



National Report - France
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**ASSOCIATION PROFESSIONNELLE
AUTOROUTES ET OUVRAGES ROUTIERS**

2007 HIGHLIGHTS

- **AN ADDITIONAL 99 KM OF MOTORWAYS HAVE BEEN PUT IN SERVICE IN 2007**

Thanks to these new sections, the French motorway network is now **8,395.2** km long:

- **88.5** km on A85, between Saint-Romain and Druye
- **10.5** km on A51, between Coynelle and Col du Fau

- **CONSTRUCTION OF TWO NEW SECTIONS STARTED IN 2007**

The new **A19** and **A41 NORTH** motorways, the operation of which was respectively granted to ARCOUR¹ and to ADELAC² in 2005, are under active construction:

- The new **A19**, which will connect A10 at the level of Artenay to A6 at the level of Courtenay, will be put in service **at the end of 2009**.
- **A41 North**, which will link Annecy to Geneva in less than 20 minutes, will open to traffic in **December 2008**.

IN 2008, 71.3 KM OF MOTORWAYS WILL BE ADDED

- **ASF: Thenon – Terrasson (A89) – 18 km – January 16, 2008**
- **Cofiroute: Rueil Malmaison – A13 (A86) – 4.5 km – Spring 2008**
- **ASF: Beltway around La Roche-sur-Yon (A87) – 16 km – Mid- 2008**
- **Cofiroute: North Beltway around Angers (A11) – 14 km – Summer 2008**
- **ADELAC: Saint-Julien-en-Genevois – Villy-le-Pelloux (A41) – 18.8 km – December 2008**

A'liénor, a subsidiary of Eiffage and Sanef based in Aquitaine, will start construction of A65 in the spring of 2008. A65 will link Pau and Langon and should be open to traffic in October 2010.

¹ ARCOUR is a wholly-owned subsidiary of VINCI Concessions.

² As a group, ADELAC includes AREA, a subsidiary of APRR Group (49.9%), as well as several subsidiaries of Bouygues Construction Group, Colas, SETEC and Caisse d'Epargne et de Prévoyance des Alpes

- **ELECTRONIC TOLL COLLECTION : NOW AVAILABLE FOR TRUCKS**

Electronic toll collection for trucks is operational since April 2007. All systems for this service are in compliance with standards established by the European Directive and can accommodate pass owners, like similar standards established in other European countries.

Four separate companies (issuer companies), all accredited by the ASFA Toll Commission, sell the loaded equipments and serve as intermediaries between transportation companies and resellers.

By the end of 2007, more than 310,000 tags have been issued

- **ETC FOR LIGHT VEHICLES: OVER TWO MILLION ACTIVE *Liber-t* SUBSCRIBERS ALREADY**

In 2007, motorway companies launched a new advertising campaign on electronic toll collection system .

Over **25% of all light vehicles transactions** are now recorded.

- **EXPERIMENTING WITH FREE FLOW TOLLING**

Motorway companies have continued promoting the development of ETC systems and asked the French government to adopt the necessary laws and regulations to foster that development. They have also tested several free flow tolling systems in real life situations.

1 – Safety: Improvements recorded since 2002 are confirmed

Safety is one of the attractive aspects of the network: motorways are four times safer than any other roadway infrastructure. Such a safety level is the result of constant efforts deployed by tolled motorway companies, and of their safe-driving awareness campaigns launched as follow-ups to governmental measures or actions intended to foster better driving habits.

1. 2007: THE GENERAL IMPROVING TREND RECORDED OVER THE LAST FEW YEARS WAS SUSTAINED

Once again, accident figures for 2007 show a significant reduction in the number of deaths (-38% vs. 2002) and in the number of injured (-26% vs. 2002).

By the end of 2007, **174 fatal accidents** (vs. 168 in 2006) causing **199 deaths** (vs. 206 in 2006) on the French motorway network had been recorded, as well as **1,411 injured** (vs. 1,436 in 2006).

Over the long run, the impact of the government's actions to reduce excessive speeding will continue to bear fruit: the Speed Observatory, set up by French motorways operators, recorded a drop in excessive speeding, from 50% in 2001 to **23 % in 2007**, a drop that can be attributed to the new national policy on speeding.

The report also shows that motorway drivers are more and more **confining themselves** to speeds around **130 Km/h**: driving at highly excessive speeds (over 150 Km/h) continues to decline, as well as driving below 120 Km/h.

Such a slow change in driving behavior has one positive aspect when it comes to safety, because it helps maintain speeds within a narrower range and makes traffic more fluid in each lane.

This change could be attributed to the implementation of technical assistance measures for drivers, such as speed regulators or limiters.

Currently, **68 fixed radars** are installed and operating over the entire French motorway network.

... Fast Fact:

Leading Causes of Accidents (new order):

- Fatigue and reduced attention
1 in 3 accidents
- Speeding and dangerous driving
1 in 4 accidents
- Alcohol, drugs and prescription drugs
1 in 5 accidents

2. AWARENESS CAMPAIGN AGAINST SLEEPINESS AT THE WHEEL

The National Conference on road safety, held in France on March 7, 2007, was a perfect opportunity for the various actors of the concession network to present their new Prevention & Safety campaign, which aims to fight against sleepiness at the wheel, now the first cause of accidents on motorways.

LAUNCHING OF A LARGE SCALE SCIENTIFIC STUDY ON DRIVERS

In order to help the scientific community better understand the problem of sleepiness at the wheel, ASFA led the first large scale study ever conducted in this area in late 2007, using **35,000 drivers** who were asked various questions, by telephone or by the Internet, under the scientific supervision of Professor Pierre Philip, an international expert from the Clinique du sommeil (Sleep Clinic) at the Bordeaux University Hospital (CHU de Bordeaux).

Initial results already reveal the scope of the problem:

- **30%** of the drivers we questioned have had to fight sleepiness at the wheel on at least one occasion.
- **4%** said they had a “**near collision**” within the last 12 months.
- These figures, projected on the total of **35 millions drivers** using the motorways each year, mean that approximately **1.5 million drivers** admitted having had a “**near collision**” on a motorway within the last 12 months.

REDUCING ACCIDENTS IN THE EMERGENCY LANE

The report also indicates that drivers who use the emergency lane, often as a result of sleepiness or reduced attention with the associated risk of hitting other vehicles parked in that lane, are responsible for an alarming number of accidents.

Each year, **a dozen vehicles** are hit by other vehicles using the emergency lane.

The victims of those accidents are either:

- Drivers trying to find an emergency telephone/alert box
- Operations or safety personnel working on the side of the motorway

The number of **accidents involving motorway company vehicles** also remains very high: **more than 100** in 2007.

After running numerous campaigns explaining the absolute need, for people walking on the side of a motorway, to wear a reflective jacket in order to make them more visible to other drivers, it seems now important to implement measures designed to discourage anyone from using the emergency lane for normal driving.

On that basis, motorway operators have asked the French government to make the line between the right-most lane and the emergency lane a continuous line, and also to increase penalties for any violation.

They also suggest to:

- Continue - and intensify - using **sound alerts**
- Experiment using transversal signals in the emergency lane in order to make it “**uncomfortable**” for drivers who regularly “bite” into that lane to guide their driving
- Regularly remind transportation companies that it is **forbidden to use** the emergency lane for normal driving
- Set up a **National Accidentology Follow-up System** in order to measure and analyze accidents that occur in the emergency lane
- Support **research programs** looking at the feasibility of installing detection systems on all vehicles for emergency lane crossing purposes

2 –Proposals for Sustainable mobility

1. TOLL-CONCESSION: A KEY ELEMENT IN OUR 9 PROPOSALS

The motorway sector has been actively involved in the Summit on the Environment (Grenelle de l'environnement) held in France in the summer of 2007, and has submitted nine ideas specifically designed for its transportation infrastructure concessions and its operating activities.

These measures aim to optimize the existing synergies between the various transportation systems, to stimulate traffic fluidity and safety on the motorways, and to encourage everyone to be respectful of the environment on the network.

MOTORWAY COMPANIES HAVE SUGGESTED TO:

- **Optimize access through the motorway network**, by building beltways around large urban areas, as well as several critically missing linking sections;
- **Develop modal complementarity between the various existing modes of transportation** by installing rest areas on cities' outskirts and building public transportation lines directly on the motorways;
- **Facilitate traffic fluidity at major city entry points through Toll Variable Rates** (peak and off-peak rates, end-of-weekend rates);
- **Regulate traffic** by modulating speed on peak days or congested areas and **adjust toll rates** to traffic periods
- **Lower emissions** associated to the typical «stop and go» at the toll booth by gradually installing **ETC**;
- **Limit gas consumption and improve safety** by expanding on the concept of smart roads and encouraging drivers to stay within speed limits;
- **Encourage drivers to use environment-friendly vehicles and/or energy**;
- **Allocate toll income from the non-concession network** to transportation infrastructure improvement programs and to campaigns encouraging drivers to use “environmentally clean” vehicles;
- **Promote toll concessions**, which are fair and sustainable development tool, in any transportation infrastructure financing and operating activity.



2. TOLL CONCESSIONS: BEST TOOL FOR SUSTAINABLE ROAD MOBILITY

Thanks to the toll-concession system, nearly **8,400 km** of high service level infrastructures have been added, which means that the French motorway network is now one of the best in the world in terms of quality and of services provided, without ever using taxpayers' money.

The new system has all the capacity needed to implement traffic fluidity measures meeting the requirements of the white paper.

Some technical measures, such as installing speed regulators and introducing ETC and free flow tolling technology, contribute to the enhancement of the network's capabilities and to boost traffic.

The toll booth itself thus becomes a time modulation management tool providing a constant flow of income.

Optimization of the network, always preferred to simply trying to increase the network's size, also entails interconnecting with other means of transportation, especially in the areas of long distance transportation and transportation in urban areas.

Existing Multi-rate Systems

Traffic Management

- **A1-Sanef**: traffic management depending on volume of vehicles returning to Paris on Sunday evenings
- **A14-SAPN**: Off-peak rates
- **A86 (2008) - Cofiroute**: Off-peak/off-day rates

« Green » Performance Incentives

- **Transalpine Tunnels - ATMB/SFTRF**: Euro Class 0 Trucks forbidden; Reduced rates for Euro Classes 2 and 3 Vehicles
- **Groupe APRR**: Reduced rates for ETC subscribers, which vary depending on the Euro Class of their vehicle
- **A14-SAPN**: Free to all carpoolers

MOTORWAY COMPANIES PARTICIPATE IN NUMEROUS EXPERIMENTS

- **ASF** is actively involved in the development of the Perpignan-Bettembourg section.
- **AREA** is actively involved in the development of the so-called "Aiton Section", used to cross the Alps.
- In suburban areas, **Cofiroute** is hosting the «bus stop» in Briis-sous-Forges.
- Finally, **SAPN** has opened the Mantes-express dedicated bus line.

ITSs (Intelligent Transport Systems), which are deployed over the entire network, also contribute to traffic fluidity by providing more information, choices, safety and regularity.

The motorway concession also allows to collect exclusively from drivers who actually use the infrastructure toll money that will be allocated to the construction, maintenance, and enhancement of the network.

Finally, the concession system is a sustainable development tool allowing to manage transportation infrastructures under the terms of a contract which sets ever-increasing environmental performance targets. Therefore, motorways operated under the terms of a concession in France, and in Europe in general, are high environmental quality roadways on which water, noise, and pollution issues are better managed than anywhere else on the road networks.

3 – Intelligent Transport Systems: For The Benefit of Our Customers

INTELLIGENT TRANSPORT SYSTEMS DEPLOYMENT ALLOWS FOR A MORE RELAXED DRIVING EXPERIENCE ON MOTORWAYS

In order to anticipate changes in traffic and to meet new safety and sustainable traffic fluidity requirements, motorways operators never hesitated to leverage the most innovating technology over the last 20 years and made central to each of the service development programs they offer their customers the concept of a “smart motorway”.

In particular, motorways companies have installed numerous surveillance systems on their network in order to increase traffic fluidity, to quickly detect any problem on the network, and to be able to keep their customers informed in real time. This information and communication technology has become a critical traffic management tool.

It is within the framework of all of the European programs to which they actively participated that motorways operators are insuring the proper integration of the French network to the Trans-European Road Network.

OPTIMIZING TRAFFIC MANAGEMENT USING “SMART ROAD” TECHNOLOGY

- **1,315** meter stations
- **2,225** video-surveillance cameras
- **1,214** variable-message signs
- **511** weather stations
- **8,280 km** of fiber optic cables
- **8,120 km** covered on radio station FM 107.7
- **9,907 km** covered by Web Traffic
- **3,500 km** covered through the Internet for driving time calculation purposes
- **2.4 millions** of ETC tags
- Cross-border Traffic Management Plan

LOOKING FOR A PERMANENT DIALOGUE BETWEEN DRIVERS AND INFRASTRUCTURES

Today, motorways use the most innovating technology to generate traffic information in real time, which is used to keep drivers apprised about traffic conditions on FM 107.7 in France, as well as to send information to variable message signs and to the Internet. This is also more and more often available in cars equipped with a navigation system that updates drivers on traffic conditions in real time.

Motorways operators have already started to think about how to **manage emergency calls in collaboration with car makers**, some of which are already offering vehicles equipped with systems allowing to “geo-position” them on the road. In case of a problem or an accident, all you need to do is press a button to be immediately connected to a call center which, using GPS technology, identifies the exact location of the vehicle and quickly sends appropriate road assistance.

In the near future, it is even anticipated that the information related to any stopped vehicle could be forwarded, without any human intervention whatsoever, to other vehicles driving towards the accident area.

At each step, precious minutes are saved thanks to this type of critical data transmission, which helps avoid having a second accident on the scene of the initial one.

As an example, ASF is currently experimenting, within the framework of a European project, on integrating to their information chain all emergency calls coming from vehicles already equipped with such a system. The data is sent directly from the vehicle to systems installed along the motorways: variable message signs, the FM 107.7 radio station, etc.

ITSS: USEFUL TOOLS FOR INFRASTRUCTURE OPERATORS

Motorways operators and roadway companies are facing a significant increase of traffic, particularly on some motorways already largely saturated but which, nonetheless, remain vital to trans-European traffic.

The anticipated traffic growth in the next few years, including truck traffic, should not lead to congestion or to a lack of safety. ITSS offer solutions to infrastructure operators that will help them face those new challenges in the future.

ITSS OFFER NUMEROUS FUNCTIONS

- **Crisis and Main Event Management:** Real time communication between multiple operators
- **Safety In Peak Traffic Conditions:** Speed Management
- **Safety In Truck Traffic:** Merchandise management, tracking of hazardous good vehicles, control of distance between vehicles on the road
- **Safety In Tunnel Traffic:** Safety instruction enforcement
- **Driving Behaviors:** In relation to speed limits, as well as all other driving rules
- **No More Stops at Toll Plazas:** Free flow tolling

Thanks to those European projects, motorway operators are helping to develop a consistent transportation space in Europe and to define future services for it.

Driving on the motorway : easy, relaxed, and accident-free

4 – Accessibility Of Our Services

SAFE PARKING AREAS FOR TRUCKS

Four safe parking areas already exist on the network, and another two will be opened in 2008, which will help protect truck company vehicles crossing France from north to south or vice-versa.

This type of facility helps meet the growing call for security expressed by transportation companies, which are increasingly concerned about truck driver and fret safety on the motorways.

- **Vémars West** (Sanef) – A1, on the Lille-Paris side: **156** parking places
- **Langres South** – Park+ (APRR/Egis Projects), near A31: **230** parking places
- **Communay Nord et Sud** – A46 (ASF/Vinci Concessions): **125** parking places
- **Béziers Ouest** – (ASF/Vinci Concessions) – near A9: **350** parking places

2 new rest areas in 2008

- **Spring 2008**: La Sentinelle (ASF/Vinci Concessions) – A2, Exit 20: **300** parking places
- **October 2008**: Galande-la-Sablère Park + (APRR/Egis Projects) – A5b (APRR): **100** parking places

Stopping at a safe parking area is part of the “defensive passive measures” implemented by transportation companies, which also include preventive escorting using motorcycles or unmarked vehicles, and GPS tracking for trucks and/or parcels.

Safety equipment (fences, alarm systems, video surveillance and guards, access control, etc.) are designed to meet the requirements of insurance contract theft provisions.

EVER MORE PLEASANT AND ATTRACTIVE SERVICE AREAS

Motorways companies are trying very hard to meet their clientele’s new needs by completely rethinking the concept of the service area.

Renewal of secondary service contracts (for food, gas distribution, etc.) represents an opportunity to create completely redesigned areas that are generally structured around a unique building with boutiques and eating stands or shops. On these service areas, more signs have been installed and special attention has been given to providing green and well-maintained surroundings.

Every new service area is now built along those lines, grouping “downtown” sign services in shopping malls, since some malls are directly accessible from the secondary network, which makes it possible to provide to some of the remote parts of the country the only available proximity services.

NEW EDITION OF OUR SERVICE GUIDE “POUR VOUS AIDER À ALLER PLUS LOIN » (HOW CAN WE HELP YOU GO FURTHER)

Motorway and roadway infrastructure companies work every day at improving their customers' comfort; for them, equipment and service availability is a very important service quality issue.

All of our teams worked together to produce this service guide, going through each of our companies to identify services currently offered and making sure all of them are listed in this new edition.



The 2nd edition at a glance:

- Targets a larger audience of people who might be experiencing difficulties accessing some services, even on a temporarily basis.
- Features some information on the non-concession network, for information consistency purposes.
- Lists a larger number of services: distributors, pumping stations, Internet access points, boutiques offering regional products, and customer areas where to get a **Liber-t** pass.

- Numerous banners provide practical information about each of the motorway companies: roadside alert box locations, voice servers, emergency phone numbers, safety advices, and Web sites.

32,000 copies of this guide have been printed and distributed to trade associations and federations.

... Fast Facts

- **89%** of toilets on rest areas are accessible
- **97%** of toilets on service areas are accessible
- **79%** food shops are accessible
- **350** service areas
- More than **555** rest areas are currently listed
- **98%** of rest areas offer adequate sanitary facilities
- **79%** of services and shops at rest areas offer access to people with limited mobility capacity

2007 figures

■ Network

The concession industry operated **8,395.2 km** of toll motorways and roadway infrastructures, and it opened an additional **99 km** to traffic in 2007.

■ Workforce

The industry employs **17,360** people.

■ Traffic

The total number of kilometers driven on the network has reached **81.9 billion**, an increase of **+3,3%** versus 2006.

■ Sales

Sales for the entire industry reached **€8.19 billion (Sales Tax includ.)** in 2006 (vs. €7.67 billions (Sales Tax incl.) in 2005)

- The industry paid **€2.9 billions** in corporate taxes and other taxes (property tax, land use planning tax, professional tax, sales tax, etc.) to the French government in 2007 (for the year 2006).
- The industry invested **€1.9 billion** in 2007 and is planning to invest an additional **€1.7 billion** in 2008.
- Average Toll Prices per Km, expressed as c€/km (All taxes includ.) (For the period between February 1st, 2007 and February 1st, 2008):
 - Class 1 Vehicles: 7.47 c€/km
 - Class 4 Vehicles: 21.98 c€/km

CPI Increase in 2007: +2.6%

GDP Growth in 2007 vs. 2006: +1.9% (source: INSEE)

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(*) Provisional Data

SUSTAINABLE DEVELOPMENT METRICS IN 2007

- Protection of water resources on **81%** of the network (+1% vs. 2005)
- Recycling: **93%** of our maintenance centers feature recycling bins. (+9% vs. 2006), and **10.5%** of road construction materials are recycled (+5.7% vs. 2006)
- Environmental/Animal Protection: on **84%** of the network
- Social Development: **3.7%** of employees are trainers
- Safety: **18.4%** personal injury accidents per one billion of kms driven (vs 20.6% in 2006), and **16** work related accidents per one million worked hours

CUSTOMER SATISFACTION METRICS

For 11 years now, the industry has been polling its customers in order to better understand their level of satisfaction, or lack thereof, with services provided on the motorways. Polled customers are asked to answer **40 questions** covering nearly every aspect of the services provided to them.

General satisfaction is indicated by a score of **7.9 (out of 10)**.

Drivers also say they are very satisfied with all of the aspects they consider essential to their driving experience on the motorways, and gave each of them a score above the satisfaction threshold:

- **Services Provided at Rest and Service Areas: 8.5**
- **Motorway Conditions: 8.3**
- **Safety** (while driving and while not driving): **7.6**
- **Going Through Tolls: 8.4**
- **Traffic Conditions: 7.8**
- **Information and Signs: 7.4**

In 2007, a phone survey about **Liber-t**, the ETC system for cars, was conducted with subscribers covering five specific areas related to this service, in order to measure customer satisfaction level related to **Liber-t**.

General satisfaction is indicated by a score of **8.1 (out of 10)**.

Billing received the highest score:

- **Pass and Support: 8.2**
- **Marketing: 7.9**
- **Going Through Tolls: 8**
- **Billing: 8.6**
- **Customer Service: 8.3**