



In addition to the abovementioned there should be pinpointed that there are new State-level-toll-projects under research such as:

- “Autopista Dos- Mares” (Two Seas Motorway) between Cantabria and Burgos, a 111 km stretch
- “Autopista Radial 1” (Radial 1 Motorway) a 85 km section between Northern Madrid metro area and Segovia
- The enlargement of “Autopista Radial 3” up to Cuenca (52 km).

<b>TOLL MOTORWAYS NETWORK (KM)</b>		
	<b>2007</b>	<b>2008</b>
<b>IN OPERATION</b>	<b>3,334.50</b>	<b>3,334.50</b>
<b>UNDER CONSTRUCTION</b>	<b>77.00</b>	<b>77.00</b>
<b>PLANNING STAGE</b>	<b>350.90</b>	<b>350.90</b>
<b>TOTAL NETWORK</b>	<b>3,762.40</b>	<b>3,762.40</b>

<b>AWARDED TOLLROADS</b>	<b>0</b>	<b>0</b>
--------------------------	----------	----------

<b>SECTIONS UNDER CONSTRUCTION (31 December 2008)</b>		
<b>SECTION</b>	<b>KM</b>	<b>CONCES.</b>
<b>M-203</b>	<b>12.30</b>	<b>Cintra</b>
<b>Eibar-Vitoria</b>	<b>27.70</b>	<b>Bidegi</b>
<b>Alto de las Pedrizas-Torremolinos</b>	<b>37.00</b>	<b>Guadalcesa</b>
<b>TOTAL</b>	<b>77.00</b>	

### **OPENINGS IN 2009**

Vitoria-Eibar AP-1 Toll Road is due to open a final stretch, 27.70 km long during 2009 as well as “Autopista Alto de las Pedrizas – Torremolinos” is bound to be inaugurated at the end of the year.

## **INVESTMENTS**

After the evolution of the Spanish concession system, more and more of the latest projects awarded imply the construction, maintenance and operation of the usual toll sections as well as the building and management of toll free stretches causing initial investments to rise.

## **TRAFFIC LEVELS**

In 2008 the average daily traffic on toll motorways was 23,823 vehicles, 5.12 % lower than the previous year. The ratio of trucks that used the toll motorway network remained at 14%.

	<b>2007</b>	<b>2008</b>	<b>%</b>
<b>Passenger cars ADT</b>	21,486	<b>20,517</b>	<b>- 4.51 %</b>
<b>HGV ADT</b>	3,624	<b>3,306</b>	<b>- 8.78 %</b>
<b>TOTAL ADT</b>	25,110	<b>23,823</b>	<b>- 5.12 %</b>

## **TOLL RATES**

The Government's Central Administration, which awards most of the toll motorways in Spain, applies the system included in Law 14/2000 of December 28<sup>th</sup>. This system takes into account the average Cost of Living Index as well as the traffic levels recorded on the motorways. As a result of that, toll fees increased by 2.53 % during 2008.

Some Regional Governments, except Catalonia, establish other tariffs review policies by solely taking just into account a certain percentage of the Average Cost Living Index.

## **REVENUES**

Despite the economic downturn whose impact resulted in extraordinary decreases of traffic levels during the last quarter of 2008, toll revenues increased slightly less than

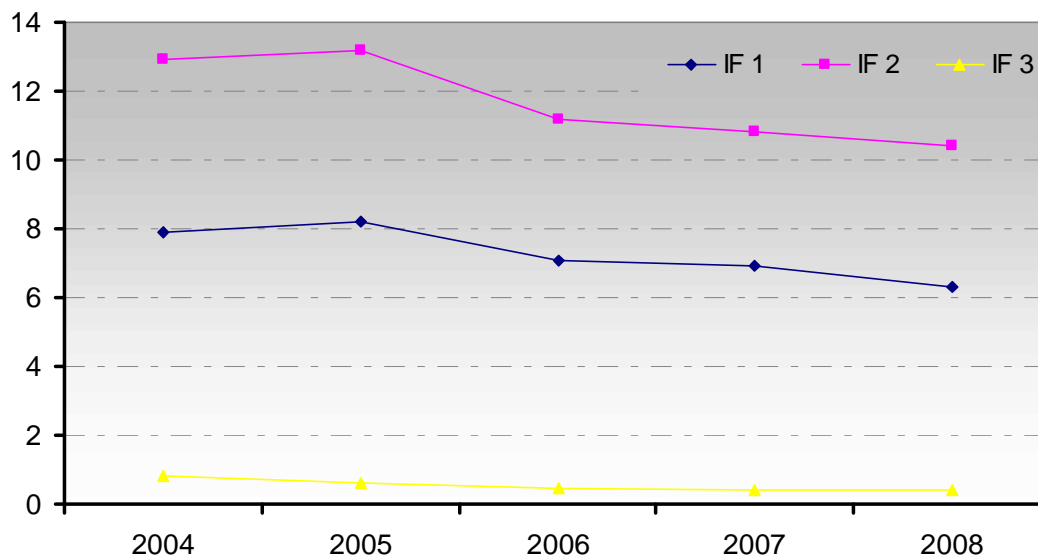
the Spanish economy, reaching 0.27 %, whereas the Spanish GDP grew by 1.2 %. Total toll revenues amounted to 1,997.8 million euros.

## **SAFETY**

Toll motorways continue to be the safest roads in Spain. The evolution of accident rates on the toll road network keeps improving proportionally in relation to the traffic increase, as a consequence of the amendments passed in 30<sup>th</sup> November 2007, referring to Road Safety on the Penal Spanish Code.

	2007	2008
<b>Total number of Accidents</b>	<b>5,788</b>	<b>5,258</b>
<b>Number of Accidents with injuries</b>	<b>1,706</b>	<b>1,508</b>
<b>Number of deaths</b>	<b>103</b>	<b>101</b>
<b>IF 1 (acc. with inj. per 100M./vh.km)</b>	<b>6.9</b>	<b>6.3</b>
<b>IF 2 (injuries per 100 M./vh.km)</b>	<b>10.8</b>	<b>10.4</b>
<b>IF 3 (deaths per 100 M./vh.km)</b>	<b>0.41</b>	<b>0.43</b>

### **5-year trend on Safety**



## **LONG TERM FORECASTS AND TRENDS**

There are three new toll projects under research by the Central Government (mentioned under the chapter Network Length) despite the fact that the Transports Infrastructure Strategic Scheme (PEIT) by the Spanish Ministry of Transport for the period 2005-2020 main priority is to maintain and upgrade current infrastructures through shadow toll schemes.

On their own accord, some regional governments are using a toll system for building high capacity motorways which run within their territory. For example the regional government of Madrid is assessing the environmental impact of building the following stretches:

- R-6 (access road to Madrid city by the Northwest)
- M-50 ring road completion .

## **RELEVANT ACTIONS**

The most important events that occurred during 2008 were those related the consolidation of the national interoperable Electronic Toll Collection system.

The national interoperable Electronic Fee collection (EFC) system, Via T, has registered a positive evolution: in 2008 new toll motorways have started operating since its opening with VIA-T and some existing ones have implemented it, thus, currently (Jan 09) 99% of tolled network uses this ETC system (100% of concessionaries in the Peninsula). Eventually at the end of 2008, almost **a million and four hundred thousand OBUs were distributed**, and yearly increase rates were close to 27%.



As a consequence of such a successful increase, **VIA-T payments are gaining ground against cash**, with 30% and 31% of total, respectively. The percentage of payments with credit cards remains stagnant (39%).

In 2009, VIA-T is in its way to achieve **interoperability with neighbouring countries**.

On one hand, Spanish and Portuguese experts have continued to work on the VIA IBERICA project, whose aim is to achieve a complete compatibility between the national ETC systems, VIA-T and VIA VERDE.

Spanish and French experts have started to work on both countries' ETC systems interoperability. At the moment, interoperability exists in some corridors and more and more projects are being undertaken to increase the number of actors and corridors.

KEY FIGURES

Spain	<b>2008</b>
Network length .....	3,334.50
2 x 2 lanes .....	2,957.76
2 x 3 lanes .....	335.84
2 x 4 lanes.....	40.90
No. of km in construction	77.00
Forecasts of opening motorways section	40.00
Annual toll revenue	1,997,805,020
Permanent staff	5,089
Average daily traffic (LV)	20,517
Average daily traffic (HV)	3,306
Average daily traffic (LV+HV)	23,823
Total number of accidents	5,258
No. of personal injury accidents	1,508
No. of dead	101
Km travelled (10 <sup>6</sup> x km)	23,782
No. of toll plazas	242
No. of lanes	2,364
No. of teletoll equipped lanes	1,734
No. of teletoll subscribers	1,343,689
No. of rest areas (with stations services)	110
No. of rest areas	149
No. of restaurants	105
No. of hotels	7