





# Strong European media company

- Operates in 20 European countries
- The leading media group in Finland
- One of Europe's largest consumer magazine publishers
- One of the largest educational material publishers in Europe
- International chain expert in kiosk operations and press distribution
- Major operator in digital media
- Net sales EUR 3,030 million, more than 20,000 employees





## Diverse portfolio













**Magazines Online operations**  **Newspapers Printing Online operations**  TV and radio Pay TV and broadband internet Online gaming

Learning Language services Literature

**Kiosks Press distribution Bookstores** Movie operations



#### Market leader **Finland** Leading In chosen segments Newspaper publishing Magazine publishing Book and educational Poland publishing Language services Leading Cable TV eLearning material Kiosk chain Press distribution The Netherlands Bookstore chain Movie operations Leading Norway Online operations Magazine publishingPress distribution Sweden Russia Online operations Leading Magazine publishing **Belgium** Leading Estonia Magazine publishing Leading UK Kiosk chain Press distribution Czech Movie operations Leading Magazine publishing Latvia Leading Slovakia Ukraine Kiosk chain Press distribution Leading Movie operations Magazine publishing Lithuania Slovenia Hungary Leading Croatia Kiosk chain Leading Magazine publishing Press distribution Serbia Educational publishing Movie operations Online operations Bulgaria Romania Leading Leading Magazine publishing Press distribution





### Strategy

Our goal is to be one of the leading media companies in Europe, with a focus on sustainable growth and profitability

### Our strategic objectives are

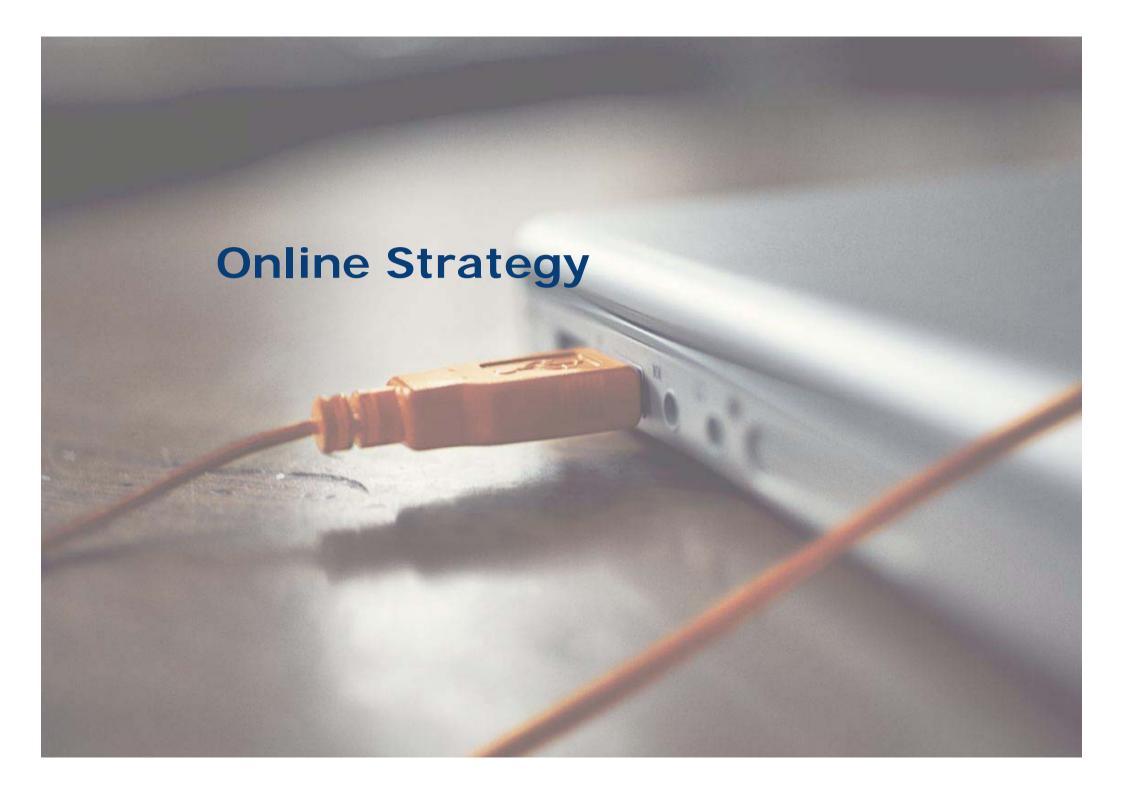
- To be the market leader in chosen businesses and markets
- To maintain a balanced business portfolio of B2C and B2B products and services - Focus areas being:
  - Magazines: We will continue to grow in print and digital media
  - Newspapers: We will actively develop our business to maintain our profitability and to ensure controlled migration to online
  - Learning and Language services: We will grow via further internationalisation and entering new segments
  - Online: We will strongly develop and expand our online assets
- To investigate opportunities to internationalise our TV operations
- To maximise our strategic position in retail



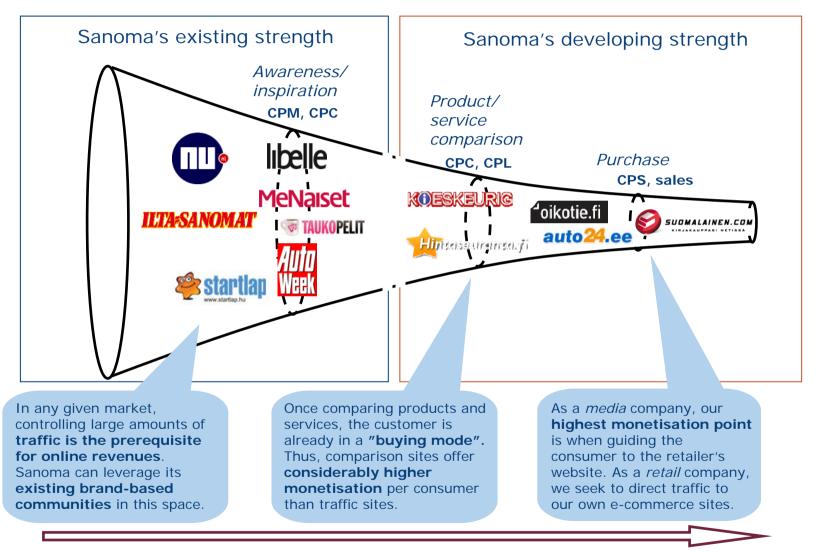
### Achieved so far

- News: Successful cost cutting and restructuring programme in multiple waves
- Online: Group-wide strategy defined, execution in progress
- Learning: Multiple international growth targets identified
- TV: International expansion opportunities analysed - execution requires availability of M&A targets at appropriate prices
- Retail: Multiple scenarios to maximise our strategic position in retail developed





### Closer to consumer transactions





# **Up-scaling the M&A and innovation targets** in chosen focus segments

Utilising our existing strong positions in e.g. comparison & classifieds

Internationalising our Finnish casual gaming operations

Building on strong vertical knowledge in print & online

Key enablers: Focus areas: **Enhanced** Transactional innovation Organic Gaming performance improvements **Up-scaling** Verticals M&A ambition

Geographic focus based on potential (not only CEE, but WE also)

Organisational

improvements to

radically enhance

Utilising "online

in key countries

performance units"

knowledge sharing

**Emerging segments monitoring** 



