

The Renewing Story

Insight into a complex
tolling transformation path

"The ship wherein Theseus sailed... was preserved by taking away the old planks and putting in new."

— Plutarch

Heimo Haub | October 2026



The system never stops to be rebuilt

On Monday morning,
a million drivers expect
nothing to have changed.

A typical mid-size national HGV scheme — in live operation, 24/7

~900,000

Registered vehicles

~80% foreign-plated

100 M +

Toll transactions

Every single month

2,400 +

Km of tolled network

Motorways & 1st-class roads

24 / 7

Live operation

Revenue stops if service stops

Free-flow scales far beyond HGV: *from 2027 Croatia charges all vehicles across its entire motorway network — ~60 million vehicles a year today.*

You don't rebuild only because the planks are worn

You rebuild because
the sea is changing



1

The fuel-tax base disappears

Electrification moves the revenue question to distance - and soon for cars, not only trucks. The money that paid for roads is draining away.

2

Regulation & procurement

Public procurement rules and limits on contract extensions force the change - the clock runs out whether the system is tired or not.

3

Future scalability

New vehicle classes, new charging schemes, new policy. A system commissioned in 2027 will still be collecting in 2037.

Transformation is driven by regulatory, operational and technical change - not by a single technology issue.

Who we are



PPF Group

PPF Group is an international investment group founded in the Czech Republic in 1991, operating across 25 countries in Europe, North America, and Asia, with a diversified portfolio spanning telecommunications, media, financial services, e-commerce, real estate, engineering, and biotechnology.

42.6 Total Assets
EURbn

0.7 Net profit
EURbn

11.8 Equity
EURbn

37k Employees worldwide

25 Europe, Asia, North America and Africa
Countries

Key portfolio pillars
Telco
Media
Financial Services
Real Estate
E-commerce
Mobility

As at 31 December 2025

Who we are

Building the next generation of tolling systems



**20+ years
group experience**

in tolling
and intelligent
transport systems



**End-to-end
delivery**

from design
and implementation
to operations



**ITIS Holding
ecosystem**

majority-owned
by PPF
Group



**Multi-technology
expertise**

GNSS tolling,
e-vignettes, ANPR-based
free-flow systems

The upside of rebuilding the ship - room to innovate

You're replacing every plank
anyway - so build a better ship,
not the same one.

- **Improved customer experience**

Simpler journeys, fewer touchpoints,
one clear account - migration is when
you finally fix them.

- **Stronger enforcement & compliance**

Close the evasion gaps the old system
quietly lived with.

- **Operational efficiency & AI**

AI-assisted image review and back-office
automation - lower cost to collect, fewer
errors.

- **Data & insight**

A modern system finally shows what is
happening on the network, in near real time.

- **New schemes & scalability**

Add zones, vehicle classes and
charges later as configuration
- not a new build.

- **Readiness for the EV era**

Distance-based charging for cars as fuel-
tax revenue fades - built in, not bolted on.

The ship was going to be rebuilt anyway — the only question is whether it comes back better.

Brownfield means changing a living system



No plank stands alone - every one is tied to the next

Collection

GNSS on-board units
· automatic number-plate recognition

Central system

operation · commercial
· enforcement

Decentral tech

sensors · power
· connectivity

TOLLING SYSTEM

Data & business rules

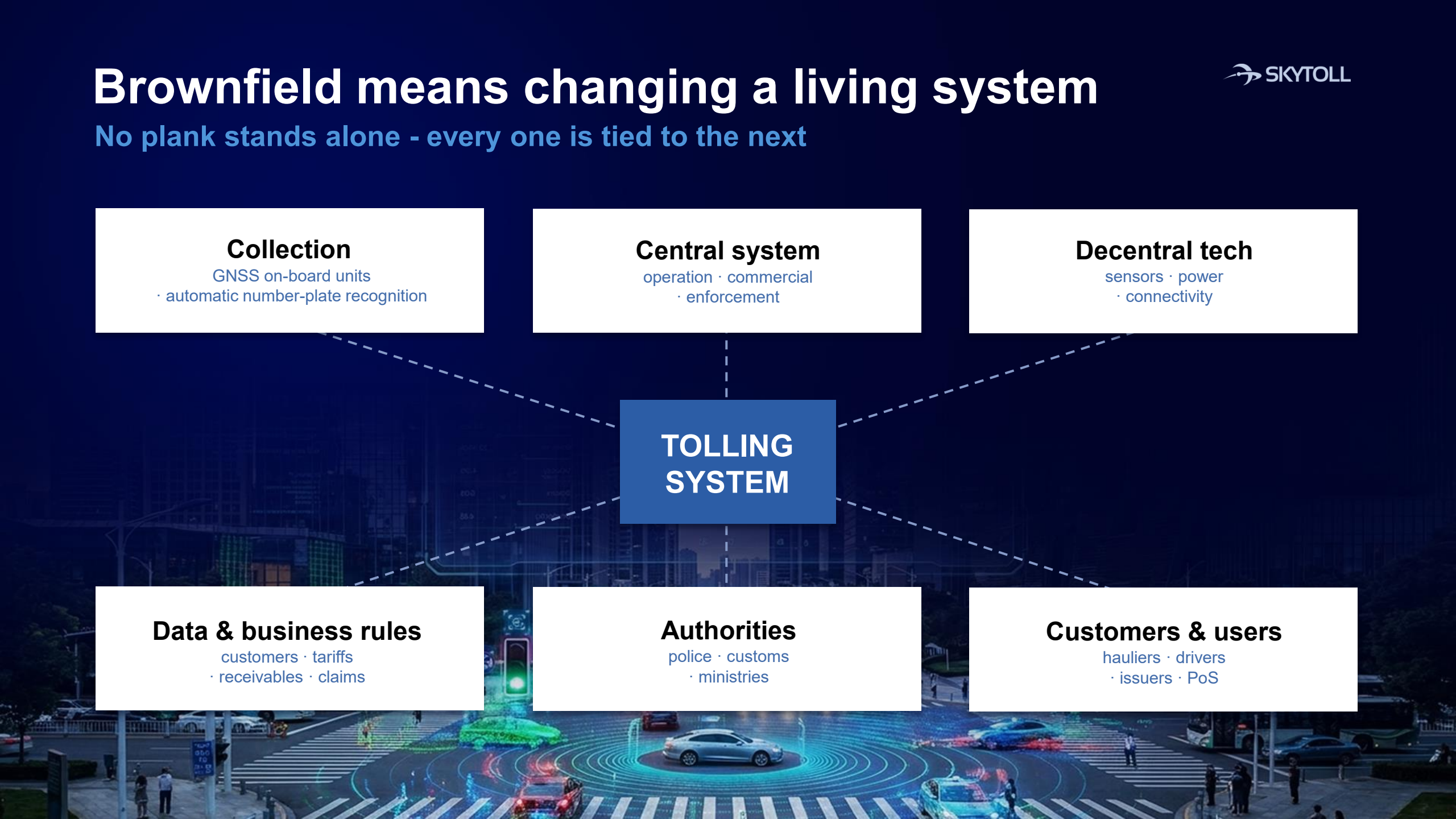
customers · tariffs
· receivables · claims

Authorities

police · customs
· ministries

Customers & users

hauliers · drivers
· issuers · PoS



Choosing the path

The method follows from the definitions - not the other way round.



Four ways to change the ship - and what to settle first

● Big bang

One cutover date
- everything moves at once.

● Phased

Domain by domain
- legacy stays live alongside.

● Parallel run

Old and new in operation
- reconciled daily.

● Incremental

New core absorbs functions one by one
- legacy shrinks until gone.

Settle before you choose the method

- Target operating model
- Reconciliation rules
- Data baseline - who owns the truth
- Fallback / rollback criteria
- Interface contracts
- Change freeze

Where the effort really hides



Six places the plan meets reality - and what to lock in

1 Supplier cooperation

The incumbent owes you nothing - make it a tender obligation, not goodwill.

2 Legacy data quality

Clearance and format issues surface late - clean and profile before migration, not during it.

3 Testing with anonymised data

Automated tests can't be built from anonymised sets alone - review one real dataset first.

4 The migration delta

Records keep accruing in the old system - plan delta handling, with a final cut just before go-live.

5 Go-live authority

Under pressure, who is allowed to decide? - name the decision-makers upfront.

Transition time is driven by data quality and cooperation — not by build effort.

The last mile is not the driver

For the driver nothing changes
- the readiness work is behind
the system

PROTECT THE USER

The driver sees nothing

A clean migration needs
no re-registration - the driver just
keeps driving. Only data we legally
cannot move forces a rare exception.

AROUND GO-LIVE

Hyper-care

Reinforced staffing on both sides
of go-live, not only after.
Define the exit criteria that
return you to normal.

AFTER GO-LIVE

Knowledge base

Known errors documented during
testing, not after - so first-level support
answers without escalating.
Owned by operations.

The last mile is the organisation being ready — so that nothing has to change for the driver.



**We don't just
talk about this
- we do it**

Backed by PPF

€42.6 bn group across 25 countries.
20-year commitment carried by
patient capital, not quarterly targets.

Czech Republic

2019

GNSS HGV toll - world's first generational
replacement, under full operation

Croatia

Go-live 2027

Free-flow distance tolling for trucks and cars
- entire national network

Slovakia

Since 2010 · upgrade go-live 2027

National electronic toll
- design, build, fund, operate

Slovenia

2021

Electronic vignette
- delivery and IT operation

Germany

Since 2003

Truck-toll enforcement
- sensor refresh on 300+ gantries

Netherlands

Live since July 2026

Nationwide HGV video tolling
- ANPR verification & back office

**Built to change
- not built to last
unchanged**

In a migration, those new planks are fitted while the ship never stops. It is meant to keep sailing.

And the same planks that renew one ship fit the next: every market, cut from the same proven design.

Thank you



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