

# PORTUGAL

## GENERAL REPORT

### ASECAP STUDY AND INFORMATION DAYS

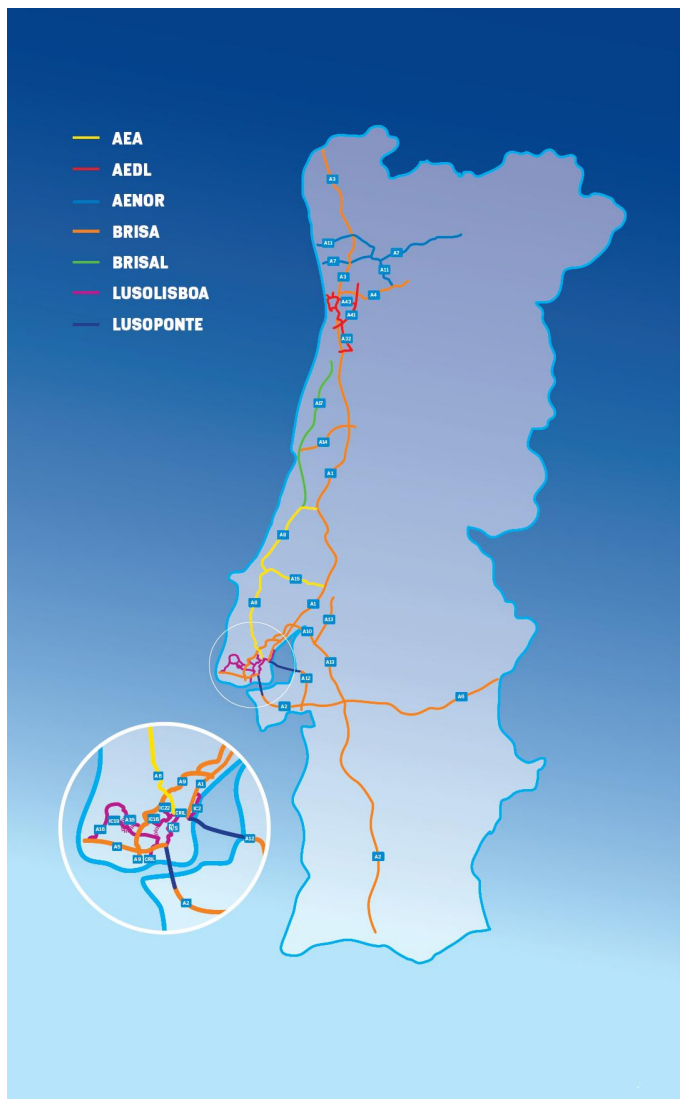
#### KRAKOW – 24-27 MAY 2009

#### Network characterization

In 2008, the length of the Portuguese motorways network under operation grew by 113 km, reaching a total of 1.669 km (1.444 km tolled and 225 km non-tolled).

The total length of the Portuguese motorway network, including the State owned network and the shadow-toll operated network, is 2.683 km.

In 2009, 5 km of toll motorways will be opened.



#### Services

In a total of 151 toll plazas there are 1.139 lanes with 375 teletoll equipped lanes. On the 31.12.2008, there were 2.262.009 teletoll subscribers.

In terms of another services, the motorway network was equipped with 35 service areas, 2 rest areas, 69 restaurants and 7 hotels.

#### Investments

The investments in 2008 reached an amount of € 437,2 million. This total includes € 335,8 million in new sections and € 101,4 million allocated to motorways in service (expansion works, rest areas and new facilities).

In 2009, an investment of € 265,2 million is foreseen as follows:

- € 140,1 million in new sections
- € 125,1 million in motorways in service

## Financing

2008 resources are broken down as follows:

Resources	€ Million	%
Bank loans	1530,2	74
State (including UE)	169,6	8
Self-financing	381,7	18

## Traffic

On the total network, the 2008 Average Annual Daily Traffic of 20.960 vehicles was distributed as follows:

Light vehicles: 19.818 (95%)

Heavy vehicles: 1.142 (5%)

The circulation was  $11.884 \times 10^6$  vehicles x km. The GDP growth in 2008 was 0,2 %.

## Tolls

Annual readjustments of toll tariffs take into account the growth of the domestic price index. In 2008 the average of toll tariffs was € 0.062 for light vehicles and € 0.157 for heavy vehicles. The earning average tariff HV/LV was 2,53.

## Revenues

The annual toll revenue in 2008 has reached € 722,7 million, which means a 1% increase from 2007, mainly due to the new motorway sections opened to the traffic.

## Safety

In 2008, 5.825 accidents occurred, including 1.640 personal injury accidents. The number of fatal accidents was 50, involving 57 deads.

Indicator	2008 (Number of accidents/ $10^9$ veh x km)	2008/2007 (%)
Personal injury accident rate	138,0	12
Fatal accident rate	4,2	-11
Rate of dead	4,8	-9

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

Three SCUTs (shadow-toll) concessions, out of seven that actually operate in Portugal, are expected to become real-toll schemes during 2009.

The expansion of the Via Verde System to other areas have progressed beyond the best expectations, such as Parking Lots, Street Parking, Gas Stations and Access Control to Historical Areas, pointing towards a continuous development and innovation future scenario of new service benefits.

The MIGRAR project, responsible for achieving a full interoperability between the Via Verde System and the CEN/TC 278 has already assured the grounds for interoperability between Portuguese and Spanish operators, being that expected to be completed during 2009.

Parallel to the effective achievement of interoperability under the CEN/TC 278, there is a natural tendency (i) to discuss interoperability between DSRC and GPS (presently without an international standard) and (ii) to evaluate the adherence to the 5.9 GHz tech in order to broad the spectrum of communications with other sectors than toll operators.

## **Significant actions already started and foreseen for 2009**

BRISAL opened the last stretch (92 km) of Litoral Centro Concession in 2008.

The Concession Grande Lisboa was awarded in 2007 to LUSOLISBOA. The object of the concession is the design, construction, financing, operation and maintenance of about 25 km of new road along with the maintenance and operation of a further 64 km of existing road in the Lisbon Metropolitan Area.

BRISA won the mandate to construct the Douro Litoral Concession in 2007 through its consortium Auto-Estradas do Douro Litoral (AEDL). Douro Litoral will build 113 km of road around the Porto Metropolitan Area, 65 km of which will be tolled.

The new toll concession, Marão Tunnel, in Tamega and Douro districts was awarded in 2008. The contract is for the design, construction, widening, financing, operation and maintenance of the A4/IP4 connection between Amarante and Vila Real (30 km).

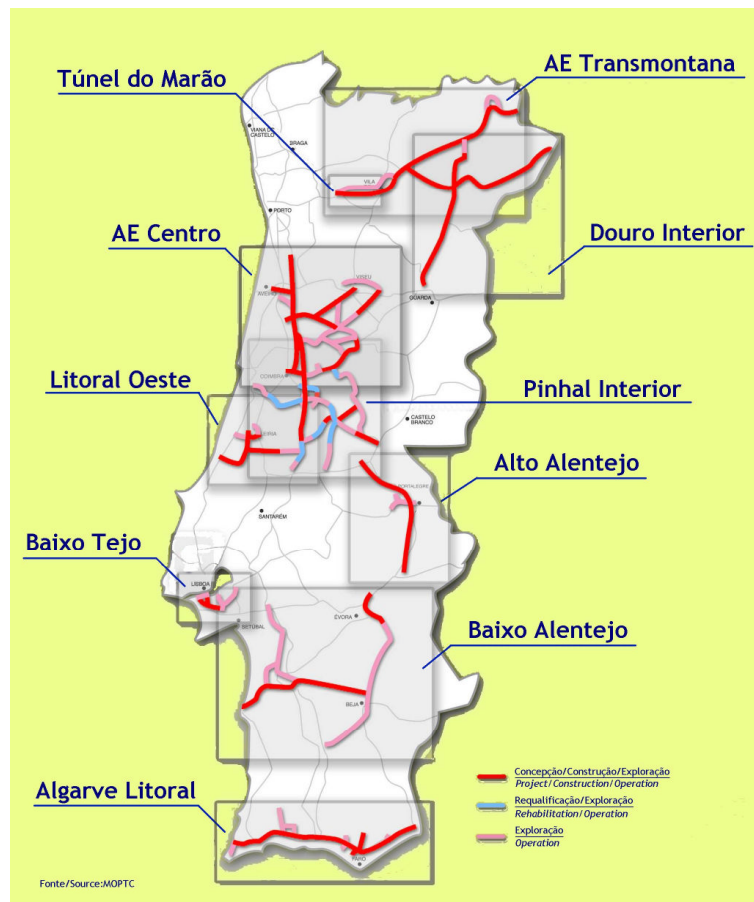
In 2007, the Government decided to launch international public tenders for the design, construction and operation of seven new road concessions: AE Transmontana, Douro Interior, Baixo Alentejo, Baixo Tejo, AE Centro, Litoral Oeste and Alto Alentejo.

The construction and renovation of these roads will be carried out by the private sector operating under the concessions to be awarded by EP – Estradas de Portugal, S.A. (EP), the public under-taking that is now responsible for managing and operating the Portuguese road network on behalf of the State. This decision results from the commitment to provide the necessary conditions to build a road network that contributes to the national economy competitiveness and regional development. These concessions materialize one of the objectives of the new management and financing model of the national road sector reinforcing the public/private partnerships (PPP).

On November 2008, the Douro Interior Concession Contract was signed between the Aenor Group and Estradas de Portugal. This Contract includes the construction of two of the most awaited roads in the Trás-os-Montes Northeast region. The Douro Interior Concession has a total length of 242 kilometres and includes the IP2 construction with a length of 111 kilometres between Macedo de Cavaleiros and Celorico da Beira. Also the IC5 construction with a length of 131 kilometres that will connect Murça to Miranda do Douro. This Sub concession also includes a 10 kilometres stretch of the IP2 which currently connects Macedo de Cavaleiros to Valebenfeito.

The AE Transmontana concession was awarded to the Autoestradas XXI consortium, made up of Globalvía Infraestructuras and the Portuguese firm Soares da Costa, to build and run the Transmontana IP4 motorway between Vila-Real and Bragança, through 18 km of new construction and 114 km of widening works as part of a design, build, finance and operate concession contract. This section of the IP4 lies on the TEN-T network. The concession also includes the rehabilitation and operation/maintenance of an additional 56 km of existing highway beyond the 138 km slated for improvement.

The Baixo Tejo concession will be awarded in the beginning of 2009 to the consortium made up of Brisa, TIIC, Teixeira Duarte, Bento Pedroso, Lena, MSF, Zagope and Alves Ribeiro. This concession is located within the Southern Greater Lisbon area (Almada / Barreiro / Montijo / Alcochete / Trafaria) and comprises 68 km, of which 17 km will be tolled.



## MAIN APCAP KEY FIGURES

<b>Country : PORTUGAL</b>	<b>2008</b>
Network length (km)	1.669,3
2 x 2 lanes (km)	1.269,4
2 x 3 lanes (km)	387,5
2 x 4 lanes (km)	12,4
No. of km in construction	4,6
Forecasts of opening motorway sections in 2009	4,6
Annual toll revenue (€)	722.740.693
Permanent staff	2.336
Average daily traffic (LV) <sup>(a)</sup>	19.818
Average daily traffic (HV) <sup>(a)</sup>	1.142
Average daily traffic (LV+HV) <sup>(a)</sup>	20.960
Total number of accidents <sup>(a)</sup>	5.825
No. of personal injury accidents <sup>(a)</sup>	1.640
No. of dead <sup>(a)</sup>	57
Km travelled (10 <sup>6</sup> x km) <sup>(a)</sup>	11.884
No. of toll plazas	151
No. of lanes	1.139
No. of teletoll equipped lanes	375
No. of teletoll subscribers	2.262.009
No. of services areas	35
No. of rest areas	2
No. of restaurants	69
No. of hotels	7

<sup>(a)</sup> Not available for AEDL and LUSOLISBOA