

**HUNGARY**  
**GENERAL REPORT 2012**  
**41<sup>st</sup> ASECAP STUDY AND INFORMATION DAYS**  
**26 May – 28 May 2013, Dubrovnik**

**The Network**

Length of the motorway network in Hungary as of 31 December 2012: 1.111 km.

Length of the motorway sections operated by ÁAK Zrt. (State Motorway Management Co. Ltd.): 740 km. State Motorway Management Company is responsible for the operation and maintenance of M1, M3, M30, M31, M35, M43, M7, M8 Motorways; M5 Motorway between sections 13-17.4, M6 Motorway between sections 14-22,3 and several expressways.

The length of the Motorway and tolled network in Hungary (see details and maps below) has not change in the year 2012.

AKA Zrt. (Alföld Concession Motorway Co. Ltd.) is a Concession Company and responsible for the operation and maintenance of M5 Motorway, total of 156,6 km.

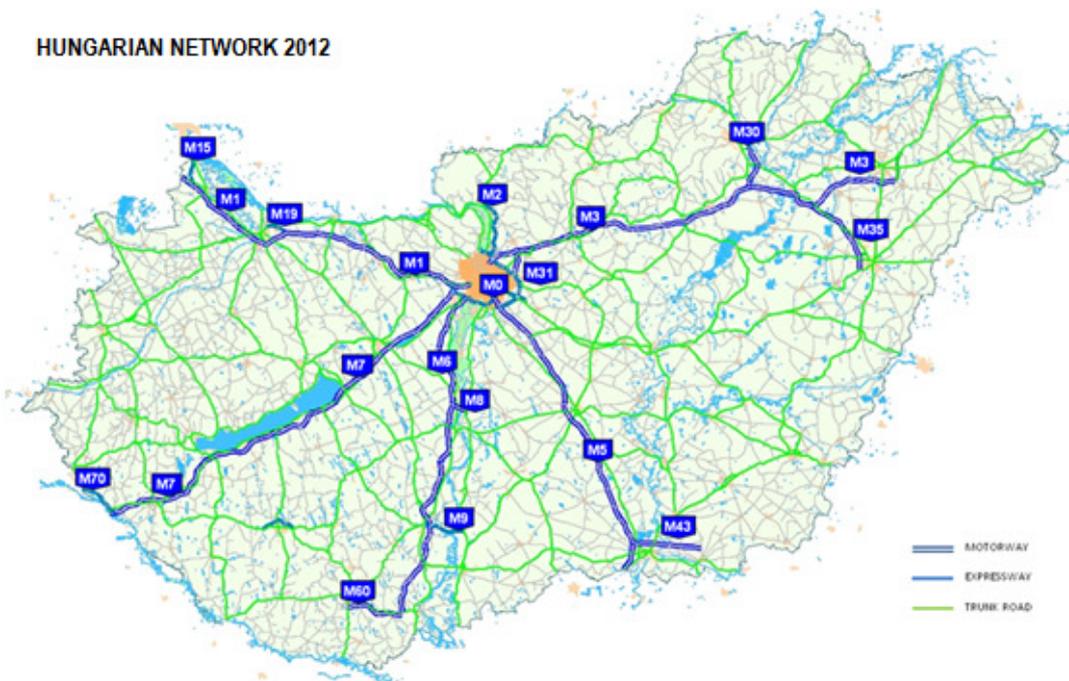
DAK Zrt. (Danube Concession Motorway Co. Ltd.) is a Concession Company and responsible for the operation and maintenance of M6 between sections 22+150 – 76+200 and M8 between sections 5+750 – 10+300 were opened to traffic on 11 June 2006. No more sections are foreseen at the moment to be included in this Concession.

MAK Zrt. (Mecsek Motorway Concession Private Company Limited by Share) is a Concession Company and responsible for the design, construction, operation and maintenance, and as well as the financing of the these activities on the following motorway sections: M6 Motorway section between Szekszárd-Bóly and M60 Motorway section between Bóly-Pécs, as well as the M6/M9 interchange, total of approx. 80 km motorway, including 4 twin tube tunnels (altogether 6.026m), 9 viaducts, 2 operation and maintenance centres, 3 simple rest areas, 1 complex rest area with fuel station. The Motorway was opened for traffic in March 2010.

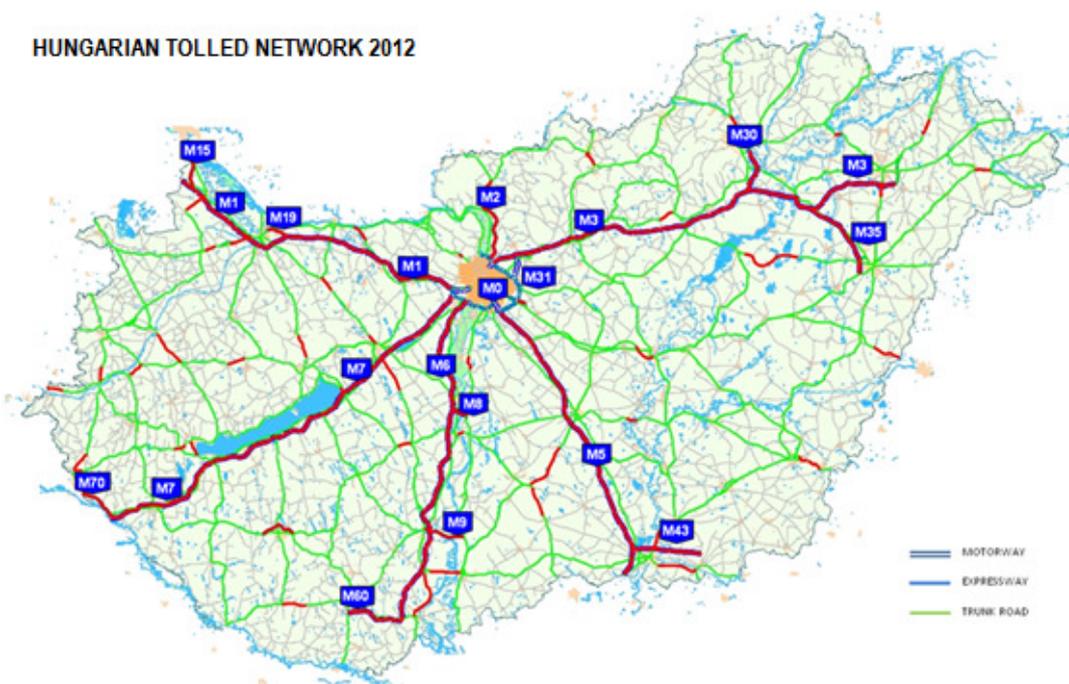
TAK Zrt. (M6 Tolna Motorway Concession Ltd.) is a concession company responsible for the design, construction, finance, operation and maintenance of M6 motorway between between 76+200 – 141+300 were opened to traffic on 31 March 2010.

No more sections are foreseen at the moment to be included in this Concession.

### HUNGARIAN NETWORK 2012



### HUNGARIAN TOLLED NETWORK 2012



Categories	Motorways	Expressways	Trunk Roads	Total
(Free for all)	(46 km)	(81 km)	(6,086km)	(6,213 km)
D1-4 Charged	948 km	0 km	0 km	948 km
D2-4 Charged	117 km	113 km	462 km	692 km
Total Charged	1065 km	113 km	462 km	1,640 km
(Total)	(1111 km)	(194 km)	(6,548 km)	(7,853 km)

### Foreseeable Openings in 2013

Road No.	Location	Beginning	End	Length (km)
M0 (expressway)	Widening to 2x3 lanes (2nd carriageway) main road Nr. 51 – M6	12+140	23+200	11
M0 (expressway)	New alignment between main road Nr. 51 - M5	23+200	29+500	6,3
M3	Nyíregyháza - Vaja (main road Nr. 49.)	234+238	268+000	33,8

### Foreseeable Openings in 2014

Road No.	Location	Beginning	End	Length (km)
M2 (expressway)	2nd carriageway (widening to 2x2 lanes) M0 – Vác	17+850	37+100	19,2
M3	Vaja (main road Nr. 49.) - Vásárosnamény	268+000	279+900	11,9
M30	main road Nr. 3 - main road Nr. 306.	29+200	30+200	2
M43	Makó – border station	34+600	57+800	23,2

### Foreseeable Openings in 2015

Road No.	Location	Beginning	End	Length (km)
M0 (expressway)	M1-M7	0+340	2+840	2,5
M4-M8	junction	90+875	96+055	5,2
M4	Abony - Törökszentmiklós	96+055	125+000	28,9
M85 (expressway)	M1 - Enese	0+000	6+800	6,8
M85 (expressway)	Enese - Csorna	13+800	20+800	7
M85-M86	Csorna bypass road	20+800	27+000	6,2
M86 (expressway)	Szeleste - Csorna	98+300	139+165	40,9

## **Investments of the Concession Companies**

AKA: No more sections are foreseen to be included in this Concession. Foreseeable investments are under negotiation like expansion of rest area and new facilities along the motorway.

DAK: No more sections are foreseen to be included in the Concession.

TAK Zrt. (Tolna Concession Motorway Co. Ltd.): No more sections are foreseen to be included in this Concession.

MAK Zrt. (Mecsek Concession Motorway Co. Ltd.): No more sections are foreseen to be included in the Concession. Invested amount in 2012 0,8 m€, foreseeable invested amount in 2013 – 1,2 m€ in the form of heavy maintenance. No expansion was performed and it is not foreseen, but ensuring the high quality standards of the pavement and the vicinity of the road and its facilities.

## **Financing**

The road user charging scheme is operated by State Motorway Management Co. Ltd. (ÁAK Zrt.) means of e-vignettes and all of the income is used in a closed financial system solely for the operation, maintenance and reconstruction mainly of the charged network. The collected user charges are transferred to the Road Budget of the State which is managed by CCTD (Coordination Centre for Transport Development). The user charging services are financed through a contract between the State Motorway Management Company and CCTD.

DAK: Notes issued on the financial markets and loan from EIB, both guaranteed by a monoline insurer.

MAK: Project is financed by a group of lenders and in line with the Concession Agreement MAK receives revenues from the State in form of availability fee during the operation period.

TAK: Notes issued on the financial markets and loan from EIB, both guaranteed by a monoline insurer.

## Traffic

- **ÁAK:** The traffic output was 6208\*10<sup>6</sup> vehicle km in 2012; and 6504\*10<sup>6</sup> vehicle km in 2011. The decrease (2012/2011 years) was 4,55 %.
- **DAK:** The traffic output was 235\*10<sup>6</sup> vehicle km in 2011 for the M6-M8 in total; and 217\*10<sup>6</sup> vehicle km in 2012. The decrease (2011/2012 years) was -8,29%.
- **TAK:** The traffic output was 168,6\*10<sup>6</sup> vehicle km in 2011 for the M6 in total; and 158,5\*10<sup>6</sup> vehicle km in 2012. The growth (2011/2012 years) was - 5,99%.
- **MAK:** Annual GDP growth is not yet officially published; approximately -1,4% expected. As the section operated by MAK is opened on 31 March 2010 we cannot speak about “stable network”. Please find below a table with the traffic figures of 2011 and 2012. Figures are in number of vehicles and are annual average daily traffic.

Year	Light	Heavy	Total
2011	3.840	780	4.620
2012	3.440	756	4.196
Variation 2012/2011	-10,42%	-3,08%	-9,18%

## Tolls (User Charges)

### Light vehicles, D1 category (max. permissible gross laden weight ≤ 3,5 tons)

Vignette type	Vignette prices in 2011	Vignette prices in 2012	Changes EUR /HUF
Yearly	146 EUR / 40.000 HUF	154 EUR / 42.980 HUF	5% / 7%
Monthly	16 EUR / 4.500 HUF	17 EUR / 4.780 HUF	4% / 6%
Weekly (10days)	10 / 2.750 HUF	11 EUR / 2.975 HUF	6% / 8%
4 Days	6 / 1.650 HUF	cancelled	cancelled

### Light commercial vehicles, D2 category (3,5 tons < max. permissible gross laden weight ≤ 7,5 tons)

Vignette type	Vignette prices in 2011	Vignette prices in 2012	Changes EUR /HUF
Yearly	420 EUR / 115.000 HUF	444 EUR / 123.975 HUF	6% / 8%
Monthly	47 EUR / 13.000 HUF	50 EUR / 13.970 HUF	5% / 7%
Weekly (10days)	28 EUR / 7.750 HUF	30 EUR / 8.255 HUF	4% / 7%
Daily	11 EUR / 3.000 HUF	12 EUR / 3.375 HUF	10% / 13%

**Medium commercial vehicles, D3 category**  
**(7,5 tons < max. permissible gross laden weight ≤ 12 tons)**

Vignette type	Vignette prices in 2011	Vignette prices in 2012	Changes EUR /HUF
Yearly	628 EUR / 172.000 HUF	663 EUR / 184.985 HUF	5% / 8%
Monthly	69 EUR / 19.000 HUF	73 EUR / 20.370 HUF	5% / 7%
Weekly (10days)	43 EUR / 11.750 HUF	45 EUR / 12.600 HUF	5% / 7%
Daily	11 EUR / 3.000 HUF	12 EUR / 3.375 HUF	10% / 13%

**Heavy trucks, D4 category**  
**(all motor vehicles that do not fall in categories D1, D2 or D3)**

Vignette type	Vignette prices in 2011	Vignette prices in 2012	Changes EUR /HUF
Yearly	785 EUR / 215.000 HUF	841 EUR / 234.950 HUF	7% / 9%
Monthly	88 EUR / 24.000 HUF	92 EUR / 25.785 HUF	5% / 7%
Weekly (10days)	54 EUR / 14.750 HUF	57 EUR / 15.875 HUF	6% / 8%
Daily	11 EUR / 3.000 HUF	12 EUR / 3.375 HUF	10% / 13%

The above specified prices are including the VAT and the exchange rates are applied according to the 1999/62/EK directive methodology.

The average price index in 2012 was 5,7%, in the country.

Nationwide e-vignette is valid for all motorways in Hungary for all categories, plus for all expressways for D2-D3-D4 categories, plus on some trunk road sections for all goods vehicles.

## **User Charge Revenues and other revenues (net)**

On the basis of the Concession Agreement between the Republic of Hungary and AKA Zrt., DAK Zrt. and TAK Zrt., the concession companies receive revenues from the State in form of availability payment. The availability payment is paid every month and can change subject to the availability of the motorway for motorists.

MAK: The availability fee payment is paid every month and can change subject to the availability of the motorway for motorists.

ÁAK Zrt. reached the following net revenues:

Revenues	2011	2012	Index
in HUF	46.003.725.000	52.834.468.305	115 %
in EUR*	167.989.000	189.228.424	113 %

Note: The above sums represents the user charge incomes. The excess charges collected from illegal users (about 1.5-2% of the total traffic) adds a 3% extra amount to these.

The change in revenues were not influenced by the user charges as they have not changed.

Sold vignettes	2011	2012	Index
for light vehicles	13.113.890 pcs	10.080.453 pcs	77 %
for heavy vehicles	4.490.756 pcs	4.328.972 pcs	96 %
Total	17.604.646 pcs	14.409.425 pcs	82 %

State Motorway Management Co. Ltd. (ÁAK Zrt.) sold significantly less (-18%) electronic vignettes in 2012 than in the previous year due to the removal of the 4 days vignettes in the light vehicles category. These permits were typically substituted by the 10 days or monthly vignettes but they were fewer in terms of numbers sold. A little rearrangement could be observed between category D2 (3,5 to 7,5 tons) and D3 (7,5 to 12 tons) in favour of the latter; while the sales of the most important truck category D4 (12 tons and above) showed a 4% decrease as well as the entire heavy vehicle segment. The number of vignettes sold in category D1 (light vehicles) decreased by 23%, what can be explained by the removal of the 4 days vignettes.

The length of the motorways operated by State Motorway Management Co. Ltd. (ÁAK Zrt.) did not change in 2012, while the vignettes prices increased by 8.5% averagely.

DAK: Received revenues in 2012: 49,43 m€

MAK does not wish to public revenue figures. More than 98% of the revenue is the Availability fee income defined in the Concession Agreement throughout the 30 years concession period.

TAK: Received revenues in 2012: 40,77 m€

## Safety

Accident data	ÁAK Zrt.		AKA Zrt.		DAK Zrt.		TAK Zrt.	
	In number for one billion km-s travelled in 2012	Variation in % in 2011/2012	In number for one billion km-s travelled in 2012	Variation in % in 2011/2012	In number for one billion km-s travelled in 2012	Variation in % in 2011/2012	In number for one billion km-s travelled in 2012	Variation in % in 2011/2012
Personal injury rate	39,9	-7,28	0,04 (2011: 0,05)	-18,4	<b>M6</b> 0,02 M8 0	<b>M6</b> -20 M8 0	0,01	-60
Fatal accident rate	2,9	3,6	0,002 (2011: 0,007)	-62,2	<b>M6</b> 0 <b>M8</b> 0	<b>M6</b> 0 compared to 2 <b>M8</b> 0 compared to 0	0	0
Rate of dead	4	31	0,002 (2011: 0,007)	-62,2	<b>M6</b> 0 <b>M8</b> 0	<b>M6</b> 0 compared to 2 <b>M8</b> 0 compared to 0	0	0

ÁAK: Number of personal injury accidents has decreased by 13,2 %, the number of fatal accidents decreased with 5,3 % in 2012.

DAK:

M6: Number of personal injury accidents has decreased in total comparing to the 2011 year's figures that means in figures 21,73% decrease (2011: 23; 2012: 5). Nevertheless, this figure can not be considered as representative, since the accident rate is quite low on M6, therefore slight change of it could result in a high figure in percentage. There was no fatal accident on the M6 motorway in 2012, and in 2011 there were 2 fatal accidents, that means no comparison can be calculated due to zero figure.

M8: There were 2 accidents happened on the M8 motorway in 2012 with no personal injury.

MAK: In 2010 (Mar. – Dec.) 35 accident happened out of which 3 involved personal injury. In 2011 (Jan. – Dec.) 28 accident happened, which is 20% less than last year, while the number of accident involving personal injury increased to 5. In 2012 30 accidents happened out of which 3 involved light personal injuries.

TAK: Number of personal injury accidents has decreased in total comparing to the 2011 year's figures that means in figures 60% decrease (2011: 5; 2012: 2). There was no fatal accident on the M6 motorway in 2012, and in 2011 also.

## **Long term forecasts and tendencies**

- The long term road network development plans started to focus instead of the last 4-6 years ambitious motorway and expressway developments towards the regional national road connections and the proper maintenance level of the existing network as it was mainly forgot meanwhile the big construction era.
- Besides the already implemented ITS applications (e.g.: VMS, CCTV) these developments will continue and a national architecture is started to be formed.
- Since March 2004 there is no direct manual toll collection in Hungary, hence the nationwide e-vignette system still generate enough revenue to cover the operation, maintenance and periodical reconstruction costs of the whole existing speedway network and some part of the already charged trunk road network as well. So the system meets the requirements of the current toll policy of the country. The definition of the new toll policy (beside the tariffs, the business structure and technical way of toll collection is considered) to generate enough revenue for long term as well, instead of the limited maximum income generation capacity e-vignette system was prepared. Although there are still debates about the details, it is not questioned, the final goal is to have a uniform interoperable ETC system in Hungary in the future.
- DAK: The Concession Period lasts 22 years plus 11 years in option starting from 2004. The Concessionaire has no plan at the moment - beyond the normal Operation and Maintenance works - for developing the motorway.
- DAK: Being the Concessionaire of the M6 between sections 22+150 – 76+200 and the M8 between sections 5+750 – 10+300 that is not the scope of our duties to report such tendencies.

- MAK: The Concession Company is a special purpose company established for the design, construction, operation and maintenance of the M6/M60 motorway during a 30 years period. Construction activity is completed in March 2010 and operation and maintenance activity will be performed in the remaining concession period. Official long-term forecasts are prepared by representatives of the Hungarian State.
- TAK: The Concession Period lasts 30 years starting from 2008. The Concessionaire has no plan at the moment - beyond the normal Operation and Maintenance works - for developing the motorway.
- TAK: Being the Concessionaire of the M6 between sections 76+200 – 141+300 that is not the scope of our duties to report such tendencies.

### **Significant actions already started (and/or to be achieved in 2012) and foreseen for 2013**

In the year 2012, the Hungarian Government has decided to implement the electronic toll collection system in Hungary by the 1st of July 2013. The public procurement tender has been processed and concluded by the year end of 2012. The winner of the tender process has been announced, but finally the company decided to deny signing the system delivery contract. Although this fact has slowed down the ETC implementation process, but the Hungarian Government is completely engaged with the necessity of the ETC project and focuses on the best possible solution to start it within the shortest possible period of time.

DAK: No information can be provided by the Concessionaire.

MAK: No such action is performed in 2012 and foreseen in 2013.

TAK: No information can be provided by the Concessionaire.

**Budapest, 10 April 2013**

## MAIN ASECAP KEY FIGURES

Country: <b>Hungary</b>	2012					
	AKA	AAK	DAK		MAK	TAK
			M6	M8		
Network length: 1,099 km 2 x 2 lanes ..... 2 x 3 lanes ..... 2 x 4 lanes.....	156,5	740	54,05	4,55	80	65,1
No. of km in construction	-	51,5 km	-	-	-	-
Forecasts of opening motorways section	-	-	-	-	-	-
Annual user charge revenue	189.23 m€					
Permanent staff	15	1,035	5	5	6	5
Average daily traffic (LV)	18,249	18,632	8,641	1,173	3,440	5,604
Average daily traffic (HV)	6,122	4,944	2,160	1,069	756	1,068
Average daily traffic (LV+HV)	24,372	23,576	10,801	2,242	4,196	6,672
Total number of accidents	419	1,746	50	2	30	34
No. of personal injury accidents	62	249	5	0	3	2
No. of dead	4	25	0	0	0	0
Km travelled (10 <sup>6</sup> x km)	1,21	6,208	2,13	3,72		1,58
No. of toll plazas	-	-	-	-	-	-
No. of toll lanes	-	-	-	-	-	-
No. of teletoll equipped lanes	-	-	-	-	-	-
No. of teletoll subscribers	-	-	-	-	-	-
No. of rest areas (with stations services)	12	52	4	0	1+1	4
No. of rest areas	18	119	4	0	3+3	4
No. of restaurants	5	35	0	0	0	0
No. of hotels	4	11	0	0	0	0