

## NATIONAL REPORT: SPAIN

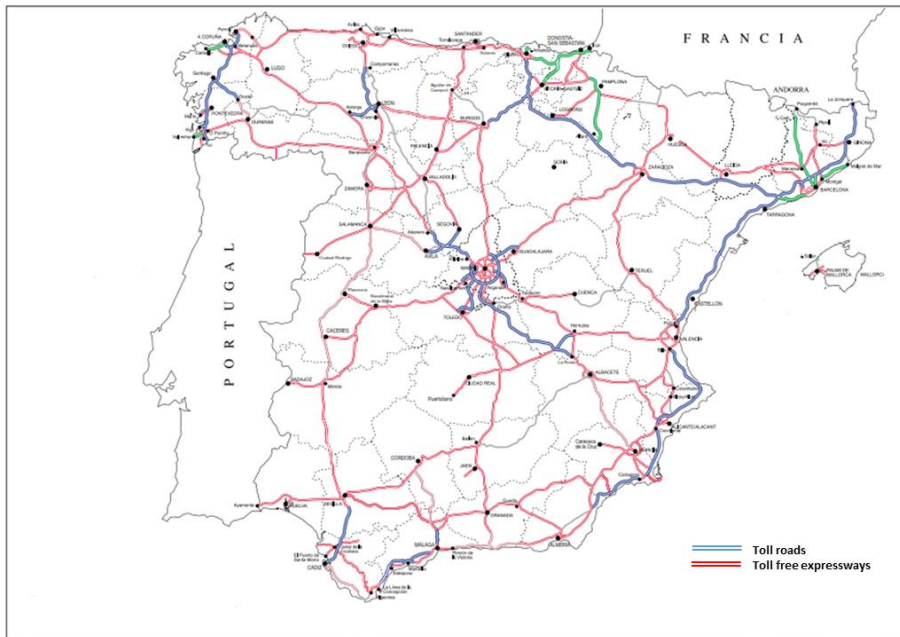
At 31/12/2017

### Network length

The total network under toll concession regime reaches 3,404 km: 2,759 km granted by the central government and 548 km by some regional governments. It includes toll motorways but also 175.7 km of non-tolled stretches that are part of some toll concessions. 3,017 km out of the total are managed by SEOPAN's members.

During 2017 there were no new stretches open to traffic, however some lane extensions were put in operation.

These 3,404 km of toll roads supposes only 18% of the total high capacity road network which is mostly free of toll.



Source: Ministerio de Fomento

TOLL MOTORWAYS NETWORK (KM)		
	2016	2017
IN OPERATION	3,404	3,404
UNDER CONSTRUCTION	4.2	4.2
PLANNING STAGE	0	0
<b>TOTAL NETWORK</b>	<b>3406.2</b>	<b>3,406.2</b>

### Openings in 2018

By January 9<sup>th</sup>, the regional government of Guipúzcoa in the North of Spain started operating a toll system for trucks over 3.5 tones in the existing N-I and A-15 motorways.

## Investments

The contribution of the toll sector to the whole society is huge: 4,430 million euros have been invested in the existing network and it is estimated that the fiscal return of the whole sector reached 42.9% of the incomes.

## Financing

Bank financing is still the most extended mechanism to finance toll concessions, nevertheless, some companies have issued bonds to get additional financing. Secondary market is also increasing and some important corporate operations are in process.

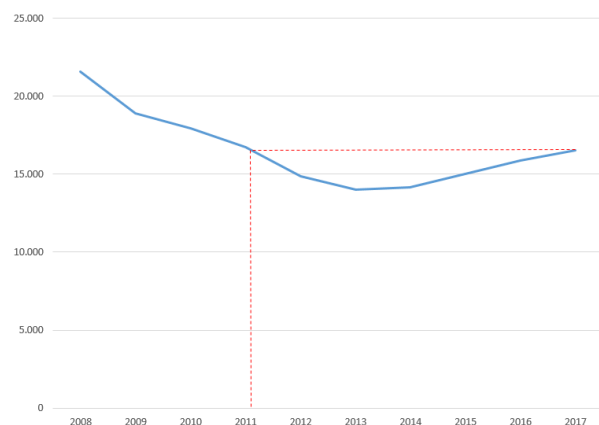
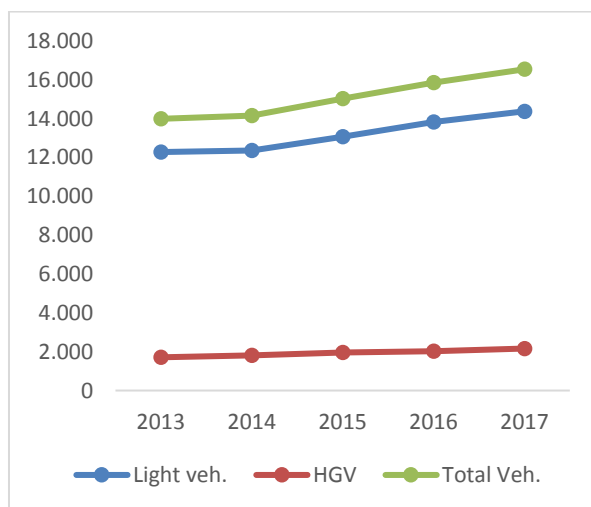
Even though it is not very common, some companies profit of participative loans granted by the Central Administration.

## Traffic

2017 is the fourth year after the economic crisis recording positive figures. The Average Daily Traffic, of those vehicles paying a toll, was 16,537, a 4.30% increase compared to 2016.

This implies that the traffic has reached the level recorded in 2011.

Toll paying vehicles	2016	2017	VARIATION
ADT Light veh.	13,826	14,375	3.97%
ADT Heavy veh.	2,029	2,162	6.53%
ADT Total veh.	15,855	16,537	4.30%



## **Tolling system and tolling technologies used**

### a. Intelligent transport systems:

Toll concessionaires and SEOPAN are very active participating in different projects related to ITS as Arc Atlantique 2 & 3, MedTIS 2 & 3, the European ITS Platform, and more recently in the C-ROAD Spain project.

The development of connecting vehicles, autonomous car, the MaaS and cooperative economy are closely monitored.

### b. Electronic toll collection

In Spain tolls are collected manually, by credit or debit cards or by an electronic toll system (ETC). The Spanish ETC system, VIA-T, reached 4.7 million users in 2017, an 11% yearly increase. 45% of the total transactions are performed with this system, while 34% are collected by cards and 21% by cash.

The ETC is based on CEN 278 DSRC 5.8 GHZ technology. It is an interoperable system in use in all motorways and also in many parking cars under the commercial name of VIA-T. This system is also accepted in Portugal and France (depending on the issuers).

Regarding the use of cards, most of concessions are performing on-line transactions and some of them are already adapted to EMV and PCI DSS standards.

## **Toll rates**

The Government's Central Administration, which awards most of the toll motorways in Spain, applies the system included in Law 14/2000 of December 28th. This system takes into account the average Cost of Living Index as well as the traffic levels recorded on the motorways. In 2017 toll tariff rates decreased by -0.41%.

The rest of the awarding Governments, establish other tariffs review policies by solely taking into account a certain percentage of the Average Cost Living Index, except Catalonia that includes a correction factor to compensate previous discounts.

Based on Law 2/2015, future toll concessions (and possible rebalances of current concessions) will not review their toll tariffs according to the current system. Instead of this, toll tariff will be reviewed based on a new formula that should be defined considering the real costs of the concession.

## **Revenues**

Toll concessionaire companies reached a net amount of revenues of 1,836.08 million euros (after commercial discounts plus subsidies from different Administrations). Despite of the toll rate reduction, the increase of revenue was due to the gradual recovery of the Spanish economy, a higher number of tourists and an increase of the HGV traffic.

## Safety

In 2017, 40 people died in the toll motorway network, 6 less than in 2016 (-13%). In addition, the number of injured people also decreased by -4,1% and the number of total accidents were reduced to 5,418 in 2016 to 5,006 in 2017 (-7.6%).

Nevertheless the number of fatal accidents and accident with injuries increased. In terms of accident rates, indicator IG1 (injured people/accidents with victims) decreased and IG2 (fatalities/accident with victims) remained unchanged, showing an improvement on our statistics and a decrease on the seriousness of the accidents.

	IG1	IG2
	injured people/accidents with victims	fatalities/accident with victims
2016	1.59	0.04
2017	1,49	0,04

Road safety is always a key issue for Spanish toll roads concessionaries that are still implementing preventive and reactive plans, campaigns and developments on that field.

	Definition and method of calculation	In number for one billion kilometres travelled in 2017	Variation in % in 2016/2017
Personal injury rate	<b>Seriously Injured</b> : A person who remains hospitalized over 24 hours resulting from injuries caused by a traffic accident	<b>1,627</b>	<b>-4,1 %</b>
Fatal accident rate	<b>Fatal accident:</b> Accident in which one or more people are killed within the subsequent 24 hours.	<b>36</b>	<b>16,1%</b>
Rate of dead	<b>Fatality:</b> A person who dies on the spot or within the subsequent 30 days as a result of a traffic accident.	<b>40</b>	<b>-13,0%</b>

## Long-term forecasts and tendencies

In 2017 the Spanish economy has continued its positive economic trend, thanks to our dynamic export and tourist sectors and the good evolution of the internal demand.

Regarding existing toll concession contracts, four contracts operating more than 1.000 km will expire by 2021. Up to know there is no political decision about how these motorways will be managed and operated in the future. Even though there is a strong local pressure that demands to take the tolls away, the high cost of maintenance, the fiscal return and the employment coming from tolls are important elements that have to be considered by the Government.

**Significant actions already started (and/or to be achieved in 2017) and foreseen for 2018.**

At the end of 2017, the regional government of Baleares has unilaterally adopted the decision to cancel the contract of Tunnel del Sóller. This 3.5 km long facility is now operated without tolls.

The new Public contracts law entered transposing the Directive 2014/24/UE on public procurement and Directive 2014/23/EU on the award of concession contracts entered into force in March 2018. All terms of reference for future tenders will be upgraded accordingly.

The 8 toll concessionaires that went to bankruptcy -and finally in liquidation- are now getting managed by the public company SEITSA that is preparing the re-tendering of these motorways for end of 2018. There will be 2 packages (one gathering the motorways in the area of Madrid and the other in the area of Alicante) and the toll-free stretches as the M-50 will be kept out of the tender. After a preselection, the government will launch the tender where the awarding criteria will be the upfront payment to be offered by the new concessionaire, in order to minimize the impact of the RPA (Patrimonial Responsibility of the Administration).

In July 2017, a new Extraordinary Road Investment Scheme (PIC) was announced to build up to 2,000 km of motorways, with an investment of 5 B €, under an availability payment system (free of toll). The tenders will be launched in 2018 and 2019.

**MAIN ASECAP KEY FIGURES**

Country: SPAIN	Indicate below how you calculate each figure provided in the "2016" column	2017 Figure
Network length (Km).....	Km financed by toll (includes non-tolled stretches financed by tolls collected in	3,404

2 x 2 lanes (Km).....	other toll roads)	2,411
2 x 3 lanes (Km).....		492.5
2 x 4 lanes (Km).....		66.1
Number of km in construction		0
Forecasts of opening motorways section		0
Annual toll revenues* (in millions of Euros)		1,836.08
VAT % (Indicate the VAT % percentage to the toll revenues)		21%
Permanent staff		3,290
Average daily traffic (light vehicles)		14,375
Average daily traffic (heavy vehicles)		2,162
Average daily traffic (total = light + heavy vehicles)		16,537
Total number of accidents		5,006
Number of personal injury accidents		1,091
Number of dead		40
Fatality rate	Fatal accident rate: Accident in which one or more people are killed within the subsequent 24 hours. Fatality rate: A person who dies on the spot or within the subsequent 30 days as a result of a traffic accident	16,1%
Kilometres travelled (10 <sup>6</sup> x km)		21,859
Number of toll transactions (Total)	Total	479,678,088
Number of toll transactions (light vehicles):		433,070,155
Number of toll transactions (heavy vehicles):		46,607,933,
Number of toll stations		243
Number of toll lanes		2,596
Number of ETC lanes		2,125

Number of ETC subscribers (Total):		4,693,441
Number of ETC subscribers (light vehicles):	Not applicable in Spain: On Board Units are interchangeable between vehicles.  No distinction is made between light and heavy vehicles.	n/a
Number of ETC subscribers (heavy vehicles):		n/a
Number of service areas (equipped with petrol stations)		95
Number of rest areas		128
Number of restaurants		92
Number of hotels		4