



Smart is the new power

# Smart homes & buildings give you the power to act on your environment

**PRESS PACK | JANUARY 2020**

Delta Dore, a French company pioneering in connected homes and buildings market





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# vision

Committing to a new conquest and innovation plan to become the European leader in Smart Homes and Smart Buildings, while contributing to the energy transition.

**Delta Dore is now the leader in smart homes in France and one of the leaders in the Building Management System (BMS) market. In 2018, the group entered a new phase in its history, with Pascal Portelli taking over as Chairman of its Board of Directors. The group's vision and ambition for the next 10 years have been set out in an ambitious transformation plan based on four pillars (innovation, achievement, talent and performance), the broad lines of which are explained by Pascal Portelli.**

## Interview with Pascal Portelli,

Chairman of the Board of Directors  
of Delta Dore



## What is your position in the growing Smart Home market?

The Smart Home gives each of us a tremendous opportunity to become a future participant in the energy transition. Delta Dore aims to be an active partner in this field and is strengthening its innovations to support individuals in managing their energies in an increasingly intelligent way, while meeting their growing needs in terms of personal comfort, at home and at work. The question of energy efficient via intelligent control systems, is at the heart of this development.

Our recent investments in digital technology have enabled us to succeed in installing the largest number of Smart Home boxes in French households. Our ambition is to continue along this path to develop innovative solutions. The arrival of voice control, for example, will really increase exposure to the Smart Home. Ease of use and convergence, which were still lacking, are finally being offered to consumers, thanks in particular to the emergence of voice assistants.

Therefore, we intend to play a decisive role in the smart home and building market, whose growth forecast is estimated at 30% over the next 5 years\*. To do this, we must be able to offer products that are simple to use, technologically efficient, affordable and that guarantee personal data security. Trust in this area is essential.

## How are you doing to achieve your goal of becoming the European market leader?

In France, Delta Dore is the leading company in the Smart Home and Building Management System markets. However, we have identified many opportunities outside of France. We have an ambitious project to become the European leader within 10 years. To achieve this, we are going to accelerate our development in Europe, particularly in Germany, Spain, the United Kingdom, Italy and Norway, where we already have sales subsidiaries. In this way we will focus our efforts on ensuring that our products are suited to these different markets and on marketing to make the compatibility of our solutions with other equipment in homes, such as windows, lighting or boilers, better known abroad.

\*Source Statista



## What are you currently working on in R&D?

Our ambition is to design tomorrow's iconic solutions for the comfort of everyone and the energy transition. The interoperability of our offering with those of other market players, including our competitors, is fundamental to supporting the growth of the smart home. We intend to strengthen it in cooperation with our many technology partners. We invest heavily in our R&D, particularly in digital technology with our smart home boxes, our IoT platform and our control applications. Today, we are directing this research towards the development of products with an attractive design for the general public, which must become a key influencer on installers.

Concerning smart buildings, here again there are many issues, such as managing the intermittency of solar energy. All this creates significant opportunities for our group. And then, of course, there are all the emerging technologies on which our engineers are working, such as artificial intelligence, which makes it possible to anticipate the behaviour of the occupants of a building, to enrich usage scenarios and to refine the management of our homes and workspaces, as well as everything that revolves around the growth of self-consumption and measuring. Delta Dore intends to stand out in all these areas in the years to come.

## Can you share with us your vision of the energy transition?

Our company originated from providing energy management solutions as a response to the 1970s oil crisis. Today, we want to provide a broader response to the challenges of energy transition in homes and buildings.

Our 1<sup>st</sup> conviction: our contribution will make a difference by providing solutions that are accessible to the greatest number of people and are very easy to use. They will put the focus back on people, giving them the power to reduce their environmental impact, while meeting their expectations in terms of comfort (optimising energy without diminishing it), budget (reducing their energy bill), but also health (optimising indoor air quality). These solutions will therefore go beyond just optimising energy consumption, playing the role of a conductor in the house, which will increasingly include intermittent energy sources or storage.

Our 2<sup>nd</sup> conviction: if the contribution of digital technology in offers is to remain decisive, it will be complemented increasingly frequently by artificial intelligence; whether this involves integration and management of renewable energy, charging (in the case of electric vehicles, for example), or water consumption.

Our 3<sup>rd</sup> conviction: as an industrial company, we must set an example and continue our efforts to minimise the environmental impact of our solutions.





# objective

## Empowering individuals to interact simply with their environment

**A French flagship in terms of success and know-how for almost 50 years, Delta Dore has been a constant motor for innovation with more than 8% of its revenue invested in R&D. This recognised constant has enabled the company to anticipate market developments and resolutely adopt the digital revolution. Its offering has thus evolved from product design to the development of comprehensive solutions, integrating mobile applications and associated services.**

## A pioneering group in “Smart Home”

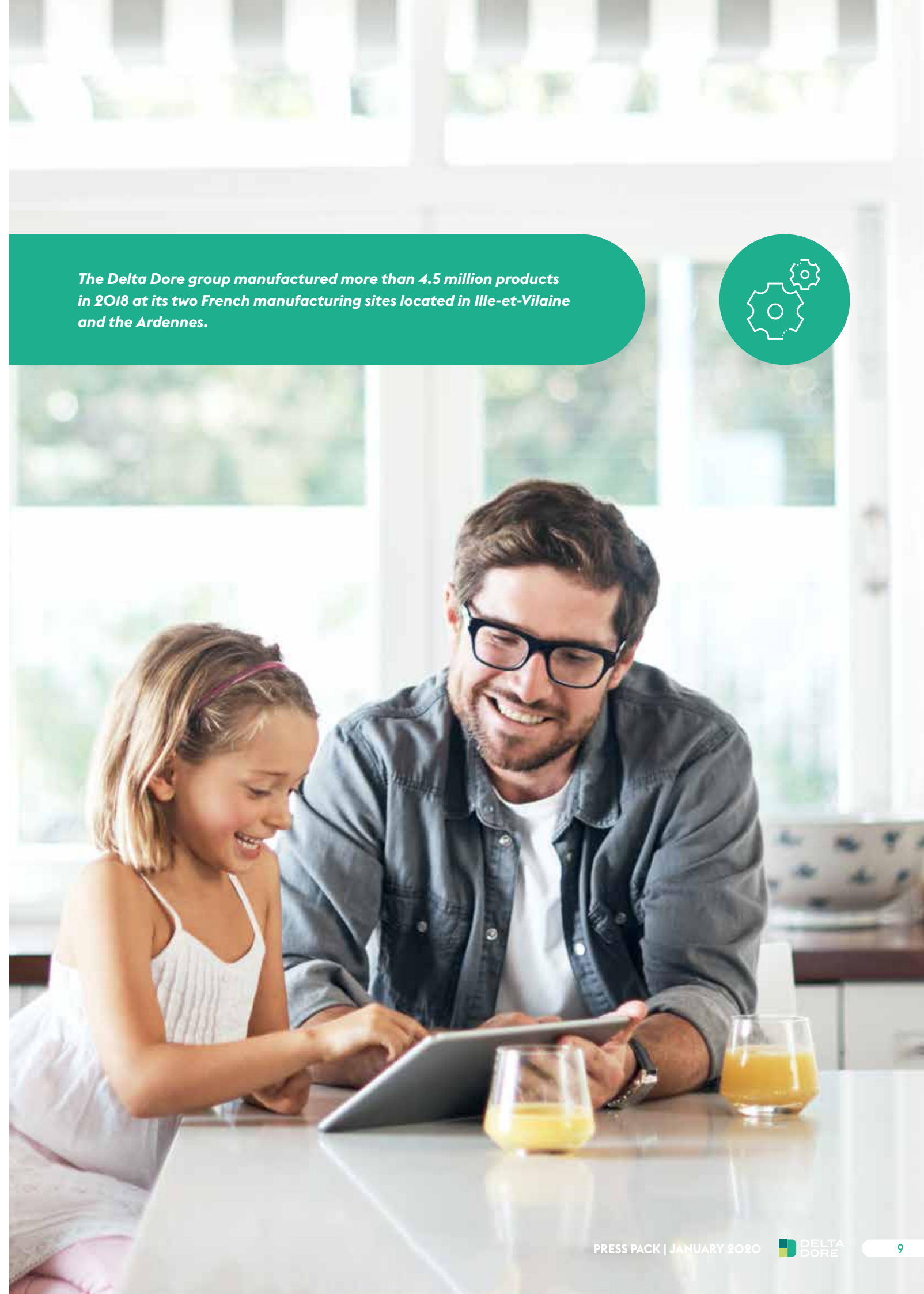
It was in 1970, halfway between Rennes and Saint-Malo, where the group's headquarters and production facility are still located, that Joël Renault and his wife Monique founded Delta Dore in their garage. The company offered electronics and telecommunications subcontracting. Three years later, the company changed its business to design and sell energy-saving products as a response to the oil crisis. Since its creation, Delta Dore has been a smart grid pioneer, launching its first “load shedder”. This solution, designed for many homes equipped with electric heating, modulates the heating over time in order not to exceed a predefined power threshold. Therefore, Joël Renault is one of the inventors of the home automation concept, which emerged in the 1980s. In June 1989, he was the first to offer a heating system that could be controlled remotely by telephone, called Typhone I.

In 2015, the group became a forerunner in the Smart Home segment with the launch of its flagship product Tydom, a smart box, which has enabled more than 200,000 homes equipped with Delta Dore products to become connected, without having to change their installed products. Lastly, the group is also a forerunner in Smart Building, with more than 10,000 tertiary and industrial sites equipped worldwide, building strong technological synergies between homes and workspaces.

This pioneering vision initially allowed this French technological and industrial gem to make a name for itself in energy management and comfort in the home, before establishing itself as a key player in smart home and building solutions.

In 2018, the group made Pascal Portelli Chairman of the Board of Directors, while still retaining its identity as a family business. The task of the new Chairman will be to strengthen the group's growth and accelerate innovation. This new stage in the life of the Delta Dore group gives it a new ambition, while retaining the achievements and founding values of the company.

*The Delta Dore group manufactured more than 4.5 million products in 2018 at its two French manufacturing sites located in Ille-et-Vilaine and the Ardennes.*







## Delta Dore certified “Future Industry Showcase”

In 2017, Delta Dore was the first mid-sized company in France to obtain the "Future Industry Showcase" label for its approach to improving the production cycle and maintaining industrial employment in France. This certification underlines the group's commitment to combining technological innovation and social policy.

Awarded by Alliance Industrie du Futur (the Alliance of Industries for the Future), this label rewards companies that have developed an innovative project to organise their production. In particular, it highlights Delta Dore's efforts to optimise the quality and reliability of its products (collaborative robots, innovative quality control systems, etc.), to improve the working conditions of its employees (reduction of musculoskeletal disorders, e-learning training of operators, etc.) and to maintain industrial employment in France (two production plants).

## R&D at the heart of the strategy

### Customer experience at the core of R&D

As the driving force behind Delta Dore's success, 150 of the group's 860 employees are dedicated to creative and dynamic R&D, in which 8% of turnover is invested. A significant and necessary investment to stay ahead of the curve in markets where demand is accelerating and technologies are developing very quickly.

Delta Dore has always focused on maintaining consistency between technologies and needs, placing the customer experience at the core of its thinking. Its objective is to provide its increasingly demanding users with technologically efficient solutions that will simplify the management of their home comfort. And to allow them to better control their energy consumption.

Four years ago, the group switched over to digital and IoT, making profound changes in the way it designs its offers and innovates, particularly through Design Thinking. This approach has led to the development of its products, applications and solutions, so that they integrate all user experiences (before, during and after), but also so that they display a “Look & Feel” that can nourish the brand's appeal.

Innovation in services is also a priority area to meet the new demands of customers seeking global and integrated solutions.

*The latest prize list of the French National Institute of Industrial Property (INPI) ranks Delta Dore as one of the top 12 French mid-sized companies having filed the most patents in 2018, across all sectors.*

### Artificial intelligence, an essential link

Artificial intelligence provides real added value to meet the comfort needs of occupants and adapt to issues related to the energy transition. For example, with AI it is possible to automatically turn on the house's equipment at the most appropriate time (heating, hot water tank, washing machine, etc.) according to the habits of each family but also to tariff constraints or electric consumption peaks.



*Delta Dore presents an AI-based solution at CES 2020*

*ONSEN is an exclusive solution that adapts to and learns from each family member's habits. It promises substantial savings on your electric water heater, without you having to change your installation. Finally, it paves the way to help families get involved in using energy more efficiently. An innovation for everyday life and in response to environmental issues. At the same time, it improves comfort while enabling people to forget about cold showers !*



## Designing more open and interoperable systems

Delta Dore is resolutely moving towards openness, to meet the challenge of interoperability between smart home solutions on the market, which is essential to improving user experience and in order for the market to take off.

### Step 1: the largest ecosystem of partners

For several years, Delta Dore has offered the largest ecosystem of partners on the market, allowing compatibility of its products with more than 120 OEM partners in the home, including major brands (Atlantic, K-Line, etc.). Delta Dore solutions are also integrated into the services offered by energy operators and insurance companies (EDF, Arkéa, etc.).

### Step 2: compatibility with smart speakers

In 2018, Delta Dore has made its offers compatible with Amazon Echo and Google Home smart speakers.

### Step 3: opening of the IoT platform

In early 2020, Delta Dore will open its IoT platform via API, thus facilitating the integration of Smart Home and Smart Building equipment and services for all players in the sector (industrial customers, equipment manufacturers, OEMs, developers and service providers). The platform will enable the creation of user-centric experiences that simplify interactions, while ensuring the security of flows and data.

### Step 4: openness to protocols

An openness to protocols in both directions: Delta Dore is opening its protocol to a growing number of partners; indeed, the X3D protocol is a major asset for Smart Home solutions: robustness, long range, low power consumption allowing long battery life of products.

At the same time, in 2021 Delta Dore will integrate the standard protocols of the market into its offers (Wi-Fi, Zigbee, low energy bluetooth, etc.).

## Meeting the challenges of the energy transition

The company will soon go even further in its contribution to the energy transition. The solutions will go beyond merely optimising energy consumption: they will help to optimise and orchestrate new needs of homes, which will increasingly include intermittent energy sources and storage.

## Delta Dore is involved in collaborative energy transition projects

Delta Dore participates in collaborative research and experimentation programmes with public laboratories, universities, prestigious schools, but also partners and competitors including:

- **Comepos:** launched in 2013, this initiative, which brings together industrialists, builders and research institutes, has made it possible to scientifically evaluate in situ the performance of 20 positive energy homes. The results will serve as a reference for the authorities, contributing to the improvement of future regulations in the single-family home building sector.
- **Smile:** a joint project between Brittany and Pays de la Loire to build the first smart electricity grids in western France.
- **Goflex:** Designed by Gimélec, this calculation method assesses and evaluates the energy flexibility of buildings, i.e. the times at which it is most appropriate for them to be taken off the grid. This new tool aims to simplify the integration of renewable energies. The goal is to "raise consumer awareness of the availability and renewable nature of the energy resource".



# ambition

## Taking the position of European leader in its markets

**In 10 years, Delta Dore has seen its turnover increase by 72%, a third of which is generated internationally, where the group has nine subsidiaries. Already number one in smart homes and one of the leading companies in BMS on the French market, the group aims to become the European leader in its markets within 10 years.**

## Continuing to perform in a buoyant market

The smart home and building market generated €20 billion in revenue worldwide in 2017 and is expected to grow by 30% in 5 years (source Statista). In this context, Delta Dore aims to achieve double-digit growth on average over the next 10 years, with more than three times the turnover.

Already in a leading position in France, it is mainly in Europe that the group intends to attain this growth.

## Great international ambitions

Delta Dore is present in 10 countries (Germany, Spain, France, Italy, Norway, Poland, United Kingdom, China, Singapore and the Philippines) and provides its offering to more than 40 countries through its network of partners.

Between 2012 and 2017, its export turnover sky-rocketed up 89%, now representing 30% of its activity. The group intends to strengthen this presence and even reverse the figures so that international business accounts for 70% of its turnover by 2028.

## Constantly strengthened industrial know-how

Delta Dore has chosen to produce in France, while remaining economically efficient. Besides consolidating the group in one territory, this unique approach gives it a solidity and consistency, which is reassuring and gives it wings. Therefore, 4.5 million products are produced each year at its site in Ille-et-Vilaine, intended for the national and international markets.

For Delta Dore, having a modern and capable production facility is essential to achieve its ambitious objectives. In three years, the group has invested in its production sites to support its growth and ensure the control of its technological innovations, particularly in cobotics, which encourages person/robot cooperation.

***Delta Dore now has 13 robots and 3 cobots for 220 full-time equivalent employees in its two plants, i.e. a person/robot ratio 4 times higher than the average in France and 6 times higher than that of China.***

Nevertheless, new technologies must be a source of additional productivity, giving employees the means to be more efficient. Under no circumstances is it a question of replacing human know-how with that of a machine, but on the contrary, of allowing these two contributors to the company to work together to achieve excellence.





# motivation

Giving our talents the resources to meet all challenges.

Delta Dore's teams are its greatest strength. The group supports its 860 employees in France and in its subsidiaries abroad in the digital transformation of their activities, in order to enable them to perform tasks with higher added value. It also promotes their development and career ambitions, by broadening their skills through appropriate training and by offering them an attractive mobility plan, particularly as part of its international expansion.

## Initiating change to support transformation

Aware that a vision can only be achieved if it is shared, Delta Dore's HR policy focuses on people. The group is implementing an "empowerment" policy to ensure that employees are both key players and drivers of the group's transformation. The objective is to involve and mobilise all employees in a sustainable way around its common value creation project.

The group also pays great attention to career follow-up and always prioritises internal advancement over recruitment when new positions are opened.

Lastly, Delta Dore is not immune to the growing scarcity of talent in the fields of electronics, smart homes, IT and mechanics, which plagues the industry. To be identified as an innovative and leading player and to attract its future employees, the group is strongly positioned in partnerships with engineering and business schools, the BTS degree in home automation and with the professional high schools.

*Delta Dore currently works with 78 schools to hunt down future talents.*



# SOFT!

## Spreading a new corporate culture

Furthermore, Delta Dore has developed a strong corporate culture, a real driver of our transformation project. It is put into practice through a common foundation, built on four values that are known as SOFT.

### Simple:

our future is designed with simplicity

### Open:

our future is amplified by openness

### Focused:

our future is energized by clear choices

### Trusted:

our future is rooted in trust



## A group where you can grow your career

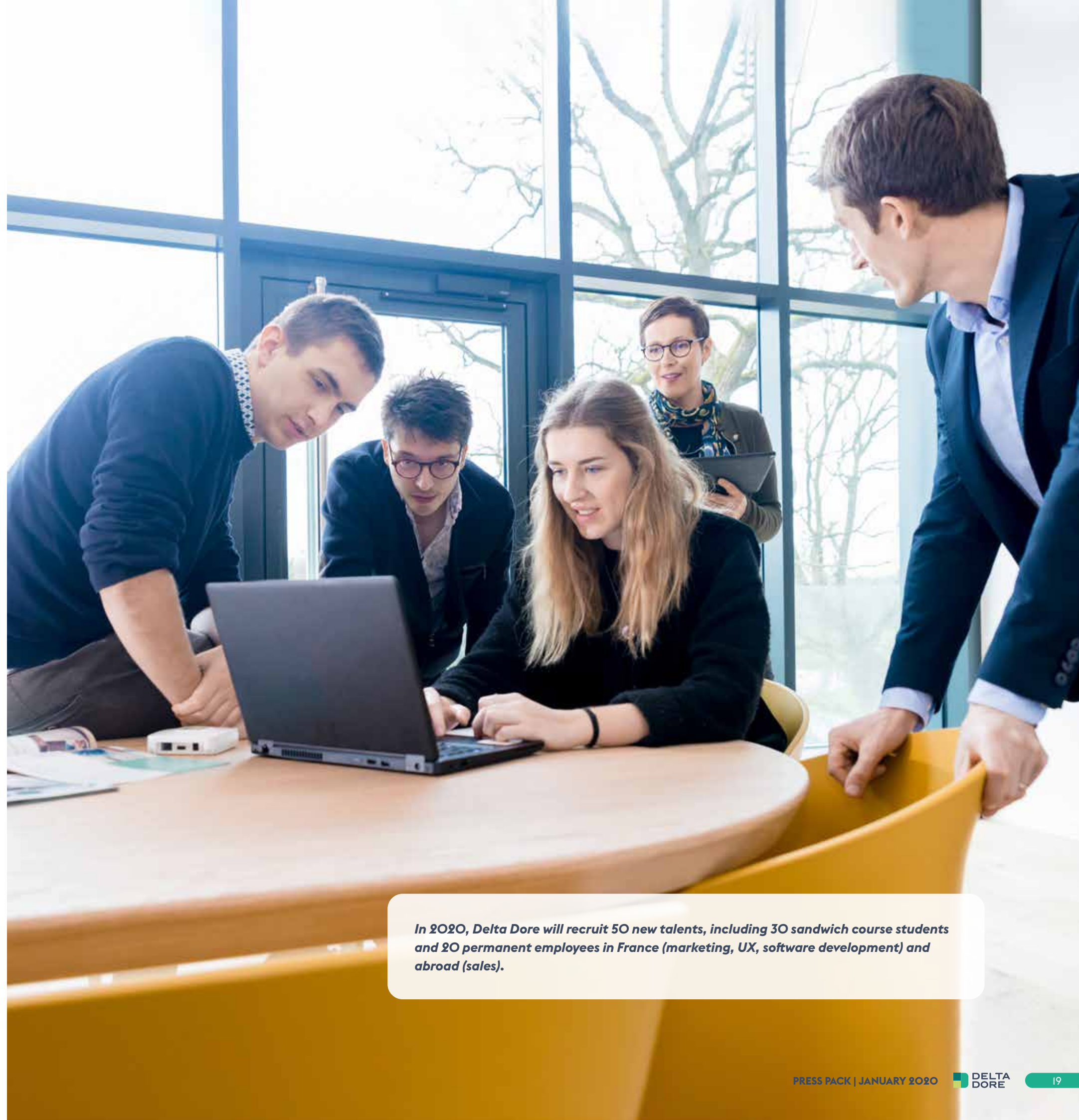
Delta Dore cares about the well-being of its employees and endeavours to help them meet their aspirations and gain skills throughout their careers, in accordance with their wishes and choices.

For this reason, Delta Dore's investment in training is twice as high as the legal obligation. In 2018, we trained 589 people, i.e. 68% of employees.

Its "Quality of Life in the Workplace" committee is there to help all those who aim to achieve a good work/life balance (right to disconnect, provision of nursery places, teleworking, etc.). Its managerial policy also aims to ensure that each employee is aware that he/she is a driving force behind the group's success.

Lastly, Delta Dore is committed to a strong risk prevention and health and safety approach, ensuring that each individual can carry out their duties under the best possible conditions. In particular, the group organises coaching workshops on managing emotions, time, assertiveness, change, etc. Sports activities are also offered to employees (pilates, piloxing, yoga, etc.).

Delta Dore is ranked among the Top 500 Employers in France in 2019 by Capital. The company ranks 293<sup>rd</sup> out of 2,100 companies in the general category, and 8<sup>th</sup> out of 56 in the electrical equipment and materials category.



*In 2020, Delta Dore will recruit 50 new talents, including 30 sandwich course students and 20 permanent employees in France (marketing, UX, software development) and abroad (sales).*



# demand

In a digital world that raises hope and concern in equal measures, Delta Dore develops reliable, open and secure technological solutions to support energy transition and greater personal comfort, both at home and at work.

## Solid foundations...

With its recognised technological and industrial know-how, Delta Dore has built its reputation on the robustness and reliability of its technologies, which have resulted in the brand's success and allowed it to place its offers at the opposite end of the scale of programmed obsolescence.

Thanks to the quality and scope of its ranges, the group has won the trust and loyalty of both its users and its installation partners. The relevance of its technologies has made Delta Dore the partner and preferred brand of many players in the smart home and building sector.

*In the last 15 years, Delta Dore has equipped more than 10 000 buildings and 4 million homes with its branded smart solutions. In addition, 10 millions of thermostats have been produced by Delta Dore under our partners brands.*

## ... on which are built a responsible approach

Aware of its social and environmental responsibilities, Delta Dore attaches great importance to its employees' well-being. The group is very involved locally and offers products 100% Made in France, as well as being a major economic player in its territory, with which it interacts continuously.

Ten years ago Delta Dore made a commitment to the eco-design and miniaturisation of its products to reduce its environmental footprint. It is also implementing measures to better control its energy consumption and waste recovery.

Furthermore, the group regularly audits its sites in order to optimise their practices.

*Delta Dore has obtained ISO 14001 environmental management certification for all its sites in Brittany.*

## Trust at the forefront

Delta Dore makes every effort to ensure the safety and security of its solutions.

**Waves:** unlike a Wi-Fi network, which continuously emits 30 mW, or a smartphone, which emits 600 to 2,000 mW, its products emit only 1 to 5 mW, and only when they are being used, i.e. only during a few milliseconds.

Respect for **personal data:** by design, the products allow for personal data protection. Specific security measures have been put in place (for example: identification, authentication and authorisation technologies, exchange encryption). The group also undertakes not to share personal data with any third party at its own initiative. If customers wish to enrich their user experience with features that require data to be shared, they are informed (e.g. use of Google Home or Alexa, etc.).

Lastly, **its Made in France production** is a guarantee of quality for its users. In this way, the company maintains control and ensures comprehensive monitoring of each solution, from its design to its delivery, including its manufacture.

*Delta Dore recovers 100% of its waste through approved service providers:*

- 74% recovery of materials
- 26% energy recovery

*The group's objective: to reduce the tonnage of CIW (Common Industrial Waste) as much as possible, in order to promote recovery of materials.*



## Smart Building by Delta Dore

Delta Dore also puts its expertise at the service of players in the tertiary and industrial sectors. The group has been able to adapt to specific requirements and supports building managers in all their energy efficiency projects.

Delta Dore simplifies the management of buildings, in order to give managers the means to:

- Increase the attractiveness and use value of buildings
- Understand and accurately analyse the consumption and behaviour of the installations, but also of the occupants.
- Analyse the data generated to boost performance.
- Reduce operating costs and simplify maintenance.
- Offer a high level of comfort and new services to building users.
- Meet standards and labels (environmental and Quality of Life at Work).

Therefore, its solutions, products, software and services are totally in line with the challenges of Smart Building. They give the power to stakeholders so they can feel empowered in their own building, simplify its use, do co-construction work on new services and adapt to the need for mobility of occupants, as well as the scalability of spaces.

The high connectivity of its control solutions is made possible thanks to the new D-One offer, with an open architecture integrating and aggregating the BIM\* model. It is also based on access to third-party information system data (maintenance, access control, weather services, energy supplier data, road traffic, etc.) and all the information required for efficient equipment operation. Data produced by buildings and their environment can also be used, via APIs, to offer new services to occupants (room reservations, information on building life, measuring satisfaction, caretaker services, etc.) and to anticipate needs.

To ensure long-term performance, Delta Dore also deploys BMS systems adapted to current and future expectations, such as Life Building (synergy between technologies for the home and the work building). Lastly, the group offers services and training to ensure the proper functioning of the BMS, energy efficiency and installation safety.

D-ONE enables managers to access all the building's data from a single web platform to meet all the needs for analysis, monitoring, diagnostics and automation, including predictive needs.

\* BIM (Building Information Modeling) is a tool used to create a digital model of the building, its twin in digital format.

# D-One

Launched in 2019, D-One is a new generation building control system from Delta Dore.

This solution integrates the BIM model at its core. It aggregates and processes all the data required to manage tertiary and industrial buildings from a single web platform.

D-One ensures responsible and valued buildings that are pleasant to live in.

### Systems offer

- **D-One Web Services**  
(TyOffice, etc.)
- **D-One Cloud Edition**  
(Web portal, etc.)
- **D-One Site Edition**  
(BMS supervision, etc.)
- **D-One Floor Server**  
(PNM<sup>3</sup>, etc.)
- **D-One Controllers**  
(module controllers, Energy Box, etc.)

### Services offer

- **Maintenance services**
- **Energy efficiency services**
- **Training**



## Smart Homes by Delta Dore

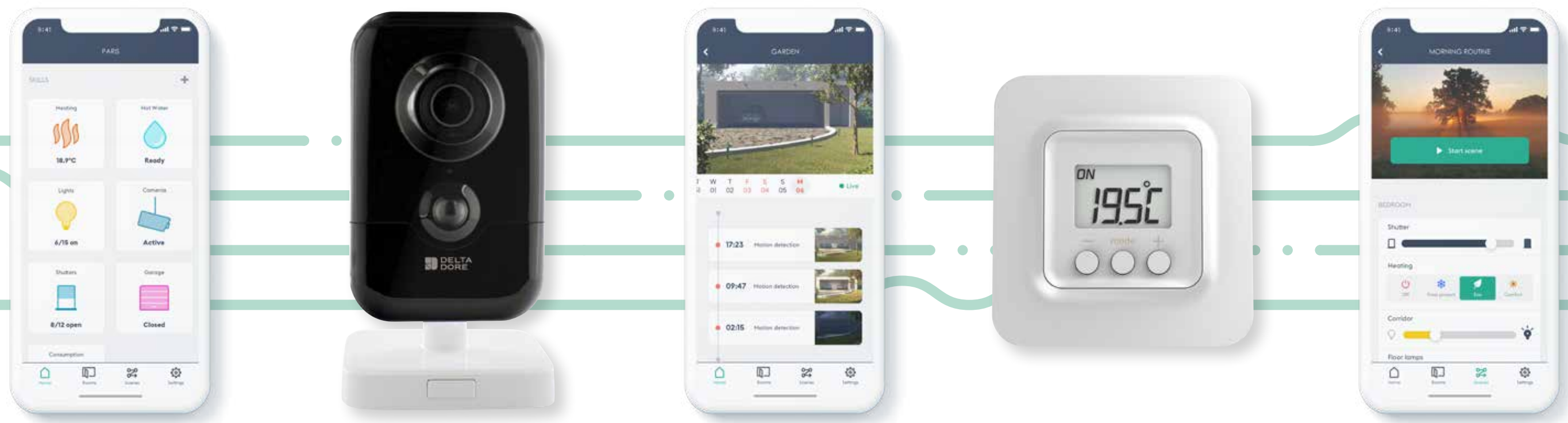
A forerunner in smart homes, and one of the inventors of home automation in the 1980s, Delta Dore now offers a very wide range of products, solutions and services to control comfort and save energy.

This offering puts technology at the service of users, focusing on ease of use so that it can take up its place in homes. In fact, the challenge is not so much connecting the home as adapting it to the behaviour of its occupants.

Its simple and modular range suits both new and old homes, for which Smart Home wireless solutions do not require any work. Among its flagship products are its Tydom smart home box and its associated application. The latter meets Delta Dore's promise to put people at the centre of the smart home, by making it possible to control compatible equipment (boiler, electric radiators, roller shutters, entrance door, gate, etc.) simply and at an affordable price.

The group also offers Lifedomus, a unique premium solution for multimedia and the smart home. This is more technical than Tydom, but is nevertheless intuitive to use and can be controlled from your smartphone or tablet. The interface can be customised through augmented reality. In addition, Lifedomus embeds almost all the protocols on the market and is therefore compatible with all existing smart home offers.

Lastly, both Tydom and Lifedomus are also voice controlled, thanks to their compatibility with Amazon Alexa and Google Assistant voice assistants.







## The showrooms

Showcasing the brand's know-how, the showrooms aim to bring the smart home experience alive for the general public.

In a renovated apartment located in the heart of major cities (Bordeaux, Rennes, Düsseldorf and Barcelona), the group presents its latest solutions for energy management, comfort and domestic security.

Each visitor can experiment with controlling the lighting, roller shutters, alarm and heating via the box and the Tydom smart home application. These interactive spaces, measuring about forty square metres, are also important centres for installers, architects and key influencers, who are invited to come and seek advice.

For Delta Dore, the aim is to widen the appeal of the smart home while raising awareness among the general public on how to easily improve their daily home comfort.

**May 2019**

***In Bordeaux, the smart home is expanding. Delta Dore is partnering with the manufacturers Atlantic and K-Line to showcase all their compatible connected products.***

## Growth

€145 million in turnover

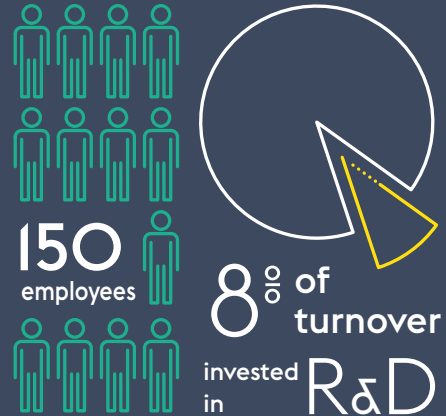


860 employees

9 SUBSIDIARIES  
Europe and Asia

40 partner COUNTRIES

## Innovation



## Industry 4.0



Press contact: **Agence Profile** • +33(1) 56 26 72 00 • [deltadore@agence-profile.com](mailto:deltadore@agence-profile.com)

Nicolas Brodiez  
+33(6) 15 93 52 10

Vanessa Chicout  
+33(6) 35 42 93 32

Lauriane Perrigault  
+33(6) 68 77 22 89

Jennifer Loison  
+33(6) 10 22 52 37