Elisa Communications Capital Market Day

Kolumbus Ltd.

February 7-8, 2001
Kuusamo

Electronic Communications since the 1980s

- Kolumbus Ltd. was founded on January 1, 2001.

- Kolumbus has provided internet services since 1995.

- An expert in data networks and electronic communications since the 1980s (e.g. the Elisa e-mail system).

- A subsidiary of Elisa Communications Corporation.

- Extensive cooperation and Elisa Communications Group's strong competence further increase our resources.
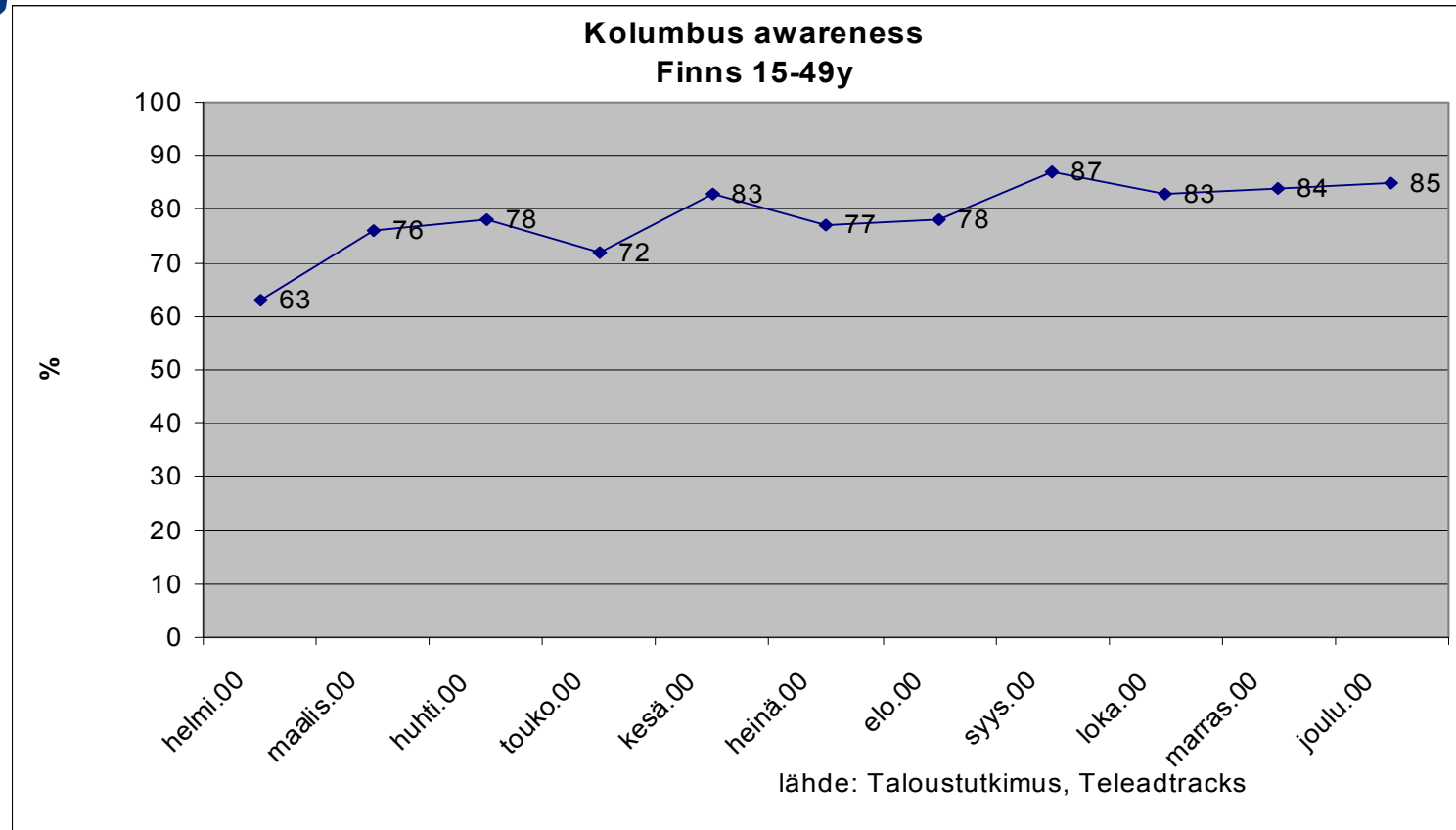
Growing Business - Nationwide Operations

- A comprehensive range of internet services and applications for residential customers, small and large businesses.

- Openness of communications is an essential operating principle for us.

- Revenue approximately FIM 160 million in 2000.

- Motivated, developing and committed personnel.

- About 240 internet professionals. Average age under 30 years.

- Managing Director of Kolumbus is Jari Karpakka.

Kolumbus is well known in Finland

Kolumbus awareness
Finns 15-49y

63 76 78 72 83 77 78 87 83 84 85

helmi.00 maalis.00 huhti.00 touko.00 kesä.00 heinä.00 elo.00 syys.00 loka.00 marras.00 joulu.00

lähde: Taloustutkimus, Teleadtracks

- Most Finns know Kolumbus as service provider

- Solid marketing basis for future services

Kolumbus business areas
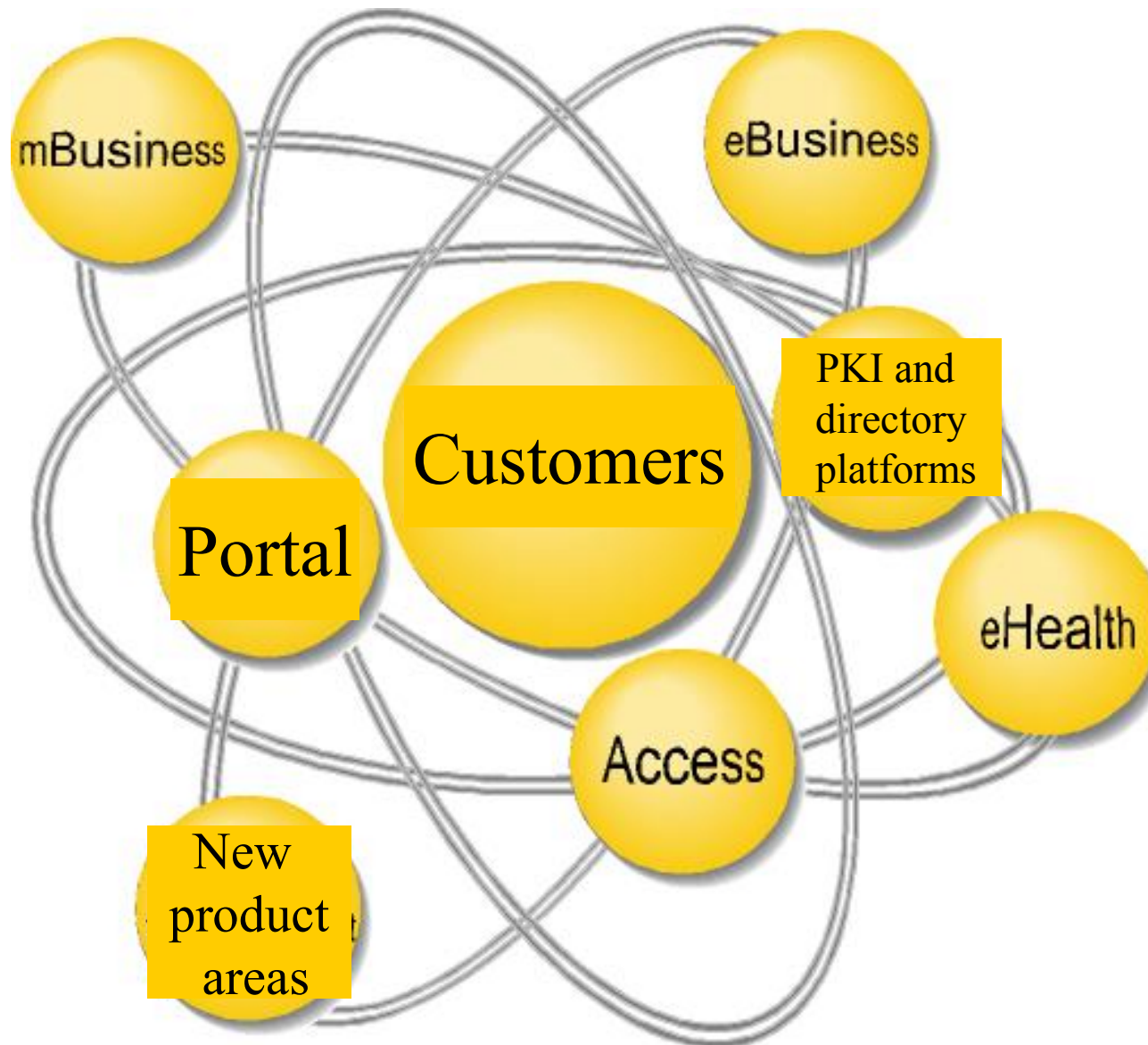
Kolumbus Multichannel and OEM Strategy

- Kolumbus provides its own and other companies' products; either the whole product or the core technology

    - residential customers: Kolumbus, Megabaud, DJ Esko, WLAN for Mäntsälä Electricity etc. Cobranding with Osuuspankki.

    - business customers: Kolumbus products, Datatie products (Lanlink, YhteysPäällikkö data transmission service), inside regional networks by Partner telcos .

- Portal platforms, directory platforms etc. for Kolumbus' end-customer products and other companies' products
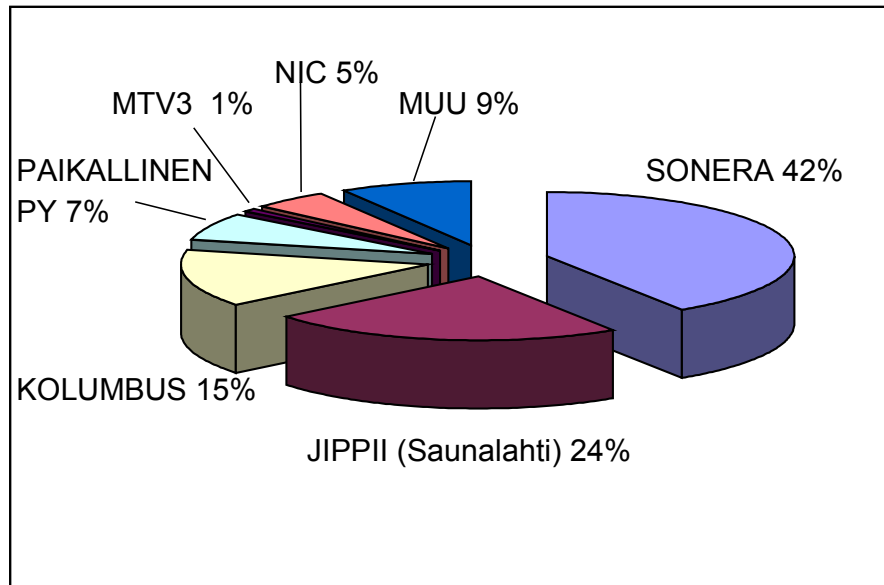
Access provides internet basic services

- Internet-access and messaging solutions to residential, business and operator customers.
- Products and services include:

  - Internet access Kolumbus 1,15, 30 ja 100, ADSL, Surffi

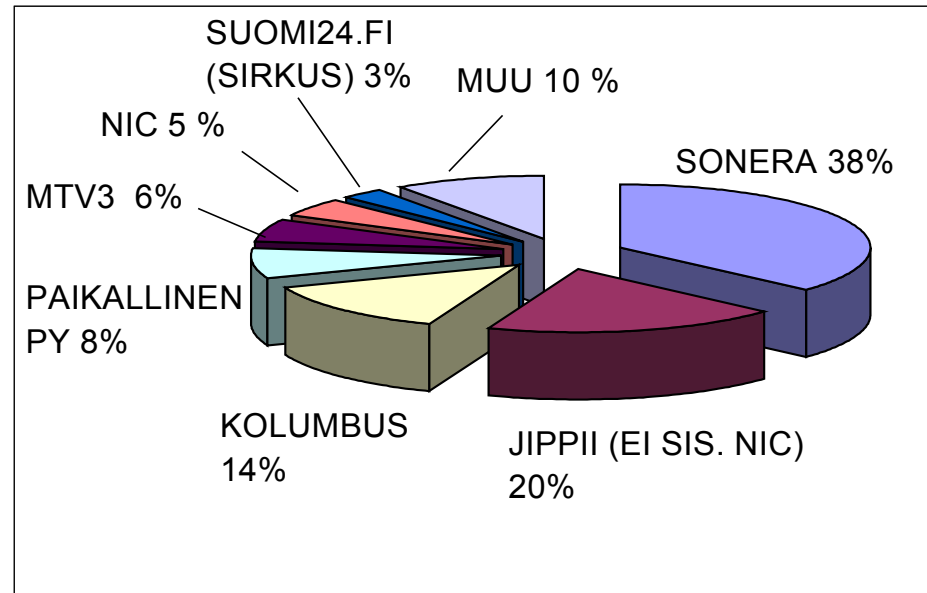 - Electronic mail services and platforms for residential and business customers

Commercial ISP market shares (residential, Finland)

january-february 2000

NIC 5%
MTV3 1%
MUU 9%
PAIKALLINEN PY 7%
SONERA 42%
KOLUMBUS 15%
JIPPII (Saunalahti) 24%

october- november 2000

SUOMI24.FI (SIRKUS) 3%
MUU 10 %
NIC 5 %
MTV3 6%
SONERA 38%
PAIKALLINEN PY 8%
KOLUMBUS 14%
JIPPII (EI SIS. NIC) 20%

source Taloustutkimus: Internet Tracking

- Kolumbus has kept its position among monthly charged services
- In the capital region Kolumbus is the largest with 30 % market share
- Kolumbus also e.g. inside DJ Esko (thousands of subscriptions),
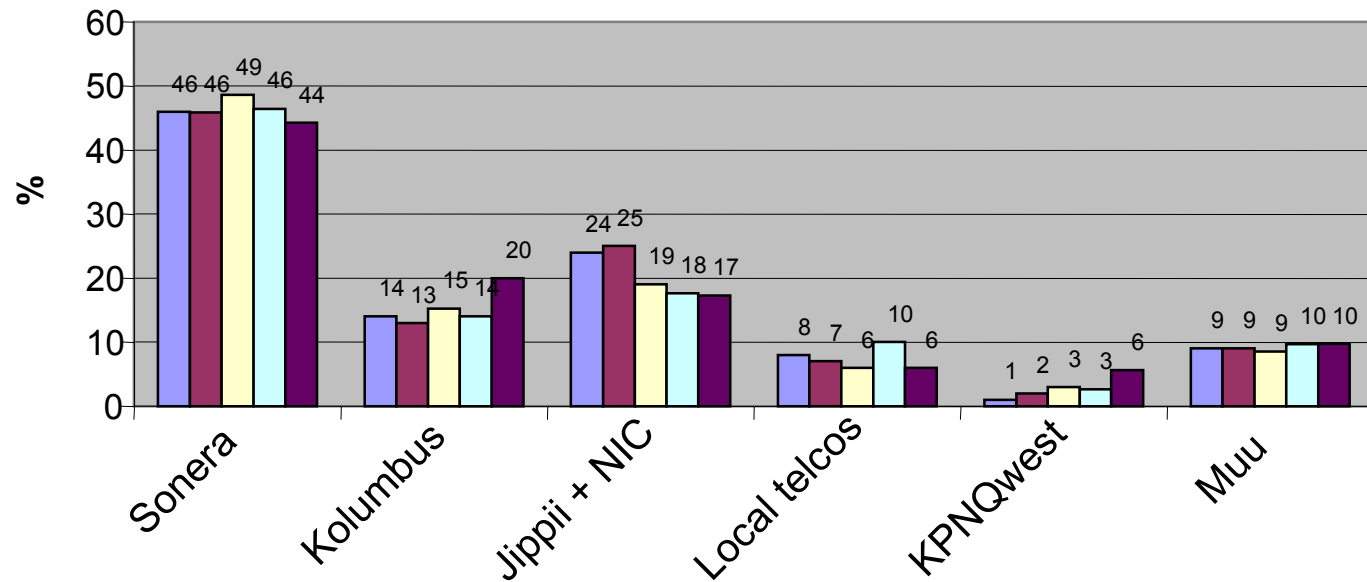- included in "muu" (=others)

Home internet penetration in Finland

- 30-34% of homes have Internet (depending on source) (Tilastokeskus ja Taloustutkimus)
  - = appr..720 000 households

- Appr. 30% of households classified as IT negative (I.R.O: Kotimikromarkkinat 2000)
  - = appr.700 000 housesolds

- The potential of new customers hence 36-40 % of households
  - = appr. 920 000 households in the next few years.

**MARKET SHARES IN SM SECTOR
BY SIZE OF BUSINESS, Autumn 2000**

Legend:
- Less than 5 empl
- 5 - 9 empl
- 10 - 19 empl
- 20 - 49 empl
- 50 + empl

	Less than 5 empl	5 - 9 empl	10 - 19 empl	20 - 49 empl	50 + empl
Sonera	46	46	49	46	44
Kolumbus	14	13	15	14	20
Jippii + NIC	24	25	19	18	17
Local telcos	8	7	6	10	6
KPNQwest	1	2	3	3	6
Muu	9	9	9	10	10

Sources: Taloustutkimus: Internetoperaattorit PK-sektorilla 10/2000 and Tietoykkönen: PK-barometri 9/2000

- Large customers by Sonera ja Elisa/Kolumbus, SM -sector among 3 largest
- Most SM-customers still based on modem/ISDN, moving into fixed data
- Kolumbus needs to improve distribution nationally (old Finnet tradition)
- Closer cooperation with Soon Communications and Partners (PY:t)
- Yrityslinja has been established as sales channel to most Finnish cities end 2000

PKI and Directory Platforms

- Provides directory platforms for various services, plus products and services that are related to user identification and encryption and can be adapted to other services.

- Enables services and applications that require special data security, and their use irrespective of place.

- Products and services:

  - Directory service platforms (X500) such as Julha, @tu, and 0100100.com, also Kolumbus customers' contact information directory

  - certification services, e.g. Elisa's own ID card, several customer applications in progress (not public)

  - Data security services (Kolumbus Secure)

  - Kolumbus continues to be the only BS7799 data security certified ISP

eBusiness brings services to the net

- Tools for businesses to do business in the net.
- Products and services include:

  - www- and ASP hosting

  - Ecommerce, Webmedia (streaming video)

  - Portal platforms, publishing systems

  - Customer specific hosting services

- Implementation together with SW providers, Kolumbus provides as a hosted and managed service to the customers

mBusiness brings mobility

- Kolumbus brings mobility to the Internet
- Close cooperation with Radiolinja, yet open to all mobile networks
- Products and services

  - WapMail

  - SMS services (augmenting web services)

  - hosting: from www.company.fi to wap.company.fi

kolumbus.fi

Kolumbus

Kolumbus - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help

Back   Forward   Stop   Refresh   Home   Search   Favorites   History   Mail   Print   Edit

Address http://kolumbus.fi/   Go   Links   Best of the Web   Channel Guide

Kolumbus

Uusi kotikäyttäjän Kolumbus!   elisa

Maanantai 2.10. | Valio   Hae Internetistä: Hae

- Etusivu
- Uutiset ja sää
- Viihde
- Urheilu
- Talous
- Pelit
- Soittoäänet ja logot
- Hotelli Kultakala
- Kolumbus Tori
- Haku

Kolumbus-palvelut
- Tuotteet
- Tiedotteet
- Tuki
- Palaute
- Kotisivut
- Palvelukeskus
- Info

Tahdon rakastella sinua!

Miten käy Kolumbuksen?

elisa shopit

Tästä puhutaan:

Onko Connery paras Bond?

Bond-maratoni päättyi eilen. Ruudussa nähtiin kaikenkarvaista yrittäjää Bondin roolissa. Vaan löytyikö joukosta Sean Connerya kovempaa... Mitä mieltä olet, onko Connery paras James Bond?

Kyllä / Ei   Kyllä: 71% Ei: 29%

HUOM!

Darude kaahaa

Darude taas hurjassa vauhdissa Feel the Beatin videossa, joka löytyy nyt Kolumbus.fi:stä.
Toistoon

HUOM!

Majoitu Kultakalaan

Ota itsellesi huone Hotelli Kultakalasta ja sisusta se tyylillä. Hengaa myös leppoisissa yleisissä tiloissa.
Hotelliin

Maanantain nettivinkit

Pelaa Six Degrees of Kevin Bacon –peliä. Kokeile vaikka Peter Franzenilla.

Uutuussarja Sopranosin **mafiaperheen** sivuilta löytyy muun muassa sukupuu.

Vuoden johtajalta unohtui pieni **yksityiskohta**.
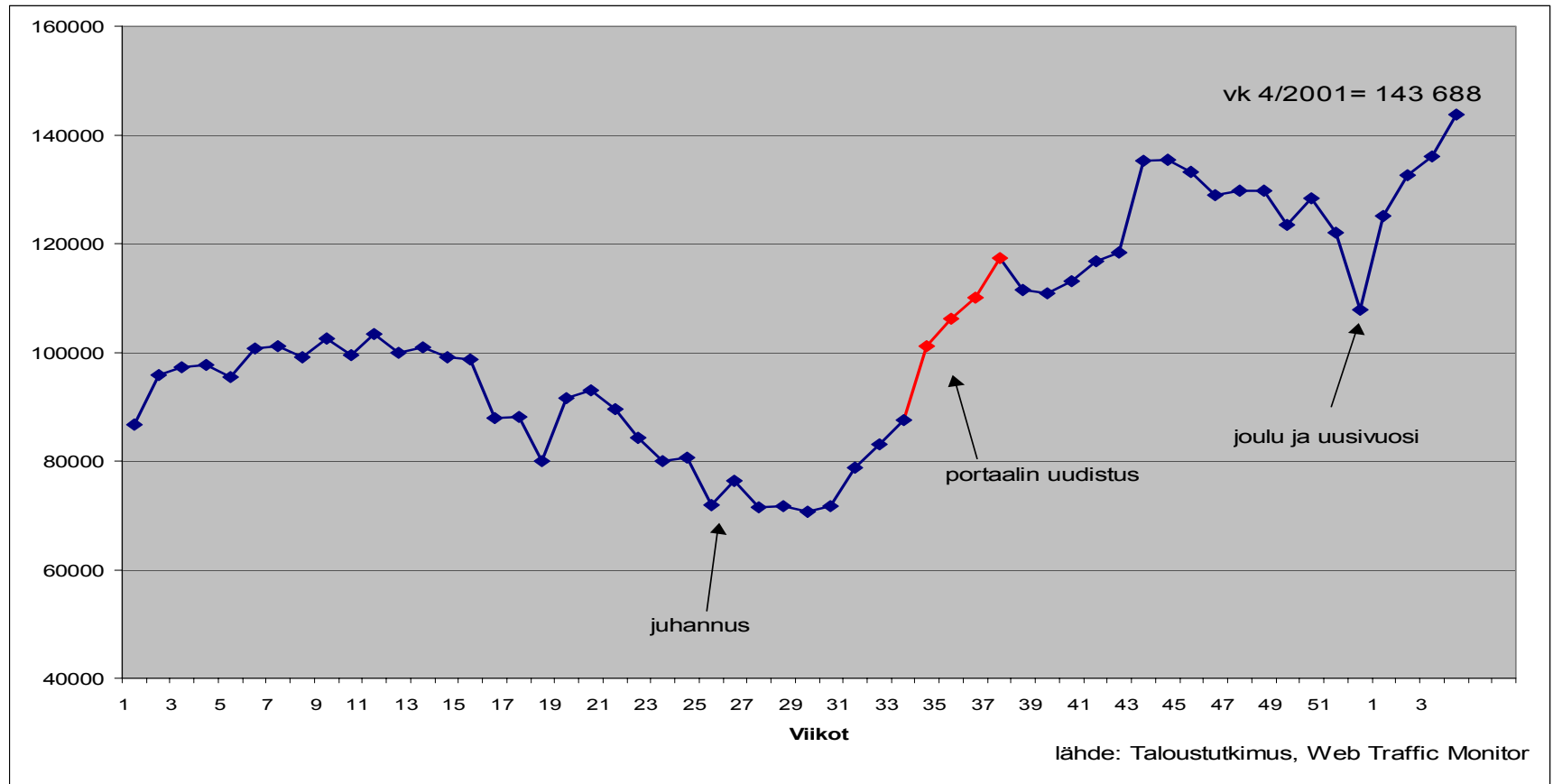
Arkisto   Lähetä vinkki

Illalla TV:ssä

Psykiatri Ben Furmania huolettaa suorassa

Uutiset:
- Sateet vaikeuttavat avustuskuljetuksia Bangladeshissa
- Kuluttajien luottamus talouskasvuun heikentynyt
- Suurin osa briteistä vastustaa euroa

Urheilu:
- Sydney 2000: Olympiatuli sammui Sydneyssä
- Ricardo Zonta lähellä Sauber-sopimusta
- Panizzi voitti Korsikan rallin, Grönholm viides

Viihde:
- Linda otsaonteloleikkaukseen
- Simply Redille potkut
- Jaggerin ex nousussa

+11   +8

Done   Internet

elisa

Unique weekly visitors in Kolumbus portal since 2000

- monthly : appr. 300 000 unique vistitors
- appr.. 8,5 million page impressions
- appr.. 2 million unique visits

KOLUMBUS OY
Jari karpakka 2/ 2001

Hotel Goldfish

Hotel Goldfish

Hotel Goldfish, sample of the products

Kolumbus Internationally

- At the present, the main market is Finland, but Kolumbus has product areas with international potential, as well

- Kolumbus has own backbone already to Sweden and Germany, where we buy the global IP transit in bulk from several suppliers. This enables smooth application production and operation from Finland.

- Kolumbus services are to be deployed in Germany together with Elisa Kommunikation GmbH.

Kolumbus Financial Info

- Revenue

    - in 1999, approx. FIM 110m

    - in 2000, approx. FIM 160m

- Access (especially in business category) is still the largest single sector in 2001, but PKI, ASP and infrastructure hosting services will grow in the future

- Portal applications are an important growth area. Hotel Goldfish, for example, hosts approx. 100,000 characters