Canvas of the National Report
to be presented by each delegation
during the ASECAP Study and Information Days
Athens, 26 - 28 May 2014

Network length

Indicate the length of the tolled Motorways network in 2013, as well as the growth of the network in 2013 compared with 2012. Eventually, please precise the length of the non-tolled network in 2013 and its foreseen growth in 2014. 42km

Openings in 2014

Indicate the foreseen openings for 2014 (beginning, end and number of kilometres of each section). Nil

Investments

Indicate the amount of the investments in Euros for 2013; give the foreseeable amount for 2014, also indicating, if possible:

- new sections Nil
- Roadchef lease our motorway service station under a 25 year term. The arrangement is under a turnover lease with quarterly guarantees of rent with top up at year end. The entire interior is being refurbished to provide additional searing eating venues, enhanced retail and a two new facilities for Costa Coffee. The investment is being made by the tenant in exchange for limited rent free periods .

Indicate the number of kilometres of the building sites in operation as for the 31.12.2013 as well as the number of kilometres of the **new** building sites to be opened in 2014. Nil

Financing

Indicate the origin of the financing system (loans, State and local authorities grants, self-financing).

Traffic

Indicate the GDP (gross domestic product) growth in 2013 (in comparison to 2012) in your country, to be compared with the traffic growth on the motorways during the year 2013 (in comparison to 2012).

Average daily traffic

2012	35,699
2013	40,236

In order to calculate the traffic growth, you should take into account the average kilometric intensity registered over a "stable network", i.e. on the motorways network in service (as for the 31.12.2013) since more than 3 years.

If another *ratio* is indicated, you will precise which ratio we are talking about (either average kilometric intensity on the existing network, either all the travels expressed in km/vehicles).

Tolls

Indicate the value of the average tariff per kilometre in Euro as for the 31.12.2013:

- for light vehicles commercially sensitive information
- for heavy loads of 5 axles and more commercially sensitive information

Indicate, for each of the above mentioned categories, the toll growth, during the year 2013, in percentage, in comparison with the toll previously in force (indicating as well since when that toll was in force at the moment of its rise) and in which period of the year this rise occurred.

Toll rate (day rate)	1/3/11	1/3/12	1/3/13	growth 2013
Light vehicles	£5.30	£5.50	£5.50	£5.50
Heavy vehicles	£10.60	£11.00	£11.00	£11.00

Indicate also the cost of living growth (variation of the price index) in 2013.

Increase in RPI = 3.05%

Revenues

Indicate the revenue received in 2013, in Euro (or national currency if your country does not belong to Euroland, indicating the exchange rate with the Euro) providing just the main revenue, i.e. the toll product, all taxes deducted.

	2012	2013
GBP	58,051,000	65,905,000
Rate	1.2337	1.77625
Euro	64,400,000	77,600,000

Indicate the increasing percentage in the national currency of this revenue between 2012 and 2013.

Comment the registered trend.

This past year has seen confidence returning to the UK. GDP is recovering and hence the propensity to pay tolls.

Our recovery is due to a number of factors

- We are experiencing uptake in view of the roadworks on the competing free section

- Overnight closures on the competing section has led to drift back to the toll road

- We have decided not to increase toll rates last year but maintain present levels and create more efficiencies to give the customer a premier experience

- In the year we engineered a major free trial with commercial traffic who are members of the RHA. This has provided a significant uptake as well as stimulating interest from regular custom who have enhanced their patronage. We have been able to sign volume deal and sign up new accounts.

- A similar if not more significant uptake has been seen across all classes, a sign of the upsurge in the UK economy rebounding from recession

- We expect the trend to continue before some deterioration in quarter 2 in 2014 as a result of the competing works completing

Safety

Indicate the following main *ratios*:

	In number for one billion kilometres travelled in 2013	Variation in % in 2012/2013
Personal injury rate	33.30	+29.67%
Fatal accident rate	1.75	N/A
Rate of dead	1.75	N/A

Eventually comment the registered trend.

Long-term forecasts and tendencies

Indicate the official long-term forecasts (within 15 years) for the development of the motorways tolled and non-tolled network.

Indicate the actual tendencies concerning the above mentioned development, expressing also the relations with the other transport modes (namely the rail transport).

There remains no likelihood of additional toll roads in the UK. The current plans are to utilize the hard shoulder on the majority of motorways. More managed motorways now branded as SMART MOTORWAYS are envisaged to be completed and commenced within the five year programme

Plans to introduce tolling to a yet to be provide bypass on the A14 have been abandoned.

The Highways Agency has been awarded substantial funds to carry out these schemes and promote Super Pinch Point programmes to alleviate congestion across the network.

There is no apparent need to utilize the private sector to deliver these schemes.

The UK continue to plan to alleviate congestion by revitalising the rail network and are finalising a hybrid bill for the development of high speed rail between London and Birmingham. This is to be developed by 2026. Current plans are to link this to Birmingham airport and Heathrow.

The opportunity then exists to extend the rail network to Manchester.

This and competing measures introduced by the Government will affect long term traffic flows on the M6toll.

UK Government are considering further measures to tax the motorist and charge for the use of motorways.

Significant actions already started (and/or to be achieved in 2013) and foreseen for 2014.

Indicate the 2 or 3 main elements on which the motorways action has been focused in 2013 (or will focus in 2014), (for instance: teletoll collection, tariff's liberalisation, urban motorways, public and decision makers sensibilization, environment, etc....).

We remain focused on action to relinquish the need to develop on extension to the M54 corridor.

Pictogram signs are completed and will now be improved with the introduction of clearly defined message sets to assist the public.

Contactless card technology has been fully introduced and continues to achieve excellent results of 9% of overall transactions, saving the customer time and the business money.

The year was dominated in discussion with our bank syndicate to restructure our loans. This was completed successfully in December under an amend and extend arrangement pushed out until 2020.

MAIN ASECAP KEY FIGURES

Country: UK	2013
Network length .... 2 x 2 lanes .... 2 x 3 lanes .... 2 x 4 lanes.............................. 2 x 5 lanes .... 2 x 6 lanes	42km 0.5km 38km 3km 0.5km 0.15km
No. of km in construction	Nil
Forecasts of opening motorways section	Nil
Annual toll revenue	77,600,000
Permanent staff	130
Average daily traffic (LV)	36425
Average daily traffic (HV)	3811
Average daily traffic (LV+HV)	40236
Total number of accidents	144
No. of personal injury accidents	19
No. of dead	1
Km travelled (10^6 x km)	570.55
No. of toll plazas	6
No. of lanes	45
No. of teletoll equipped lanes	40
No. of teletoll subscribers	43087
No. of rest areas (with stations services)	1
No. of rest areas	1
No. of restaurants	1
No. of hotels	1