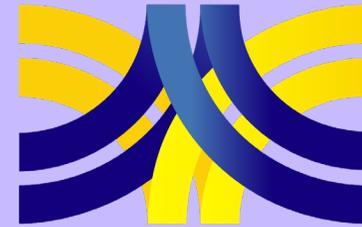


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*Decarbonizing Road Infrastructure : Challenges,
Perspectives and Actions in Tough Economy*

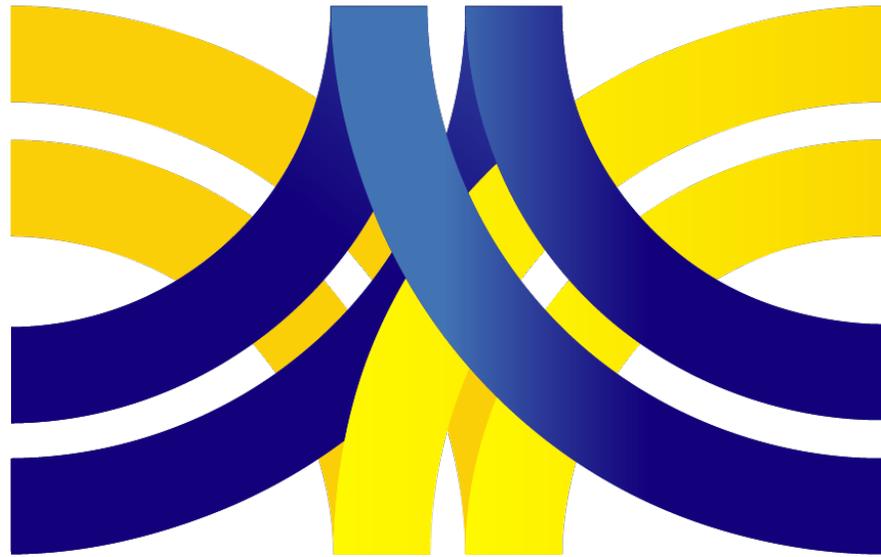
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Digital transformation
on road infrastructure

The
“Golden Fleece”

for the new Mobility Era

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A new Mobility Era

In recent years we have experienced significant changes in the field of mobility due to:

- growing number of people moving,
- urbanization growth & longer commuter trips
- need for individual and personalized mobility,
- social, ecological and environmental issues and awareness



An "Era" that has mobilized so many industries & organizations:

Automobile



Telecom



Banking



Educational & Technical Institutes



IT & ITS



Motorway Operations



Mass Transportation



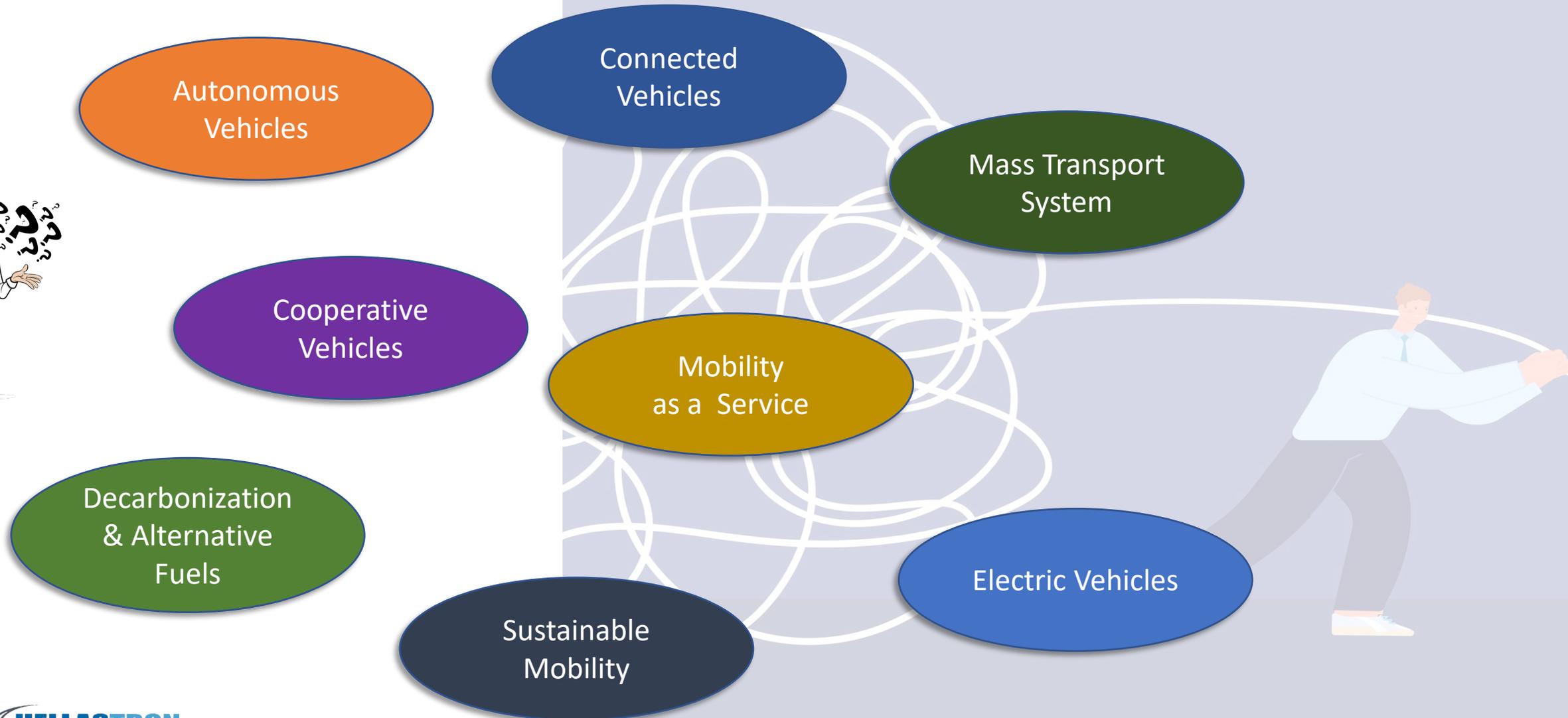
Energy & Fuel



Content Providers



An "Era" that has not yet been clearly defined...



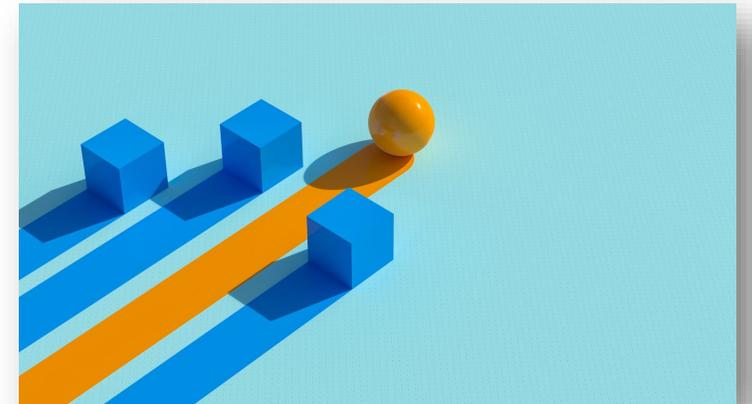
An Era that has been in the “Storm Phase”



Where:
each stakeholder moves on
with its own strategy,
at a different speed,
and tries
to impose itself
and set the rules of the
game !

Despite the rapid development of the automobile, telecom, ITS and content provider industries, motorway operators could be considered as the coach who combines the skills of his players and decides how to set up the team for the best possible result.

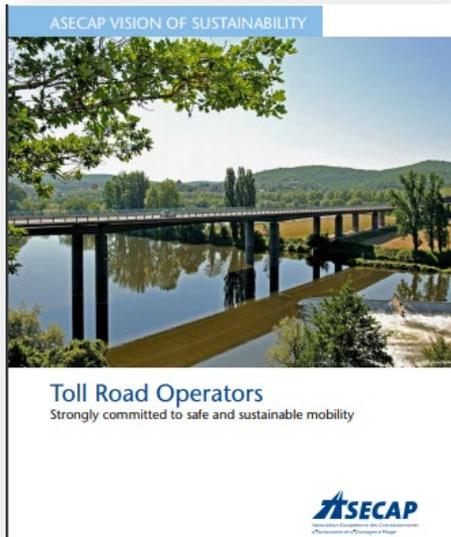
**"Without players there is no team
without the coach the team can not play (*1)"**



The role of Motorway operators in the new era

But in order to be the “coach”, motorway operators should be able to:

- have an integrated and well-defined strategy,
- develop and provide the demanded infrastructure,
- complete the required digital transformation,
- comply with the European and motorway’s industry vision for sustainability,
- change the way of thinking and operational philosophy.



The strategy for the New Mobility era:

the industry must move rapidly through its associations to develop a comprehensive strategic plan, for all the issues posed by the new mobility era, so that any future action will be a coordinated steppingstone to ensure the required role.



Who and why should fund or co-fund the demanded Motorway Infrastructure?

- The State (to improve the safety, mobility and the environment) by extending the concession period?
- The Motorway industry (to decrease the operating expenses)?
- The Automobile industry (to sell the new generation of vehicles)?
- The Telecom industry (to sell more xG services)?
- The Content providers (to sell "content" to users)?
- The Users (to travel quickly, safely and protect the environment)?



Digital transformation:

- **Modernizing the existing and introduce new IT infrastructure,**
- **Digitizing and reorganizing existing operations properly,**
- **Digital Customer Support & Marketing,**
- **New Ventures, new business models.**

Change the way of thinking and operational philosophy:

- A new win-win approach is required since Motorway Operators will be soon one of the links of the chain, and not the full chain.
- Time is precious and even though, this issue has been under consideration for the last few years, most of the operators – worldwide – are still thinking how to "Setup the Team“, while many players want to join, and others are thinking of leaving.





- Additional revenue from Value Added Services like traffic information provision, park & ride or parking services, MAsS services, EV Charging, exploitation of renewable energy resources, etc.
- Exploitation of the existing database of registered Subscribers.
- Increase the frequency of use via a dynamic policy based on the time and distance of the trip, and possible decrease of the total cost of the trip (Toll fee plus parking fee).

- Existing Concession Contracts,
- Tollway traffic and revenue decrease due to increased public transit use,
- Tollway traffic and revenue decrease due to cheaper route alternatives,
- Lack of funding resources.



THREATS

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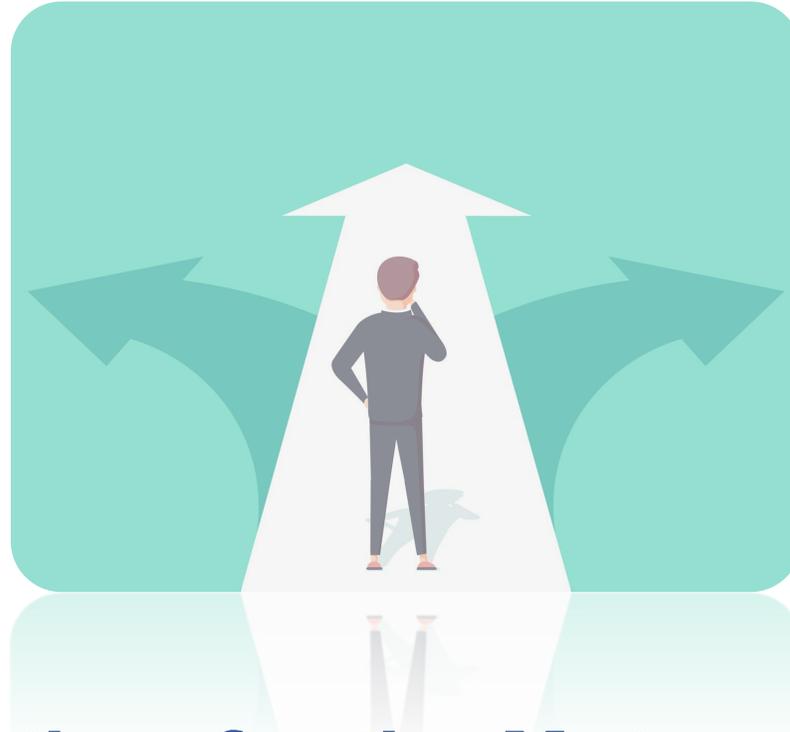
THREATS

The attempt of the other stakeholders to access and exploit the data collected by the operation of the Motorways is reminiscent of Jason and the "Golden Fleece", a myth from ancient Greece associated with the Greeks' quest to learn the secrets of gold mining from the area of ancient Colchis.



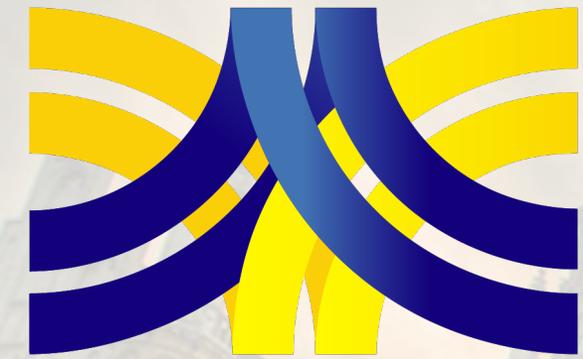
Jason takes the Golden Fleece, representation of a marble sarcophagus, second half of the 2nd century BC,

The role of Motorway operators in the new era.



**Now is the time for the Motorways Industry
to define a clear approach for this new era...**

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**THANK YOU FOR
YOUR ATTENTION**

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