

DORO DRIVING DIGITAL TRANSFORMATION

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DORO IN BRIEF



600 employees
worldwide



£200M
revenue



100% focused and
market leader in the
senior market



Monitoring in
3 countries



Integrated equipment to
service model



8M alarm calls
received per year



Head office
Malmö, Sweden



Growth through
successful
acquisition



3M mobile
phones sold to
seniors per year



TSA QSF
ISO 9001
ISO 14001
ISO 27001



220,000 monitored
connections



Listed
company



25,000 private
monitored
customers



5 Alarm
Receiving
Centres

KEY MARKET DRIVERS



Demographic changes

The proportion of seniors is increasing, both in absolute terms and in relation to the population as a whole



A growing need for care in society

Leads to a greater cost burden for government, local and county authorities. There is therefore a great need to find new and effective solutions to counteract the rising costs



New digital technologies and innovative solutions

Encourage a more healthy lifestyle and enable preventive healthcare to through A.I and cloud-solutions based on open APIs

TAILORED INDIVIDUAL SOLUTIONS



SOCIAL ALARMS



MOBILE SOCIAL
ALARMS



REMOTE VISIT



PERIPHERALS



ALARM RECEIVING
CENTRES

LEADER IN DIGITAL SOCIAL ALARMS

2008
CareIP®

- Long and solid history in developing social alarms
- The world's first digital social alarm launched by Doro¹⁾ in 2008 - CareIP®
- 250,000+ devices installed in the field across Europe

220k
Connections

- 5 ARCs. Complete end-to-end digital alarm chain
- 220,000+ connection across Europe, ca 90% digital connections
- Handling 20,000+ calls/day

ISO
27001, 14001
9001

- Certified in Information Security Management ISO 27001, 14001, 9001

¹⁾ CareTech was acquired by Doro in 2015





FUTURE IS DIGITAL

Implementing digital reduces the risk of error
and increases the security and efficiency of the
system

NO MORE FIXED LINES

Advances in technology and the move by telecoms providers to switch to next generation networks means that analogue telecare systems are becoming an unreliable care solution

More and more people are choosing to cancel analogue telephone subscriptions in favour of mobile telephones



DIGITAL TRANSFORMATION

- European telcos expected to close down analogue networks by 2025
- Digital alarm chain offers 10-15% improved total cost of ownership
- Increased security due to visible alarm units and faster call connectivity
- Ability to launch additional services on a digital alarm chain

NETWORK PROVIDERS HAVE SET THE DATE FOR
ANALOGUE SHUT DOWN:

Deutsche Telecom	2019
Swisscom	2019
KPN (NL)	2019
Orange France	2023
BT	2025*

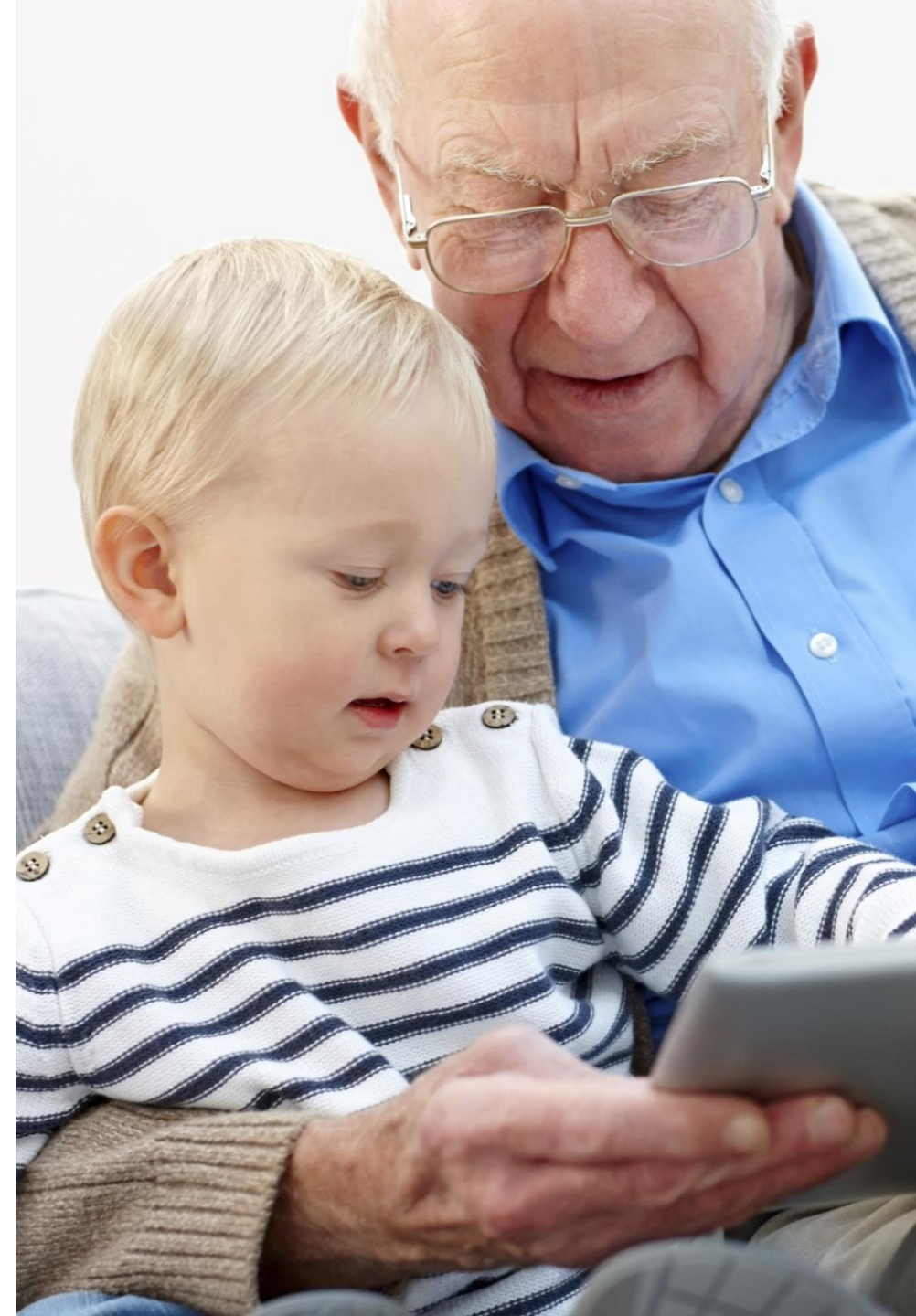
* No more landlines to be installed after 2020



PROVEN BENEFITS
OF DIGITAL TELECARE

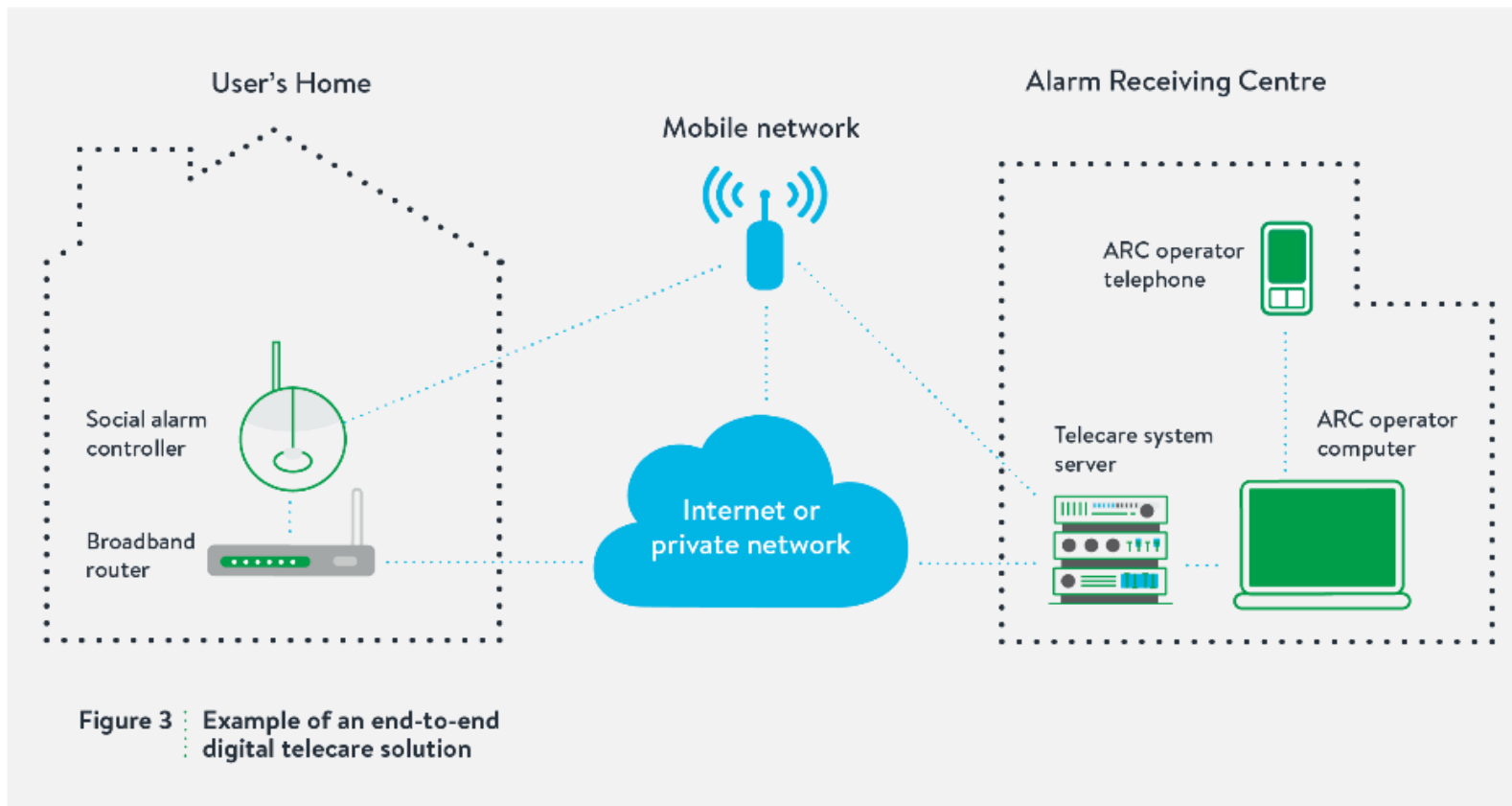
FUTURE-PROOFED

Digital telecare is not only ready to work with new networks, it is also ready to work with the digital health services of the future



SEAMLESS CONNECTIONS

Switching to end-to-end digital systems is critical to ensure that alarm services are delivered, developed and function reliably



SYSTEMS THAT ARE COST-EFFICIENT

Remote programming, upgrades and resource flexibility keep operational and lifetime costs low

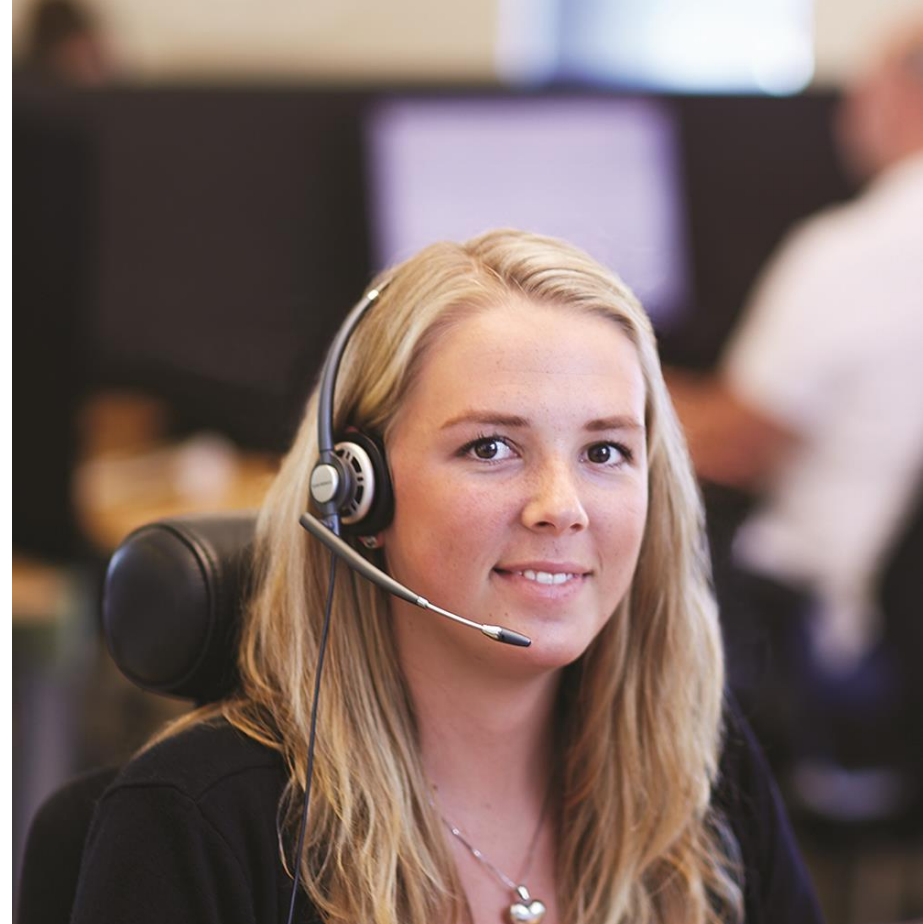


“not implementing digital social alarm systems will lead to greater costs, both directly and indirectly for municipalities”

The Swedish Association
of Local Authorities
and Regions (SKL)

KEEPING SYSTEMS IN CHECK

Digital telecare systems are always online, so any errors can be quickly identified and fixed

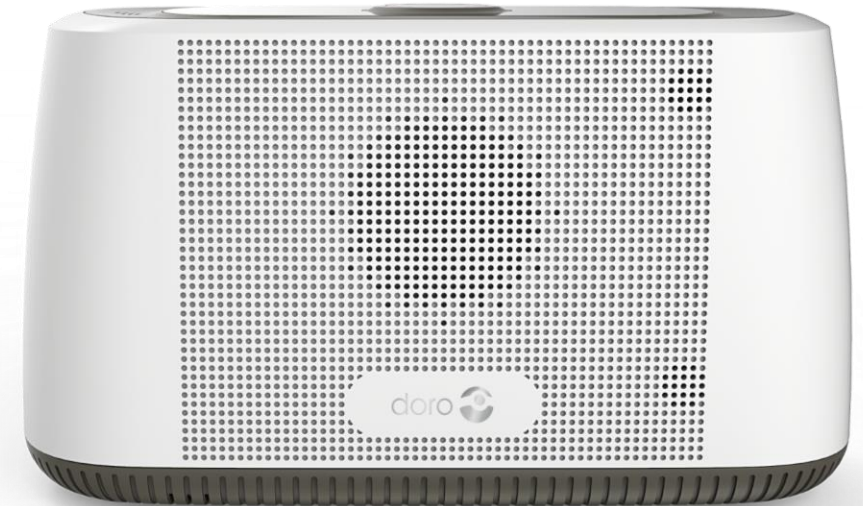


“The automatic self-test every 24 hours means the system is much safer for our users”

Trelleborgs municipality,
Sweden

RAISING THE QUALITY

Digital systems have enhanced call quality and roaming SIMs mean that social alarms can always source a network to connect to, even in remote areas



COMMUNICATION

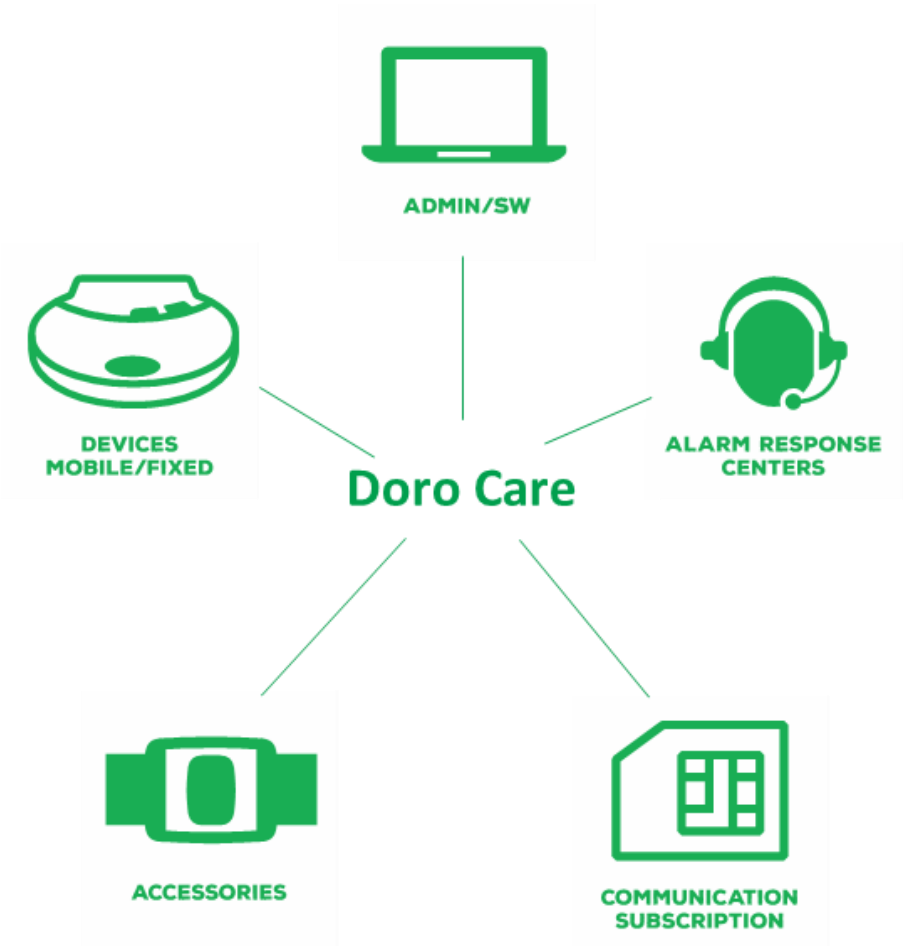
Secure social alarms need resilient, reliable communication solutions

- High quality M2M SIM card
- Long lifetime, 15 years
- Free roaming in Europe
- Dual APN resilience
- Fixed monthly cost covering call time and data
- Secure, 'always-on-line' supervised solution
- Recurring revenue stream



A COMPLETE DIGITAL ALL-IN-ONE BUNDLE

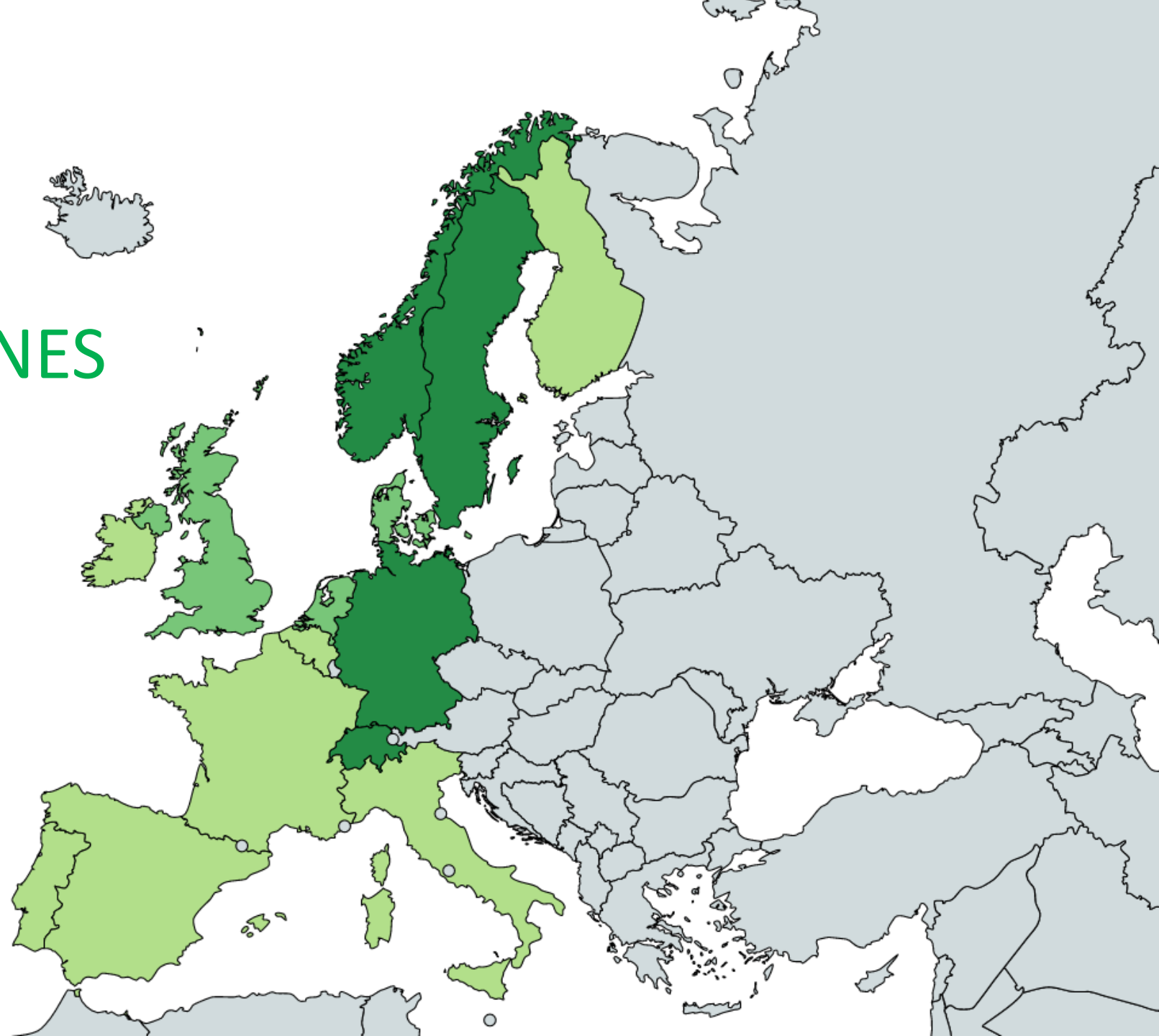
- Subscription based model including device, SIM, ARC. Cost €15 - €20 per user/month
- Access to the first truly digital alarm response centre in the Nordics
- Access to i-care® online web portal
- Continuous monitoring of SIM operation
- Inclusive of warranty, technical support and software/firmware upgrades



250,000

DIGITAL CARE PHONES IN EUROPE

- Developed market
- Developing market
- New market



SWEDEN; MAKING THE TRANSITION FROM ANALOGUE TO DIGITAL

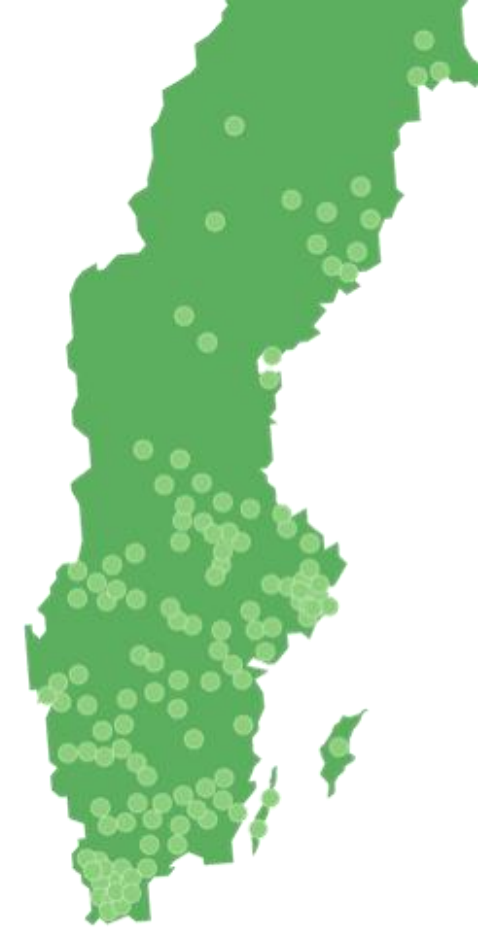
In 2007, Swedish telecom provider Telia upgraded their core network to an NGN. Following the transition it was estimated that 20% of analogue social alarm connections via an NGN failed.

As a result the government set a target for all social alarms to be digital by the end of 2018 and Sweden is now leading the way in the move to digital social alarms.

So far the local authorities who have made the switch have reported great success.

SOCIAL ALARMS IN SWEDEN

- 10 million population of which 20% are 65+
- Social alarm penetration 10%
- 290 municipalities in Sweden. Doro Care works with 158 municipalities
- 240,000 social alarms in total, of which 160,000 are already digital
- 98% of the digital social alarms run over GSM with roaming SIM cards



TRELLEBORG MUNICIPALITY

“The automatic self-test every 24 hours means the system is much safer for our users”

A CENTRALISED PROCUREMENT PROCESS

- Detailed technical specification and framework pricing agreement with a clear message to end analogue telecare
- Clear description and guidelines for municipalities to enable a smooth and cost efficient transition
- 70% of local authorities have used the SKL framework agreement for procurement



“not implementing digital social alarm systems will lead to greater costs, both directly and indirectly for municipalities”

The Swedish Association
of Local Authorities
and Regions (SKL)

SUBSCRIPTION BASED MODE

- Digital carephone
- SIM subscription
- i-care® Online remote provisioning
- Optional ARC response
- Lifetime device support



BORÅS MUNICIPALITY



“Continuous monitoring of SIM operation is a big advantage over analogue carephones. Not needing a land line and having more flexible installation options is good. To be able to get an “all in one” solution is a big time saver.”

STANDARDS GOING FORWARD

- The SCAIP protocol was agreed as the standard going forward
- A standard open protocol, SCAIP, allow municipalities to choose their preferred ARC
- New Cenelec TS 50134-9 published and ratified in 2018



NYKÖPING MUNICIPALITY

”It makes it possible to program at distance which makes it possible to make updates immediately. When the customer pushes the alarm button the best network at that moment is used and different suppliers are available.”

SITUATION IN THE UK – ANALOGUE UNITS

- TSA stated monitoring centres currently experiencing 14% handshake failures/calls with no speech
- Calls taking 30-40 seconds to connect
- BT announced no landlines will be installed after 2020. First customers were upgraded from analogue to digital phone lines in 2018, with the aim for all BT's customers to be using digital telephone services by the end of 2025
- ATA adapter will work as a temporary measure, but will NOT fix the 14% handshake failures and will NOT work if power cut
- Analogue networks are no longer being maintained by network providers meaning that service providers have two options – try and update analogue units to keep them working or switch to a fully digital unit
- If phone line goes down service provider is not alerted



DORO ELIZA

Doro Eliza is a new smartcare hub that raises the bar in Technology Enable Care (TEC)

- Contemporary design, fits nicely in the home
- Reliable, safe communication over 4G and other digital IP-networks
- Part of a complete smartcare solution and compatible with sensors for TEC today and tomorrow



A COMPLETE SMARTCARE SOLUTION COMPATIBLE WITH SENSORS FOR TEC



Prepared for both today's and future accessories and sensors with different types of interfaces;

- BLE – Bluetooth Low Energy
- Zigbee
- 869MHz
- Wifi¹

1. Wifi connection requires USB expansion (accessory)

FUTURE SMART HOMES WILL BE OPTIMISED FOR HEALTH MONITORING

Smart home solutions are making homes more intelligent...



...and a safer place

