

**ASECAP STUDY AND INFORMATION DAYS  
ATHENS, 26 - 28 MAY 2014**

***Naradna dialnicna spolocnost, a.s. – SLOVAK REPUBLIC  
National Motorway Company***

***Network length***

From January 1<sup>st</sup>, 2010, the system of network charging had changed. Except for the vignette system which is still valid for vehicles under 3.5 t, the Slovak Republic introduced a multi-lane, free flow electronic tolling system. In principle, all commercial vehicles with a maximum allowable mass extending 3.5 tons are subject to a distance based toll charge. This toll depends on the road category, the vehicle category, which is established through the number of axles and emission class of the vehicle.

**Currently charged road network in the Slovak Republic**

<b>category</b>	<b>motorways</b>	<b>expressways</b>	<b>I<sup>st</sup> class roads</b>	<b>bypasses outside residential areas</b>	<b>residential areas</b>
under 3.5 t	✓	✓	x	x	x
over 3.5 t	✓	✓	✓*	✓	x

\*approx. 43% of 1st class road network



<b>Type of road</b>	<b>Road specification</b>	<b>2012 (km in operation)</b>	<b>2013 (km in operation)</b>
<b>Motorways</b>	D1	308.014	308.014
	D2	69.515	69.515
	D3	8.905	8.905
	D4	6.566	6.566
<b>Expressways</b>	R1	164.938	164.938
	R2	30.961	30.961
	R3	17.751	17.751
	R4	9.895	24.070
	R6	2.283	2.283
<b>I. class roads*</b>	I/11	27.258	27.258
	I/12	3.057	3.057
	I/13	10.882	10.882
	I/18	204.411	204.411
	I/2	52.137	52.137
	I/49	9.336	9.336
	I/50	309.331	309.331
	I/51	57.191	57.191
	I/59	71.348	72.490
	I/61	112.930	112.930
	I/62	32.847	32.847
	I/63	67.668	67.668
	I/64	65.737	67.563
	I/65	98.202	98.202
	I/66	80.320	80.320
	I/68	23.559	23.559
	I/69	11.115	11.115
	I/72	31.941	31.941
	I/73	37.600	37.600
	I/75	37.166	41.573
I/76	43.623	43.623	
I/79	26.734	28.442	
<b>Total length</b>		<b>2033.221</b>	<b>2056.479</b>

\* National Motorway Company owns only motorways and expressways but is a toll collector on some 1<sup>st</sup> class roads too. Therefore later in presentation there are published only figures regarding to motorway and expressway network, but revenues contain also 1<sup>st</sup> class roads.

## ***Openings in 2014***

NDS is planning to open following sections in 2014:

<b>Name of the section</b>		<b>km</b>
<b>D1</b>	Janovce – Jablonov I. section	9.000
	Beharovce, intersection	0.76
	Dubna Skala - Turany	16.49
<b>R2</b>	Ziar nad Hronom, bypass (half profile)	5.76
<b>Total length in km</b>		<b>32.01</b>

## ***Investments***

Narodna dialnicna spolocnost, a.s. (NMC) invested to new sections construction in **2013**:

**290,071,981 €**

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

**57,432,139 €**

For **2014**, there is planned for new sections construction:

**874,736,200 €**

and for reconstruction, maintenance and operation:

**67,562,904 €**

## Building sites in operation as for the 31.12.2013

Name of the section		km
<b>D1</b>	Janovce – Jablonov I. section	9.00
	Janovce – Jablonov II. section	9.54
	Dubna Skala - Turany	16.49
	Fricovce - Svinia	11.22
	Beharovce, intersection	0.76
	Hubova - Ivachnova	15.28
	Hricovske Podhradie – Lietavska Lucka	11.32
<b>D3</b>	Skalite – border crossing SR/PR (half profile)	3.13
	Svrcinovec – Skalite (half profile)	12.28
<b>R2</b>	Ziar nad Hronom bypass (half profile)	5.76
	Pstrusa - Krivan	10.38
	Ruskovce – Pravotice (half profile)	9.56
<b>Total length in km</b>		<b>114.72</b>

## New building sites to be opened in 2014

Name of the section		km
<b>D1</b>	Triblavina, intersection	1.630
	Senec – Blatne, intersection	1.420
	Lietavska Lucka – Dubna Skala	13.510
<b>D3</b>	Zilina, Strazov – Zilina, Brodno	4.250
<b>R2</b>	Zvolen east - Pstrusa	7.850
<b>Total length in km</b>		<b>28.66</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 and toll
5. Other (rent, services...)

The maximum part of such funds is used for the construction of motorways and expressways.

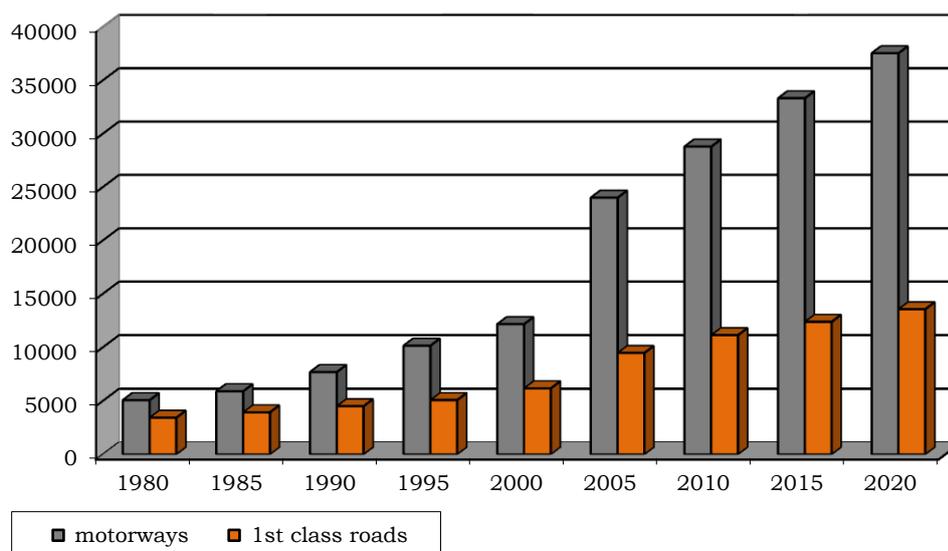
## Traffic

Year/GDP	I. quarter (mil. €)	II. quarter (mil. €)	III. quarter (mil. €)	IV. quarter (mil. €)
<b>2012</b>	16 549.6	17 822.3	18 879.0	18 212.1
<b>2013</b>	16 709.8	18 035.8	18 995.6	18 392.9

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 1980-2010) and are forecasted for the period 2015-2020.

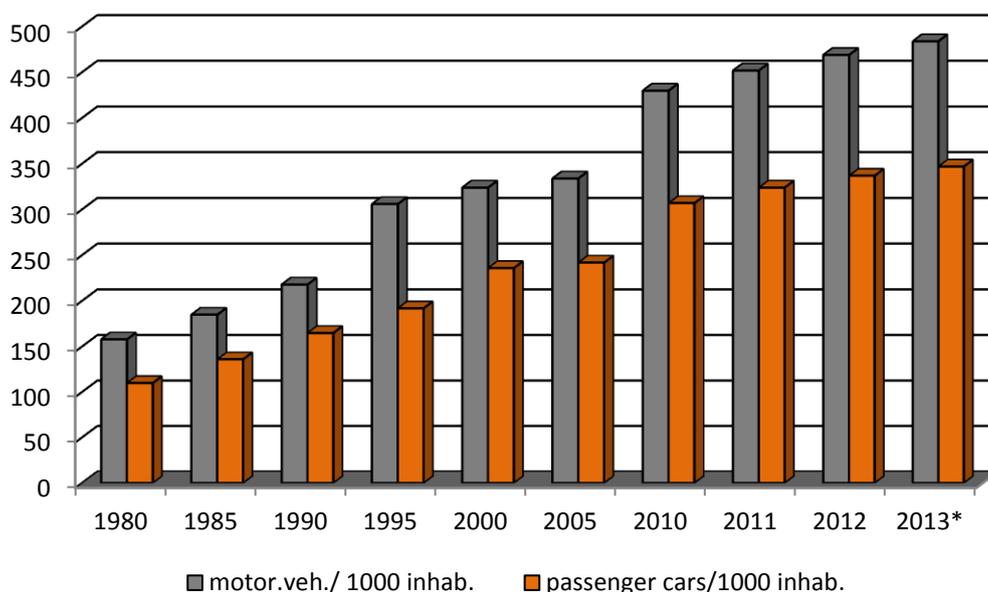
Year	Motorways	1st class roads	Year	Motorways	1st class roads
<b>1980</b>	5066	3428	<b>2005</b>	24002	9466
<b>1985</b>	5895	3928	<b>2010</b>	28782	11129
<b>1990</b>	7686	4500	<b>2015</b>	33315	12368
<b>1995</b>	10147	5070	<b>2020</b>	37531	13546
<b>2000</b>	12150	6164			

### Development of annual average daily traffic



Year	no. 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
2010	5435	2339	1669	430	307
2011	5404	2442	1749	452	324
2012	5410	2537	1824	469	337
2013	5415	2623	1880	484	347

### Motorization level



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 and vignettes***

In 2013, vehicles were divided into 2 groups according to weight of vehicle:

1. below 3.5 t (vignette system)
2. over 3.5 t (ETC system)

## 1. Vignette system

Types of vignettes for the year 2013 were:

1. Year vignette
2. Month vignette
3. 10 days vignette

All types of vignettes are both for motor vehicles (category M1, N1, M1G and N1G) and trailed vehicles (category O1, O2). Vignette for trailed vehicle is necessary when total weight of motor vehicle and trailed vehicle exceed 3.5 t.

### **Vignettes for 2013**

<b>One - year vignettes</b>		
1	Motor vehicles up to 3.5 t	50 €
2	Trailed vehicle	50 €
<b>Month vignettes</b>		
1	Motor vehicles up to 3.5 t	14 €
2	Trailed vehicle	14 €
<b>10-days vignettes</b>		
1	Motor vehicles up to 3.5 t	10 €
2	Trailed vehicle	10 €

## 2. Electronic toll collection system:

The provision of the Toll Order providing the vehicles liable to pay the toll to use the transit sections of roads without the OBUs lost its validity and effect on 30 September 2013.

From 1 October 2013 the operator is liable to get registered in the Electronic Toll Collection and to install the OBU in the vehicle if using the transit road sections.

## Toll Rates for the Use of Specified Sections of Motorways and Expressways

Vehicle category			Emission class		
			EURO 0 - II	EURO III	EURO IV, V, EEV
<b>Heavy vehicles</b>	3.5 t – 12 t		0.093	0.086	0.083
	over 12 t	2 axles	0.193	0.183	0.179
		3 axles	0.202	0.193	0.189
		4 axles	0.209	0.199	0.196
		5 axles	0.206	0.193	0.189
<b>Busses</b>	3.5 t – 12 t		0.060	0.050	0.030
	over 12 t		0.110	0.100	0.060

## Toll Rates for the Use of Specified Sections of the 1st Class Roads

Vehicle category			Emission class		
			EURO 0 - II	EURO III	EURO IV, V, EEV
<b>Heavy vehicles</b>	3.5 t – 12 t		0.070	0.063	0.063
	over 12 t	2 axles	0.146	0.136	0.136
		3 axles	0.153	0.146	0.143
		4 axles	0.156	0.149	0.146
		5 axles	0.153	0.146	0.143
<b>Busses</b>	3.5 t – 12 t		0.040	0.030	0.020
	over 12 t		0.080	0.070	0.040

Vignette prices as well as toll rates were not changed during the years 2011, 2012 and 2013.

### **Revenues**

<b>Vignettes</b>	<b>2012</b>	<b>2013</b>	<b>% growth</b>
Year	28 834 959 €	30 402 375 €	5.44
Month	3 701 765 €	4 003 417 €	8.15
10 days	18 015 109 €	17 695 433 €	-1.77
<b>Total</b>	<b>50 551 833 €</b>	<b>52 101 225 €</b>	<b>3.06</b>

<b>Toll collection</b>		<b>2012</b>	<b>2013</b>	<b>% growth</b>
Heavy vehicles	3.5 t – 12 t	12 689 624 €	12 550 995 €	-1.09
	over 12 t	133 605 837 €	138 151 470 €	3.40
Busses	3.5 t – 12 t	223 285 €	225 078 €	0.80
	over 12 t	4 745 718 €	4 598 899 €	-3.09
Ticketing		5 513 285 €	3 102 258 €	-43.73
<b>Total</b>		<b>156 777 749 €</b>	<b>158 628 700 €</b>	<b>1.18</b>

Ticketing yearly revenue decrease was caused by its expiration to 30 September 2013.

There was a total rise in revenues of vignettes **8.5 %** and rise in revenues of toll **0.9 %** comparing years 2012 and 2013.

There are some main changes prepared from 01.01.2014:

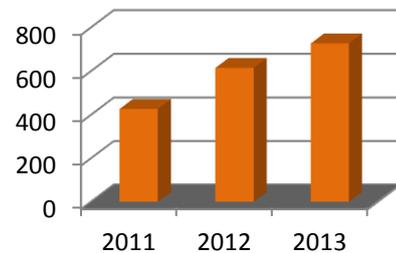
- toll on 6 additional 1<sup>st</sup> class roads
- tolled transit through residential area on tolled network
- traffic monitoring on remaining 1<sup>st</sup> class roads and whole 2<sup>nd</sup> and 3<sup>rd</sup> class road network
- discounts depending on driven km
- new toll rates

## **Safety**

Table below shows number of all accidents (fatal, seriously and slightly injured), on road network in the Slovak Republic. Significant reduction in number of accident was caused by a change of legislation in 2009. Since 2009 legislation increased the minimum amount of damage, when police forces have to be called and accidents were divided into casualty (accidents with a little damage which are not solved by police forces but through insurance company directly) and accidents (when the police forces are called). Until 2011, there was not any difference between accidents on motorways and expressways mainly because of small amount of expressways network. Since 2011, the table shows only accidents on motorways and expressways. Data are registered statistically and shown in tables. Chart below

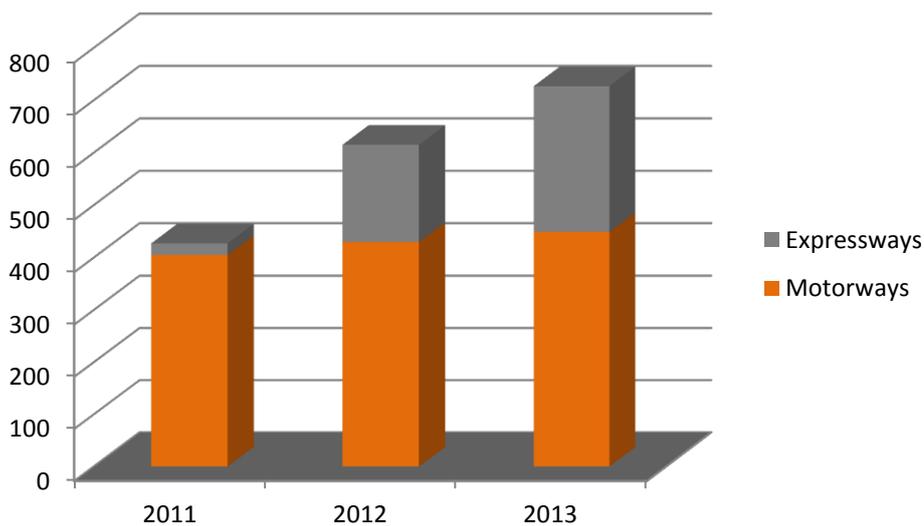
shows only data since 2011 due to above mentioned. Increasing of number of accidents can be caused by increasing of expressway network.

Year	No. of accidents	Fatal injury	Seriously injured	Slightly injured
2000	50932	628	2204	7890
2005	59991	560	1974	8516
2010	4270	135	367	1695
2011	427	9	30	-
2012	615	8	37	195
2013	727	14	41	164



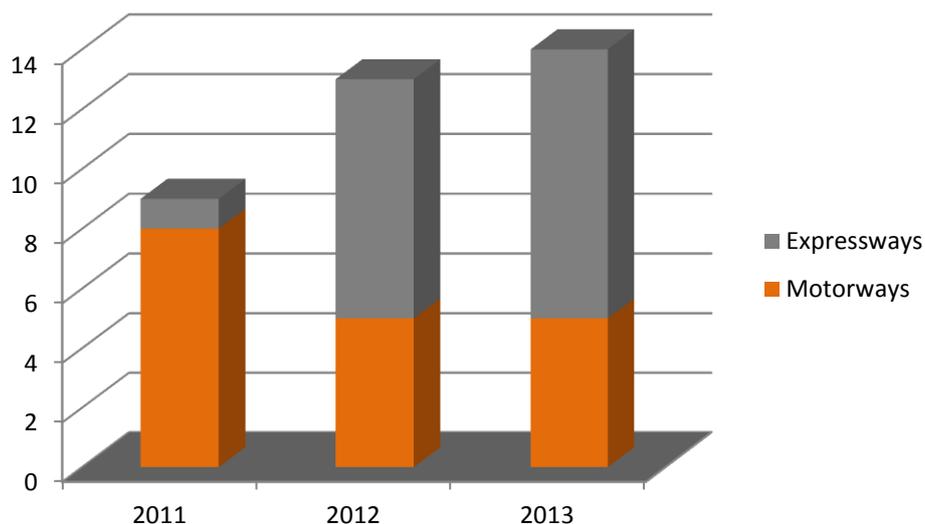
### Number of accidents

Year	No of accidents		Year	No of accidents	
	Motorways	I <sup>st</sup> class roads		Motorways	Expressways
2000	969	10 998	2011	405	22
2005	1338	13 352	2012	430	185
2010	548	3331	2013	449	278



## Number of fatal injuries

Year	No. of fatal injuries		Year	No. of fatal injuries	
	Motorways	I <sup>st</sup> class roads		Motorways	Expressways
2000	13	264	2011	8	1
2005	19	237	2012	5	8
2010	13	100	2013	5	9



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

In Slovakia every motorway and expressway in operation is charged as soon as a new section is opened. Therefore NDS does not have in operation non – charged network except for already mentioned bypasses and residential areas. Table shows plans for construction of expressway and motorway network in Slovakia until the year 2020.

	Forecasted annual growth (km)						
	2014	2015	2016	2017	2018	2019	2020
motorways	26.250	21.532	21.110	15.280	66.385	10.790	41.953
expressways	5.760	18.230	9.560	0	42.054	152.511	108.996

### MAIN ASECAP KEY FIGURES

Country: Slovak republic	2013
Network length .....	633 km
2 x 2 lanes .....	(393 km – motorways)*
2 x 3 lanes .....	
2 x 4 lanes.....	
No. of km in construction	114.72
Forecasts of opening section	28.66
Annual toll revenue	158 628 700 €**
Permanent staff	1307
Average daily traffic (LV) on motorways	16 036
Average daily traffic (HV) on motorways	4 789
Average daily traffic (LV+HV) on motorways	20 825
Total number of accidents	727
No. of personal injury accidents on motorways	205
No. of dead on motorways	14
Km travelled (10 <sup>6</sup> x km)	1 043 704 000 km
No. of toll plazas	no
No. of lanes	no
No. of ETC sections	1,132
No. of ETC subscribers	232,783
No. of rest areas (with stations services)	37
No. of rest areas	77
No. of restaurants	21
No. of hotels	3

\* This figure includes only tolled network of motorways and expressways

\*\* This figure excludes the revenue from vignettes