE/TOTAL as separate apps



Heimgard App

- Third party Vendor, eg security or WiFi management application
- Integrated functionality with WiFi management or other functions

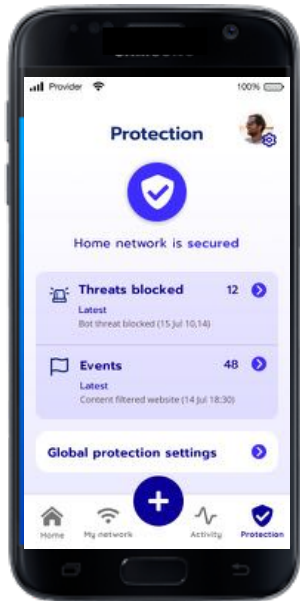
ON THE GO



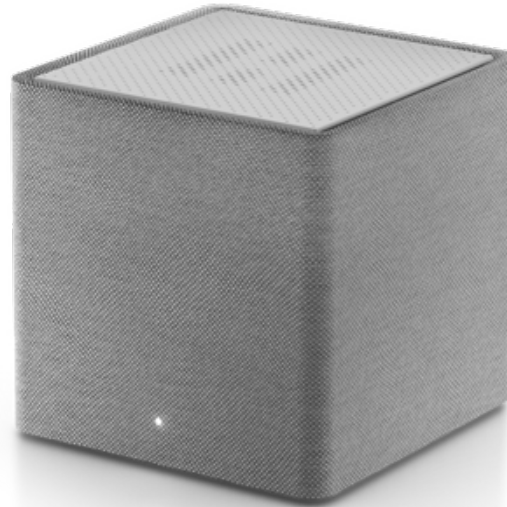
- Protection on-the-go with SAFE/TOTAL as separate apps & IDP

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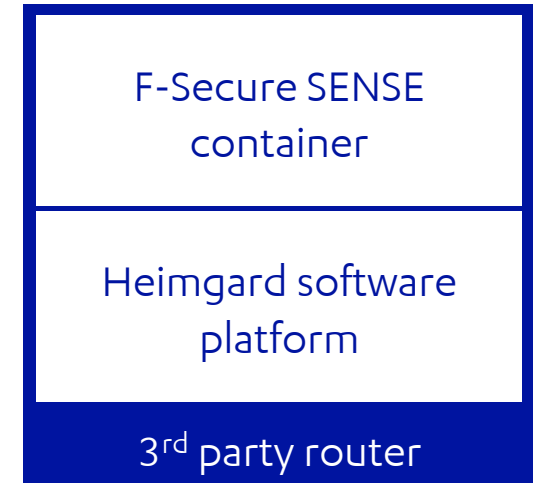
CONVERGED SMART HOME & SECURITY FEATURES EXAMPLE WITH F-SECURE & HEIMGARD



F-Secure SENSE functionality can be made available in Heimgard smart home app



F-Secure SENSE integrated on the Heimgard smart home gateway



One solution to be used on 3rd party routers.



F-Secure®