

HUNGARY
Canvas of the National Report
to be presented by each delegation
during the ASECAP Study and Information Days
Turin, 27 - 30 May 2012

The Network

Length of the motorway network in Hungary as of 31 December 2011: 1.110 km.

The length of the motorway, expressway and trunk road sections operated by ÁAK Zrt. (State Motorway Management Co. Ltd.) are 740 km, 186 km and 30 km accordingly.

State Motorway Management Company (ÁAK Zrt.) is responsible for the operation and maintenance of M1, M3, M30, M31, M35, M43, M7 and M8 motorways, and several expressways.

AKA Zrt. (Alföld Concession Motorway Co. Ltd.) is a Concession Company and responsible for the operation and maintenance of M5 Motorway, total of 156 km.

DAK Zrt. (Danube Concession Motorway Co. Ltd.) is a Concession Company and responsible for the operation and maintenance of M6 between sections 22+150 – 76+200 and M8 between sections 5+750 – 10+300 were opened to traffic on 11 June 2006.

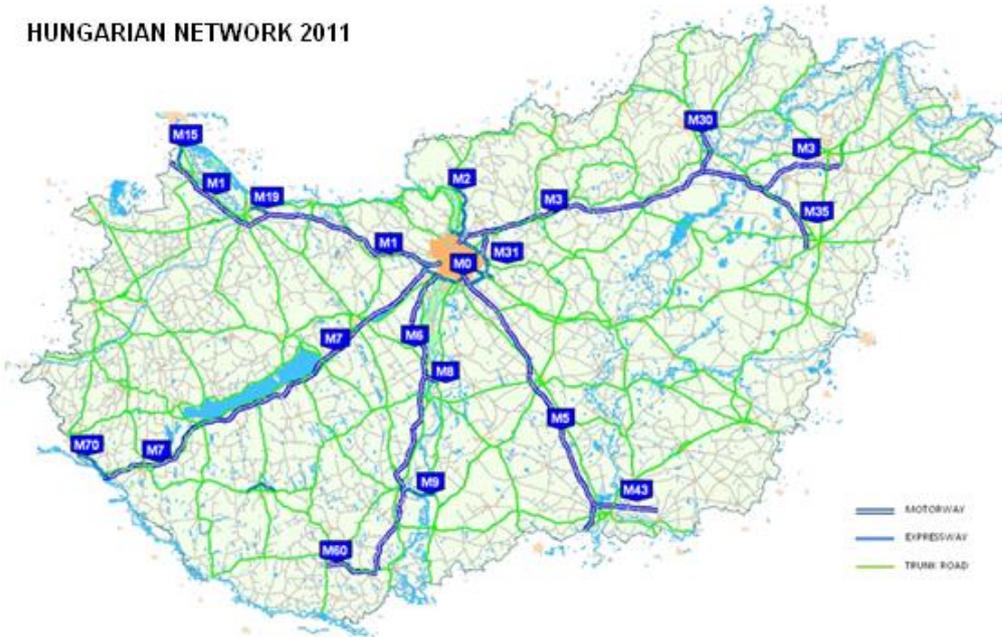
No more sections are foreseen at the moment to be included in this Concession.

MAK Zrt. (Mecsek Motorway Concession Private Company Limited by Share) is a Concession Company and responsible for the design, construction, operation and maintenance, and as well as the financing of the these activities on the following motorway sections: M6 Motorway section between Szekszárd-Bóly and M60 Motorway section between Bóly-Pécs, as well as the M6/M9 interchange, total of approx. 80 km motorway, including 4 twin tube tunnels (altogether 6.026m), 9 viaducts, 2 operation and maintenance centres, 3 simple rest areas, 1 complex rest area with fuel station.

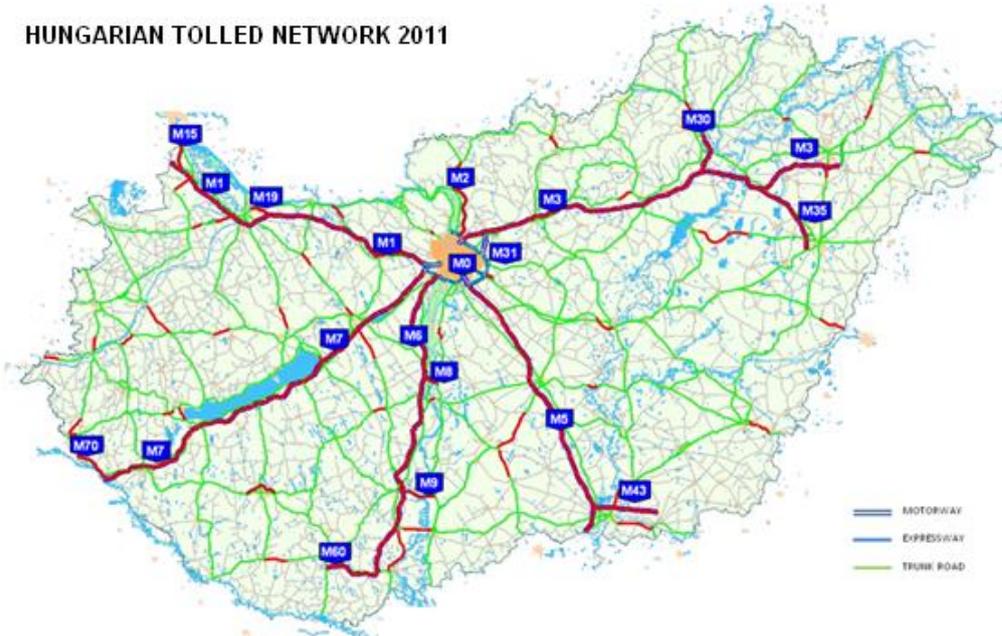
The Motorway was opened for traffic in March 2010.

TAK Zrt. (M6 Tolna Motorway Concession Ltd.) is a concession company and responsible for the development and operation of M6 Motorway between Dunaújváros and Szekszárd.

HUNGARIAN NETWORK 2011



HUNGARIAN TOLLED NETWORK 2011



Categories	Motorways	Expressways	Trunk Roads	Total
(Free for all)	(46 km)	(81 km)	(6,086km)	(6,213 km)
D1-4 Charged	948 km	0 km	0 km	948 km
D2-4 Charged	117 km	113 km	462 km	692 km
Total Charged	1065 km	113 km	462 km	1,640 km
(Total)	(1111 km)	(194 km)	(6,548 km)	(7,853 km)

The following sections were opened in 2011 in Hungary:

Road No.	Location	Beginning	End	Length (km)
M43	Szeged - 47. sz. main road	3+000	9+700	6,7
M43	main road Nr. 47. - Maroslele	9+700	18+400	8,7
M43	Maroslele – Makó + Makó bypass	18+400	34+600	16,2
M85 (expressway)	Enese bypass	6+800	13+800	7

Foreseeable Openings in 2012

Road No.	Location	Beginning	End	Length (km)
M0 (expressway)	2nd carriageway (widening to 2x3 lanes) M7-M6	2+840	9+400	6,6
M3	Nyíregyháza - main road Nr. 49.	234+238	268+000	33,7

Foreseeable Openings in 2013

Road No.	Location	Beginning	End	Length (km)
M0 (expressway)	2nd carriageway (widening to 2x3 lanes) M6 - main road Nr. 51	12+140	23+200	11,1
M0 (expressway)	(new 2x3 lanes) main road Nr.51. – M5	23+200	29+500	6,3
M3	main road Nr. 49. - Vásárosnamény	268+000	279+900	11,9

Constructions in 2011

Motorway section	length (km)	Opening
M3 Motorway between Nyíregyháza - main road Nr. 49.	33.7	11. 2012
Total length	33.7	

Expressway section	length (km)	Opening
M0 (expressway 2nd carriageway (widening to 2x3 lanes) M7-M6	6.6	07. 2012
M0 (expressway 2nd carriageway (widening to 2x3 lanes) M6 - main road Nr. 51	11.1	2013

M0 (expressway (new 2x3 lanes) main road Nr.51. – M5	6.3	2013
Total length	24	

Investments of the Concession Companies

AKA: No more sections are foreseen to be included in this Concession. Foreseeable investments are under negotiation like expansion of rest area and new facilities along the motorway.

DAK: No more sections are foreseen to be included in the Concession. Invested amount in 2010 - 0 m€, foreseeable invested amount in 2011 - 0 m€.

TAK Zrt. (Tolna Concession Motorway Co. Ltd.): is a concession company and responsible for the development and operation of M6 Motorway between Dunaújváros and Szekszárd.

MAK Zrt. (Mecsek Concession Motorway Co. Ltd.): No more sections are foreseen to be included in this Concession. There is no foreseeable investment in 2011.

Financing

One of the main mission of AKA Zrt. is to finance the motorway, which was achieved with the signature of the Credit Agreement with a group of Lenders.

The road user charging scheme is operated by ÁAK Zrt. means of e-vignettes and all of the income is used in a closed financial system solely for the operation, maintenance and reconstruction of the charged network. The user charges collected are transferred to the Road Budget of the State which is managed by CCTD (Coordination Center for Transport Development). The user charging services are financed trough a contract between ÁAK Zrt and CCTD.

DAK: Notes issued on the financial markets and loan from EIB, both guaranteed by a monoline insurer.

MAK: Project is financed by a group of lenders and in line with the Concession Agreement MAK receives revenues from the State in form of availability fee during the operation period.

Traffic

Hungary: GDP growth 2010: 1,3%; GDP growth 2011: 1,7%. The CPI (consumer price index) for 2011 was 103,9%.

- **AKA:** The traffic output was 1398*10⁶ vehicle km in 2010; and 1222*10⁶ vehicle km in 2011. The decrease (2010/2011) was 12,6%, however it is due to the newly implemented traffic counting system, thus the new counting method defers from the one used in previous years.
- **ÁAK:** The traffic output was 6504*10⁶ vehicle km in 2011; and 6430*10⁶ vehicle km in 2010. The growth (2011/2010 years) was 1,01 %.
- **DAK:** The traffic output was 233*10⁶ vehicle km in 2010 for the M6-M8 in total; and 235*10⁶ vehicle km in 2011. The growth (2010/2011 years) was 0,86 %.
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User Charges

(including VAT) (exchange rate is 273.85 HUF/EUR, according to the 1999/62/EK directive methodology)

- **Light vehicles, D1 category (max. permissible gross laden weight ≤ 3,5 tons)**

Vignette, end 2011		
€	146 / yearly	(HUF 40,000)
€	16 / 31 days	(HUF 4,500)
€	10 / 10 days	(HUF 2,750)
€	6 / 4 days	(HUF 1,650)

- **Light commercial vehicles, D2 category (3,5 t < max. permissible gross laden weight ≤ 7,5 t)**

Vignette, end 2011		
€	420 / yearly	(HUF 115,000)
€	47 / 31 days	(HUF 13,000)
€	28 / 10 days	(HUF 7,750)
€	11 / 1 day	(HUF 3,000)

- **Medium commercial vehicles, D3 category (7,5 t < max. permissible gross laden weight ≤ 12 t)**

Vignette, end 2011		
€	628 / yearly	(HUF 172,000)
€	69 / 31 days	(HUF 19,000)
€	43 / 10 days	(HUF 11,750)
€	11 / 1 day	(HUF 3,000)

- **Heavy trucks, D4 category: all motor vehicles that do not fall in categories D1, D2 or D3**

Vignette, end 2011			
€	785	/ yearly	(HUF 215,000)
€	88	/ 31 days	(HUF 24,000)
€	54	/ 10 days	(HUF 14,750)
€	11	/ 1 day	(HUF 3,000)

User Charge Revenues and other revenues (net)

On the basis of the separate Concession Contracts between the Republic of Hungary and AKA Zrt., MAK Zrt. and DAK Zrt., the concession companies receive revenues from the State in form of availability payment. The availability payment is paid every month and can change subject to the availability of the motorway for motorists.

ÁAK Zrt. reached the following net revenues:

	2010	2011	INDEX
Revenues in HUF	40 682 815 260 Ft	46 003 725 000 Ft	113 %
Revenues in EUR *	145 534 861 €	167 989 000 €	115 %

Note: The above sums represent the user charge incomes. The excess charge collected from illegal users (less than 2% of the total traffic) adds an extra 4% amount to these.

* Average exchange rate: 279.54 HUF/€ (in 2010) and 273.85 HUF/€ (in 2011)

The change in revenues can be partially explained by the actual user charges as they have been increased by 7-8% typically.

Sold vignettes	2010	2011	Index
for light vehicles	13 311 080 pcs	13 113 890 pcs	98.5%
for heavy vehicles	4 421 424 pcs	4 490 756 pcs	101.6%
Total	17 732 504 pcs	17 604 646 pcs	99.3%

ÁAK Zrt. sold slightly less (- 0.7%) electronic vignettes in 2011 than in the previous year. A little rearrangement could be observed between category D2 (3.5 to 7.5 tons) and D3 (7.5 to 12 tons); nevertheless the sales of the most important truck category D4 (12 tons and above) showed a 1.7% increase as a signal for the slowly improving economy. The number of vignettes sold in category D1 (light vehicles) decreased by 1.5% what can be explained by the effect of the increasing fuel prices for the consumers.

The length of the motorways operated by ÁAK Zrt. increased by almost 2%, while the vignettes prices typically by 7-8%.

Safety

Accident data	ÁAK Zrt.	
	In number for one billion km-s travelled in 2011	Variation in % in 2010/2011
Personal injury rate	42,3	-20,6
Fatal accident rate	2,8	-40,4
Rate of dead	5,8	-34

ÁAK: Number of personal injury accidents has decreased with 20,6 %, the number of fatal accidents decreased with 40,4 % in 2011.

AKA: In 2010 (Jan-Dec) 584 accident happened (out of which 90 involved personal injury). In 2011 (Jan-Dec) 432 accident happened (out of which 79 involved personal injury), which is 26 % less than last year.

MAK: In 2010 (Mar. – Dec.) 35 accident happened out of which 3 involved personal injury. In 2011 (Jan. – Dec.) 28 accident happened, which is 20% less than last year. However the number of accident involving personal injury increased to 5.

DAK: M6: Number of personal injury accidents has increased in total comparing to the 2010 year's figures that means in figures 209% increase (2011: 23; 2010: 11). Nevertheless, this figure cannot be considered as representative, since the accident rate is quite low on M6, therefore slight change of it could result in a high figure in percentage. There were 2 fatal accidents on the M6 motorway, but in 2010 there was no fatal accident, therefore, no real changing rate can be calculated. M8: There was one accident happened on the M8 motorway in 2011 with no personal injury.

Long term forecasts and tendencies

- Besides the already implemented ITS applications (e.g.: VMS, CCTV) these developments will continue and a national architecture is started to be formed.
- Since March 2004 there is no direct manual toll collection in Hungary, hence the nationwide e-vignette system still generate enough revenue to cover the operation, maintenance and periodical reconstruction costs of the whole existing speedway network and some part of the already charged trunk road network as well. So the system meets the requirements of the current toll policy of the country. The

definition of the new toll policy (beside the tariffs, the business structure and technical way of toll collection is considered) to generate enough revenue for long term as well, instead of the limited maximum income generation capacity e-vignette system was prepared. Although there are still debates about the details, it is not questioned, the final goal is to have a uniform interoperable ETC system in Hungary in the future.

MAIN ASECAP KEY FIGURES

Country: Hungary	2011					
	AKA	ÁAK	DAK		MAK	Tolna
	M5		M6	M8	M6	M6
Network length: 1,110 km 2 x 2 lanes 2 x 3 lanes 2 x 4 lanes.....	156.5	740	54.05	4.55	80	65,1
No. of km in construction	-	33.7 km	-	-	-	-
Forecasts of opening motorways section	-	-	-	-	-	-
Annual user charge revenue	167,9 m€					
Permanent staff (inactive staff included ¹)	11	1,050	5	5	7	35
Average daily traffic (LV)	19.007	19,561	9 506	1 241	3.840	6 033
Average daily traffic (HV)	6.331	5,138	2 201	1 098	780	1 065
Average daily traffic (LV+HV)	25.338	24,699	11 707	2 339	4.620	7 098
Total number of accidents	432	1,711	84	1	28	49
No. of personal injury accidents	79	287	23	0	5	5
No. of dead	11	38	2	-	-	-
Km travelled (10 ⁶ x km)	1.222	6,504	-	-	-	-
No. of toll plazas	0	0	0	0	0	0
No. of toll lanes	2*2	-	2*2	2*2	2*2	2*2
No. of teletoll equipped lanes	0	0	0	0	0	0
No. of teletoll subscribers	0	0	0	0	0	0
No. of rest areas (with stations services)	12	52	4	0	1	0
No. of rest areas	6	119	4	0	3	4
No. of restaurants	5	35	0	0	0	0

No. of hotels	3	11	0	0	0	0
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ⁱ The Concession Companies' staff does not include the operation staff at the operation and maintenance centres