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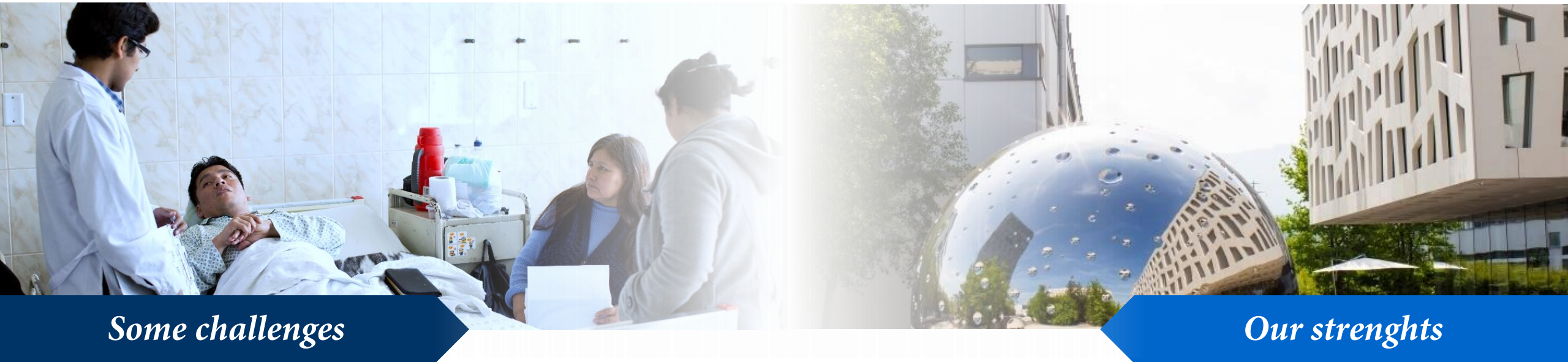
## **Roche Diagnostics**

*Innovating diagnostics, shaping healthcare, changing lives*



# Healthcare under pressure

*Answering main challenges with our strenghts*



## *Some challenges*

- ▶ High Disease Burden
- ▶ Need for Value Based Health Care
- ▶ How to finance innovation
- ▶ Lack of Human Resources
- ▶ Complexity of information
- ▶ Data is not integrated

## *Our strenghts*

- ▶ Commitment to patients
- ▶ Diagnostics - Therapeutics
- ▶ Scientific & medical expertise
- ▶ Strong investment in R&D
- ▶ Global presence
- ▶ Healthcare system experience

***Diagnostics bring value to patients worldwide***

**>23 billion**

Roche Diagnostics tests were performed in 2020, making us one of the largest providers of real-world data.

**+10%**

In 2020 we increased by 10% our investments in R&D, which are already the highest in our industry.



# Our role on the Digital Transformation of Healthcare

*Leveraged by a strong installed based and our strategic consultancy team*

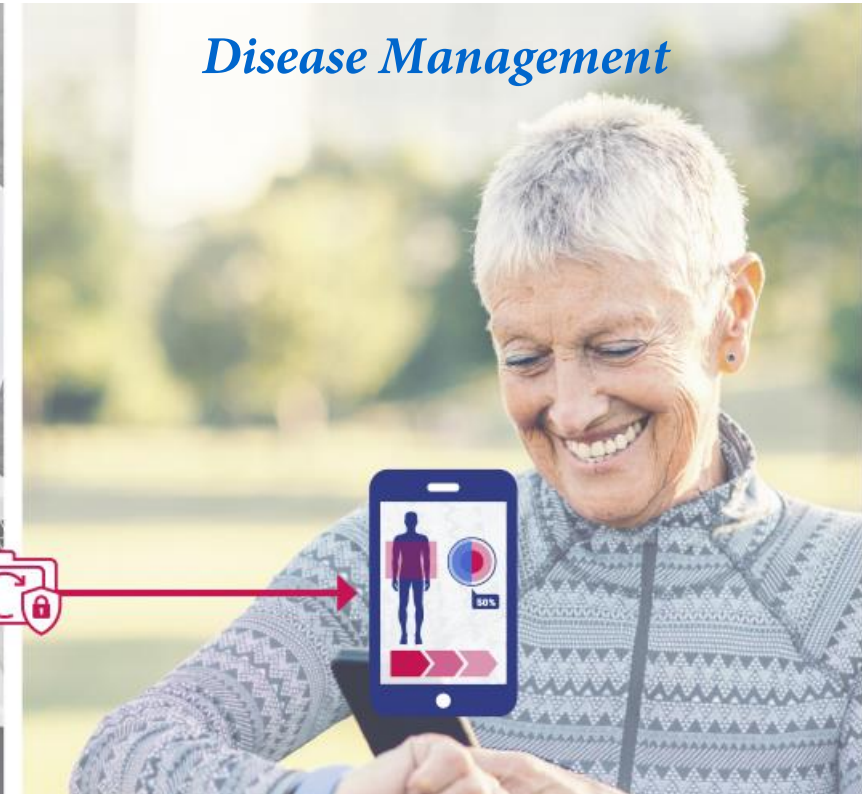
## Diagnostic Solutions



## Clinical Decision Support



## Disease Management

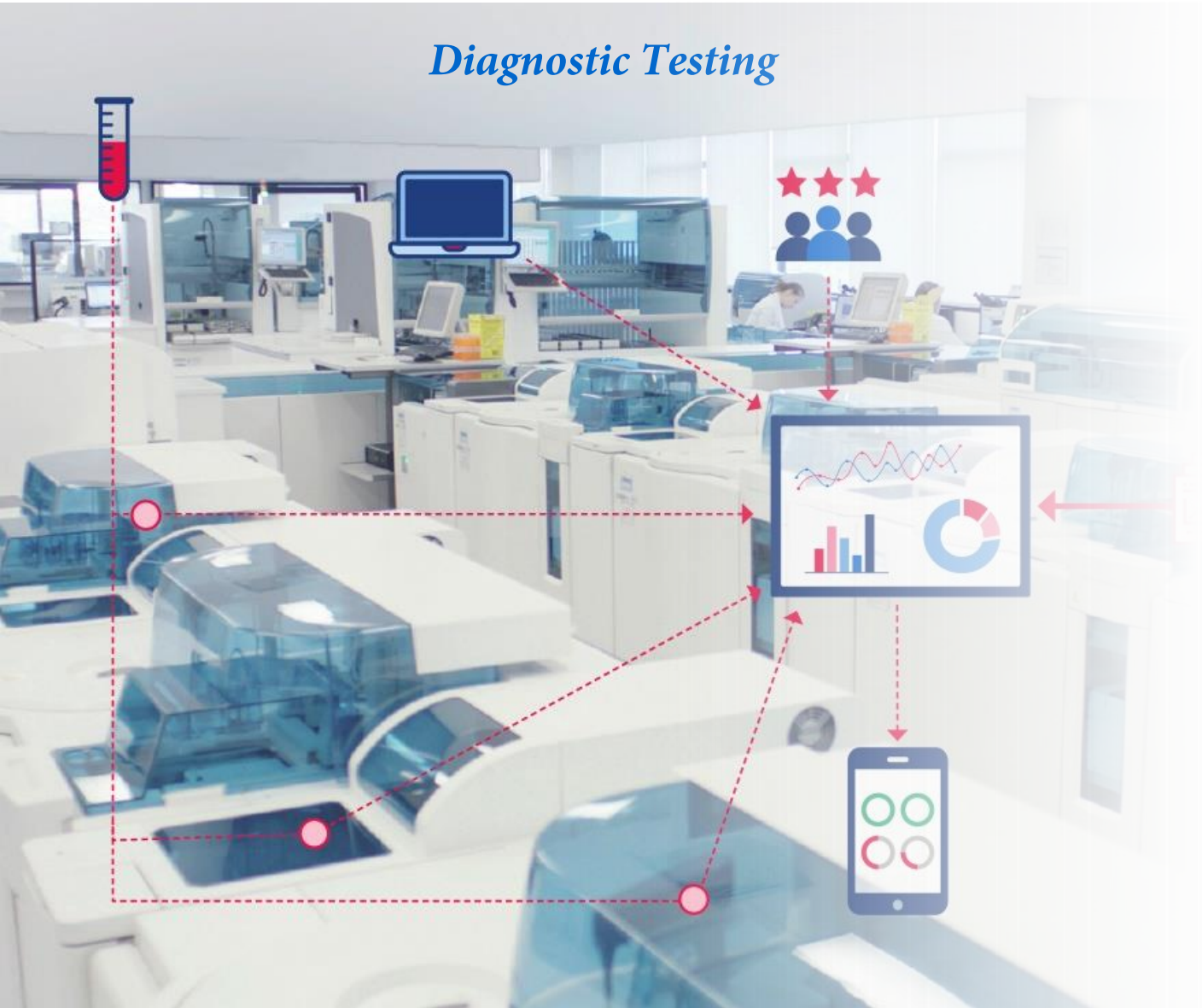


**Patient Self-management**

**Preventive approach**

**Personalized Healthcare**

# Use healthcare data to better manage resources



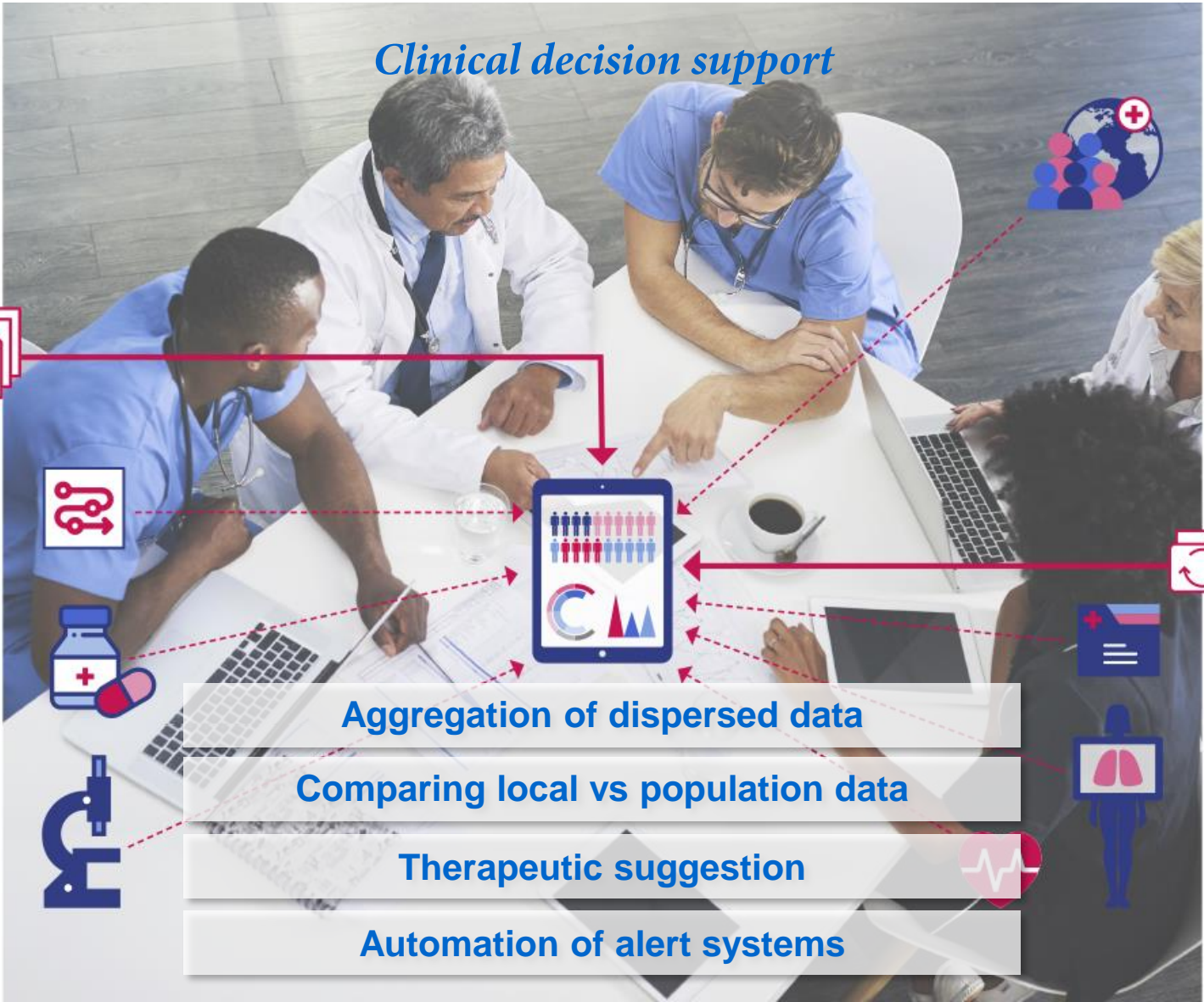
- 1** Lab operations
- 2** Customer experience
- 3** Test interpretation
- 4** Insights based on IVD test data

# Combine data to support Clinical Decision

*Diagnostic solutions*



*Clinical decision support*



*Disease management*



# Digital Solutions to optimize the patient journey

*Coordinated health interventions to improve clinical outcomes*

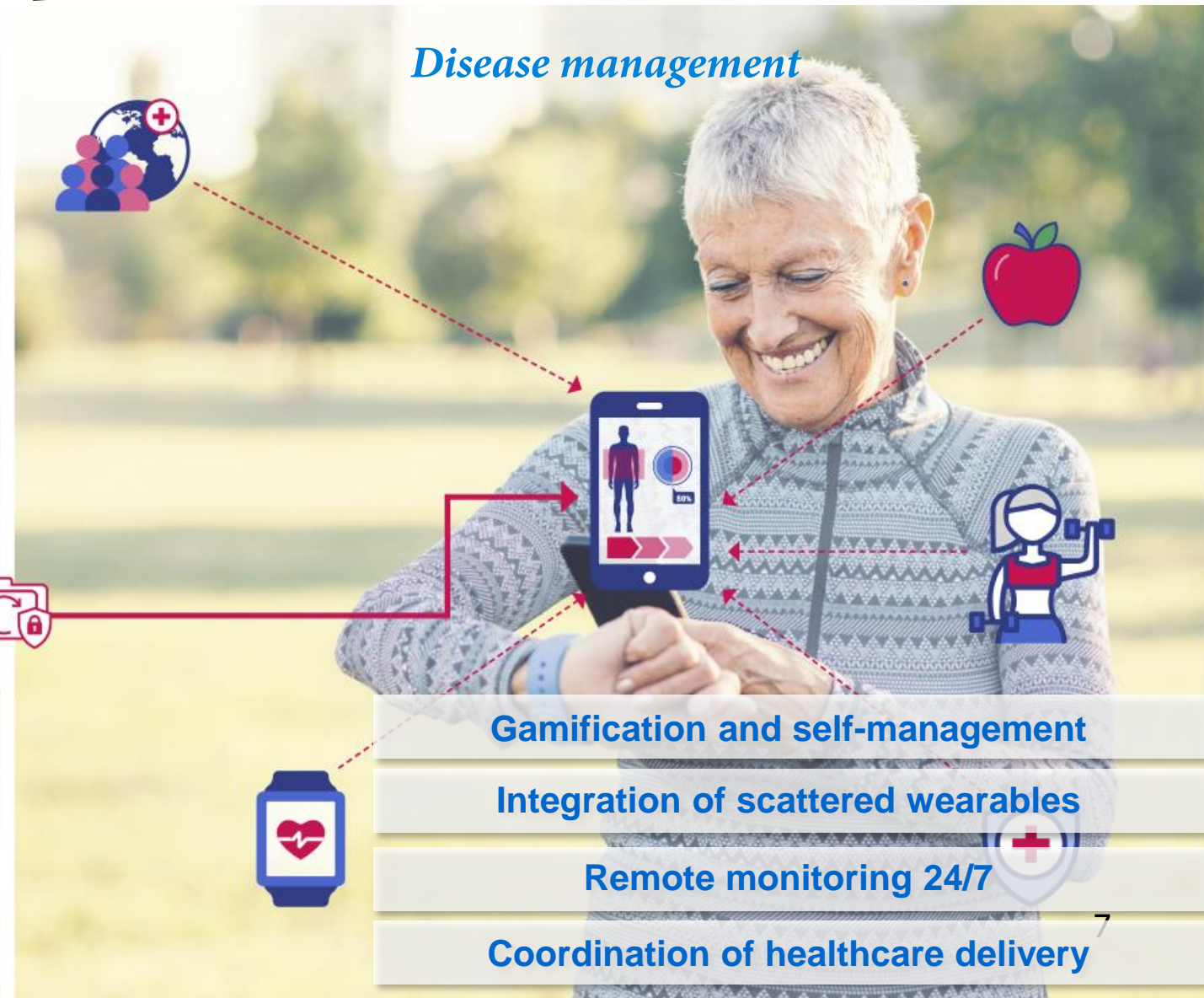
*Diagnostic solutions*



*Clinical decision support*



*Disease management*



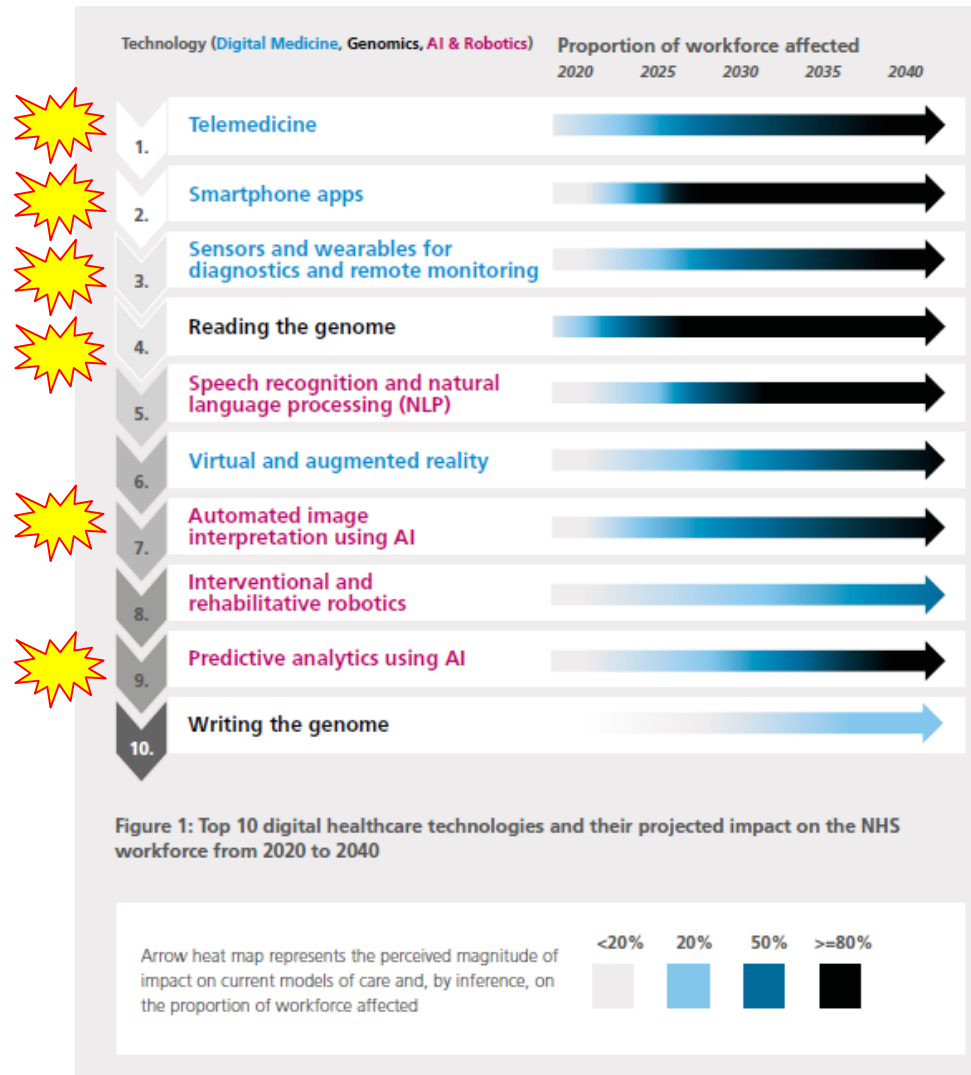
Gamification and self-management

Integration of scattered wearables

Remote monitoring 24/7

Coordination of healthcare delivery

# Roche's portfolio and pipeline targets the main areas of digital transformation in Health



## The Topol Review

# Preparing the healthcare workforce to deliver the digital future

An independent report on behalf of the  
Secretary of State for Health and Social Care  
February 2019

*Doing now what patients need next*