Patrice Perche
Chief Revenue Officer & EVP Support
Consistent Vision
Fortinet Security Fabric
Broad, integrated, and automated cybersecurity platform

Cybersecurity Mesh Architecture Complete

75% of large organizations are actively pursuing a vendor consolidation strategy.*

*Gartner, Infographic: Top Trends in Cybersecurity 2022 — Vendor Consolidation Published 19 August 2022.
Fortinet Security Fabric — Industry Validation

One of the most validated enterprise cybersecurity platforms
Convergence of Fast-Growing Markets
Secure networking and cyber-physical security

2010: ~$80B
Enterprise Networking¹
2010: $36.2B
Cybersecurity²
2010: $43.3B

Today: ~$180B
Enterprise Networking¹
2023: $82.9B +3.4% Y/Y
Cybersecurity²
2023: $88.5B +13.9% Y/Y
Secure Networking
2023: $35B +10%
OT Security³
2023: $10B

2026: ~$280B
Enterprise Networking¹
2026: $98.9B +5.0% Y/Y
Secure Networking¹
2026: $90B +10% Y/Y
Cybersecurity²
2026: $134.8B +12.8% Y/Y
OT Security³
2026: $15B

³ Westlands Advisory: IT/OT & OT Total Available Market Analysis.
Consistent Execution
Strong Business Growth

Outperforming the industry at scale in the context of difficult market conditions

Billings

$5.6B

35% CAGR

$3,090
$4,181
$5,594

2020 2021 2022

Revenue

$4.4B

30% CAGR

$2,594
$3,342
$4,417

2020 2021 2022

Customers

635,000+

385,000
440,000
500,000
565,000
635,000

2019 2020 2021 2022 2023
Financial Stability

The rule of 40 validates financial health and long-term ability to execute

Based on the midpoint of 2023 guidance provided on February 7, 2023
Business Diversity

Uniquely addressing diverse market needs without being reliant on any one segment, country, or vertical

Customer Types
- Large Enterprise: 24%
- Mid Enterprise: 13%
- Small Enterprise: 24%
- SP/MSSP: 39%

Geographies
- 100+ Countries: 48%
- Canada: 27%
- United Kingdom: 13%
- United States: 13%
- Japan: 13%
- Other Countries: 16%

Industries
- Worldwide Gov't: 10%
- Fin Serv: 13%
- Retail: 16%
- SP/MSSP: 9%
- Other Industries: 39%

Based on invoiced amounts over the last 12 months ending December 31, 2022. Customer Type and Industry exclude Alaxala.
Trust of a Large Ecosystem
Most adopted vendor with unparallel global expertise

Global Customer Base: 635,000+
Employees: 13,000
Active Partners: 60,000+
Consistent Leadership
Network Firewall Leader

Validated vision and execution

Recognized in 2022 Gartner Magic Quadrant for Network Firewalls for the 13th time.

Highest in Ability to Execute

Firewall Market Growth
Leading a market in expansion with new use cases

Secure SD-WAN Leader

Unique ability to meet customer need for converged security and networking

1 Gartner, Magic Quadrant for WAN Edge Infrastructure – 2019-2021. 2 Gartner, Magic Quadrant for SD-WAN Published 12 September 2022 G00759390.
Secure SD-WAN Leader

Unique ability to meet customer need for converged security and networking

Leader three years in a row and placed highest in “Ability to Execute” two years in a row.

1 Gartner, Magic Quadrant for WAN Edge Infrastructure – 2019-2021. 2 Gartner, Magic Quadrant for SD-WAN Published 12 September 2022 G00759390.
SD-WAN Market

Best positioned to capture third generation of SD-WAN deployments

OT Security Leadership

Unique combination of innovation and partnerships to address cyber-physical security demand

Applying the same approach for broad, integrated, and automated security

Next Areas of Leadership

Universal SASE
- SD-WAN
- FWaaS
- CASB
- Sandbox
- SWGaaS
- ZTNA

Unified Endpoint Security
- ZTNA Agent
- SASE Agent
- VPN Agent
- EDR
- EPP
- Vulnerability Management

Secure 5G
- Customer Edge
- OT Edge
- Mobile RAN
- Mobile Edge & Core

$9.2B
$18.9B
$5B

Commitment to Advancing Cybersecurity
Commitment to Securing Digital Business
Addressing and anticipating the cyber evolution

Driving Infrastructure Evolution
- Work from Anywhere
- Digital Acceleration
- Application Journey
- Operational Technology Connectivity

Compliance
- General Data Protection Regulation (GDPR)
- Digital Operational Resilience Act (DORA)
- California Consumer Privacy Act (CCPA)
- American Data Privacy and Protection Act (ADPPA)
- Cyber Resilience Act (CRA)

Evolving Threat Landscape
- Cloud
- Nation Sponsored
- Ransom as a Service
- Hermetic Wiper
- REvil
- Growing Attack Surface
- AI-enabled
- Operational Technology
- Wipers
- Colonial Pipeline
- SolarWinds
- Log4j
- Swarmbot
- Kaseya VSA
- Hermetic Wiper
- REvil
- Ransom as a Service
Commitment to Sustainability

“A lack of cybersecurity has become a clear and immediate danger to our society worldwide.”
Klaus Schwab, World Economic Forum Founder

Partnering Against Cybercrime
Private-public collaboration open ecosystem

Closing the Cybersecurity Skills Gap
1 Million net-new trained in cybersecurity by 2026
219,465 Newly trained in 2022
On track toward our goal

Driving Sustainable Innovation
Reducing product environmental impacts
66% average reduction in energy consumption
100% biodegradable packaging for FortiGate series

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Commitment to Partner Success
Building long-term trusted relationships

Trust
- Culture of channel loyalty
- Sustained sales, marketing, and executive support

Investment
- New Engage Technical Support Partner Program
- Enhanced support for multi-national reseller organizations
- Expansion of the Professional Services Channel Program
- Intangi Iris configuration and design tool support

Training
- Free training
- Certification
Commitment to Customer Success

Enabling customers along their security journey

World-class Multichannel Support
• Staying close to our customers—no outsourcing

Proactive and Personalized Care
• New Advanced Support Portfolio to maximize your Fortinet investment
  • Faster time-to-value
  • Reduced risk

Expanded Service Catalogue
• QuickStarts
  • Easy-to-buy, easy-to-consume microservices mapped to solutions and use-cases

CSAT
9.35
10

Meeting SLAs
99.8%
Cybersecurity Partner of Choice

Consistent Vision

Consistent Execution

Consistent Leadership

Consistent Commitment
Ken Xie
Founder & Chief Executive Officer
Convergence and Consolidation
Convergence
Secure networking will be larger than networking by 2030

Why Secure Networking?

Secure connectivity requires more processing power — Security Compute Rating

Connectivity
Trust Everything

Secure Connectivity
Zero Trust

Device ➔ Networking ➔ Application

Connection based on IP
Small amount of compute required

Device ➔ Secure Networking ➔ Application

Connection based on application, content, users, devices and location
More compute required
Edges

The edge will eat the cloud
The Most Deployed Network Security Solution

41% of all next-gen firewall shipments
Vendor Consolidation

Organic development has a huge advantage over M&A in vendor and function consolidation

<table>
<thead>
<tr>
<th>Endpoint Vendors</th>
<th>Network Security Vendors</th>
<th>Organic Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trellix</td>
<td>Symantec</td>
<td>Palo Alto</td>
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<tr>
<td>Trewlix</td>
<td>Symantec</td>
<td>Cisco</td>
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<td>FireEye</td>
<td>McAfee</td>
<td>CLOUDIBX</td>
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<td>OveroDin</td>
<td>BlueCoat</td>
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<td>SmartHunters</td>
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<td>Evidentio</td>
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<td>INVOTA Sistems</td>
<td>MOCANA</td>
<td>Valtix</td>
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<td>Invocat</td>
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<td>Cloudlock</td>
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<td>FortiGuard</td>
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<td>Open Ecosystem</td>
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<td>Meraki</td>
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<td>Cloudlock</td>
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</tbody>
</table>

Result – Multiple Platforms       Result – Multiple Platforms       Result – One Platform
Organic R&D Investment Across Our Portfolio

Nearly 3x more patents than comparable network security companies

1,285 Global Patents
935 U.S. Patents
350 International Patents
(255 Pending Patents)

- 30% Other
- 32% Switch/WAN
- 30% Switch/WAN
- 19% NextGen Firewall/IPS/VPN/AV
- 11% Secure Wireless
- 8% Security Analytics/SIEM/SOAR/MAC

U.S. Patents

- 935 U.S. Patents
- 350 International Patents
- 255 Pending Patents

- Palo Alto Networks 371
- Zscaler 157
- Check Point 98
- Okta 27
Functional Consolidation

Occurs at different levels across the platform

- **Ecosystem Level**
  - 300+ partners
  - 500+ integrations

- **Fabric Level**

- **FortiOS Level**

- **ASIC Level**
Application-Specific Design & Multi-Core Processors

FortiSP5 concurrently supports 2x more applications than the previous generation.

- **2 apps**
  - Anti-Malware Firewall

- **4 apps**
  - IPS
  - IPSEC
  - Anti-Malware Firewall
  - Anti-Malware Firewall

- **7 apps**
  - SD-WAN
  - SSL
  - NGFW
  - IPS
  - IPSEC
  - Anti-Malware Firewall

- **14 apps**
  - SD-Branch
  - Zero Trust
  - OT
  - 5G
  - Edge Compute
  - VXLAN
  - Secure Boot
  - SD-WAN
  - SSL
  - NGFW
  - IPS
  - IPSEC
  - Anti-Malware Firewall
  - Secure Boot
Universal SASE

The only integrated SASE solution across every function

**Multivendor SASE Solution**

- Console A
  - Vendor A
  - Cloud
  - Only
  - SASE

- Console B
  - Vendor B
  - SD-WAN

- Console C
  - Vendor C
  - ZTNA

- Console D
  - Vendor D
  - CASB

- Console E
  - Vendor E
  - Firewall

**Fortinet SASE Solution**

- Single Console
- Single Operating System
One Platform

Enterprise “best of breed” and “platform” are not mutually exclusive

Network Firewall

SD-WAN

Wired and Wireless LAN

FortiOS Operating System

1 Gartner, Magic Quadrant for Network Firewalls Published 19 December 2022 G00761497. 
2 Gartner, Magic Quadrant for SD-WAN Published 12 September 2022 G00759390. 
3 Gartner, Magic Quadrant for Enterprise Wired and Wireless LAN Infrastructure Published 21 December 2022 G00762282.
Security Compute Rating
Huge performance and power efficiency advantage

Recent FortiGate Releases

<table>
<thead>
<tr>
<th>Specification</th>
<th>Fortinet Average</th>
<th>Security Compute Rating</th>
<th>Industry Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firewall (Gbps)</td>
<td>643.0</td>
<td>9.0X</td>
<td>74.6</td>
</tr>
<tr>
<td>NGFW (Gbps)</td>
<td>29.5</td>
<td>1.4X</td>
<td>20.6</td>
</tr>
<tr>
<td>IPSec VPN (Gbps)</td>
<td>215.0</td>
<td>14.1X</td>
<td>15.2</td>
</tr>
<tr>
<td>Threat Protection (Gbps)</td>
<td>28.1</td>
<td>2.0X</td>
<td>16.0</td>
</tr>
<tr>
<td>SSL Inspection (Gbps)</td>
<td>23.4</td>
<td>5.5X</td>
<td>4.3</td>
</tr>
<tr>
<td>Concurrent Sessions</td>
<td>408M</td>
<td>31.2X</td>
<td>13M</td>
</tr>
<tr>
<td>Connections per Second</td>
<td>5.9M</td>
<td>14.3X</td>
<td>414K</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Energy Consumption</th>
<th>FortiGate 1000F</th>
<th>Energy Efficiency</th>
<th>Industry Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watts / Firewall Throughput</td>
<td>2.06W</td>
<td>6.0X</td>
<td>12.46W</td>
</tr>
<tr>
<td>Watts / IPVPN Throughput</td>
<td>7.42W</td>
<td>6.9X</td>
<td>51.5W</td>
</tr>
<tr>
<td>BTU / h per Firewall Throughput</td>
<td>6.2 BTU</td>
<td>6.5X</td>
<td>40.45 BTU</td>
</tr>
</tbody>
</table>

Based on New FortiGate 4800F, 3000F, 1000F, 600F and 400F Series.
Hybrid World Forever
Protecting people, devices, and data everywhere

Secure Networking Journey

One Cybersecurity Platform

OT Aware Fabric
Complexity Creates Risk and Slows Innovation

Operational Nightmare

- Distributed Applications
- Users are working from anywhere
- More devices are attaching to the cloud

Threat Landscape

- Attack Surface
- Supply Chain
- Social Engineering

Internet → SaaS → Public Cloud → Data Center → Edge Compute


Travel → Home → Campus → Branch → Factory
Secure Networking Journey

Networking that is location, user, device, content, and application aware

1. Firewall
   Control points across the infrastructure

2. SD-WAN
   Optimize application experience

3. SD-Branch
   Secure your premise

4. SASE
   Secure remote users

5. ZTNA
   Apply zero trust to all applications
Network Firewall

FortiManager

Network Firewall
Remote Users — VPN

Data center perimeter

Core segmentation

VPN concentrator

Internet

SaaS

Public Cloud

Data Center

Edge Compute

WAN

Travel

Home

Campus

Branch

Factory

FortiGuard

Intrusion Prevention
Web Filtering
Antivirus
Application Aware
Firewall Use Cases

The firewall has expanded across all infrastructure edges
“By 2026, more than 60% of organizations will have more than one type of firewall deployment, which will prompt adoption of hybrid mesh firewalls.”

Source: Gartner Network Firewall MQ 2022
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>5th Generation Security Processing Unit</strong></td>
<td>7 nm Technology</td>
</tr>
<tr>
<td><strong>Secure Boot</strong></td>
<td>Distributed Firewall, Secure SD-WAN, Rugged Firewall, Embedded Firewall</td>
</tr>
<tr>
<td><strong>Industry-Leading Performance per Watt</strong></td>
<td>2.5Gbps SSL Deep Inspection, Dual Cluster CPU Octa Core</td>
</tr>
<tr>
<td><strong>88% Less Power Consumption</strong></td>
<td>Compared to Leading Industry-Standard CPUs</td>
</tr>
<tr>
<td><strong>32x Encryption</strong></td>
<td>Hardware-Accelerated Encryption</td>
</tr>
<tr>
<td><strong>VXLAN / GRE / QoS</strong></td>
<td>Hardware-Accelerated Encapsulation and Traffic Shaping</td>
</tr>
<tr>
<td><strong>17x Security Compute Rating</strong></td>
<td>for Firewall Performance vs. Leading Industry-Standard CPUs</td>
</tr>
<tr>
<td><strong>Interfaces</strong></td>
<td>1G / 2.5G / 5G / 10G / 40G</td>
</tr>
<tr>
<td><strong>Volumetric DDoS Protection</strong></td>
<td></td>
</tr>
<tr>
<td><strong>NP7 lite + CP 10</strong></td>
<td>Security Processing Unit</td>
</tr>
</tbody>
</table>
Firewall Units Shipped

IDC Quarterly Appliance Trackers 2022/Q3 historical, publication date: December 8, 2022, UTM units shipped. *Firewall as defined by Fortinet includes the following market from IDC’s Quarterly Security Appliance Tracker: UTM.
Secure SD-WAN

Just switch on SD-WAN
SD-Branch, SD-Campus
Enable secure switch, access point, and 5G

FortiManager
- Network Firewall
- Remote Access - VPN
- Secure SD-WAN
- Secure Switch
- Secure AP
- Secure 5G

FortiGuard
- Intrusion Prevention
- Web Filtering
- Antivirus
- Application Aware
- DNS Security
- Botnet
- In-Line Sandboxing
- Application Steering
- Internet Services DB
- IoT and OT
- Network Access Control

Intrusion Prevention
Web Filtering
Antivirus
Application Aware
DNS Security
Botnet
In-Line Sandboxing
Application Steering
Internet Services DB
IoT and OT
Network Access Control
Universal SASE
Move the FortiOS experience to the cloud
Universal ZTNA
Zero trust for every user, device, and application
Integrated Secure Networking Stack

- **FortiOS**: Single network O/S
- **FortiGuard**: AI-powered threat intelligence
- **FortiManager**: Single management console
- **FortiClient**: Unified agent

Common Network Operation System - FortiOS

Unified Agent - FortiClient

- Hybrid Mesh Firewall
- Secure WLAN LAN
- Secure SD-WAN
- Universal SASE
- Universal ZTNA

Single Management and Analytics Console

- SOC Services
- Application Security
- Device Security
- Content Security
- Web Security
- AI Powered Threat Intelligence

Employees

Contractors

WFH

Branch

Campus

OT

Public Cloud

Internet

Data Center

SaaS

Edge

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We Care A Lot
#alaskaCARElines

$9.64B
Annual Revenue

25,000+
Employees

120+
Destinations Served

300
Aircraft in Fleet

1,200
Daily Flights

- OneWorld Alliance Partner
- #1 Airline for Customer Service (Newsweek)
- Time 100 Most Influential Companies for Sustainability
- Forbes List of Best Large Employers
- Perfect 100, “Best Place to Work” on Disability Equality Index
- Best Major Airline in North America, Passenger Choice Awards

Brian Talbert
CISO
We Care A Lot #alaskaCARElines

Convergence
The intersection of traditional networking and cybersecurity

Consolidation
Leveraging the benefits of strategic partnership

Enabling the Business
How security infrastructure enables the business

Brian Talbert
CISO
## One Platform – Security Fabric

<table>
<thead>
<tr>
<th>Broad</th>
<th>Integrated</th>
<th>Automated</th>
</tr>
</thead>
</table>

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One Platform

Enterprise “best of breed” & “platform” are not mutually exclusive

Endpoint Protection
Gartner Magic Quadrant for Endpoint Protection Platforms, 2023
Fortinet Recognized as a Visionary Vendor

Email Security
Frost & Sullivan...Frost Radar™: Email Security, 2022
Fortinet Recognized as a Top Vendor

SIEM
Gartner Magic Quadrant for SIEM 2023
Fortinet Recognized as a Challenger

SOAR
KuppingerCole Leadership Compass for SOAR, 2023
Fortinet Recognized as a Leader

The Fortinet Security Fabric
Fortinet Security Fabric in Action

Research

- In-house threat team
- Actionable insights
- Provide protection
Fortinet Security Fabric in Action

- Unified protections
- Known and unknown
- Autonomous security
Fortinet Security Fabric in Action
Who Are the Cybersecurity Industry Consolidators?

Gartner Magic Quadrant benchmarking

Consolidators: 7+ MQ’s
Pretenders: 4 MQ’s
Legacy: 2 MQ’s
Point Product: 1 MQ’s
Good Luck: 0 MQ’s
Gartner Magic Quadrants in Cybersecurity by Vendor

### Consolidators

<table>
<thead>
<tr>
<th>Category</th>
<th>Vendor</th>
<th>Endpoint Security</th>
<th>Network Firewall</th>
<th>SIEM</th>
<th>Access Management</th>
<th>SD-WAN</th>
<th>SWG/SSE</th>
<th>WLAN/LAN</th>
<th>PAM</th>
<th>AST</th>
<th>WAAP</th>
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<tr>
<td>Visionary</td>
<td>Fortinet (7)</td>
<td>Visionary</td>
<td>Leader</td>
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### Pretenders

<table>
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<tr>
<th>Category</th>
<th>Vendor</th>
<th>Endpoint Security</th>
<th>Network Firewall</th>
<th>SIEM</th>
<th>Access Management</th>
<th>SD-WAN</th>
<th>SWG/SSE</th>
<th>WLAN/LAN</th>
<th>PAM</th>
<th>AST</th>
<th>WAAP</th>
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<tbody>
<tr>
<td>Visionary</td>
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<tr>
<td>Leader</td>
<td>Palo Alto (5)</td>
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<td>Visionary</td>
<td>VMWare (4)*</td>
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<tr>
<td>Visionary</td>
<td>Broadcom (4)*</td>
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<tr>
<td>Visionary</td>
<td>IBM (4)*</td>
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<td>Visionary</td>
<td>Huawei (4)</td>
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</tbody>
</table>

*included in the Magic Quadrant for Application Performance Monitoring and Observability and/or Magic Quadrant for Unified Endpoint Management Tools.
**Gartner Magic Quadrants in Cybersecurity by Vendor**

<table>
<thead>
<tr>
<th>Visionary</th>
<th>Leader</th>
<th>Challenger</th>
<th>Honorable Mention</th>
<th>Niche</th>
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<tbody>
<tr>
<td><strong>Consolidators</strong></td>
<td>Pretenders</td>
<td>Legacy</td>
<td>Point Product</td>
<td>Good Luck</td>
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<tr>
<td>Fortinet</td>
<td>Microsoft</td>
<td>Cisco</td>
<td>Palo Alto</td>
<td>Huawei</td>
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<tr>
<td><strong>Endpoint Security</strong></td>
<td><strong>Network Firewall</strong></td>
<td><strong>SIEM</strong></td>
<td><strong>Access Management</strong></td>
<td><strong>SD-WAN</strong></td>
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*Included in the Magic Quadrant for Application Performance Monitoring and Observability and/or Magic Quadrant for Unified Endpoint Management Tools*
<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Customers</td>
<td>4,000+</td>
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<tr>
<td>Cross-connects</td>
<td>211,000+</td>
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<tr>
<td>Global metros</td>
<td>50+</td>
</tr>
<tr>
<td>Data centers</td>
<td>300+</td>
</tr>
<tr>
<td>Cloud onramps</td>
<td>225+</td>
</tr>
<tr>
<td>Global carriers (carrier neutral)</td>
<td>1,300</td>
</tr>
<tr>
<td>Renewable energy under contract</td>
<td>910MW</td>
</tr>
<tr>
<td>Rentable space under active development</td>
<td>9.2M sqft.</td>
</tr>
<tr>
<td>Acres held for future development</td>
<td>842+</td>
</tr>
</tbody>
</table>
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Joe Neumann
CISO
Build a robust defense architecture

Data and system segregation

Monitoring and alerting

Layered compensating controls

Joe Neumann
CISO
Cyber-Physical System Security
OT Aware networking and cybersecurity portfolio

Purdue Enterprise Reference Architecture

| Level 5 | Secure Networking | FortiGate 70F Rugged |
| Level 4 | Secure Access | FortiPAM Secure Remote Access for OT |
| DMZ | OT Aware Cybersecurity | Purdue Model & MITRE ATT&CK for ICS |
| Level 3 | OT Threat Intelligence | Increased OT security with virtual patching |
| Level 2 | OT Ecosystem | Increased Depth of OT integrations |
| Level 1 | | |
| Level 0 | | |

OT Professional Services = CTAP for OT and OT tabletop exercises
Closing the Cybersecurity Skills Gap

**NSE Certification Program**
- Modular, flexible, and scalable program with five proficiency levels and 11 certifications

**K-12 Security Awareness Training**
- Available to 8M Education Staff
- Trained 143,000 staff across 27 states to date, available to all school districts in the U.S

**Academic Partner Program**
- Available to 1M education staff in the UK and more countries in 2023
- Fortinet security training integrated into college and university curriculum.

**Diversity & Equity in Cybersecurity**
- 37 partners representing underserved, under-represented, and economically challenged individuals, including women, minorities, and veterans.

**Education Outreach Program**
- 526 New Partners in 2022
Secure Networking

- Thin Edge Secure Edge FortiManager Integration
- Hybrid Mesh Firewall
- FortiGate 7080F FortiGate Cloud-Native Firewall FortiFlex
- Single Vendor SASE
- Secure WLAN/LAN
- Universal ZTNA
- Secure SD-WAN
- Thin Edge Secure Edge FortiManager User-based Risk Scoring
- Overlay Orchestration

Information Security

- SIEM - Link Graphs FortiSOAR SaaS SoCaaS FortiAnalyzer
- Outbreak Alerts Device Security
- FortiDevSec
- FortiDeceptor
- FortiPAM
- Application Security
- Identity & Access
- SOC
- Threat Intelligence
- FortiEDR FortiNDR FortiRecon FortiDeceptor
- Endpoint & Early Response

FortiOS 7.4

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