



# CAPITAL MARKETS DAY

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# Expert Knowledge and Partnership to Deliver Security Outcomes

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# CYBER SECURITY CONSULTING MARKET GROWS AS ORGANIZATIONS SEEK EXPERTISE COUNTERING AN EVOLVING THREAT

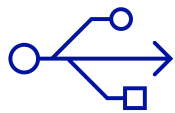
## Cyber Attack Trends



**Enterprise software vulnerabilities** exploited widely and opportunistically



**Ransomware** prevalence - focus on data theft for extortion

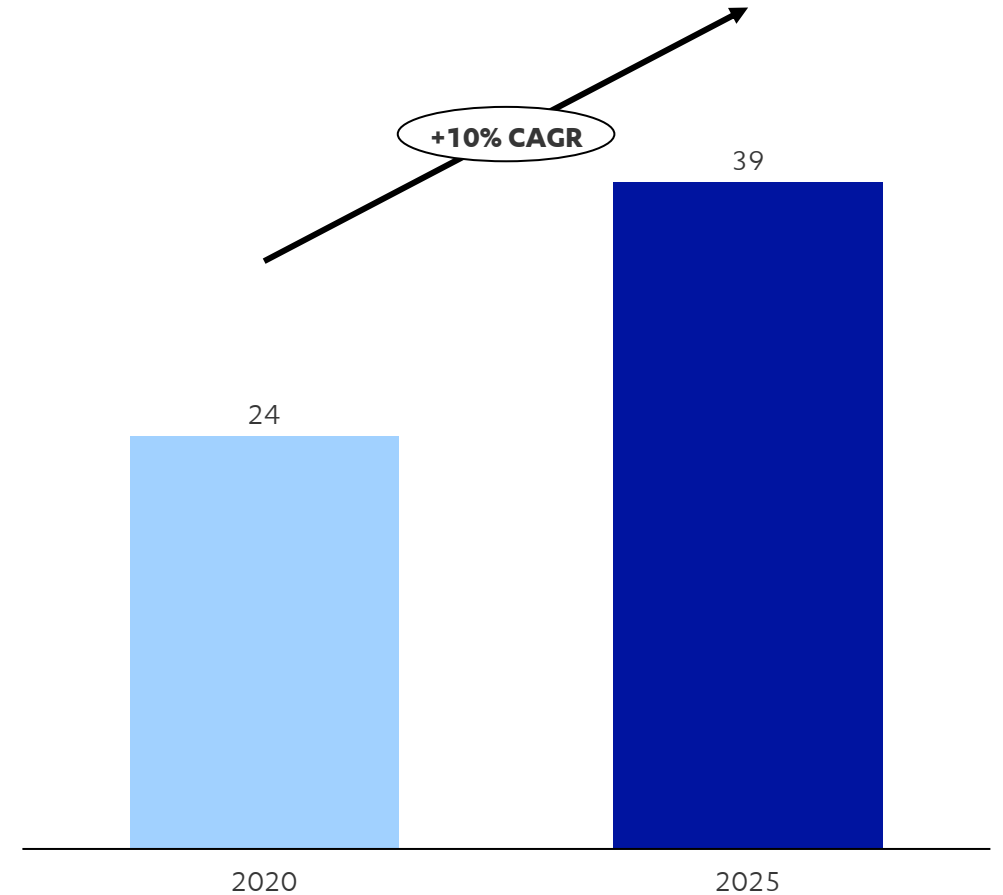


**Supply chain** attacks undermine trust in digital economy



**Cloud-based attacks** exploiting new architectures and technologies

## Cyber security consulting market



# INSIGHT FROM PARTNERS BUILDS EXPERTISE TO TACKLE THE MOST COMPLEX SECURITY CHALLENGES

Technical complexity and pace of change leaves clients struggling to deliver security outcomes

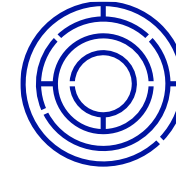
## TECH THEMES



**Cloud technology** has been implemented faster than organizational cultures can change

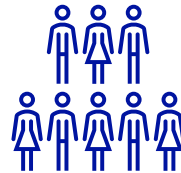


**Security trailing DevOps / Agile** resulting in increased attack surface exposure.



**Complicated legacy** of past mergers and acquisitions a major stumbling block

## EXPERTISE GAP



**Lack of adequate resources** – to drive value from cloud security tools and vulnerability management platforms



**Zero trust** – key in security strategy but in practice closer to an abstract ideal

# VERTICAL FOCUS CREATES DEEPER EXPERTISE AND PARTNERSHIP

**F-Secure serves enterprises that are highly targeted, or for whom technology is central to their value proposition.**



## FINANCIAL SERVICES

Willing to invest in cyber security.  
Mature regulatory environment.  
Very strong existing client base  
and vertical expertise.



## TECHNOLOGY

Organizations leveraging new  
technologies drive innovation and  
development of new capabilities  
and offerings.



## COMMUNICATIONS

Telco, broadcasting, and media  
now critical infrastructure.  
Embracing new network  
technologies. Regulatory  
pressure growing.

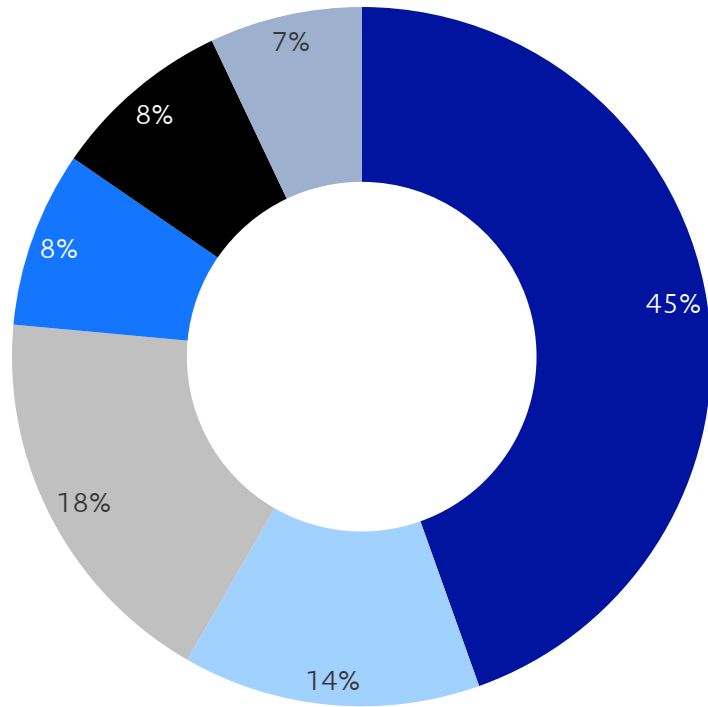
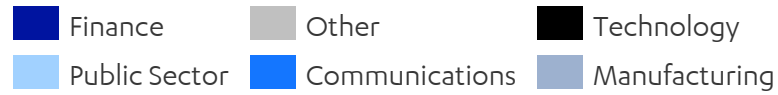


## MANUFACTURING

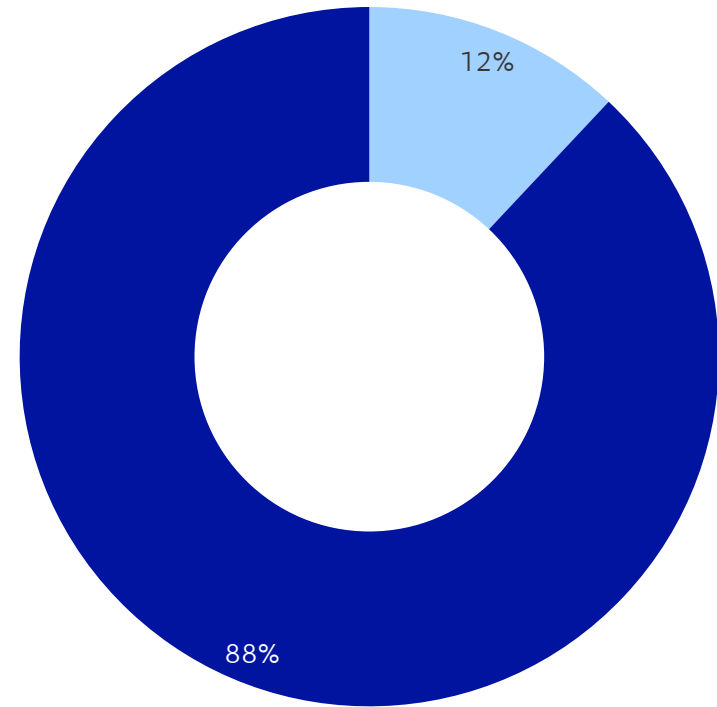
High safety and availability  
requirements. Cyber maturity  
varies. Increasingly targeted by  
attackers, especially ransomware.

# STRONG AND RELIABLE EXISTING CUSTOMER BASE FOCUSED ON FINANCIAL SERVICES

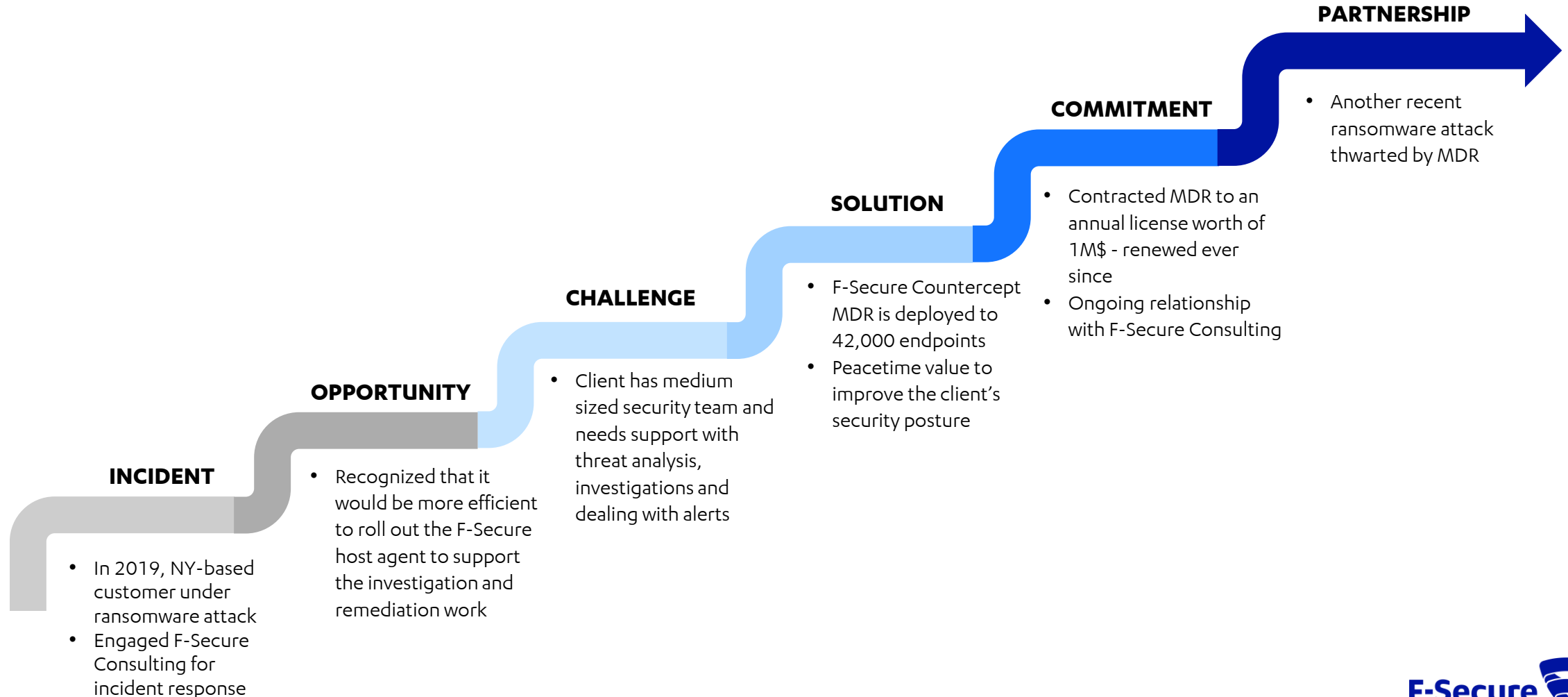
Illustrative Solutions<sup>1</sup> business split by verticals



Illustrative consulting business split by customer type<sup>2</sup>




# PORTFOLIO AND EXPERTISE KEY TO WIN NEW CUSTOMERS




# PARTNERSHIP LEADS TO GROWTH AND CROSS-SALES IN FINANCIAL SERVICES

PARTNERSHIP WITH A  
**LEADING GLOBAL BANK** BEGINS IN UK




EXTENDING THE  
**PARTNERSHIP** TO OPERATIONS IN US



LONG PARTNERSHIP UNLOCKS STRATEGIC ADVISORY ASSIGNMENTS

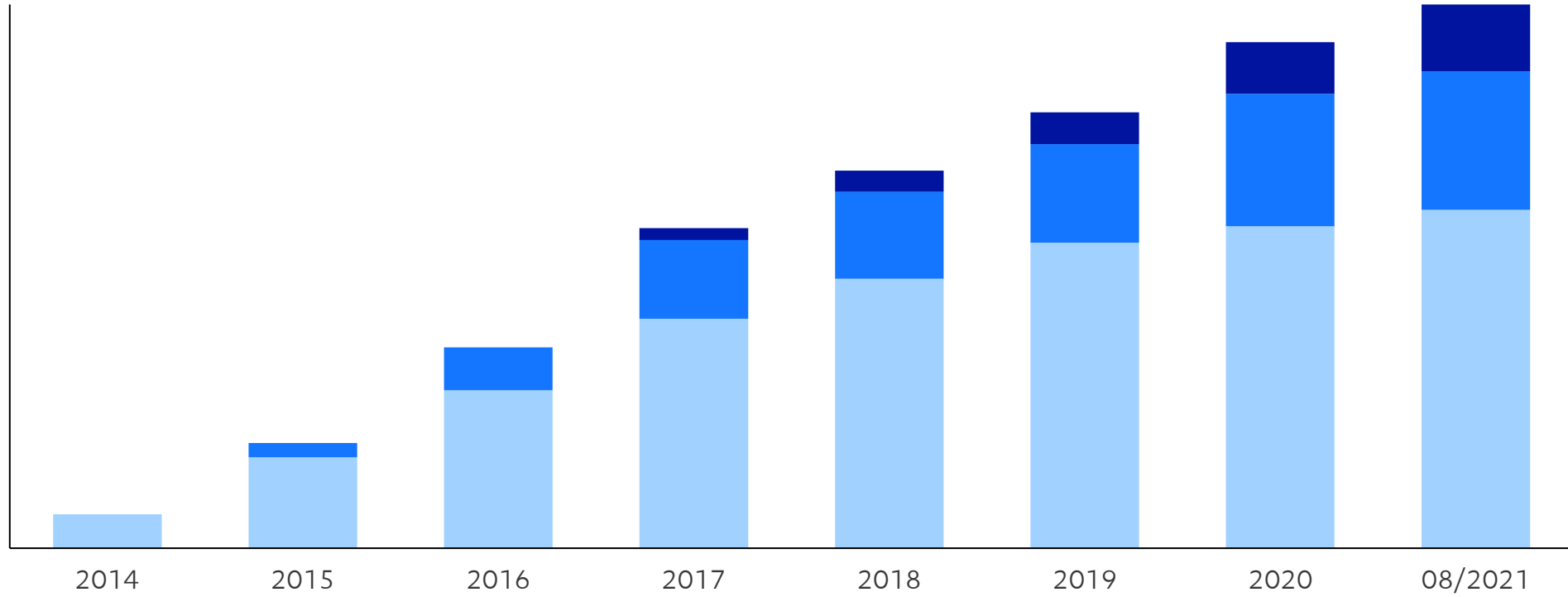
**CROSS SALES**



**CLOUD PROTECTION FOR SALESFORCE**

**~15M€ ACCUMULATED CUSTOMER LIFETIME VALUE**

Cumulative order value (EUR, million)



- STRATEGIC** - Security initiatives that help to deliver business objectives
- TACTICAL** - Client seeks our help solving a security challenge and is flexible about the solution
- TRANSACTIONAL** - Part of client's 'business as usual' assurance activity



# SUMMARY

- **CYBER SECURITY CONSULTING MARKET PRESENTS GOOD GROWTH OPPORTUNITIES**
- **OUR EXPERTISE IN THREATS, ENTERPRISE TECHNOLOGIES AND VERTICALS OFFERS A COMPETITIVE ADVANTAGE**
- **PARTNERING WITH CLIENTS CREATES CROSS-SALES OPPORTUNITIES**
- **SERVITISATION OF SECURITY WILL BRING SYNERGIES AND NEW SERVICES THAT DELIVER SECURITY OUTCOMES**



**F-Secure®**