

HELLASTRON NATIONAL REPORT
TO BE PRESENTED DURING THE ASECAP STUDY AND
INFORMATION DAYS
COSTA NAVARINO, 29-31 MAY 2019

Network length

The total length for the entire toll infrastructure network in Greece is 2.133,2 kms, the same as it was also in 2017. This length includes tunnels and bridges as well as open highway sections. On the HELLASTRON network there are 122 tunnels with a length above 500m (the threshold defined by the tunnel directive 2004/54/EC). The total length of these tunnels is 163 kms (sum of both directions).

Openings in 2019

No additional kms of toll road sections are anticipated in 2019.

Near Future Evolution

There are still another 113,7 kms under design and construction in order to farther expand the Motorway Network. These sections are the north and south ends of the Central Greece Motorway (“Kentriki Odos” - 102,7 kms) and the Schimatari – Chalkida link (11 kms) of the “Nea Odos” Concession Motorway, which will add 113,7 kms raising the total length at 2.246,9 kms.

Investments

The financial crisis in Greece, which started in 2010, found all five (5) Interurban Motorway Projects under construction. Given that the rehabilitation, upgrading and construction were executed on the basis of Concession contracts, the Lending Institutions discontinued funding and construction slowed down and/or was suspended for about three (3) years. The reset of 4 out of 5 projects, which was initiated in late 2013, was impacted in early 2015 by the financial standoff with Greece’s lenders and the

banking controls enacted by the new Greek Government, resulted in limiting funding again. It was only after the July 2015 Agreement which was reached between Greece and the Institutions that funding was reinstated and again new arrangements and new time schedules for completion of the Interurban Tollway projects (all 5 of them) were agreed in late 2015. This enabled one Project (Moreas Motorway) to be completed in late 2016 with the remaining four (4) Projects to reach full completion in the second half of 2017.

In 2018, a total of 46,85M€ were invested in new sections (constructions and expansions) of the National Motorway Network. Moreover, another 42,37M€ were invested into the existing network for renovation, large scale repairs and new facilities or application of new technologies. Hence, the overall amount of investments in 2018 reached 89,21M€.

Financing

The table below presents globally the sources for the financing for the road concessions in Greece, the total cost of which is approximately 8,5 billion Euro.

State Contribution	Toll Revenue	Concessionaire Equity	Loans	Total
25%	25%	10%	40%	100%

Traffic

The total kilometres travelled in 2018 along all Greek Tollways were 9.904×10^6 , compared to 9.743×10^6 in 2017, which corresponds to an increase of 1,7%. The average daily traffic for 2018 along all Greek Tollways was 12.810 vehs/day, compared to 13.703 in 2017, which corresponds to a 6,5% decrease. This is due to the fact that 2018 was the first year of full 12 month operation of new & long sections with lower traffic volumes than the average 2017 volumes which did not exist in 2017 in those new sections and therefore the national average daily traffic

figure of vehicles per km was decreased, although overall traffic was increased. In 2019 this is expected to rise again, as 2019 will be the first year that the network will be identical with the one of the previous year for the entire 12 month period.

Tolling system and tolling technologies used

The tolling system that is currently operational in the Greek Tollways, is an “open” toll system, comprising mainly of Mainline toll stations, combined with ramp stations on the entry and exit points of the Toll Roads. The toll stations provide the capability for manual toll payment, as well as electronic payment by means of ETC transponders and smart cards. At the moment, there are 145 toll stations with 780 toll gates, of which 491 are ETC or permitting mixed operation (manual / ETC).

The tolling technology used for the ETC is DSRC at 5,8 GHz. Full interoperability on a “pier to pier” basis between five Concessionaires (Attiki Odos, Gefyra, Moreas, Olympia Odos and Aegean Motorway) called “GRITS” has been implemented. Two other Concessionaires (Nea Odos and Kentriki Odos) are both interoperable between them using the same tag, while Egnatia Odos, which has a system “GRITS” ready, has not distributed any tags, using smart cards only for subscribers, handed to toll collectors.

Regarding the future of tolling in Greece, 2019 brings a new initiative by the Greek State introducing a new tolling concept in the National Network. A tender is currently under way for the procurement of a full distance based electronic “Open Road Tolling” (ORT) system. The new system requires all commercial vehicles to be equipped with GPS devices operating on satellite applications (GNSS technology). Thus, all commercial vehicles and not only trucks will have to install an On-Board Unit, which will record the entire travel path and determine the kilometres covered, while the system for all other vehicles, mainly private cars, will apply Automatic Number Plate Recognition (ANPR) technology of Video Tolling with the distance travelled to be

determined through the identification of their licence plates (ANPR) by cameras at the entry and exit from the Motorways.

The "Installation of a full electronic system of distance based charging of tolls, of satellite technology with optical recognition", as the system has been named by the Greek Ministry, will affect all private cars and professional-use vehicles. The announcement of the preferred bidder for the installation of the new tolling system is expected in the next few months. However, there are still various issues to be examined especially related to the financial equilibrium of the Concessions, while the Lenders for all concessions will have to consent as well, in order for the proposed system to proceed as planned.

Toll rates

The average toll rate per kilometre (VAT excluded) for 2018 and the corresponding comparison with 2017 is shown in the following table:

		2018	2017	% difference
Average toll rate for LV (in €)	LV revenue collected / LV kms travelled	0,054	0,049	10,6%
Average toll rate for HV (in €)	HV revenue collected / HV kms travelled	0,140	0,119	17,2%
Average toll rate - TOTAL (in €)	total revenue collected / total kms travelled	0,067	0,058	14,0%

The following tables show the toll tariffs for 2018 and 2017, for each toll plaza in each motorway. It has to be noted however, that the average toll rate shown above (i.e. the ratio of revenue collected / veh-kms travelled) was increased more than the toll tariffs in 2018, mainly due to new toll plazas introduced, that resulted in less and shorter free trips on the Greek Network.

TOLL PLAZAS	December 2017				June 2018				Change of June 2018 fees				January 2019				Change of January 2019 fees			
	Cat. 1	Cat. 2	Cat. 3	Cat. 4	Cat. 1	Cat. 2	Cat. 3	Cat. 4	Cat. 1	Cat. 2	Cat. 3	Cat. 4	Cat. 1	Cat. 2	Cat. 3	Cat. 4	Cat. 1	Cat. 2	Cat. 3	Cat. 4
Nea Odos																				
Afidnes	2,25	3,25	8,15	11,40	2,30	3,25	8,20	11,50	2%	0%	1%	1%	2,30	3,30	8,30	11,65	0%	2%	1%	1%
Kapandriti (ramp)	1,35	1,95	4,95	6,90	1,40	2,00	5,00	7,00	4%	3%	1%	1%	1,40	2,00	5,05	7,05	0%	0%	1%	1%
Malakasa (ramp)	0,95	1,40	3,50	4,90	0,95	1,40	3,55	4,95	0%	0%	1%	1%	1,00	1,40	3,60	5,00	5%	0%	1%	1%
Oinofyta (ramp)	0,45	0,65	1,65	2,30	0,45	0,65	1,65	2,35	0%	0%	0%	2%	0,45	0,65	1,70	2,35	0%	0%	3%	0%
Thiva (ramp)	1,05	1,50	3,75	5,30	1,05	1,50	3,80	5,35	0%	0%	1%	1%	1,05	1,50	3,85	5,40	0%	0%	1%	1%
Thiva	2,65	3,80	9,50	13,35	2,65	3,85	9,60	13,45	0%	1%	1%	1%	2,70	3,85	9,70	13,60	2%	0%	1%	1%
Tragana	2,65	3,80	9,50	13,30	2,65	3,80	9,60	13,40	0%	0%	1%	1%	2,70	3,85	9,70	13,55	2%	1%	1%	1%
Tragana (ramp)	2,10	3,05	7,60	10,65	2,15	3,05	7,70	10,75	2%	0%	1%	1%	2,15	3,10	7,75	10,90	0%	2%	1%	1%
E65																				
Ag. Triada	1,20	1,75	4,40	6,15	1,20	1,75	4,40	6,20	0%	0%	0%	1%	1,25	1,75	4,45	6,25	4%	0%	1%	1%
Molos (ramp)	0,20	0,30	0,85	1,15	0,20	0,30	0,85	1,20	0%	0%	0%	4%	0,20	0,30	0,85	1,20	0%	0%	0%	0%
Mpralos (ramp)	0,40	0,60	1,50	2,10	0,40	0,60	1,50	2,15	0%	0%	0%	2%	0,40	0,60	1,55	2,15	0%	0%	3%	0%
Mavromantila	1,30	1,85	4,70	6,60	1,30	1,90	4,75	6,65	0%	3%	1%	1%	1,30	1,90	4,80	6,70	0%	0%	1%	1%
Ag. Marina (ramp)	0,80	1,20	3,00	4,20	0,80	1,20	3,00	4,20	0%	0%	0%	0%	0,85	1,20	3,05	4,25	6%	0%	2%	1%
Stylida (ramp)	0,45	0,65	1,60	2,25	0,45	0,65	1,65	2,30	0%	0%	3%	2%	0,45	0,65	1,65	2,30	0%	0%	0%	0%
Anavra (ramp)					1,20	1,70	4,35	6,10					1,20	1,75	4,40	6,15	0%	3%	1%	1%
Sofades					2,10	3,00	7,60	10,60					2,15	3,05	7,65	10,75	2%	2%	1%	1%
Proastio (ramp)					0,70	1,05	2,65	3,70					0,75	1,05	2,65	3,75	7%	0%	0%	1%
Trikala					1,35	1,95	4,90	6,90					1,35	1,95	4,95	6,95	0%	0%	1%	1%
Aegean Motorways																				
Pelasgia	2,40	3,40	8,50	11,90	2,40	3,40	8,60	12,00	0%	0%	1%	1%	2,40	3,50	8,70	12,20	0%	3%	1%	2%
Pelasgia (ramp)	1,80	2,50	6,30	8,80	1,80	2,50	6,30	8,80	0%	0%	0%	0%	1,80	2,60	6,40	8,90	0%	4%	2%	1%
Velestino (ramp)					0,90	1,20	3,00	4,30					0,90	1,20	3,10	4,30	0%	0%	3%	0%
M. Monastiriou (ramp)													1,30	1,80	4,60	6,50				
Kileler (ramp)					1,70	2,40	5,90	8,30					1,70	2,40	6,00	8,30	0%	0%	2%	0%
Moschohori	2,70	3,90	9,80	13,70	2,80	4,00	9,90	13,80	4%	3%	1%	1%	2,80	4,00	10,00	14,00	0%	0%	1%	1%
Gyrtoni (ramp)	0,50	0,70	1,80	2,50	0,50	0,70	1,80	2,50	0%	0%	0%	0%	0,50	0,70	1,80	2,50	0%	0%	0%	0%
Markyhor	1,70	2,50	6,20	8,70	1,80	2,50	6,30	8,80	6%	0%	2%	1%	1,80	2,50	6,40	8,90	0%	0%	2%	1%
Makryhori (ramp)	0,80	1,10	2,70	3,80	0,80	1,10	2,80	3,90	0%	0%	4%	3%	0,80	1,10	2,80	3,90	0%	0%	0%	0%
Evangelismos (ramp)	0,80	1,20	2,90	4,00	0,80	1,20	2,90	4,10	0%	0%	0%	2%	0,80	1,20	3,00	4,10	0%	0%	3%	0%
Pyrgetos	1,10	1,60	4,10	5,70	1,20	1,70	4,10	5,80	9%	6%	0%	2%	1,20	1,70	4,20	5,80	0%	0%	2%	0%
Platamonas (ramp)	0,40	0,60	1,60	2,20	0,50	0,60	1,60	2,30	25%	0%	0%	5%	0,50	0,70	1,60	2,30	0%	17%	0%	0%
Leptokarya	2,20	3,10	7,80	10,90	2,20	3,20	7,90	11,10	0%	3%	1%	2%	2,20	3,20	8,00	11,20	0%	0%	1%	1%
leptokarya (ramp)	1,20	1,80	4,40	6,20	1,30	1,80	4,50	6,30	8%	0%	2%	2%	1,30	1,80	4,50	6,30	0%	0%	0%	0%
Kleidi	1,50	2,10	5,40	7,50	1,50	2,20	5,40	7,60	0%	5%	0%	1%	1,50	2,20	5,50	7,70	0%	0%	2%	1%

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Egnatia																				
Polymylos	1,70	2,40	6,00	8,40	1,70	2,40	6,00	8,40	0%	0%	0%	0%	1,70	2,40	6,00	8,40	0%	0%	0%	0%
lasmos	1,30	1,90	4,80	6,70	1,30	1,90	4,80	6,70	0%	0%	0%	0%	1,30	1,90	4,80	6,70	0%	0%	0%	0%
Malakasi	1,50	2,10	5,30	7,40	1,50	2,10	5,30	7,40	0%	0%	0%	0%	1,50	2,10	5,30	7,40	0%	0%	0%	0%
Analipsi	1,70	2,40	6,00	8,40	1,70	2,40	6,00	8,40	0%	0%	0%	0%	1,70	2,40	6,00	8,40	0%	0%	0%	0%
Tyria	1,50	2,10	5,30	7,40	1,50	2,10	5,30	7,40	0%	0%	0%	0%	1,50	2,10	5,30	7,40	0%	0%	0%	0%
Moystheni	1,70	2,40	6,00	8,40	1,70	2,40	6,00	8,40	0%	0%	0%	0%	1,70	2,40	6,00	8,40	0%	0%	0%	0%
Malgara	0,80	1,20	3,00	4,20	0,80	1,20	3,00	4,20	0%	0%	0%	0%	0,80	1,20	3,00	4,20	0%	0%	0%	0%
Aktio	0,70	3,00	7,50	10,50	0,70	3,00	7,50	10,50	0%	0%	0%	0%	0,70	3,00	7,50	10,50	0%	0%	0%	0%
Promachonas	1,70	2,40	6,00	8,40	1,70	2,40	6,00	8,40	0%	0%	0%	0%	1,70	2,40	6,00	8,40	0%	0%	0%	0%
Pamvotida	0,80	1,20	3,00	4,20	0,80	1,20	3,00	4,20	0%	0%	0%	0%	0,80	1,20	3,00	4,20	0%	0%	0%	0%
Evzonoï	1,30	1,80	4,50	6,30	1,30	1,80	4,50	6,30	0%	0%	0%	0%	1,30	1,80	4,50	6,30	0%	0%	0%	0%
Mesti	1,20	1,70	4,30	6,00	1,20	1,70	4,30	6,00	0%	0%	0%	0%	1,20	1,70	4,30	6,00	0%	0%	0%	0%
Ieropigi	1,50	2,10	5,30	7,40	1,50	2,10	5,30	7,40	0%	0%	0%	0%	1,50	2,10	5,30	7,40	0%	0%	0%	0%
Olympia Odos																				
Elefsina	1,40	2,10	5,30	7,40	1,50	2,10	5,30	7,50	7%	0%	0%	1%	1,50	2,10	5,40	7,60	0%	0%	2%	1%
Nea Peramos (ramp)	1,00	1,40	3,50	5,00	1,00	1,40	3,60	5,00	0%	0%	3%	0%	1,00	1,40	3,60	5,10	0%	0%	0%	2%
Pahi (ramp)	0,60	0,90	2,30	3,20	0,60	0,90	2,30	3,20	0%	0%	0%	0%	0,60	0,90	2,30	3,30	0%	0%	0%	3%
Ag. Theodoroi (ramp)	0,30	0,50	1,30	1,90	0,30	0,50	1,30	1,90	0%	0%	0%	0%	0,30	0,50	1,40	1,90	0%	0%	8%	0%
Isthmos	1,20	1,80	4,50	6,30	1,20	1,80	4,50	6,40	0%	0%	0%	2%	1,20	1,80	4,60	6,40	0%	0%	2%	0%
Zevgolatio (ramp)	0,50	0,70	1,80	2,60	0,50	0,70	1,90	2,60	0%	0%	6%	0%	0,50	0,70	1,90	2,70	0%	0%	0%	4%
Kiato (ex Zevgolatio)	1,60	2,20	5,70	8,00	1,60	2,30	5,70	8,00	0%	5%	0%	0%	1,60	2,30	5,80	8,10	0%	0%	2%	1%
Kiato (ramp)	0,60	0,80	2,10	3,00	0,60	0,80	2,20	3,00	0%	0%	5%	0%	0,60	0,80	2,20	3,10	0%	0%	0%	3%
Derveni (ramp)	0,90	1,30	3,30	4,60	0,90	1,30	3,30	4,70	0%	0%	0%	2%	0,90	1,30	3,40	4,70	0%	0%	3%	0%
Akrata (ramp)	1,20	1,70	4,30	6,00	1,20	1,70	4,30	6,10	0%	0%	0%	2%	1,20	1,70	4,40	6,20	0%	0%	2%	2%
Kalavryta (ramp)	1,60	2,30	5,90	8,30	1,60	2,40	6,00	8,40	0%	4%	2%	1%	1,70	2,40	6,00	8,50	6%	0%	0%	1%
Eleonas	2,20	3,20	8,10	11,30	2,20	3,20	8,10	11,40	0%	0%	0%	1%	2,30	3,30	8,20	11,50	5%	3%	1%	1%
Drepano (ramp)	1,20	1,70	4,30	6,00	1,20	1,70	4,30	6,00	0%	0%	0%	0%	1,20	1,70	4,30	6,10	0%	0%	0%	2%
Rio	1,40	2,10	5,30	7,40	1,60	2,20	5,70	8,00	14%	5%	8%	8%	1,60	2,30	5,70	8,10	0%	5%	0%	1%
Moreas																				
Spathovouni	1,70	2,45	6,20	8,70	1,70	2,50	6,30	8,80	0%	2%	2%	1%	1,70	2,55	6,35	8,90	0%	2%	1%	1%
Nestani	1,60	2,35	5,90	8,25	1,60	2,35	5,95	8,35	0%	0%	1%	1%	1,60	2,40	6,05	8,45	0%	2%	2%	1%
Gefyra Manari	1,30	1,90	4,80	6,70	1,30	1,90	4,85	6,75	0%	0%	1%	1%	1,30	1,95	4,90	6,85	0%	3%	1%	1%
Veligosti	0,80	1,20	3,10	4,35	0,80	1,25	3,15	4,40	0%	4%	2%	1%	0,80	1,25	3,15	4,45	0%	0%	0%	1%
Paradeisia (ramp)	0,50	0,75	1,90	2,65	0,50	0,75	1,90	2,65	0%	0%	0%	0%	0,50	0,75	1,90	2,70	0%	0%	0%	2%
Kalamata	1,30	1,85	4,70	6,60	1,30	1,90	4,75	6,65	0%	3%	1%	1%	1,30	1,90	4,80	6,75	0%	0%	1%	2%
Arfaroï (ramp)	0,50	0,75	1,85	2,60	0,50	0,75	1,90	2,65	0%	0%	3%	2%	0,50	0,75	1,90	2,65	0%	0%	0%	0%
Petrina	2,00	2,85	7,20	10,05	2,00	2,90	7,25	10,15	0%	2%	1%	1%	2,00	2,90	7,25	10,15	0%	0%	0%	0%
Thouria (ramp)	0,30	0,45	1,20	1,65	0,30	0,45	1,20	1,65	0%	0%	0%	0%	0,30	0,45	1,20	1,65	0%	0%	0%	0%

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	Cat. 1	Cat. 2	Cat. 3	Cat. 4	Cat. 1	Cat. 2	Cat. 3	Cat. 4	Cat. 1	Cat. 2	Cat. 3	Cat. 4	Cat. 1	Cat. 2	Cat. 3	Cat. 4	Cat. 1	Cat. 2	Cat. 3	Cat. 4
Ionia Odos																				
Klokova	2,05	2,95	7,45	10,40	2,10	3,00	7,50	10,50	2%	2%	1%	1%	2,10	3,00	7,60	10,65	0%	0%	1%	1%
Gavrolimni (ramp)					1,45	2,10	5,30	7,45					1,50	2,15	5,35	7,50	3%	2%	1%	1%
Mesologgi (ramp)	0,85	1,25	3,10	4,40	0,85	1,25	3,15	4,40	0%	0%	2%	0%	0,85	1,25	3,20	4,45	0%	0%	2%	1%
Aggelokastro	2,45	3,50	8,75	12,25	2,45	3,50	8,85	12,35	0%	0%	1%	1%	2,50	3,55	8,95	12,50	2%	1%	1%	1%
Kouvaras (ramp)	1,10	1,60	4,05	5,65	1,15	1,60	4,10	5,75	5%	0%	1%	2%	1,15	1,65	4,15	5,80	0%	3%	1%	1%
Menidi	2,05	2,95	7,45	10,45	2,10	3,00	7,50	10,55	2%	2%	1%	1%	2,10	3,00	7,60	10,65	0%	0%	1%	1%
Arta (ramp)	0,50	0,75	1,90	2,65	0,50	0,75	1,90	2,70	0%	0%	0%	2%	0,50	0,75	1,95	2,70	0%	0%	3%	0%
Gorgomylos (ramp)	0,70	1,00	2,50	3,50	0,70	1,00	2,55	3,55	0%	0%	2%	1%	0,70	1,00	2,55	3,60	0%	0%	0%	1%
Terovo (ramp)	2,15	3,05	7,70	10,80	2,15	3,10	7,75	10,90	0%	2%	1%	1%	2,20	3,15	7,85	11,00	2%	2%	1%	1%
Attiki Odos																				
All plazas	1,40	2,80	7,10	11,30	1,40	2,80	7,10	11,30	0%	0%	0%	0%	1,40	2,80	7,10	11,30	0%	0%	0%	0%

Gefyra									
	Cat. 1	Cat. 2	Cat. 3	Cat. 4	Cat. 5	Cat. 6	Cat. 7	Cat. 8	Cat. 9
Toll	1,90	13,50	20,30	33,00	42,00	42,00	30,50	43,00	66,00

Moreas, Olympia Odos, Nea Odos, Kentriki Odos, Aegean Motorway (former TEO Network) & Egnatia Odos	
Category 1	Motorcycles
Category 2	Vehicles with or without a trailer, up to 2.20* metres high
Category 3	Vehicles of 2-3 axles, with or without a trailer, over 2.20* metres high
Category 4	Vehicles with or without a trailer, of 4 or more axles, over 2.20* metres high

*: for Egnatia: 2.70 metres high

Attiki Odos - Categories	
Category 1	Motorbikes and two-wheel motorcycles, one wheel per axle.
Category 2	Private use passenger cars, including passenger cars with a small trailer and roof rack, h < 1.30 m over the first two-wheel axle or h < 1.30 m. over the third axle.
Category 3	Light Commercial Vehicles up to 1.30m high over the first axle and a total height of less than 2.70m
Category 4	Cars with trailers up to h < 1.30m high over the first axle and h > 1.30m over 3 axles, as well as small mini-vans (less than 15 seats).
Category 5	Small and Medium HGVs, trucks, total height h > 2.70m., with 2 or 3 axles and large buses (over 15 seats).
Category 6	Large HGVs, total height h > 2.70m with 4 or more axles

Gefyra - Categories	
Category 1	Motorcycles
Category 2	Cars
Category 3	Trucks – 2 Axles
Category 4	Trucks – 3 Axles
Category 5	Trucks – 4+ Axles
Category 6	Trucks – 5+ Axles
Category 7	Coaches Up to 20 seats
Category 8	Coaches 20-40 seats
Category 9	Coaches more than 40 seats

Revenues

The annual toll revenues for year 2018 reached 659.61 million Euros (excluding VAT) compared to 569.20 million Euro in 2017. This is an increase of 15,9% that comes mainly as a consequence of the increase in toll transactions from 232,3 million in 2017 to 263,4 million in 2018 (13,3% increase), due to the operation of more toll stations in 2018 compared to 2017 (from 132 to 145) and adjustments of toll rates per the terms of the Concession Agreements.

Safety

The following table shows the main road safety rates for 2018 and the comparison with 2017.

	Definition and method of calculation	In number for 1 billion kilometres travelled in 2018	Variation in % in 2018/2017
Personal injury rate	The number of injured people for every 1 billion kilometers travelled along the motorway.	55,43	0,2%
Fatal accident rate	The number of fatal accidents for every 1 billion kilometers travelled along the motorway.	5,25	31,3%
Rate of dead	The number of fatalities for every 1 billion kilometers travelled along the motorway.	5,86	26,8%

The figures show an increase in all categories compared to 2017, however there is no evident trend that shows that this increase will continue in 2019.

Long-term forecasts and tendencies

With the completion of almost all the national motorway network in late 2017, little is left for future plans regarding expansion of the network. There are plans for developing the Northern

Motorway Axis in the island of Crete, known as VOAK, as well as a tender process for the Patra – Pyrgos section in the Peloponnese that was left out of the Olympia Odos project, following the reset of the concession contract. At this stage the Ministry of Infrastructures & Transport is developing the National Strategic Transport plan for the period up to year 2037 that will be completed within 2019 and will suggest priorities for network extensions for both road and rail.

Significant actions already started (and/or to be achieved in 2018) and foreseen for 2019.

The most significant action from the Greek State's side is the initiation of a tender process for a new fully electronic Open Road Tolling System, foreseen to replace the current Manual and DSRC ETC on all existing toll roads in Greece. From the Concessionaires' side, actions already started in 2018 include the introduction of POS for credit and debit cards at the manual toll lanes that introduce another payment method in addition to cash payment. Also negotiations to reach full toll interoperability in all seven (7) tollways are still underway. Finally the implementation of a "hybrid" toll system, i.e. a combination of "open" toll coupled with a distance based system for ETC users is under examination for development in some projects. HELLASTRON has proposed the hybrid system to the State, as an alternative to the fully electronic toll system that the State envisages; as HELLASTRON believe that the hybrid system is a more sensible and easy to implement approach compared to the fully electronic satellite / video tolling that still has a lot of issues to be resolved, more important of which is the foreseen high rate of uncollectable tolls.

Finally it has to be noted that the only state operated motorway in Greece, the Egnatia Odos Motorway in Northern Greece, is planned to be privatized in the next year. The tender for the 35 year concession of Egnatia is underway, with 7 schemes having officially expressed initial interest, however the bid submission date is delayed and pushed back to October 2019, as a lot of issues are open, mainly related to heavy maintenance, tunnel certifications and tolling policy.

Main ASECAP key figures

Country: GREECE	Description	2017 Figure	2018 Figure
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NETWORK INFORMATION - COUNTRY DATA			
Total length of national roads	Total length of national roads in the country (without local roads and municipality roads)	3.222,0	3.222,0
Total length of motorways	Total length of motorways in the country (high capacity roads, seperated carriageways)	2.133,2	2.133,2
- Total length of tolled motorways	- Total length of tolled motorways (high capacity roads) in the country	2.133,2	2.133,2
- Total length of non-tolled motorways	- Total length of non-tolled motorways (high capacity roads) in the country	0,0	0,0
% of tolled network from all motorway network in the country		100%	100%

NETWORK INFORMATION - MEMBERS DATA			
Length of motorways operated by the members	Length of motorways (high capacity roads) operated by the members (including tunnels)	2.054,8	2.054,8
Length of other roads operated by the members	Length of other roads but high capacity roads (operated by the members)	78,4	78,4
Members network length (in km)	Members network length (network operated by members in km)	2.133,2	2.133,2
Lenght of tunnels longer than 500 m (in km of tunnel tubes)	Lenght of tunnels longer than 500 m operated by the members (lenght of the tubes)	163,0	163,0
Number of tunnels operated by the members longer than 500 m		122	122
Km of network in construction	Number of km in construction (new construciton, greenfield investments)	107,5	113,7
Km of network widening (additional lanes)	Km of network widening (additional lanes) - in construction	0,0	0,0

INVESTMENT (CAPEX) - MEMBERS DATA			
New investment (in M€)	New investment: new constructions and expansions done on motorways in the calendar year (M€)	428,43	46,85
Investment into existing network (in M€)	Investment into existing network: renovation, big repairs and new facilities, like ITS equipment or similar on existing motorways in the year (M€)	39,69	42,37
Total annual investments (in M€)	TOTAL INVESTMENTS (CAPEX) = new investment + investment into existing motorways (M€)	468,12	89,21

TOLL REVENUES - MEMBERS DATA			
Annual toll revenues from light vehicles (in M€)	Annual toll revenues (without VAT or other taxes) from light vehicles (M€)	414,78	460,10
Annual toll revenues from heavy vehicles (in M€)	Annual toll revenues (without VAT or other taxes) from heavy vehicles (M€)	154,42	199,52
Annual toll revenues - total (without VAT, in M€)	Total annual toll revenues (from light vehicles and heavy vehicles, without VAT or other taxes)(in M€)	569,20	659,61
Taxes other than VAT calculated on toll	Taxes other than VAT calculated on toll (charged to the users)	0,00	0,00
VAT %	VAT % (indicate the VAT % percentage to the toll revenues) (in %)	24%	24%
Calculated VAT/VAT charged on tolls (in M€)		136,61	158,31
Mark-ups or external cost paid to the State budget by the concessionaires	Mark-up or external costs as defined in the Eurovignette directive	0,00	0,00

EMPLOYMENT - MEMBERS DATA			
Permanent staff	Permanent staff (direct employees) (number)	5.926	4.537

TRAFFIC DATA - MEMBERS DATA			
Annual average daily traffic - light vehicles		11.832	10.952
Annual average daily traffic - heavy vehicles		1.870	1.858
Annual average daily traffic - total	Annual average daily traffic - total = light + heavy vehicles	13.703	12.810
Kilometres travelled (in million km) - light vehicles		8.447	8.474
Kilometres travelled (in million km) - heavy vehicles		1.297	1.430
Kilometres travelled (in million km) - total	Kilometres travelled (in million km) - total = average daily traffic (LV+HV) * 365 (no of days in the year) * network length	9.743	9.904

ROAD SAFETY - COUNTRY DATA			
Number of dead (fatalities) on roads in the country	Total number of road accidents on national road network (country data)	730	707

ROAD SAFETY - MEMBERS DATA			
Total number of road accidents on members network		404	441
Number of personal injury accidents on members network		365	389
Number of persons injured in road accidents on members network		539	549
Number of accidents with dead (fatalities)		39	52
Number of dead (fatalities)	No of dead within 30 days from the date of the accident	45	58
Fatality rate on the members network	Fatality rate on the members network = number of dead within 30 days from the date of the accident / million km travelled * 100	0,46	0,59

TOLLING - MEMBERS DATA			
Number of toll transactions - total		232.330.490	263.388.562
Number of toll transactions - light vehicles		206.418.526	230.797.936
Number of toll transactions - heavy vehicles		25.911.964	32.590.626
Total number of ETC transactions		69.335.691	79.157.510
% of manual transactions		70%	70%
% of ETC transactions		30%	30%
Number of OBUs in operation		0	0
Number of toll stations		132	145
Number of toll lanes		745	780
Number of ETC lanes or mixed lanes	Number of ETC lanes or mixed lanes (excluding free flow lanes)	459	491
Number of ETC subscribers - total		774.337	831.090
Number of ETC subscribers - light vehicles		724.786	774.920
Number of ETC subscribers - heavy vehicles		49.551	56.170
Tolling technology/system in use for LV	Tolling technology/system in use for LV (distance related or vignette / GNSS, DSRC 5,8 GHz, ANPR, RFID, other)	manual & DSRC 5,8 GHz	manual & DSRC 5,8 GHz
Tolling technology/system in use for HV	Tolling technology/system in use for HV (distance related or vignette / GNSS, DSRC 5,8 GHz, ANPR, RFID, other)	manual & DSRC 5,8 GHz	manual & DSRC 5,8 GHz
Length of the network tolled electronically (in km)	Length of the network tolled (also) electronically (in km)	2.133	2.133
Length of the network tolled in the MLFF	Length of the network tolled in the multilane free traffic flow (like GNSS, DSRC gantries...no toll booths on the road)	0	0

SERVICES			
Number of service areas (equipped with petrol stations)		44	54
Number of truck parking (s)lots or spaces		183	363
Number of rest areas		161	167
Number of restaurants		45	53
Number of hotels		1	1

ENVIRONMENT			
Euro-emission classes (yes/no)		NO	NO
If yes: % of traffic per Euroclass categories EURO V, EEV and EURO VI		N/A	N/A

*General note: if there is no data available give the estimate, if only possible