

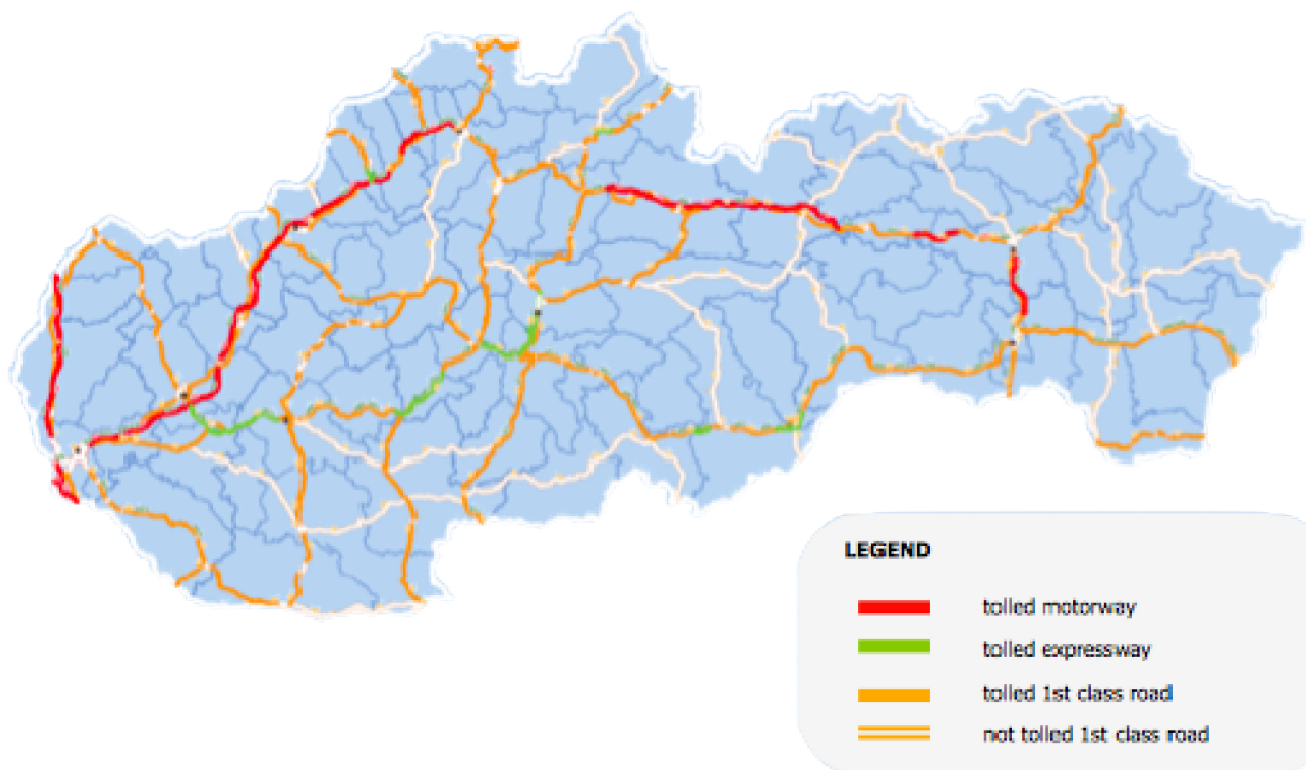
**ASECAP STUDY AND INFORMATION DAYS  
OSLO, 30 MAY – 2 JUNE 2010**

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

***Network length***

On January 1<sup>st</sup>, 2010 the Slovak Republic introduced a multi-lane, free flow electronic tolling system on all motorways and expressways as well as on some 1<sup>st</sup> class roads. In principle all commercial vehicles with a maximum allowable mass extending 3,5 tons are subject to a distance based toll charge. This toll is depending on the road category, the vehicle category, which is established through the number of axles and emission class of the vehicle. Except the electronic tolling system there is still in use also a vignette system for vehicles below 3,5 tones. For these vehicles only motorways and expressways are charged.

**Map of the currently charged road network**



## Currently charged road network in Slovakia

Type of road	Road specification	2008 (km in operation)	2009 (km in operation)
<b>Motorways</b>	D1	271,838	310,3
	D2	69,998	69,998
	D3	0	0
	D4	2,766	2,766
<b>Expressways</b>	R1	99,312	121,3
	R2	0	0
	R3	0	0
	R6	1,382	0 ?
<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	0
	I/61	77,558	77,558
	I/63	61,139	61,139
	I/68	12,827	0
	I/69	10,553	0
	I/73	1,555	1,555
<b>Total length</b>		<b>772,653</b>	<b>777,842</b>

### **Openings in 2010**

NDS is planning to open following sections in 2010:

Name of the section		km
<b>D1</b>	Sverepec - Vrtizer	9,595 (full profile)
	Jablonov - Studenec	5,210 (half profile)
	Studenec - Beharovce	3,323 (full profile)
	Svinia – Presov, zapad	7,95 (full profile)
<b>R1</b>	Zarnovica – Sasovske Podhradie II.	8,372 (full profile)
<b>R3</b>	Horna Stubna - bypass	4,321
	Trstena - bypass	7,200 (full profile)
<b>R4</b>	Svidnik bypass	4,573 (half profile)
<b>Total length in km</b>		<b>50,544</b>

## **Investments**

Narodna dialnicna spolocnost, a.s. (NMC) invested to new sections construction in **2009**:

**41 300 000 €**

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

**30 049 000 €**

For **2010** is planned for new sections construction:

**104 400 000 €**

and for reconstruction, maintenance and operation:

**41 489 000 €**

## **Building sites in operation as for the 31.12.2009**

<b>Name of the section</b>		<b>km</b>
<b>D1</b>	Sverepec – Vrtizer I, II	9,595
	Jablonov – Studenec (half profile)	5,210
	Studenec - Beharovce	3,323
	Svinia – Presov - west	7,950
<b>D3</b>	Skalite – boarder crossing SR/PR	3,175
<b>D4</b>	Crossroad – Stupava, south	3,200
<b>R1</b>	Zarnovica – Sasovske podhradie II	8,372
<b>R3</b>	Horna Stubna bypass	4,321
	Trstena bypass	7,200
<b>R4</b>	Svidnik bypass	4,573
<b>Total length in km</b>		<b>56,919</b>

## New building sites to be opened in 2010

<b>Name of the section</b>		<b>km</b>
<b>D1</b>	Jablonov – Studenec (II. Profile)	5,210
<b>D3</b>	Zilina, Strazov – Zilina, Brodno	4,250
	Žilina, Brodno – Kysucké Nové Mesto	10,118
<b>R2</b>	Ziar nad Hronom bypass	6,594
<b>R4</b>	Kosice - Milhost	15,800
<b>Total length in km</b>		<b>41,972</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
5. other (rent, services...)

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

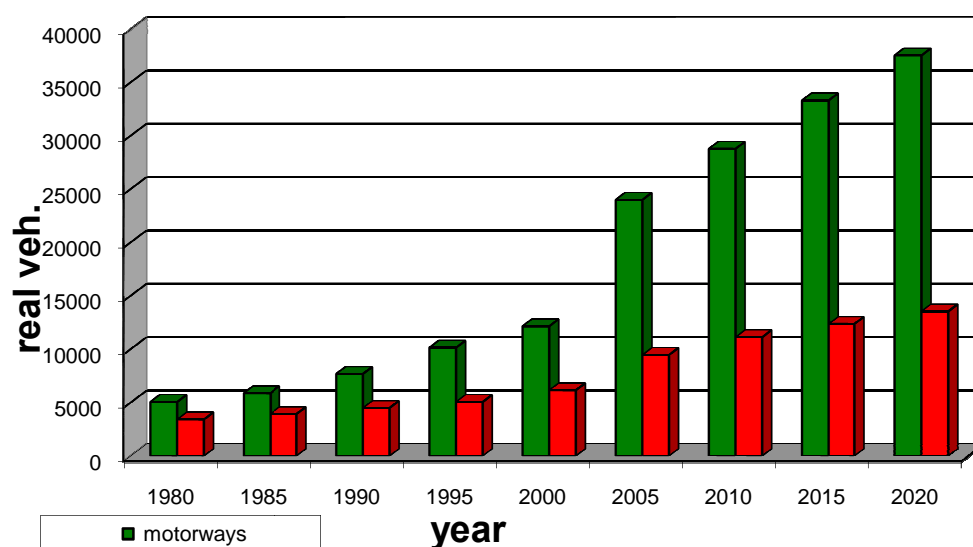
### *Traffic*

<b>Year/GDP</b>	I. quarter (mil. €)	II. quarter (mil. €)	III. quarter (mil. €)	IV. quarter (mil. €)
<b>2008</b>	15 601,74	16 721,97	17 658,43	17 348,90
<b>2009</b>	14 448,90	15 770,2	17 035,30	

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

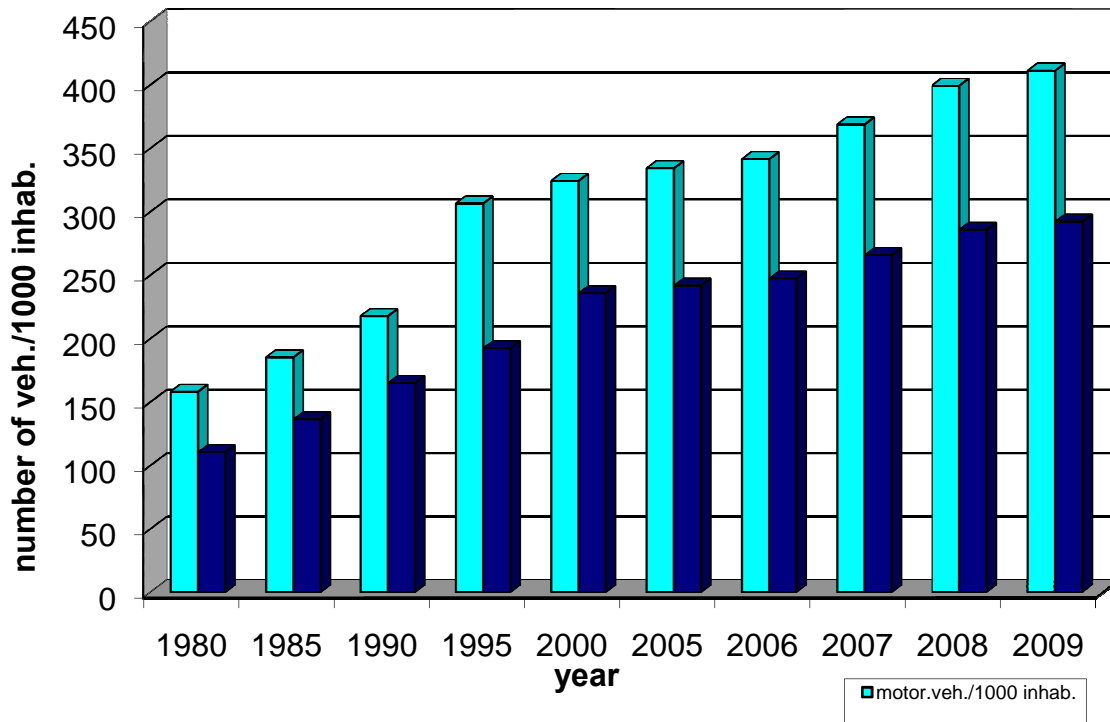


<b>Year</b>	<b>Number of inhabitants (thous.)</b>	<b>No. of vehicles (thous.)</b>	<b>No. of light vehicles (thous)</b>	<b>motor.veh./ 1000 inhab.</b>	<b>passenger cars/1000 inhab.</b>
<b>1980</b>	4996	790	552	158	110
<b>1985</b>	5177	959	706	185	136
<b>1990</b>	5311	1156	876	218	165
<b>1995</b>	5368	1645	1033	306	192
<b>2000</b>	5403	1752	1274	324	236
<b>2005</b>	5389	1801	1303	334	242
<b>2006</b>	5393	1841	1334	341	247
<b>2007</b>	5397	1990	1434	369	266
<b>2008*</b>	5405	2158	1545	399	286
<b>2009**</b>	5422	2229	1584	411	292

\*no. of inhabitants in 2008 as of 30.6.2008

\*\*no. of inhabitants in 2009 as of 30.9.2009, no of vehicles in 2009 as of 30.9.2009

## 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 - vignettes***

In 2009, vehicles were 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 for the year 2009 were:

1. One-year vignette
2. 9 – month vignette (from 1.1.2009)
3. Month vignette
4. Week vignette
5. One day vignette (only for vehicles over 3,5 t)

## Vignettes for 2009

<b>One - year vignettes</b>		
1	Motor vehicles up to 3,5 t, including trailed vehicle	36,5 €

<b>9 - month vignettes</b>		
2	Motor vehicles from 3,5 to 12 t, including trailed vehicle	495 €
3	Motor vehicles over 12 t, including trailed vehicle	810 €

<b>Month vignettes</b>		
1	Motor vehicles up to 3,5 t, including trailed vehicle	9,9 €
2	Motor vehicles from 3,5 to 12 t, including trailed vehicle	55 €
3	Motor vehicles over 12 t, including trailed vehicle	90 €

<b>Week vignettes</b>		
1	Motor vehicles up to 3,5 t, including trailed vehicle	4,9 €
2	Motor vehicles from 3,5 to 12 t, including trailed vehicle	24 €
3	Motor vehicles over 12 t, including trailed vehicle	40 €

<b>One-day vignettes</b>		
1	Motor vehicles from 3,5 to 12 t, including trailed vehicle	8,6 €
2	Motor vehicles over 12 t, including trailed vehicle	10 €

Due to the implementation of electronic tolling system in 2010, in Slovakia there are only vignettes for vehicles up to 3,5 tones:

1. One-year vignette
2. Month vignette
3. Week vignette

## **Revenues**

<b>Vignettes</b>	<b>2008</b>	<b>2009</b>	<b>% growth</b>
One-year	45 274 935,4	23 173 375,5	- 48,8 %
9 - month	0	11 391 795	100%
Month	5 777 992,4	12 410 406,1	114,8%
Week	11 953 571,7	12 353 824,5	3,35%
One-day	27 371 582,7	29 153 729	6,51%
<b>Total</b>	<b>90 378 082,2</b>	<b>88 483 130,1</b>	<b>- 2,1%</b>

	<b>2008</b>	<b>2009</b>	<b>% growth</b>
Below 3,5 t	35 558 650,3	37 891 421,1	6,56%
3,5 – 12 t	9 281 826,4	9 278 829	- 0,03%
Over 12 t	45 537 605,5	41 312 880	- 9,28%
<b>Total</b>	<b>90 378 082,2</b>	<b>88 483 130,1</b>	<b>- 2,1%</b>

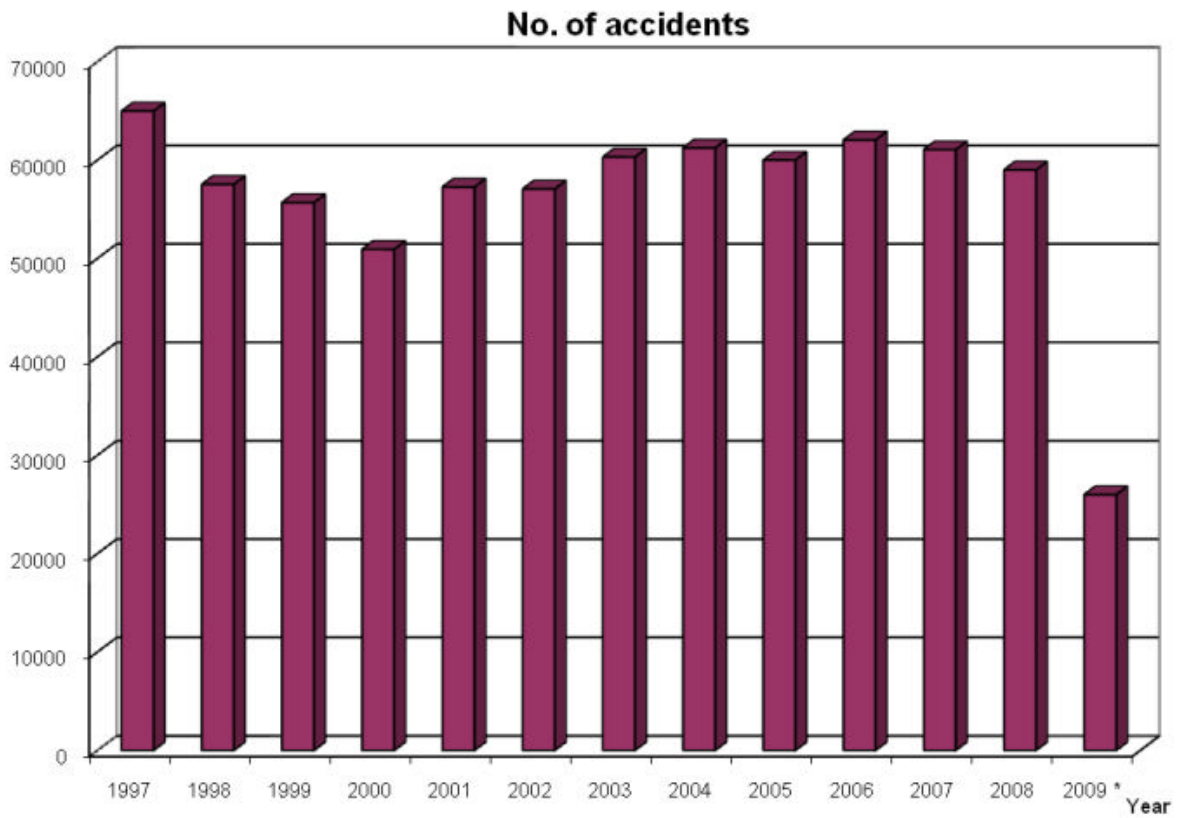
There was a total loss in revenues – **2,1 %** comparing year 2009 with 2008.

Increasing of revenues from vignettes for passenger cars (below 3,5 t) was caused by increasing of traffic volume mainly due to an anti crises action of a government – state grant for purchasing a new vehicle in case the old one was scraped. The revenue from vehicles over 3,5 t decreased due to an economic crises and an effort of carriers to use heavy vehicle much more effective.

## **Safety**

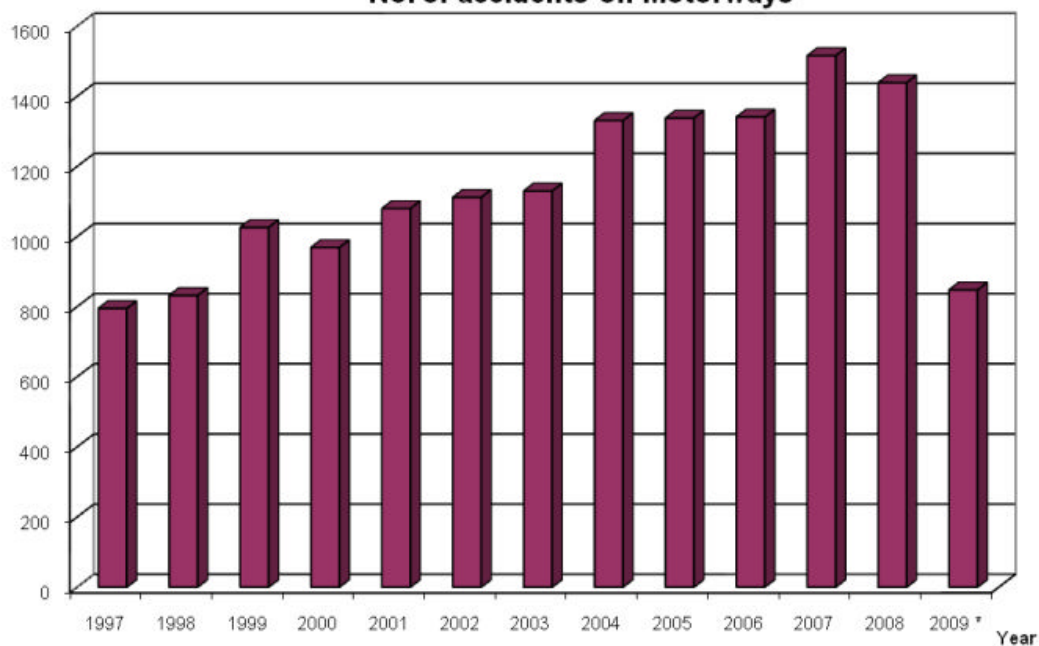
Table below shows number of all accidents including fatal, seriously and slightly injured on whole road network in Slovak Republic. Significant reduction in number of accident was caused by a change of legislation. Legislation increased the minimum amount of damage, when police forces have to be called. It means that accidents with a little damage were not solved by police forces but through insurance company directly.

Year	No. of accidents	Fatal injury	Seriously injured	Slightly injured	Year	No. of accidents	Fatal injury	Seriously injured	Slightly injured
1997	64977	788	3879	9694	2004	61233	603	2157	9033
1998	57532	819	3124	9778	2005	59991	560	1974	8516
1999	55683	647	2684	8782	2006	62040	579	2032	8660
2000	50932	628	2204	7890	2007	61051	627	2029	9283
2001	57258	614	2367	8472	2008	58996	559	1792	9192
2002	57060	610	2213	8050	2009	25989	347	1408	7126
2003	60304	645	2162	9158					

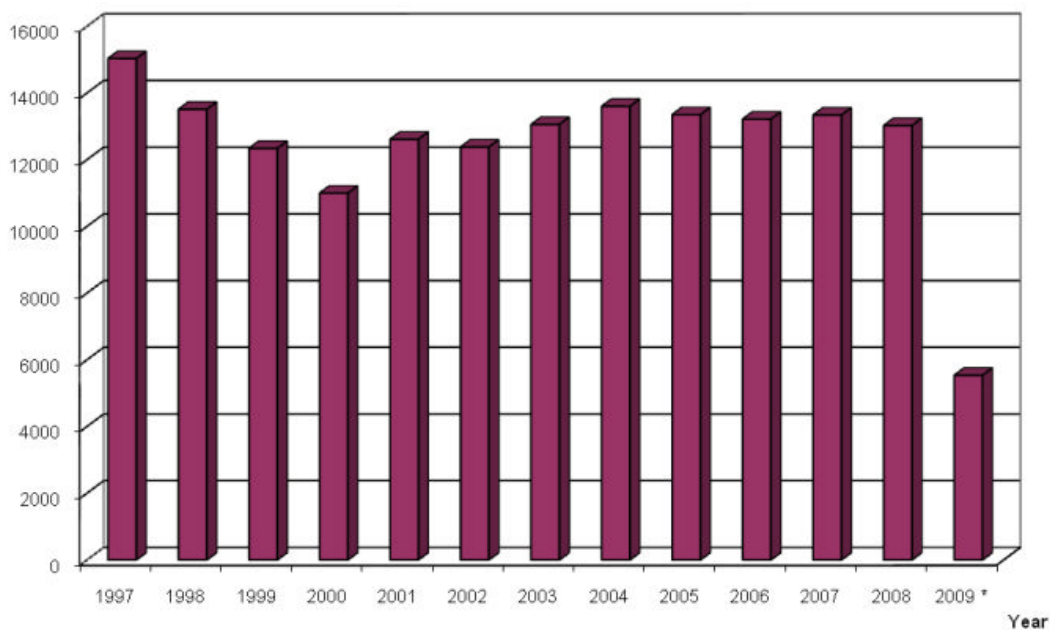


Year	No of accidents		Year	No of accidents	
	Motorways	Ist class roads		Motorways	Ist class roads
1997	795	15 034	2004	1331	13 601
1998	832	13 514	2005	1338	13 352
1999	1026	12 342	2006	1341	13 218
2000	969	10 998	2007	1516	13 341
2001	1080	12 614	2008	1439	13 024
2002	1112	12 383	2009	848	5536
2003	1130	13 058			

No. of accidents on Motorways

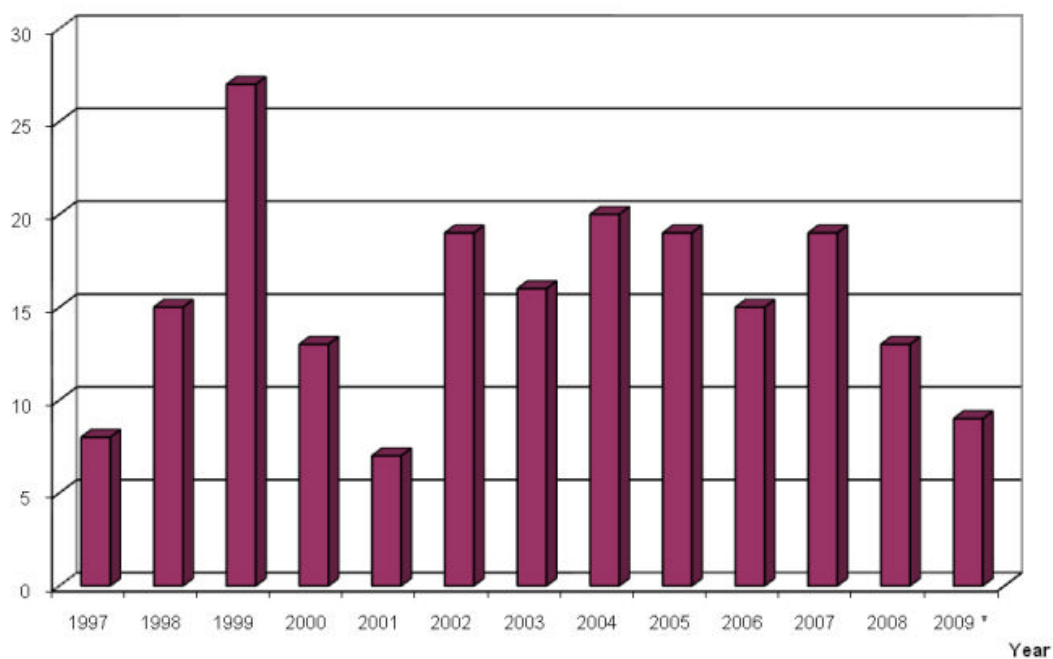


No. of accidents on Ist class roads

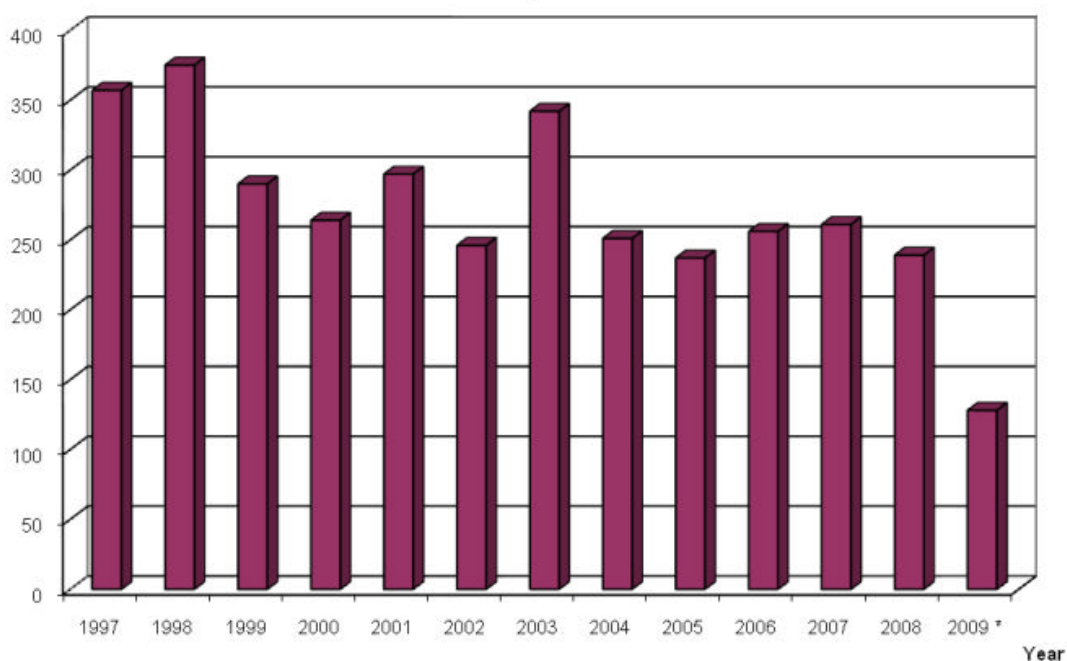


Year	No. of fatal injuries		Year	No. of fatal injuries	
	Motorways	Ist class roads		Motorways	Ist class roads
1997	8	357	2004	20	251
1998	15	375	2005	19	237
1999	27	290	2006	15	256
2000	13	264	2007	19	261
2001	7	297	2008	13	239
2002	19	246	2009	9	128
2003	16	342			

No. of fatal injuries on Motorways



No. of fatal injuries on first class roads



<b>Year</b>	<b>Motorways in operation (km)</b>	<b>Accidents (number)</b>	<b>Fatal injury</b>	<b>Seriously injured</b>	<b>Slightly injured</b>	<b>Property damage (mil. €)</b>
<b>2005</b>	325,375	1338	19	47	132	6,2
<b>2006</b>	327,505	1341	15	42	166	6,3
<b>2007</b>	363,560	1516	19	32	129	6,54
<b>2008</b>	382,767	1439	13	24	130	7,62
<b>2009</b>	388,9	848	9	27	121	6,48

### ***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 rural areas. On tables are shown plans for construction of expressway and motorway network in Slovakia.

	31.12.2009 (km)	<b>Forecasted annual growth (km)</b>				
		2010	2011	2012	2013	2014
motorways		26,67	11,72	28,94	11,14	112,19
expressways		17,8	43,12	95,56	151,83	171,93

	<b>Forecasted annual growth (km)</b>					
	2015	2016	2017	2018	2019	2020
motorways	3,5	3,4	0	0	0	0
expressways	170,6	148	22,65	0	114,7	0

This table does not contain sections of motorway D1 and expressway R1 which are constructed by PPP projects. PPP projects are under the patronage of Ministry of transport, posts and telecommunications of Slovak republic. From 2009, 45,7 km long section of expressway R1 is being constructed and at the moment there are preparatory works on motorway D1 in the length of nearly 100 km.

### MAIN ASECAP KEY FIGURES

Country: Slovak republic	2009
Network length .....	777,842 km
2 x 2 lanes .....	(383,06 km - motorways)
2 x 3 lanes .....	
2 x 4 lanes.....	
No. of km in construction	56,911 km
	(32,453 km - motorways)
Forecasts of opening motorways section	50,544 km
Annual toll revenue	88 483 130,1 €*
Permanent staff	1 192
Average daily traffic (LV) on motorways	23 929
Average daily traffic (HV) on motorways	5 140
Average daily traffic (LV+HV) on motorways	29 069
Total number of accidents	848
No. of personal injury accidents on motorways	148
No. of dead on motorways	9
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)	20
No. of rest areas	55
No. of restaurants	32
No. of hotels	2

\* This figures includes the revenue from vignettes on the whole charged network, including motorways, expressways and selected 1<sup>st</sup> class roads