ELECTRONIC TOLL COLLECTION IN EUROPE

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President of ASECAP and CFO of ASFINAG
NORVEGFINANS Conference 2012
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Topics

- ASFINAG and ASECAP in brief
- (Electronic) Tolling solutions in Europe
- Challenges and solutions
- Further trends
Company overview

• ASFINAG is responsible for 2.170 km motorways
  • Planning, Construction and Maintenance
  • Operation (incl. traffic management & information services)
  • Toll collection & Financing issues

• Stock company – fully owned by the Republic of Austria
  • Financed via the capital market – well-established issuer of bonds
  • Guarantee by the Republic of Austria – rating of Aaa/AA+

• No public grants – 100% user-financed (tolls)
ASFINAG Vision 2015

ASFINAG is one of the leading motorway operators in Europe, especially when it comes to availability, information and safety, establishing main links and interconnectedness to the public transport system.

- **Availability:** Minus 10% traffic delays (basis 2010)
- **Information:** Provide drivers with the latest updated traffic information → one of two drivers use this information regularly
- **Safety:** Minus 15% accidents involving personal injury (basis 2010)
Road Network subject to Tolling in Austria

Toll Sticker (Passenger car time-dependent toll) and GO-Box

Special toll (Passenger car distance-dependent toll) and GO-Box

Version: October 2010
### Toll System in Austria – Revenue 2011

<table>
<thead>
<tr>
<th>Toll Sticker</th>
<th>Special Toll</th>
</tr>
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<tbody>
<tr>
<td>Up to 3.5t mpgw</td>
<td></td>
</tr>
<tr>
<td>Revenue*) of EUR 368 million</td>
<td>Revenue*) of EUR 131 million</td>
</tr>
<tr>
<td>More than 3.5t mpgw</td>
<td></td>
</tr>
<tr>
<td>Fully electronic toll payment by GO-Box</td>
<td></td>
</tr>
<tr>
<td>Revenue*) of EUR 1,062 million</td>
<td></td>
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*) net revenue 2011, rounded
Financial goals / strategy

- Striking a balance between investment programs / costs and income aimed at economic independence
  - Theoretical debt retirement period of max. 30 years
  - Net profit of EUR 200 Mio. per year

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>10 → 11</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net profit for the year</td>
<td>440</td>
<td>+29.7%</td>
<td>339</td>
</tr>
<tr>
<td>Net debt</td>
<td></td>
<td></td>
<td>-547</td>
</tr>
<tr>
<td>Debt reduction</td>
<td>94</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current and non-current liabilities</td>
<td>11,786</td>
<td>-2.0%</td>
<td>12,022</td>
</tr>
</tbody>
</table>
- European Association of Tolled Motorways, Bridges and Tunnels - [www.asecap.com](http://www.asecap.com)
- 20 Countries
- 168 Organizations
  - 45,000 km of motorways
  - 15,000 toll lanes
  - 18,500 ETC lanes
  - 24,000,000 ETC subscribers
  - EUR 25 billions toll revenues (2011)
ASECAP Presidents and Vice presidents

• President
  Klaus Schierhackl, ASFINAG (Austria)

• First Vice-President
  Jean Mesqui, ASFA (France)

• Second Vice-President
  Øyvind Halleraker, NORVEGFINANS (Norway)

• Immediate Past President
  Jose-Luis Feito, ASETA (Spain)
Stockholm Group

- Platform of national authorities on Tolling since 2002
  - Information exchange on national tolling and EETS
  - Addressing of open issues regarding EETS, e.g.
    - Security framework
    - Key Performance Indicators
- 15 Members: AT, CH, CZ, DE, DK, FI, FR, HU, IR, NL, NO, PL, SE, SLO, UK
- Close cooperation with ASFINAG and ASECAP
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Tolls are present nearly everywhere in Europe…

- …main toll roads are managed by ASECAP partners

[Map showing toll roads and vehicle categories]
Technologies in use

- Time based: Toll stickers
- Distance based:
  - Toll plazas
- Electronic toll collection
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Electronic Toll Collection (ETC)

- ETC ≠ ETC
  - DSRC CEN Standard
  - DSRC UNI Standard
  - GPS/GNSS Systems

- DSRC GPS/GNSS

- HGV Ecotax in France in 2013
Interoperability frontrunner solutions

• Service of TOLL COLLECT & ASFINAG
• DE OBU can be used also in AT
• Launch: 1. Sept 2011
• One year later 50,000 registered users!

• DK, NO, SE toll operators together with ASFINAG
• One DSRC-OBU, one contract, one invoice – for travelling through DK, NO, SE and AT
• Start of service planned for beginning of 2013
European-wide interoperability

- Frontrunner solutions – existing, under preparation
- Regional Electronic Tolling Services – under discussion
  - 1 On Board Unit
  - 1 Contract
  - 1 Registration for travelling through Europe
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European transport policy: The European Commission White Paper

30% of road freight over 300 km should shift to other modes such as rail or waterborne transport by 2030, and more than 50% by 2050!

Impact on our business ??
White Paper – Smart pricing and taxation

• Phase I (up to 2016)
  • From taxation to the user and polluter pays principle, mandatory earmarking, all modes of transport, (all vehicles)

• Phase II (2016 to 2020)
  • full and mandatory internalisation of external costs for all modes of transport!
    – Noise
    – Local pollution
    – Congestion
Let’s keep working to influence our future positively!