

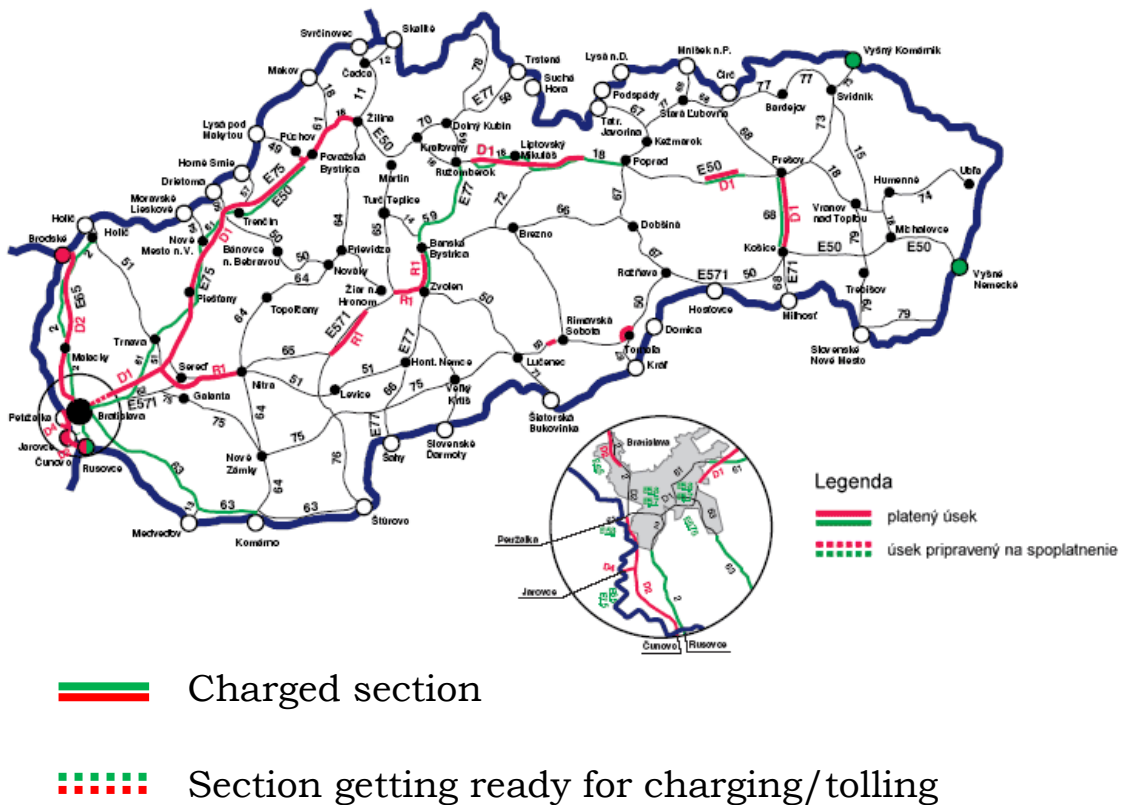
# ASECAP STUDY AND INFORMATION DAYS MARRAKESH 18 – 21 MAY 2008

## *Narodna dialnicna spolocnost, a.s. - SLOVAKIA National Motorway Company*

### *Network length*

At the moment in Slovakia there is only vignette system used for road charging and is applied for all vehicles. Electronic toll collection is under preparation and will start the operation for vehicles over 3,5 tons from January 1<sup>st</sup> 2009. Narodna dialnicna spolocnost, a.s. (National Motorway Company) will be responsible for operation of this system.

### **Map of the currently charged road network**



All motorways, expressways and selected first class roads are charged in the Slovak republic. Motorways and expressways are charged for all types of vehicles and selected I. class roads are charged for vehicles over 3,5 t.

### Currently charged road network in Slovakia

| <b>Type of road</b>   | <b>Road specification</b> | <b>2006 (km in operation)</b> | <b>2007 (km in operation)</b> |
|-----------------------|---------------------------|-------------------------------|-------------------------------|
| <b>Motorways</b>      | D1                        | 229,124                       | 253,988                       |
|                       | D2                        | 69,998                        | 69,998                        |
|                       | D3                        | -                             | 7,530                         |
|                       | D4                        | 2,766                         | 2,766                         |
| <b>Expressways</b>    | R1                        | 99,312                        | 99,312                        |
|                       | R2                        | 15,615                        | 15,615                        |
|                       | R3                        | -                             | 6,441                         |
|                       | R6                        | 1,382                         | 1,382                         |
| <b>I. class roads</b> | I/2                       | 60,217                        | 60,217                        |
|                       | I/18                      | 68,986                        | 68,986                        |
|                       | I/50                      | 2,023                         | 2,023                         |
|                       | I/59                      | 32,499                        | 32,499                        |
|                       | I/61                      | 77,558                        | 77,558                        |
|                       | I/63                      | 61,139                        | 61,139                        |
|                       | I/68                      | 12,827                        | 12,827                        |
|                       | I/69                      | 10,553                        | 10,553                        |
|                       | I/73                      | 1,555                         | 1,555                         |
|                       | I/77                      | 1,520                         | 1,520                         |
|                       | I/79                      | 3,927                         | 3,927                         |
| <b>Total length</b>   |                           | <b>751,001</b>                | <b>789,836</b>                |

There was growth of charged road network in 2007 compared with 2006 in the length of **38,835 km.**

## ***Openings in 2008***

NDS is planning to open in 2008 following sections:

| <b>Name of the section</b> |                                       | <b>km</b>            |
|----------------------------|---------------------------------------|----------------------|
| <b>D1</b>                  | Mengusovce - Janovce                  | 11,62 (half profile) |
|                            | Mengusovce - Janovce                  | 6,23 (full profile)  |
|                            | Vazec – Mengusovce                    | 12,9 (full profile)  |
| <b>D3</b>                  | Hričovské Podhradie – Žilina, Strážov | 1,6 (full profile)   |
| <b>R2</b>                  | Figa bypass                           | 3,3 (half profile)   |
| <b>Total length in km</b>  |                                       | <b>35,65</b>         |

## ***Investments***

Narodna dialnicna spolocnost, a.s. (NMC) invested to new sections construction in **2007**:

**14 456 356 138,71 Sk (431 533 019 €).**

For motorways, expressways and selected I. class roads in operation invested for reconstruction, maintenance and operation:

**1 588 542 830,00 Sk (47 419 189 €).**

For **2008** is planned for new sections construction:

**17 820 164 000,00 Sk (531 945 194 €)**

and for reconstruction, maintenance and operation:

**1 391 405 000,00 Sk (41 534 478 €).**

### **Building sites in operation as for the 31.12.2007**

| <b>Name of the section</b> |                                      | <b>km</b>     |
|----------------------------|--------------------------------------|---------------|
| <b>D1</b>                  | Vazec - Mengusovce                   | 12,225        |
|                            | Mengusovce – Janovce I, II, III      | 25,85         |
|                            | Svinia – Presov - west               | 7,075         |
| <b>D3</b>                  | Skalite – boarder crossing SR/PR     | 3,125         |
|                            | Hricovske podhradie – Zilina Strazov | 1,6           |
| <b>R2</b>                  | Figa - bypass                        | 3,3           |
| <b>Total length in km</b>  |                                      | <b>53,175</b> |

### **New building sites to be opened in 2008**

| <b>Name of the section</b> |                                | <b>km</b>    |
|----------------------------|--------------------------------|--------------|
| <b>D1</b>                  | Sverepec – Vrtizer I, II       | 9,595        |
| <b>R1</b>                  | Zarnovica – Sasovske Podhradie | 9,675        |
| <b>R3</b>                  | Trstena – bypass               | 7,4          |
| <b>R4</b>                  | Svidnik - bypass               | 4,8          |
| <b>Total length in km</b>  |                                | <b>31,47</b> |

### ***Financing***

NDS is funded through a multi-pillar system. It disposes of the following funding resources:

1. State Budget
2. Funds of the European Union
3. NDS loans
4. Vignettes

The maximum part of such funds is used for the construction of motorways and expressways. Private funds are expected as other resource of funding the main road

infrastructure construction, through which motorways will start to be constructed in the form of the Public Private Partnership Project (PPP).

### **Traffic**

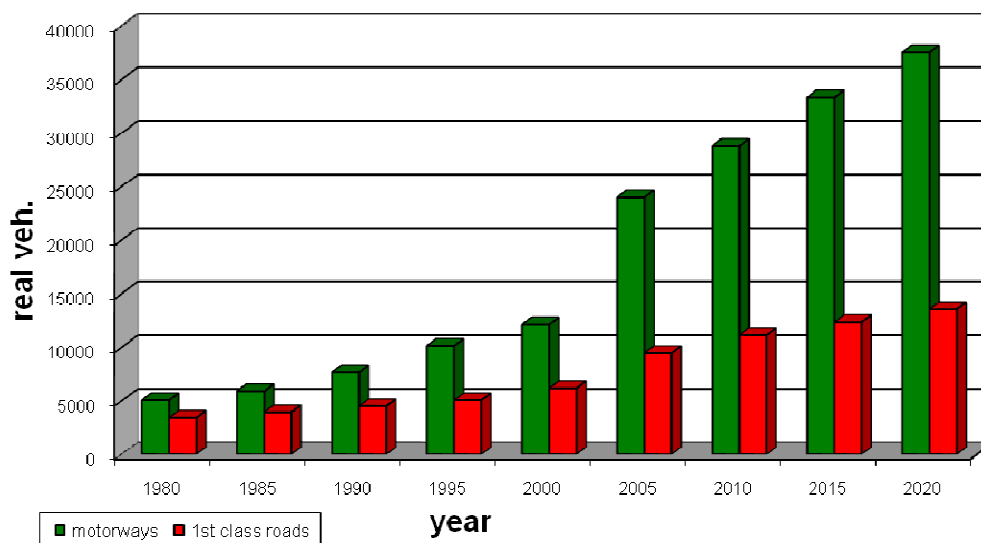
| <b>Year/GDP</b> | I. quarter<br>(bil. Sk) | II. quarter<br>(bil. Sk) | III. quarter<br>(bil. Sk) | IV. quarter<br>(bil. Sk) |
|-----------------|-------------------------|--------------------------|---------------------------|--------------------------|
| <b>2006</b>     | 300,867                 | 327,232                  | 332,936                   | 330,218                  |
| <b>2007</b>     | 325,942                 | 357,717                  | 368,55                    | 373,0                    |

**1€ = 33,5 Sk**

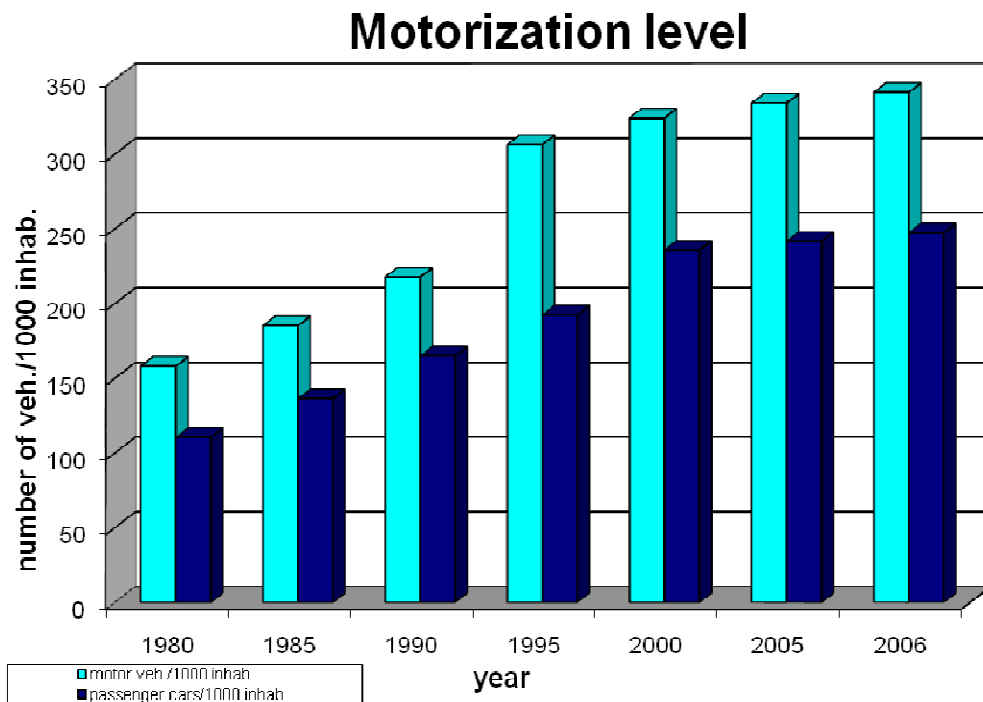
Traffic growth in Slovakia is in accordance with the Gross Domestic Product. Data on traffic development are from the State Traffic Counting performed every 5 years (in the period 1980-2005 ) and are forecasted for the period 2010-2020.

| <b>Year</b> | <b>Motorways</b> | <b>1st class roads</b> |
|-------------|------------------|------------------------|
| <b>1980</b> | 5066             | 3428                   |
| <b>1985</b> | 5895             | 3928                   |
| <b>1990</b> | 7686             | 4500                   |
| <b>1995</b> | 10147            | 5070                   |
| <b>2000</b> | 12150            | 6164                   |
| <b>2005</b> | 24002            | 9466                   |
| <b>2010</b> | 28782            | 11129                  |
| <b>2015</b> | 33315            | 12368                  |
| <b>2020</b> | 37531            | 13546                  |

### Development of annual average daily traffic



| Year | Number of inhabitants (thous.) | No. of vehicles (thous.) | No. of light vehicles (thous) | motor.veh./1000 inhab. | passenger cars/1000 inhab. |
|------|--------------------------------|--------------------------|-------------------------------|------------------------|----------------------------|
| 1980 | 4996                           | 790                      | 552                           | 158                    | 110                        |
| 1985 | 5177                           | 959                      | 706                           | 185                    | 136                        |
| 1990 | 5311                           | 1156                     | 876                           | 218                    | 165                        |
| 1995 | 5368                           | 1645                     | 1033                          | 306                    | 192                        |
| 2000 | 5403                           | 1752                     | 1274                          | 324                    | 236                        |
| 2005 | 5389                           | 1801                     | 1303                          | 334                    | 242                        |
| 2006 | 5393                           | 1841                     | 1334                          | 341                    | 247                        |



Traffic volume especially on motorways has a rapid increasing trend caused by growing of number of vehicles on road network but also thanks to acceleration of new motorway sections construction in the Slovak republic.

### **Tolls**

Vehicles are divided into 3 groups according to weight of vehicle:

1. below 3,5 t
2. 3,5 – 12 t
3. over 12 t

Types of vignettes are:

1. One-year vignette
2. Month vignette
3. Week vignette
4. One day vignette (only for vehicles over 3,5 t)

| <b>One - year vignettes</b> |  |           |
|-----------------------------|--|-----------|
| 1                           | Motor vehicles up to 3,5 t, including trailed vehicle      | 1 100 Sk  |
| 2                           | Motor vehicles from 3,5 to 12 t, including trailed vehicle | 13 500 Sk |
| 3                           | Motor vehicles over 12 t, including trailed vehicle        | 28 000 Sk |

| <b>Month vignettes</b> |  |          |
|------------------------|--|----------|
| 1                      | Motor vehicles up to 3,5 t, including trailed vehicle      | 300 Sk   |
| 2                      | Motor vehicles from 3,5 to 12 t, including trailed vehicle | 2 600 Sk |
| 3                      | Motor vehicles over 12 t, including trailed vehicle        | 3 000 Sk |

| <b>Week vignettes</b> |  |          |
|-----------------------|--|----------|
| 1                     | Motor vehicles up to 3,5 t, including trailed vehicle      | 150 Sk   |
| 2                     | Motor vehicles from 3,5 to 12 t, including trailed vehicle | 1 100 Sk |
| 3                     | Motor vehicles over 12 t, including trailed vehicle        | 1 200 Sk |

| <b>One-day vignettes</b> |  |        |
|--------------------------|--|--------|
| 1                        | Motor vehicles from 3,5 to 12 t, including trailed vehicle | 260 Sk |
| 2                        | Motor vehicles over 12 t, including trailed vehicle        | 300 Sk |

**1€ = 33,5 Sk**

### **Revenues**

| <b>Vignettes</b> | <b>2006</b>   | <b>2007</b>   | <b>% growth</b> |
|------------------|---------------|---------------|-----------------|
| One-year         | 1 094 967 200 | 1 295 647 600 | 18.33           |
| Month            | 97 889 700    | 143 890 700   | 46,99           |
| Week             | 264 331 100   | 316 810 350   | 19,85           |
| One-day          | 635 418 690   | 755 096 220   | 18,83           |

|              |                      |                      |              |
|--------------|----------------------|----------------------|--------------|
| <b>Total</b> | <b>2 092 606 690</b> | <b>2 510 494 870</b> | <b>19,97</b> |
|--------------|----------------------|----------------------|--------------|

|              | <b>2006</b>          | <b>2007</b>          | <b>% growth</b> |
|--------------|----------------------|----------------------|-----------------|
| Below 3,5 t  | 800 642 600          | 937 546 850          | 17,1            |
| 3,5 – 12 t   | 216 159 150          | 283 467 120          | 31,14           |
| Over 12 t    | 1 075 804 940        | 1 289 480 900        | 19,86           |
| <b>Total</b> | <b>2 092 606 690</b> | <b>2 510 494 870</b> | <b>19,97</b>    |

There was a total growth in revenues 19,97% comparing year 2007 with 2006.

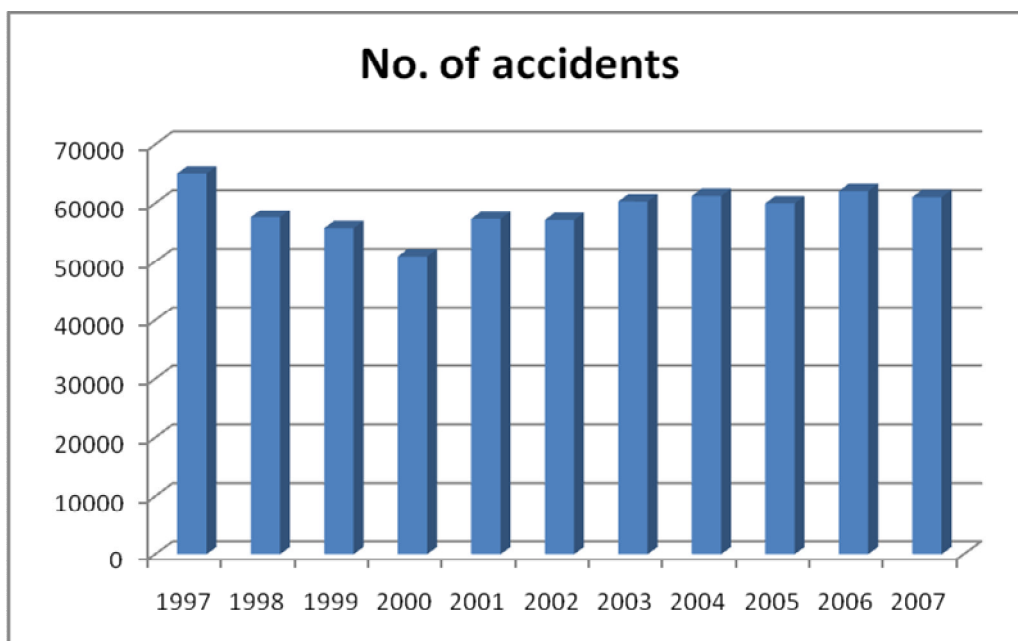
Prices for vignettes were in 2007 the same as in 2006 therefore increasing of revenues was caused by increasing of traffic volume. In case of short term vignettes, better selling is caused by development of regional tourism.

In respect of application of toll system in the Czech Republic and Austria, most of international shippers use Slovak road network because of low prices for vignettes with comparison of toll in the Czech Republic or the Austria. Prices for vignette is low but sanction for not having vignette is relatively high, therefore we register decreasing of international and internal shippers without vignette. This also helps to increase vignettes revenues as an income to the Narodna dialnicna spolocnost, a.s.

## **Safety**

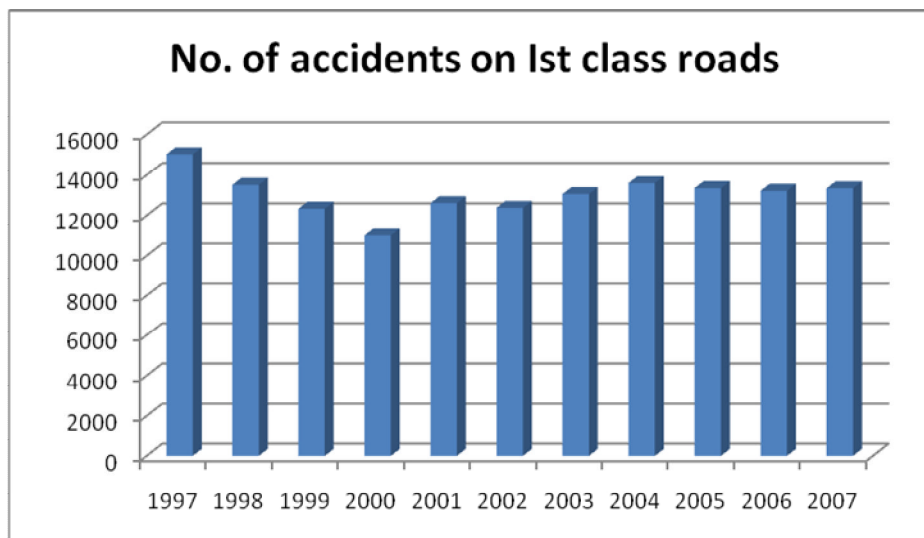
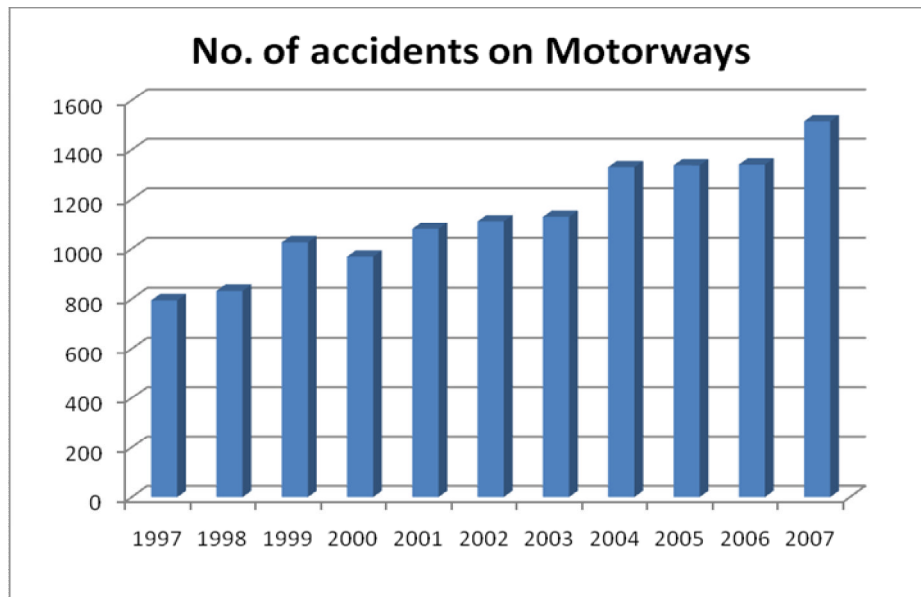
| <b>Year</b> | <b>No. of accidents</b> | <b>Fatal injury</b> | <b>Seriously injured</b> | <b>Slightly injured</b> |
|-------------|-------------------------|---------------------|--------------------------|-------------------------|
| <b>1997</b> | 64977                   | 788                 | 3879                     | 9694                    |

|             |       |     |      |      |
|-------------|-------|-----|------|------|
| <b>1998</b> | 57532 | 819 | 3124 | 9778 |
| <b>1999</b> | 55683 | 647 | 2684 | 8782 |
| <b>2000</b> | 50932 | 628 | 2204 | 7890 |
| <b>2001</b> | 57258 | 614 | 2367 | 8472 |
| <b>2002</b> | 57060 | 610 | 2213 | 8050 |
| <b>2003</b> | 60304 | 645 | 2162 | 9158 |
| <b>2004</b> | 61233 | 603 | 2157 | 9033 |
| <b>2005</b> | 59991 | 560 | 1974 | 8516 |
| <b>2006</b> | 62040 | 579 | 2032 | 8660 |
| <b>2007</b> | 61051 | 627 | 2029 | 9283 |



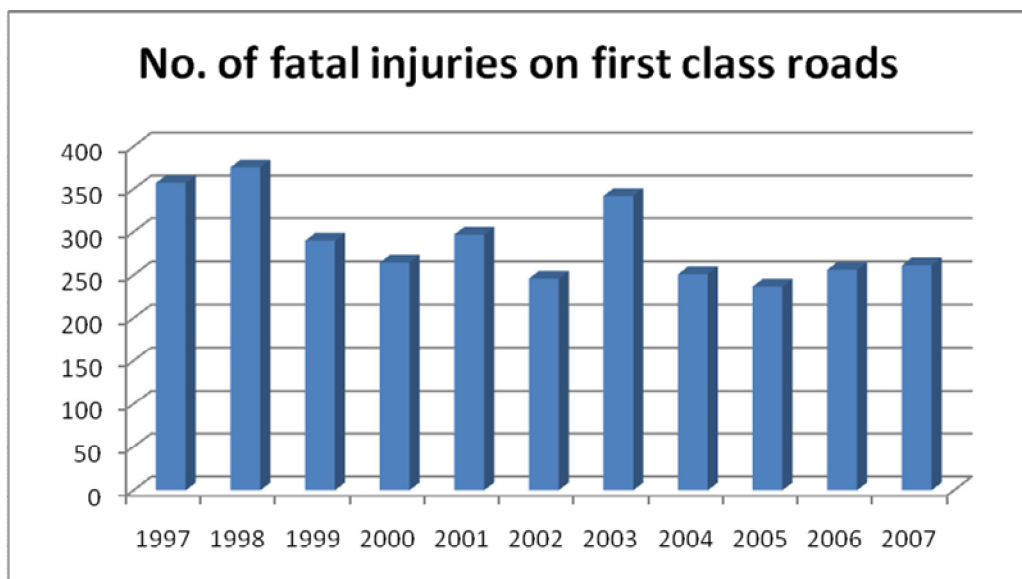
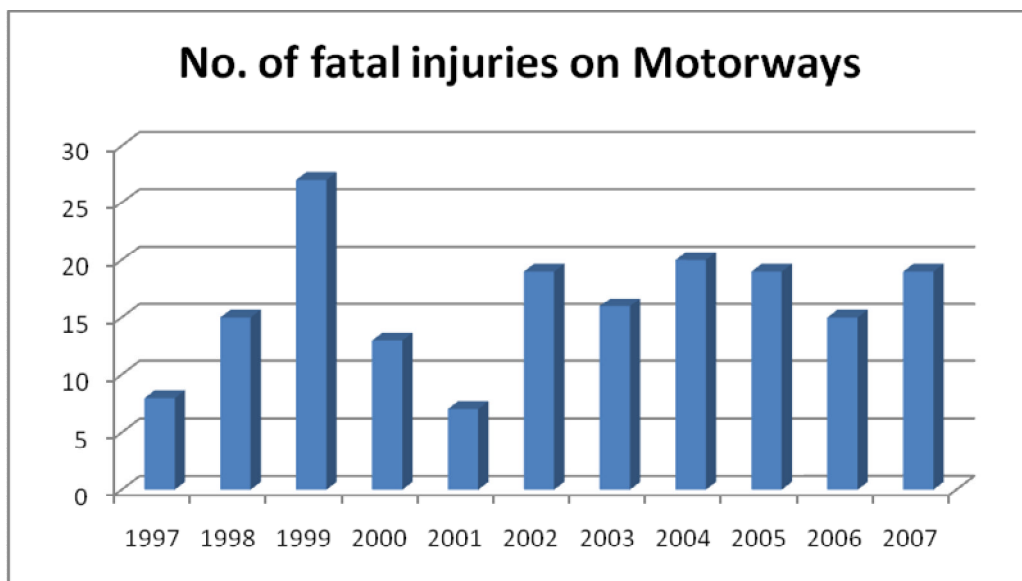
| <b>Year</b> | <b>No of accidents</b> |                        |
|-------------|------------------------|------------------------|
|             | <b>Motorways</b>       | <b>Ist class roads</b> |
| <b>1997</b> | 795                    | 15034                  |
| <b>1998</b> | 832                    | 13514                  |
| <b>1999</b> | 1026                   | 12342                  |

|             |      |       |
|-------------|------|-------|
| <b>2000</b> | 969  | 10998 |
| <b>2001</b> | 1080 | 12614 |
| <b>2002</b> | 1112 | 12383 |
| <b>2003</b> | 1130 | 13058 |
| <b>2004</b> | 1331 | 13601 |
| <b>2005</b> | 1338 | 13352 |
| <b>2006</b> | 1341 | 13218 |
| <b>2007</b> | 1516 | 13341 |



| <b>Year</b> | <b>No. of fatal injuries</b> |                        |
|-------------|------------------------------|------------------------|
|             | <b>Motorways</b>             | <b>1st class roads</b> |
| <b>1997</b> | 8                            | 357                    |

|             |    |     |
|-------------|----|-----|
| <b>1998</b> | 15 | 375 |
| <b>1999</b> | 27 | 290 |
| <b>2000</b> | 13 | 264 |
| <b>2001</b> | 7  | 297 |
| <b>2002</b> | 19 | 246 |
| <b>2003</b> | 16 | 342 |
| <b>2004</b> | 20 | 251 |
| <b>2005</b> | 19 | 237 |
| <b>2006</b> | 15 | 256 |
| <b>2007</b> | 19 | 261 |



| Year | Motorways in operation (km) | Transport performance (thous.veh km/ day) | Accidents (number) | Fatal injury | Seriously injured | Slightly injured | Property damage (mil. €) |
|------|-----------------------------|---|--------------------|--------------|-------------------|------------------|--------------------------|
| 2005 |                             | 6 699                                     | 1338               | 19           | 47                | 132              | 6,2                      |
| 2006 | 327,505                     | 7 798                                     | 1341               | 15           | 42                | 166              | 6,3                      |
| 2007 | 363,560                     | 8 896                                     | 1516               | 19           | 32                | 129              | 6,54                     |

### ***Long-term forecasts and tendencies***

|             | 31.12.2007<br>(km) | Forecasted annual growth (km) |      |       |       |       |       |
|-------------|--------------------|-------------------------------|------|-------|-------|-------|-------|
|             |                    | 2008                          | 2009 | 2010  | 2011  | 2012  | 2013  |
| motorways   | 363,560            | 32,35                         | 19,6 | 99,20 | 14,49 | 12,40 | 38,59 |
| expressways | 153,187            | 3,3                           | 0,00 | 71,30 | 10,60 | 0,00  | 73,69 |

|             | Forecasted annual growth (km) |       |       |        |       |       |        |
|-------------|-------------------------------|-------|-------|--------|-------|-------|--------|
|             | 2014                          | 2015  | 2016  | 2017   | 2018  | 2019  | 2020   |
| motorways   | 12,44                         | 0,00  | 23,2  | 38,17  | 0,00  | 0,00  | 0,00   |
| expressways | 35,88                         | 55,00 | 93,73 | 129,86 | 70,80 | 28,00 | 103,29 |

In Slovakia every motorway and expressway in operation is tolled as soon as a new section is opened. Therefore NDS does not have in operation non – charged network. On tables is showed plans for construction of expressway network and completing motorway network in Slovakia.

### ***Significant actions already started (and/or to be achieved in 2007) and foreseen for 2008.***

In December 2007 was approved act no. 25/2007 about **Electronic Toll Collection** for using selected sections of road network with force of legislation from April 1<sup>st</sup> 2007. Referring to this act, some implementation regulations were also approved: Regulation no. 413/2007 – Regulation of Ministry of transport, posts and telecommunications of the Slovak republic, by which are selected sections of motorways, expressways and 1<sup>st</sup> class roads with electronic toll collection; and statutory order no.

350/2007 – Statutory order of government of the Slovak republic which define prices for tolled sections for using selected sections of roads.

These documents have made law bases for implementation and operation of electronic toll collection system in the Slovak republic. They constitute obligation to pay toll for all vehicles over 3,5 t on motorways, expressways and selected 1st class roads. Road sections on which toll will be collected are define in regulation. Total length of tolled network is about 1900 km. Total length does not include roads within towns and villages – these roads are toll free.

Price for 1 km is from 1,9 – 6,3 Sk (0,05 – 0,19 €) and is differentiated according to the weight of vehicle (under 12 t and over 12 t), emission category, number of axes and according as it is bus or heavy vehicle.

Electronic toll collection is planned to start from January 1<sup>st</sup> 2009. System administrator for toll collection is Narodna dialnicna spolocnost, a.s.

## MAIN ASECAP KEY FIGURES

|  |                |
|--|----------------|
| Country: Slovak republic                   | 2007           |
| Network length .....                       | 790 km*        |
| 2 x 2 lanes .....                          | 334,3 km       |
| 2 x 3 lanes .....                          | (motorways)    |
| 2 x 4 lanes.....                           |                |
| No. of km in construction                  | 49,9 km        |
| Forecasts of opening motorways section     | 32,35 km       |
| Annual toll revenue                        | 74 940 145 €** |
| Permanent staff                            | 1045           |
| Average daily traffic (LV)                 | 19 010         |
| Average daily traffic (HV)                 | 6 156          |
| Average daily traffic (LV+HV)              | 25 166         |
| Total number of accidents                  | 1516           |
| No. of personal injury accidents           | 131            |
| No. of dead                                | 19             |
| Km travelled (10 <sup>6</sup> x km)        | -              |
| No. of toll plazas                         | no             |
| No. of lanes                               | no             |
| No. of teletoll equipped lanes             | no             |
| No. of teletoll subscribers                | no             |
| No. of rest areas (with stations services) | 30             |
| No. of rest areas                          | 42             |
| No. of restaurants                         | 26             |
| No. of hotels                              | 2              |
|  |                |

\*whole charged network including motorways, expressways and selected 1st class roads

\*\*revenue from vignettes on whole charged network