

42ND ASECAP STUDY & INFORMATION DAYS

Ensuring sustainability in times of dwindling traffic: the role of tolling

26 – 28 May 2014



MINUTES OF THE CONFERENCE

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1st DAY

OPENING SPEECHES

K. DIONELIS – ASECAP SECRETARY GENERAL

Mr Dionelis welcomed and thanked all the participants for their contribution to the success of the ASECAP Days.

Mr Dionelis explained that we are all facing a period of crisis and he underlined how motorways bring us together and are key for economic growth of the European Regions.

The main priority for ASECAP and its members is the Safety of European citizens. Moreover ASECAP is actively working to create a sustainable motorway sector based on key technological development and deployment.

J. MESQUI – PRESIDENT OF ASECAP

He expressed its joy to be in Greece for the ASEAP Days as it is the cradle of the European culture.

He presented the work of ASECAP during the year 2013-2014:

1. ASECAP key figures;
2. Directive on concession where COPER I has made very clear the position of ASECAP;
3. View of ASECAP on giganliners;
4. Issue of the coexistence of radio frequencies: need to preserve the 5.8GHz frequency for toll collection. Wifi can seriously endanger toll collection at this state of play;
5. ENPI Directive: impact of infrastructure project on an environmental point of view;
6. Directive on electronic transaction;
7. Interoperability – Last year the REETS Project was launched. It is a very important project for ASECAP;

8. Study on concession in order to promote the concession scheme in a time of crisis;
9. All the publications of ASECAP;
10. Last year Joint Declaration with IBTTA.

Mr Mesqui underlined that all these activities, the various position papers, the promotion of the tolling system, are done to preserve the means of doing business within ASECAP and the success of these projects show the many efforts made by toll road operators in the last decades.

SAVAIDIS – Chairman of the Board and Managing Director of EGNATIA ODOS

He cheered all the audience and presented the EGNATIA ODOS which recently replaced TEO according to a recent law of the Greek Parliament. EGNATIA ODOS is the company that constructed and now manages the EGNATIA ODOS motorway, a major motorway in the north of Greece of nearly 670 Km that goes from the Port of Igoumenitsa to the Turkey border. It is also constructing 9 axes as part of the PAN European network. A new Greek Association of all the Green Motorway company will be formed in the near future gathering the other 7 Greek Motorway Companies.

He explained that the concession model in Greek has went through a complicate moment due the crisis and, only recently, the Greek government has ensured the continuation of this model. A clear examination and discussion of all the European strategy on transport issues it is indeed very crucial at European level to address the major issues the road transport sectors is currently facing.

M. HEILIGENSTEIN – IBTTA President

He thanked J. Mesqui and ASECAP for the great cooperation and efforts made together in the last few years.

Mr Heiligenstein is the president of a relatively new Mobility Authority in TEXAS. He represents a toll agency of 20 miles of tolled motorway, in the central Texas, one of the fast-growing region in the United States. They invested 1 BIL dollars in ten years' time, counting for 50 million transactions per year. They are currently engaged with 12 billion worthy projects in Texas, half of them concerning the concession model.

IBTTA has strong bond with ASECAP based on the JOINT TOLLING DECLARATION signed last year: toll is the most effective tool to finance, build, maintain, improve road infrastructure for the benefit of the entire community. IBTTA and ASECAP are committed to provide a safe and efficient, seamless mobility through tolling.

IBTTA's key goal priority is customers and collaboration: IBTTA is very committed towards the public outreach, customers are indeed the foundation of tolling industry business worldwide.

Moving AMERICA forward campaign

Very strategic initiative on public awareness campaign. It was started 1 year and half ago. It is about raising the debate and the public awareness on infrastructure financing and on the benefits of the tolling system.

Late this April the OBAMA administration launched the multiyear financial transportation proposal. The President's proposal include the provision to eliminate the concept of "free federal roads". This is very much in line with the IBTTA position and a big step forward for the transport policy of the United States. It is now on the table for discussion.

Interoperability

Electronic tolling started in the United States in 1989. It started with regional interoperability, where each tolling agency was developing its own system without exchanging any thoughts with other companies (reference to the presentation). Millions of investments made in the system.

An Interoperability survey has been launched in the recent months in order to adopt a nationwide specification for readers and transponders. In 2012 the Obama administration adopted the new legislation that mandates National Interoperability by July 2016. Toll road operators have to accustom their technologies, services and back offices in a very short time. Mexico and Canada will also be involved in this process. The sharing of information between the different agencies will be fundamental especially concerning toll violation and therefore enforcement procedures.

Nevertheless the Federal Government will provide no money and there are no specifications on how to achieve interoperability in the USA. IBTTA has recently formed the interoperability Steering Committee in order to implement this new legislation.

Mr Heiligenstein compared the EU APPROACH on ETC against the US APPROACH.

He finally presented the annual IBTTA meeting in Austin by showing a nice video and he warmly invited to join him in AUSTIN for this very interesting event.

1° PANEL

Bruno de la Fuente – COPER I Chair

Mr de la Fuente introduced the COPER I main activities which is the permanent committee dealing with issue on tolling and concession in ASECAP.

The main issues where COPER I has been very active on are:

1. The ongoing study on concession
2. Directive on the award of concession and public procurement
3. New document on tolled infrastructure in ASECAP
4. Proposal of the revision Directive 96/53/EC on “weights and dimension” specifically on the impact of mega-trucks in the operation of motorways.

Anna BONET – Director of Planning and management Control in ABERTIS

Agreements based on existing toll contracts to improve mobility

The traffic on motorways in Spain has decreased significantly, more than 35% since 2008.

The characteristics of the motorway network in Spain are peculiar, it is a very unbalanced situation: you can find free roads closed to toll roads, moreover you have other competitive means of transports. Public authorities are also incentivizing collective transports.

She presented two specific cases closed to Barcelona: one very mature concessions with low rates, and the second a relatively new concession with high rates due to the characteristics of the road.

In ABERTIS they are always underlining the benefits of the PPPs model for managing infrastructure projects. The concession model have always to be re-invented in order to fulfill the expectations of the internal and external stakeholders.

JOIA CEIA – Operational Manager of Autostrada Atlantico

A journey along with technology

He explained the technology development in Portugal during the last decades since the setting up of BRISA in 1972.

In the near future the challenges is not at technological level but rather at political level to fully deploy interoperability in Europe and opt for a unique toll system.

By middle 2013 the interoperability of Spanish OBUs in Portugal is possible.

KOUCHOKOS – Director of Exploitation and Growth of EGNATIA ODOS

“Egnatia Odos”, a toll way from the past to the future

He presented the historical roots of Egnatia Odos and its development across different historical periods. Nowadays it represents a key motorway axis which connects the east of Greece to the very western side and it has also many vertical stretches to the north allowing for a good connection with other key northern Regions. Egnatia Odos has many tunnels and bridges which make tunnel safety one of the main challenge (90 km of tunnels).

He also presented the main construction costs, toll rates and figure concerning the average daily traffic.

The first tolling station was introduced in 2010, one year after the construction. In 2011, 5 more stations were added and finally in 2014 there is a new plan to move from the manual toll collection from a multilane free flow ETC. This is obviously a challenging task for Egnatia Odos.

Egnatia Odos is in the process of shifting from a simple motorway project into a new concession project that will gather all the other concessions projects in Greece.

BILL HALKIAS – CEO, Attikes Diadromes SA

BUILDING ON THE SUCCESS OF ATTICA TOLLWAY IN ATHENS, GREECE

He presented the Attika Diadromes which is the key road stretch that links the motorway that goes to the north and the one that goes to the south. It is a motorway surrounding the city of Athens and it has been the first tolled road to introduce ETS in Greece in 2002, and full interoperability in 2008. The motorways is characterized by its high level of service and advance traffic management: it provides services in order to make sure that the money customers pay is directly related to the high services provided.

Mr Halkias also presented the data concerning accidents and the great results and commitments of social and environmental issues.

He offered a very nice comparison of 8 European Motorways in order to show the great results of the Attika Diadromes motorway. Indeed, recent surveys focusing on customer satisfaction underlined the extremely positive feedbacks achieved.

Alberto WYTTEBACH – GSA Expert

GNSS and its development within the tolling domain

He explained the main technologies develop by the European GNSS Agency. Mr Wytttenbach clearly underlined the main benefits of GNSS for the road sector such as:

- Major Flexibility (to choose on which aspects to calculate the toll)
- Extensibility
- Low transaction costs
- Revenue potential
- Traffic management
- Environmental benefits

Mr Wytttenbach underlined the status of the implementation and the great development compared to last year. He showed the very interesting cases of Slovakia and Hungary concerning the implementation of GNSS. He finally stressed that GNSS now represents the technology of choice for new free-flow tolling systems.

2° PANEL

Malika Seddi – COPER II Chair

Madame Seddi briefly introduced the work of COPER II which is the ASECAP Committee dealing with issues related to road safety and sustainability. She thanked the COPER II Vice-Chair and other people involved in the COPER II activities.

The main activities of COPER II has been:

1. Gathering data on accident fatalities, environmental and other indicators
2. New document on “sustainability” showing the great efforts of tolled motorways towards sustainability
3. Organization of the Road Safety Event last March in Madrid and the ongoing organization of the next year event in Wien.

Lorenzo Grosso – Autostrade per l'Italia

1999-2013: Fifteen years of continuous congestions reduction and road safety enhancement

Mr Grosso briefly introduced the figures of Autostrade per l'Italia, and he mentioned the new key reference indicator they launched in 2006 “total delay” to assess the level of congestion on the motorway. This indicator, since 2006, has shown great results in reducing congestions thanks to:

- **Interventions on the infrastructure:** enlargement toll plazas and toll roads
- **Information:** major information campaigns and technological tools (mobile, radio and VMS)
- **Organization:** concentrate all the activities, works during low traffic volume

Concerning safety they reduced accident fatalities by more than 50%, perfectly in line with the European objectives, thanks to the use of speed control systems, improvements of the infrastructure, raising awareness campaigns. With a view on the future, Autostrade per l'Italia is investing in campaigns on road safety, new technologies and information flow to put the drives in the best safety driving conditions.

Mr Pedro Pinto – CINTRA

Mobile Enforcement at free flow toll system

Mr Pinto briefly introduced the Portuguese network. He explained the kind of issue in terms of “toll violations” occurring in Portugal, especially considering foreign drivers. According to the law, concessioners can use “enforcement patrols” to pursue violators, but still they have limited resources. In 2013 a new enforcement system via a laptop has been launched towards national user. The system has proved to be very positive by recovery many of the tolls tariffs not paid compared to the very limited investment made. The future application would be to extend this system to mobile devices.

Mrs Christine Allard – Director of Communication in SANEF

SANEF's Survey on motorway behavior

Madame ALLARD presented the results of the scientific survey concerning driving behaviors on motorways, highlighting the main dangerous driving behaviors. This survey has highlighted that 1 driver out of 3 undertakes dangerous driving behaviors. A strong communication campaign has been subsequently been developed based on these findings that has led to very good results. A specific campaign in 2012 was also launched to underline the importance of respecting distance between cars leading to the reduction of distance-related infractions by more than 30%. A recent new

campaign in the right use of indicators has launched. All these campaigns show the great importance of getting the right message out in order to save lives.

Mr Martin Gam – Deputy Head of Traffic Manager Unit (ASFINAG)

Improving Road Safety and Traffic Management in the Vienna Metropolitan Area

Mr Gam introduced the new Unit of Traffic Management in the metropolitan area of Wien aiming at improving traffic management, traffic information and road safety. 16 traffic managers have been formed in order to manage traffic conditions. These managers cover 4 main areas: mobile traffic management, accident management, road safety services and customer control services (see the presentation for concrete examples). This Unit has proved to be crucial for effective network operations in the urban area of Wien.

Mr Jan Sajovic – Traffic Safety Expert DARS

Lay-bys and protection against lateral obstacles – Situation in Slovenia

Mr Sajovic introduced the topic of traffic safety in tunnels. In 2010 due to a major accident in a tunnel, new investigations have been started to increase tunnel safety especially on the lay-bys component. A specific study by the University of Ljubljana underlined that modified crash cushion is the optimum solution to improve traffic safety in tunnels. It can optimally cover the necessary space in front of the lay-bys end wall. DARS have been responsible to test these new cushions and to deploy them into the tunnel equipment.

Mr P.Papanikolas – CEO Gefyra

RION ANTIRION BRIDGE “CHARILAOS TRIKOUPIS” 10 years of Uninterrupted Operation

Mr Papanikolas introduced the safety aspects of the Charilaos Trikoupis Bridge focusing on the construction, management and traffic control aspects. He explained the very characteristic of the site where the bridge has been built taking into due consideration the risk of earthquakes and floating. Mr Papanikolas also explained the very demanding maintenance works that the bridge requires in order to ensure high level of safety.

Mr Kirk Pedersen – SUND&BAELT

Integrating sustainability and CSR into the core business

Mr Pedersen stressed the great efforts of SUND&BAELT towards sustainability through a very comprehensive CSR strategy focusing on the people, the planet and obviously also the profit aspect. All these key aspects have been explained showing the very key activities that

SUND&BAELT carries out. Concerning the “responsibility side” SUND&BAELT is currently working to improve its operation particularly on social clauses. He concluded by saying that CSR needs to focus on very key aspects in order to make a serious business case to be constantly improved.

3° PANEL

Mr Maurizio Rotondo

Presenting COPER III on behalf of the COPER III Chair Marko Jandrisits, the permanent committee dealing with issue on ITS.

Madame Fiammetta Diani – GSA Expert

Update on EGNOS and Galileo & GSA/ASECAP roadmap for GNSS in tolling

Madame Diani presented the EGNOS (Satellite Based Augmentation System) and Galileo System (Global Satellite Navigation System) explaining the main features, services and advantages of these two systems. In particular the Galileo System has the advantage of being more accurate than the actual GPS and the robustness of the position.

Madame Diani also presented the roadmap between GSA and ASECAP, based on five key joint actions, agreed last year. This cooperation has not been producing any major results so far and it has to be restarted in order to deliver some concrete results. There are also new opportunities coming from HORIZON 2020 focusing on the GNSS application in different context.

Madame Maria Cristina Ebli – Autostrada del Brennero

DRIVE C2X, A 22

Since 2012 Autostrada del Brennero has been participating to the European Project called DRIVE C2X. The project operates an on line internet system that makes possible the communication between cars and the infrastructure in order to exchange information on accidents, traffic conditions, road conditions. A specific test site has been performed on the A 22 to test the DRIVE C2X architecture to check the functionality of the system. The system responds to many functionalities and the benefits are various in terms of safety, efficiency and sustainability purposes.

The project is crucial in bringing all the major stakeholders together, it has developed a clear roadmap, it also builds the market case for these new technologies and it stresses the case of the bottom up approach for ITS applications in Europe.

Mr Luigi Giacalone – CEO Autostrade Tech

SICVe – Safety Tutor

Mr Giacalone presents the new system which is focussing on speed enforcement in Italy. Mr Giacalone explained the main features of the system and its functioning: the system calculates the speed of the vehicle between the first entry and the second entry. The data are sent to the control centre and in case of no violation the data are erased. The first prototype was built in 2003 and the first installation was in 2005. In 2006 a tutor system has been massively installed in those sections showing above-average death rate. The results has been very good in both reducing speeds and therefore preventing mortal/serious accidents while also leading to a significant reduction in vehicle speed variance (between fast and slow vehicles).

Madame Alexia Journé – SANEF

ELECTRIC MOBILITY ON MOTORWAYS

Madam Journé introduced the topic of electro mobility by stressing the main environmental and health benefits while also highlighting the main obstacles to deploy these vehicles. This is particularly the case in motorways which are designed for fuel engine vehicles: motorway operators should enhance the development of the electric vehicles by supporting the implementation of charging systems. She showed the different electronic charge systems (static and dynamic charge) and the technology that SANEF is currently developing. SANEF is also part of the European FABRIC Project, launched at the beginning of 2014, aiming at carrying out a feasibility analysis and developing on-road charging solutions for future electric vehicles.

Mr Bernd Datler – ASFINAG

VAO: Providing services instead of data, the Austrian way for intermodal traffic information

Mr Datler presented the VAO (traffic information Austria) that is no-stop shop solution for traffic information in Austria. In 2010 this platform was created to offer an open information service: it is nationwide, multimodal and free of charge for the users. The first step has been the collection of quality data which has been difficult considering the different transport modes involved. Mr Datler explained the functioning of the system which is able provides you a comparison between all the transport modes. An open question that remains is how to provide real time information which are challenging for example concerning accidents. In terms of benefits for the users the VAO

provides reliable high quality information, it is multimodal therefore it comprises all the transport modes. There are 6 partners involved in this project due to the need to create synergies for its development and for purchases and licensing due to its costs. The government would like to see a modal shift from the dissemination of this platform towards an effective public transport toll for urban areas.

Mr Kostas Papandreu – Olympia Odos Liturgia S.A.

Lessons Learned by the Implementation and 1st year of Operation of ETC Interoperability in 5 Concessions in Greece

He represents 5 companies which are working together to deploy ETC interoperability in Greece. He provided a very clear picture of the toll roads and toll operators sectors in Greece. ETC is relatively new in Greece compare to other European countries, it just started back in 2002 in Attiaka ODOS. At the very beginning the market has always been fragmented with motorways companies using different technologies and not exchanging data. In 2008, the year of the privatization of the national road network, there has been the first effort towards interoperability. In 2009 the GRITS Project has been launched and 5 operators made an agreement to launch the GRITS Services which was finally achieved in 2012. Many activities have been performed in terms of services regulation, operations standardization, legal and administrative obligations. The major issues faced has been exchanging of real –time quality data, the different systems of classification in placed, and lastly that each operators has different discount policies. Mr Papandreu explained the architecture of the system and the main benefits for the users in terms of faster transactions, less stops, less hassle for virtually all GRITS network. The future key task would be to make this system working across all the national network and how to manage the discount policy issues

Mr Karel Feix – CEO of KAPSCH CZ

Weigh-in-Motion (WIM) in Czech ETS

Mr FEIX presented the WIM system. The key issue in Czech Republic is the one related to overload Lorries accounting for more than 60% of the overall traffic. The integration of weights in motion into the tolling system is due to different reasons: motorways and highways are saturated so there is the need to control (foreign) transit traffic, economic reasons linked to technological integration in already existing infrastructures and to the integration of data and processes. Mr Feix explained the functioning of the system that started with a pilot project in 2012. The main results economically speaking have been the collection of fines but above all the indirect cost saving related to less money spent on repairing the infrastructures. The deterrent effect has also been a very positive result in preventing violations of the regulations on legal carriage.

Mr Fabio Pressi – INFOBLU

Smart Mobility Platform: innovative solutions for Traffic Management

Mr Pressi explained the current worldwide situation where crowdsourcing has become a major driver of the market. InfoBlu is a company currently owned by Autostrade per l'Italie and Octo telematics which has the largest GPS fleet in the world market. Floating vehicle data represents a very useful opportunity to collect GPS data. InfoBlu is specialized in GPS data processing and to fuse data from different sources in order to ensure a constant flow of information concerning traffic evolution, alert management and travel times. The B2C represents the future in the automotive industry where users will choose the application to use inside their car and, secondly, B2C is functional for a multimodal service.

MARKETING Session

Emanuela STOCCHI - AISCAT

Emanuela Stocchi presented the “marketing session” which provide an opportunity to toll road operators’ to shed more light on their new and innovative services fulfilling their customers’ needs and expectations. This session follows a previous workshop held in Lisbon last year, the “ASECAP marketing session”, where new commercial services and new applications were presented.

Luis D’Eca Pinheiro – BRISA

Digital Marketing & Motorways

We do not talk about client or customers but about people. People have drastically changed their attitude: they want to be connected, they want to share, and they need better and more sophisticated services. This has an impact on the motorway sector which have to accustom themselves to this new environment. This is the reason of the new applications for cars, the new concept of smart mobility and smart infrastructure based on multiple safe devices. Mr Pinheiro underlined what BRISA is currently doing and particularly the new ViaVerde system: anyone can have all the information concerning his/her own transactions and can provide a wide range of information on other services as well (petrol stations, parking spaces).

Charlotte ANDERSEN – Social Marketing Coordinator SUND&BAELT

Using Facebook as a marketing channel for Great Belt Link

Mr Andersen explained the SUND&BAELT market strategy through social media and in particular by using Facebook as a tool of connection. The Great Belt Link is a very expensive tolled road

section therefore it is crucial to explain to users why they have to pay. SUND&BAELT uses a wide range of communicative tools such as television broadcasts, newsletters, articles and Facebook where the Great Belt Link has more 50.000 fans since its page was launched in 2010. Facebook is used to meet the users, provide them with information about the bridge. The key result has been the creation of a comprehensive bridge community.

Zofia KWIATWOWSKA – AWSA PR Manager

AUTOSTRADA WIELKOPOLSKA SA: SOCIAL AND EDUCATIONAL CAMPAIGNS

A2 represents the first PPP motorway project in Poland and one of the biggest environmental-friendly infrastructural project in Europe part of the TEN-T. Madame KWIATWOWSKA explained the key social and political activities behind this project focusing on three main field: drivers' safety, sharing good practices and promoting Regions. She focused on three main successful campaigns:

1. **A2 – the Road to Euro:** the campaign used to promote the A2 for the European Championship in 2012 aiming at facilitating the fans' trips on the concession section of A2
2. **A2 to career:** an educational partnership with the University of Economics of Poznan aiming at popularizing knowledge about motorways among young people. They recently created a new blog for young people
3. **Drive SA2fely. Like it!:** by using unconventional channels such as cartoons the campaign touches various aspects concerning road safety. The campaign aims at informing and raising awareness on the most common wrong driving behaviors.

Madame KWIATWOWSKA finally presented other Polish campaign. The main results of all these campaigns have been a wider acceptance and appreciation by users who consider the A2 as one of the best infrastructural project in Poland ever.

2° DAY

Mr S. SIMOPOULOS – Greek Ministry of Infrastructure, Transport and Network

The Greek Ministry is currently trying to develop the motorways sector in order to improve safety and accessibility thus achieving regional economic development. For many years Greece has been upgrading the key road axis into motorways for a total length of 2.300km. Two main roads axis of around 1500 km are currently under upgrading: the eastern/south north axis (PAThE axis) and the west to east axis (the EGNATIA axis).

Concessions have been through a very harsh moment in Greece, starting in 2010, due to the economic crisis. The drop of traffic and consequently the reduction of revenues have put into serious danger the new concession projects in Greece. In 2011 all the construction activities were stopped due to financial gap and the lack of financial supporters. Moreover another problem was the refusal of the citizens to pay the tariffs and the subsequent reduction of the toll tariffs by toll road operators. These new projects have been recently reactivated and should be finalized by the end of 2015/2016.

Finally Greek operators have agreed to jointly start a new association of Greek toll operators. Till that moment EGNATIA ODOS will represent the Greek motorways.

THE CONCESSION MODEL, plenary session

Mr C. BOUTIN – ASFA together with Paolo GUGLIELMINETTI, PWC

Concession study – interim report presentation

A new concession study has been launched within ASECAP to show the common meaning, the key features and main advantages of the **Concession model**. Concession is the basis for the development of people and goods ensuring a high level of safety and efficiency. It is also a powerful tool to finance the mitigation measures necessary to protect the environment. Mr BOUTIN, together with Mr Guglielminetti, presented the structure of the report: the first chapter offer an overview of the network and a definition of the concession model; the second provides an analysis of the risks and issues faced by the concession model in Europe; the third and final chapter focusses on the future of the toll road concessions. In particular Mr Guglielminetti provided an overview of the European of the legislative framework affecting the concession model

touching the new regulation on concession and public procurements, the road charging policies, ITS directives and the new TEN-T framework.

Mr Lukasz ROZANSKI – DG MARKT, European Commission

Directive on the award of concession contracts

Mr Rozanski introduced the concept of “concession” according to the EU, the scope and content of the new directives on concession and public procurements. The new legislative framework has recently adopted and has entered into force on the 26th of April 2014. That leaves 2 years, till the 16th of April 2016, to Member States to transpose the legal text into their national legal framework. Mr Rozanski underlined particularly the legal difference between a concession and other legal instruments: in case of remuneration in case of exploitation, the risks have to be transferred to the concessionaire. Mr Rozanski explained clearly the risks behind the concession model, highlighting also the different concession models. Concerning the question of duration, the general principle is that concessions can always be awarded for 5 years, if they last longer than 5 years the terms of the concession cannot exceed the time necessary to recoup the investments made. Mr Rozanski concluded by explaining the modification rules of the new legal framework.

Guy CHETRIT – EIB

Financing road concessions in Europe

He introduced the topic of financing green field road concession projects. He sheds more light on the financing aspect of these projects and new ways of funding.

Mr Chetrit presented data concerning concession green field road projects that has reached financial close: it means concessions for new road projects financed by the private investors. During the last ten year the toll sector accounts for more than 20 % of the overall PPP market which clearly show the importance of this sector. Since 2008 there has been a drop in those projects that have reached financial close based on the user pays principle replaced by the “government pay” schemes. In 2013 there has been a change in the sense that a few projects have reached financial closure. It is quite clear that most “toll road countries” have been severely affected by the crisis and also due to too optimistic traffic and revenues projections. Nevertheless, although toll road projects are more complicated to finance, governments have pushed for these projects because they have more budgetary constraints. The main news of the financial market is the entry of institutional investors (private funds, insurance companies, pension’s funds) that would like to invest in infrastructure projects in those countries where the system has proved to be more reliable and where there is more transparency, clarity and strong guarantees.

Emanuela STOCCHI - AISCAT

Ensuring Sustainability in Times of Dwindling Traffic: The Role of Tolling

Madame Stocchi presented the current scenario in the Italian toll road system. Toll road operators in Italy are mostly private entities and concessions are governed by law clarifying the rights and obligations of each parties. The main developments in Italy are: the creation of an Independent Transportation Authority in 2012 which is responsible for all the transport means in Italy; concerning the motorway sector the authority has several competences for ensuring the efficient management of the highways' sector and stimulate competition. Secondly the new development in Italy has been the experimental introduction of toll tariffs discounts for particular citizens, the commuters, under specific conditions. AISCAT supports the new directive on the award of concessions' contracts particularly on the simplification and flexibility point of view. Madame Stocchi concluded by underlying the great importance of the concession model for an efficient and sustainable mobility.

Sarantis PANTELIAS – Greek Representative

Mr Pantelias explained that, although the very harsh moment we are getting through, Greece is still implementing the road concession projects avoiding catastrophic consequences. The new directive has introduced more clarity and security. In Greece there will be the need to revise the current models and adapt them to the new legislative framework to be implemented in the next two years.

Bruno DE LA FUENTE – Director of Concession for SEOPAN

The concession model: a powerful and sustainable system in times of dwindling traffic

Mr de La Fuente underlined the difference in Spain between mature concessions, that survived the effects of the crisis, and the new concessions awarded at the beginning of the century that are currently in bankruptcy procedure (8 companies). This is due to a series of reasons: firstly the expropriation of land has drastically increased which were not foreseen in the contract; secondly, the construction of additional stretches and connections that were not foreseen in the contracting phase; lastly the sharp decrease of the traffic volume. Normally if these concessionaires go to liquidation the State has to assume entirely the debts accumulated or to reach an agreement with the creditors. The situation is not clear at the moment. A concrete possibility is to nationalize these concessions which will try to ensure the growth of these concessions. No public funds are available for infrastructural projects and private investors are truly needed. However some changes in the assumption of risk need to be made in order to attract these investments.

Jean MESQUI – ASFA

He underlined the period that we are facing and in particular:

1. concessions is still one of the most efficient tool to operate and maintain a road in Europe
2. concessions are regulated at European and national level and this can represent often a problem. Flexibility is truly needed in order to make the concession model even more effective and long-lasting

In November ASECAP will organize an event in Brussels to present this study which will clarify many issues currently discussed and will pave the way for the future of the concession model.

Electronic tolling interoperability in the EU: the REETS Project

Hurbert Resch

Mr Hurbert Resch (ASFINAG), Project Leader of REETS project, introduced the main features of the project focusing in particular on the status quo of the various activities and the forthcoming evaluation phase.

Valérie Dumerç (ASFA) – WP I Leader

Madame Dumerç explained the main challenges and issues faced by WP I which focusses on two main activities: 1. Description of the contractual framework 2. Risk management

Maurizio Rotondo (AISCAT) – WP II

Mr Rotondo introduced WP 2 “on certification” which ensures an open market with common procedures and common standards for all the EETS stakeholders.

Juan Marti (ABERTIS AUTOPISTAS) – WP III Leader

Mr Martin introduced the work of WP 3 aiming at setting up the key KPIs to ensure the quality of the EETS between service providers and toll charges: the goal is to produce a toll box for reducing the costs and efforts of the implementation of the KPIs in Europe.

Paolo Giorgi (AISCAT) – WP IV Leader

Mr Giorgi explained the main activities of WP 4 that are: 1. definition of backup office interfaces, 2. the second is the definition of the possible security framework of the project

Eva Tzoneva – AETIS/SHELL

Madame Tzoneva underlined the position of Service providers. The main challenge has been the complexity of the market where heavy-good vehicles represent a very volatile industry affected by many external factors. Madame Tzoneva highlighted the key positive aspects related to the REETS project.

Mr Resch concluded by highlighting the future steps of the project. In particular Mr Resch focusses on the future evaluation report which will provide a clear picture of the main results and issues addressed by the project till this moment.

EASYGO - Interoperability between Austria and Northern Countries

Soren RASMUSSEN — SUND&BAELT

Mr Rasmussen presented the initiative EASYGO that was launched several years ago. It is a joint venture between different toll chargers based on the goal “one contract one onboard unit”. It involved all 50 toll chargers in Scandinavian and since 2013 it includes also ASFINAG in Austria. More than 2.6 million on on-board unit and there are 5 partners in EASYGO working together. The Project has proved to be very successful in deploying full interoperability in the Scandinavian area and now even to Austria for vehicles above 3.5 T.

Klaus SCHIERHACKL, CEO of ASFINAG

Mr Schierhackl thanked all the people who are actively working on interoperability issues which is the main focus on the future for the tolling sector. He concluded by saying that EASYGO has been very important in creating a new case for interoperability in Europe and this is just a first step towards the future success and full interoperability in Europe.

Interoperability between Spain and Portugal

Mr **Represa LLOves** and Mr **CEIA** presented the project of interoperability recently launched between Portugal and Spain and the recent test sites which have been develop to test the project. Cross-borders enforcement will be one of the key issue to be faced in the future.

Jan SZULCZYK, DG MOVE, European Commission

Mr SZULCZYK started his speech by explaining the difference between the EETS and the REETS Project. EETS is truly needed in Europe and there is a great need for the goods transport sector to fully achieve interoperability. It is the role of the EC and the industry to create the necessary conditions for the EETS and this is not yet the case for 3 main reasons:

1. The reluctance of Member States to put in place the necessary applications of the EETS requirements. The EC is following closely the process.
2. Market operators are reluctant to enter into a risky and unknown business. The EC is willing to give full support to these companies
3. Too many conflicting standards, legal procedures, tasks and where the REETS can play a major role.

It is a pity that REETS partners have not committed to any sort of real deployment. Nevertheless the REETS have proved to be very effective in highlighting the main issues and challenges faced. The interim evaluation will be carefully assessed and the Commission will continue its support if they see some clear commitment towards interoperability deployment activities which is the ultimate goal of the project. He remembered the two deadlines of the EETS directive: the already expired deadline for heavy vehicles and the second one for light vehicle which will expire in the months to come. Finally the EC is currently considering a legislative proposal to facilitate the deployment of fair, smart and efficient tolls and they are counting on the contribution of the toll community to move forward.

FINAL REMARKS

J. MESQUI – Former President of ASECAP

He reminded to the Commission the position of ASECAP when they proposed the deadline for the implementation of the EETS for light vehicles and the mistake they made in setting up such obligation. Concerning the REETS project it is crucial to get those stakeholders who are willing to deliver the system on board and not simply spectators observing passively the work currently done.

J. BRAGA – President of APCAP

Mr Braga invited all the participants to the next year ASECAP Study Days which will be held from the 27th to the 29th of May in Lisbon. A nice video presenting the event has been shown to the audience.



J. HALLERAKER – New President of ASECAP

He thanked the former ASECAP President, J. MESQUI, and the COMEX of ASECAP for the great work done in the past. He explained how transport represents the engine for the growth of our economy. ASECAP will work with the new European Commission and the new-elected European Parliament to make the motorways sector a true driver of sustainable development in Europe. He finally thanked Mr Arnautis, the host of the event EGNATIA ODOS, the ASECAP Secretariat and all the speakers and public for their key contribution to the success of the ASECAP Days in Athens.

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