Investor Presentation.
March 2018.
Kapsch.

KTC: Leading entity of the Kapsch Group.

- Kapsch founded in Vienna in 1892
- Electronic industry
- Strong brand in Austria
- Four key entities
  - Kapsch TrafficCom – KTC (Intelligent Transportation Systems)
  - Kapsch BusinessCom (ICT solutions for enterprises and public administration)
  - Kapsch CarrierCom (End-to-end telecom solutions for railway operators, carrier networks, public authorities, public transport operators and airports)
  - Kapsch Public TransportCom (Intelligent infrastructure solutions for public transport operators & transportation agencies)
- Group revenues >EUR 1bn

Kapsch: Tradition meets Future.

125 years in the ever-changing technology industry are a proof of the sustainable business approach and the entrepreneurial spirit within the family-owned Kapsch Group.

This, together with the professionalism, structures and transparency required from a listed company, are key success factors for Kapsch TrafficCom.

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Kapsch TrafficCom.
At a glance.

Provider of Intelligent Transportation Systems
- Tolling (Electronic Toll Collection – ETC)
- Mobility (Intelligent Mobility Solutions – IMS)

Solid financial parameter
- Revenues ~EUR 650mn
- Sustainable dividend policy: Base dividend of EUR 1,--

Global player
- More than 5,000 employees
- Presence in >30 countries
- References in >50 countries

Listed at Vienna Stock Exchange
- Market cap >EUR 500mn
- Free float 24.0%
## Portfolio.

Integrated mobility solutions provider.

<table>
<thead>
<tr>
<th>Tolling (ETC)</th>
<th>Intelligent Mobility Solutions (IMS)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tolling solutions</strong></td>
<td><strong>Highway</strong></td>
</tr>
<tr>
<td></td>
<td><strong>City</strong></td>
</tr>
<tr>
<td>Electronic Toll Collection</td>
<td>Traffic management (TM)</td>
</tr>
<tr>
<td>Multi-lane free-flow, managed lanes, mobile tolling, eVignette</td>
<td>Highway TM, managed lanes, tunnels and bridges</td>
</tr>
<tr>
<td>City tolling</td>
<td>Traffic management (TM)</td>
</tr>
<tr>
<td>Plaza tolling</td>
<td>Urban TM, corridor management, access management</td>
</tr>
<tr>
<td><strong>Tolling services</strong></td>
<td><strong>Traffic safety</strong></td>
</tr>
<tr>
<td></td>
<td>Electronic vehicle registration, commercial vehicle enforcement</td>
</tr>
<tr>
<td>Trans-European tolling services</td>
<td><strong>Connected vehicles</strong></td>
</tr>
<tr>
<td></td>
<td>V2X-automotive, V2X-infrastructure, connected services</td>
</tr>
<tr>
<td><strong>City</strong></td>
<td><strong>Smart parking</strong></td>
</tr>
<tr>
<td></td>
<td>Integrated mobility</td>
</tr>
</tbody>
</table>

Revenues 2016/17: EUR 468 million, i.e. 72%

Revenues 2016/17: EUR 180 million, i.e. 28%
Business model – ETC.

One-stop-shop.

Components

- In-vehicle components
- Road-side components

Integration

Subsystems

Toll stations
- Enforcement stations
- Back office

Integration

Operation

- Consulting
- Technical operation
- Commercial operation

End-to-end solutions as a one-stop shop

In-vehicle components
- On-board units (OBUs)
- Programming station

Transceivers & readers
- Transceiver
- Mobile reader
- Reader

Cameras & sensors
- Vehicle detection
- Vehicle registration
- Vehicle classification

Toll & enforcement station
- Stationary enforcement
- Mobile enforcement

Back office
Strategy.
Profitable and sustainable growth.

Top-line growth
- Secure and expand the core business
- Reduce the cluster risk
- Growth resulting from a broad portfolio
- Growth in existing and new markets
- Acquisitions

Profitability
- Price pressure in ETC:
  - Larger number of smaller projects with lower profitability
  - Current and upcoming large tenders – price pressure
- EBIT margin in IMS to gradually improve:
  - Higher business volumes use overheads more efficiently

Sustainability
- Long-term & sustainable management: 125 years of history
- Sustainable business model
- Innovation: open approach
- Patents
- Employees: lifelong learning
- Working environment
- Engaging with stakeholder groups

- Revenues to increase in both segments
- Higher rates of growth for IMS (mid term)

- ETC EBIT margin comfortably >10%
- IMS EBIT margin ~8% possible (mid term)
- Group EBIT margin > 10% (mid term)

- R&D and innovation: open approach
- Close to customers
- Recognize trends early
Q1-Q3 2017/18.

Highlights.

> EUR 500 million revenue mark passed after just three quarters for the first time.
> Zambia: Nation-wide concession agreement for road safety & traffic management.
> Bulgaria: Awarded contract for nation-wide toll system.
> Poland: Tender discontinued.
> Czech Republic: Tender process ongoing.
> Extensive new business opportunities.

<table>
<thead>
<tr>
<th>Revenues</th>
<th>EBIT</th>
<th>EBIT margin</th>
<th>EPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>EUR 506.9 mn</td>
<td>EUR 35.3 mn</td>
<td>7.0%</td>
<td>EUR 1.82</td>
</tr>
<tr>
<td>Q1-Q3 16/17</td>
<td>Q1-Q3 16/17</td>
<td>Q1-Q3 16/17</td>
<td>Q1-Q3 16/17</td>
</tr>
<tr>
<td>EUR 472 mn</td>
<td>EUR 43 mn</td>
<td>9.1%</td>
<td>EUR 2.31</td>
</tr>
<tr>
<td>+7%</td>
<td>-18%</td>
<td>-2.1%p</td>
<td>-21%</td>
</tr>
</tbody>
</table>
Q1-Q3 2017/18.
Other key financials.

**Net investments**

<table>
<thead>
<tr>
<th>Year</th>
<th>Q1-Q3 2016/17</th>
<th>Q1-Q3 2017/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016/17</td>
<td>12.3</td>
<td>14.5</td>
</tr>
<tr>
<td>2017/18</td>
<td>4.8</td>
<td></td>
</tr>
</tbody>
</table>

Net investments were lower than in Q1-Q3 2016/17 because of the acquisition of KTT in 2016.

**Free cash flow**

<table>
<thead>
<tr>
<th>Year</th>
<th>Q1-Q3 2016/17</th>
<th>Q1-Q3 2017/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016/17</td>
<td>42.6</td>
<td>38.7</td>
</tr>
<tr>
<td>2017/18</td>
<td>40.6</td>
<td></td>
</tr>
</tbody>
</table>

Strong free cash flow mainly as a result of:
- Decline in trade receivables (and working capital).
- Lower investments.

**Net credit/debt**

<table>
<thead>
<tr>
<th>Year</th>
<th>Dec 31 2016</th>
<th>Mar 31 2017</th>
<th>Dec 31 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016/17</td>
<td>17.6</td>
<td>19.6</td>
<td>26.1</td>
</tr>
</tbody>
</table>

Net credit because of a strong free cash flow and despite:
- Dividend payment.
- Expenses for M&A.

**Balance sheet total and equity ratio**

<table>
<thead>
<tr>
<th>Year</th>
<th>Dec 31 2016</th>
<th>Mar 31 2017</th>
<th>Dec 31 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016/17</td>
<td>628.2</td>
<td>648.8</td>
<td>568.1</td>
</tr>
<tr>
<td>2017/18</td>
<td>34%</td>
<td>35%</td>
<td>40%</td>
</tr>
</tbody>
</table>

Repayment of the 4.25% corporate bond had a shortening effect on the balance sheet. As a consequence the equity ratio increased.
### Q1-Q3 2017/18.

Segment results: ETC accounts for 76% of total revenues, IMS 24%.

#### Key financials

<table>
<thead>
<tr>
<th>ETC</th>
<th>Q1-Q3 2016/17</th>
<th>Q1-Q3 2017/18</th>
<th>+/-</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
<td>346.6</td>
<td>386.9</td>
<td>12%</td>
</tr>
<tr>
<td>EBIT</td>
<td>54.8</td>
<td>41.8</td>
<td>-24%</td>
</tr>
<tr>
<td>EBIT margin</td>
<td>15.8%</td>
<td>10.8%</td>
<td>-5.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IMS</th>
<th>Q1-Q3 2016/17</th>
<th>Q1-Q3 2017/18</th>
<th>+/-</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
<td>125.0</td>
<td>120.0</td>
<td>-4%</td>
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<tr>
<td>EBIT</td>
<td>-11.8</td>
<td>-6.5</td>
<td>-45%</td>
</tr>
<tr>
<td>EBIT margin</td>
<td>-9.5%</td>
<td>-5.4%</td>
<td>4.1%</td>
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</tbody>
</table>

#### Key financials

<table>
<thead>
<tr>
<th>Segment</th>
<th>Q1-Q3 2016/17</th>
<th>Q1-Q3 2017/18</th>
<th>+/-</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
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</tr>
</tbody>
</table>

#### Revenues by region

<table>
<thead>
<tr>
<th>Region</th>
<th>EMEA</th>
<th>Americas</th>
<th>APAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>ETC</td>
<td>69%</td>
<td>25%</td>
<td>6%</td>
</tr>
<tr>
<td>IMS</td>
<td>57%</td>
<td>40%</td>
<td>3%</td>
</tr>
</tbody>
</table>

#### Revenues by type

<table>
<thead>
<tr>
<th>Type</th>
<th>Q1-Q3 2016/17</th>
<th>Q1-Q3 2017/18</th>
<th>+/-</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design &amp; build</td>
<td>57.8</td>
<td>99.4</td>
<td>72%</td>
</tr>
<tr>
<td>Operations</td>
<td>214.7</td>
<td>208.6</td>
<td>-3%</td>
</tr>
<tr>
<td>Components</td>
<td>74.1</td>
<td>78.8</td>
<td>6%</td>
</tr>
</tbody>
</table>

1) Includes badwill of EUR 0.9 million
2) Includes badwill of EUR 2.1 million

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Further revenue growth.

Goal to achieve last year’s EBIT, adjusted for a one-off effect (badwill from KTT acquisition: EUR 3.0 million) and for charges from exchange rate fluctuations (Q1-Q3 2017/18: EUR 9.0 million).

Equity ratio:

- In Q3, equity ratio increased following the redemption of the corporate bond:
  - The 4.25% corporate bond issued in 2010 was repaid as scheduled at the beginning of November.
  - In 2016, Kapsch TrafficCom obtained the funds necessary for this by issuing a promissory note bond.
  - The repayment discharges the financial result and had a shortening effect on the balance sheet, which had a positive effect on the equity ratio.

- At year end, the equity ratio will come down again:
  - In January 2018, we took out a corporate loan: EUR 50 million, 6 year term, interest: 0.8%.
What makes Kapsch TrafficCom unique?

- Ability to develop tailored solutions – proven track record
- Close to our customers
- Domain know-how
- Integrated, one-stop-shop
- Global player
  - Best practice
  - Risk diversification
- A leading position in our core business
- Size and financial stability
- Listed (transparence, access to capital)
- No principal-agent-conflict as one main shareholder is the CEO
  - Long-term view; sustainable measures not sacrificed for short-term profits
Kapsch TrafficCom share.

### Shareholder structure

- **Axaion S.A./Shareholder Value Management AG**: 8.7%
- **KAPSCH-Group Beteiligungs GmbH**: 63.3%
- **Funds of EISTE Asset Management/ EISTE-SPARINVEST KAG**: 4.0%
- **Retail**: 8.3%
- **Institutional investors**: 12.7%
- **Miscellaneous**: 3.0%

**Free float**: 24%

### Institutional investors by region

- **4%**: Other
- **14%**: UK and Ireland
- **22%**: Austria
- **27%**: North America
- **33%**: Continent Europe (excl. Austria)

**Source**: Shareholder survey from March 2017, participation notifications, estimation by Kapsch TrafficCom AG

### Basic information

- Listed in Prime Market segment at the Vienna Stock Exchange since 2007
- 13 million shares
- **Market cap**: >EUR 500mn
- Coverage by: Erste Group, Kepler Cheuvreux, Matelan, ODDO BHF, RCB

### Select events

- **June 18, 2018**: Results FY 2017/18
- **August 23, 2018**: Results Q1 2018/19

### More information: [www.kapschtraffic.com/ir](http://www.kapschtraffic.com/ir)
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### Competition.

**Overview.**

<table>
<thead>
<tr>
<th>Tolling</th>
<th>Traffic Management</th>
<th>Smart Urban Mobility</th>
<th>Safety &amp; Security</th>
<th>Connected Cars</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ETC</strong></td>
<td>Highway</td>
<td>Smart Parking</td>
<td>Road Safety Enforcement</td>
<td>V2X Automotive</td>
</tr>
<tr>
<td>T-Systems</td>
<td>Delcan</td>
<td>IPS Group</td>
<td>Redflex</td>
<td>Delphi</td>
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<tr>
<td>Autostrade</td>
<td>Q-Free</td>
<td>Worldsensing</td>
<td>Jenoptik</td>
<td>Denso</td>
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<tr>
<td>Q-Free</td>
<td>SwRI</td>
<td>Smart Parking</td>
<td>Sensys</td>
<td>Continental</td>
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<td>Inrix</td>
<td>Gatso</td>
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<td>emovis</td>
<td>Siemens</td>
<td>Xerox</td>
<td>Vitronic</td>
<td>Bosch</td>
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<tr>
<td><strong>City Tolling</strong></td>
<td>Managed Lanes</td>
<td>Urban Traffic</td>
<td>Commercial Vehicle</td>
<td>V2X Infrastructure</td>
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<td>Q-Free</td>
<td>Delcan</td>
<td>Management</td>
<td>Enforcement</td>
<td>Cohda</td>
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<tr>
<td>MHI</td>
<td>Xerox</td>
<td>Eagle</td>
<td>IRD</td>
<td>Savari</td>
</tr>
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<td>IBM</td>
<td>SICE</td>
<td>Swarco</td>
<td>Xerox</td>
<td>Neavia</td>
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<tr>
<td>Cubic</td>
<td>Q-Free</td>
<td>SICE</td>
<td>Mettler Toledo</td>
<td>Arada</td>
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<tr>
<td>Siemens</td>
<td>TransCore</td>
<td>Econolite</td>
<td>Drivewayze (IMS)</td>
<td>Dynniq</td>
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<tr>
<td><strong>Plaza Tolling</strong></td>
<td>Tunnel &amp; Bridges</td>
<td>Intermodal Mobility</td>
<td>Electronic Vehicle</td>
<td>Connected Services</td>
</tr>
<tr>
<td>Tesctidel</td>
<td>SICE</td>
<td>HaCon</td>
<td>Registration</td>
<td>n.a.</td>
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<tr>
<td></td>
<td>Delcan</td>
<td>Xerox</td>
<td>3M</td>
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<td>Moovel</td>
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<td>G.E.A.</td>
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<td>Cubic</td>
<td>Neology</td>
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<td></td>
<td>IBI Group</td>
<td>Siemens</td>
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<td></td>
<td></td>
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</table>

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## References in more than 50 countries.

**Global**

<table>
<thead>
<tr>
<th>All figures in EUR mn unless otherwise stated</th>
<th>2016/17</th>
<th>% of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
<td>648.5</td>
<td></td>
</tr>
<tr>
<td>thereof ETC</td>
<td>468.4</td>
<td>72%</td>
</tr>
<tr>
<td>thereof IMS</td>
<td>180.0</td>
<td>28%</td>
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</tbody>
</table>

**EMEA**

<table>
<thead>
<tr>
<th>All figures in EUR mn unless otherwise stated</th>
<th>2016/17</th>
<th>% of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
<td>407.7</td>
<td>63%</td>
</tr>
<tr>
<td>thereof ETC</td>
<td>307.1</td>
<td>47%</td>
</tr>
<tr>
<td>thereof IMS</td>
<td>100.6</td>
<td>16%</td>
</tr>
</tbody>
</table>

**Americas**

<table>
<thead>
<tr>
<th>All figures in EUR mn unless otherwise stated</th>
<th>2016/17</th>
<th>% of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
<td>195.4</td>
<td>30%</td>
</tr>
<tr>
<td>thereof ETC</td>
<td>122.4</td>
<td>19%</td>
</tr>
<tr>
<td>thereof IMS</td>
<td>72.9</td>
<td>11%</td>
</tr>
</tbody>
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**APAC**

<table>
<thead>
<tr>
<th>All figures in EUR mn unless otherwise stated</th>
<th>2016/17</th>
<th>% of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
<td>45.4</td>
<td>7%</td>
</tr>
<tr>
<td>thereof ETC</td>
<td>39.0</td>
<td>6%</td>
</tr>
<tr>
<td>thereof IMS</td>
<td>6.5</td>
<td>1%</td>
</tr>
</tbody>
</table>
Corner stones of the promissory note bond

- Issued 2016
- Volume: EUR 62mn + USD 14.5mn
- 3 tenors (5/7/10 years)
- Partially fixed interest, partially variable

Corner stones of the long-term bank loan

- Issued January 2018
- Volume: EUR 50mn
- Term: 6 years
- Fixed interest: 0.8% p.a.
- Redemption: 2.5 years grace period, then 8 half-year installments
Large project in Zambia.

Overview.

About the project

- Nation-wide concession contract to improve road safety and traffic management.
- Main components:
  - Vehicle inspection,
  - Vehicle registration,
  - Speeding fines and other traffic-related infringements.
- Term: 17 years

Organizational & financial

- 50:50 joint venture (JV) with local partner Lamise Trading.
- JV consolidated at equity; reported as result from operating activities.
- JV’s expected revenues in the first 3 years projected to be in the range of EUR 90 million to EUR 110 million.
Large project in Bulgaria.

Overview.

About the project

- Contract to design and build nation-wide tolling System.
- Satellite technology for trucks over 3.5 tons.
- eVignette for passenger cars.
- Tolls collected on all class I, II, and III roads, (all paved roads).
- Some details:
  - 500 terminals for registering and issuing eVignettes,
  - 100 enforcement vehicles, 100 weigh-in-motion facilities, 100 tolling gantries.
- Term: 19 months from signing (January 2018).
- Kapsch TrafficCom’s 6th nation-wide toll collection system in Europe (after Austria, Switzerland, Poland, the Czech Republic, and Belarus).

Financial

- Total revenues of about EUR 75 million.
Corporate milestones.
125 years in the ever-changing electronic industry.

1892
Kapsch founded

1892
Kapsch founded
- Morse telegraph devices
- Telephones
- Capacitors and dry batteries
- Radios
- TVs (black & white, later color)
- Telecom networks (analog, later digital)
- Portable radios
- Mobile phones

1991
Toll collection division within Kapsch AG

2002
Activities structured in three autonomous organizations:
- Kapsch TrafficCom
- Kapsch BusinessCom
- Kapsch CarrierCom

2007
IPO of Kapsch TrafficCom

2011
Capital increase

2016
Acquisition of KTT (Schneider Electric Transportation Business)

1991
- Toll collection division within Kapsch AG

1995
Contract for the realization of the nationwide Ecopoint System, the world’s 1st emissions-based TMS

1999
Launch of world’s 1st MLFF ETC system for an urban motorway on Melbourne City Link in Australia.

2004
Austria introduces the national truck road user charging system: the worldwide 1st nationwide multi-lane free-flow system on major highways

2007
Nation-wide ETC system in Czech Republic goes into operation

2010
Contract for implementation and operation of nation-wide tolling system in Poland

2012
Contract for implementation and operation of nation-wide tolling system in Belarus

2017
- Concession agreement for nation-wide road safety and traffic management in Zambia
- Nation-wide tolling system in Bulgaria
We make mobility solutions intelligent to enable users to arrive at their destination

❖ comfortably,
❖ on time,
❖ safely,
❖ efficiently, and
❖ with minimal environmental impact.