

IBTTA

Global Tolling Summit

Lisbon, 28oct2019

The Key Challenges for the Portuguese Tolling Industry

António Nunes de Sousa, APCAP President





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Portuguese Toll
History Timeline



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Role of Motorways in
European Context



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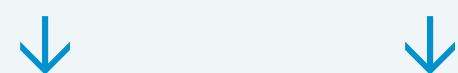
Portuguese Toll History Timeline

We have Toll Bridges since 1870 – Abrantes Bridge And Toll Motorways since 1959 – A1



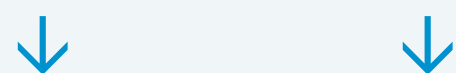
1972

1st Road Toll Concession Agreement – Brisa



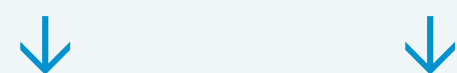
1985

Joining UE



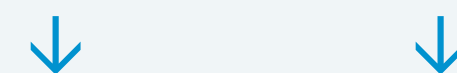
1994

2nd Toll Crossing over Tagus - Lusoponte



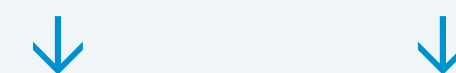
1997

1st Concession Program – 2 Real Toll and 7 Shadow Toll



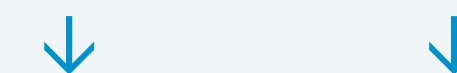
1998

2nd Concession Program – 3 Real Toll



1999

1st Madeira Concession Shadow Toll



1

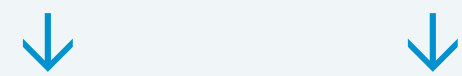
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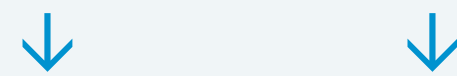
2003

New Regulation of PPP



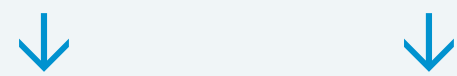
2004

2nd Madeira Concession – Shadow Toll



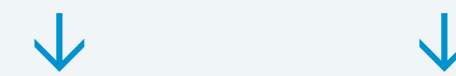
2006

Azores Concession Shadow Toll



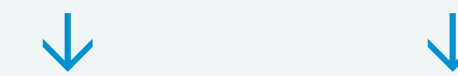
2007

EP State General concessionaire – 3rd Program Concessions (7 subconcessions)



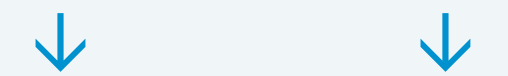
2011

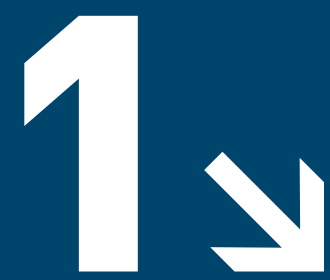
Shadow Tolls replaced by ETC - MLFF



2012

Interoperability with Spain





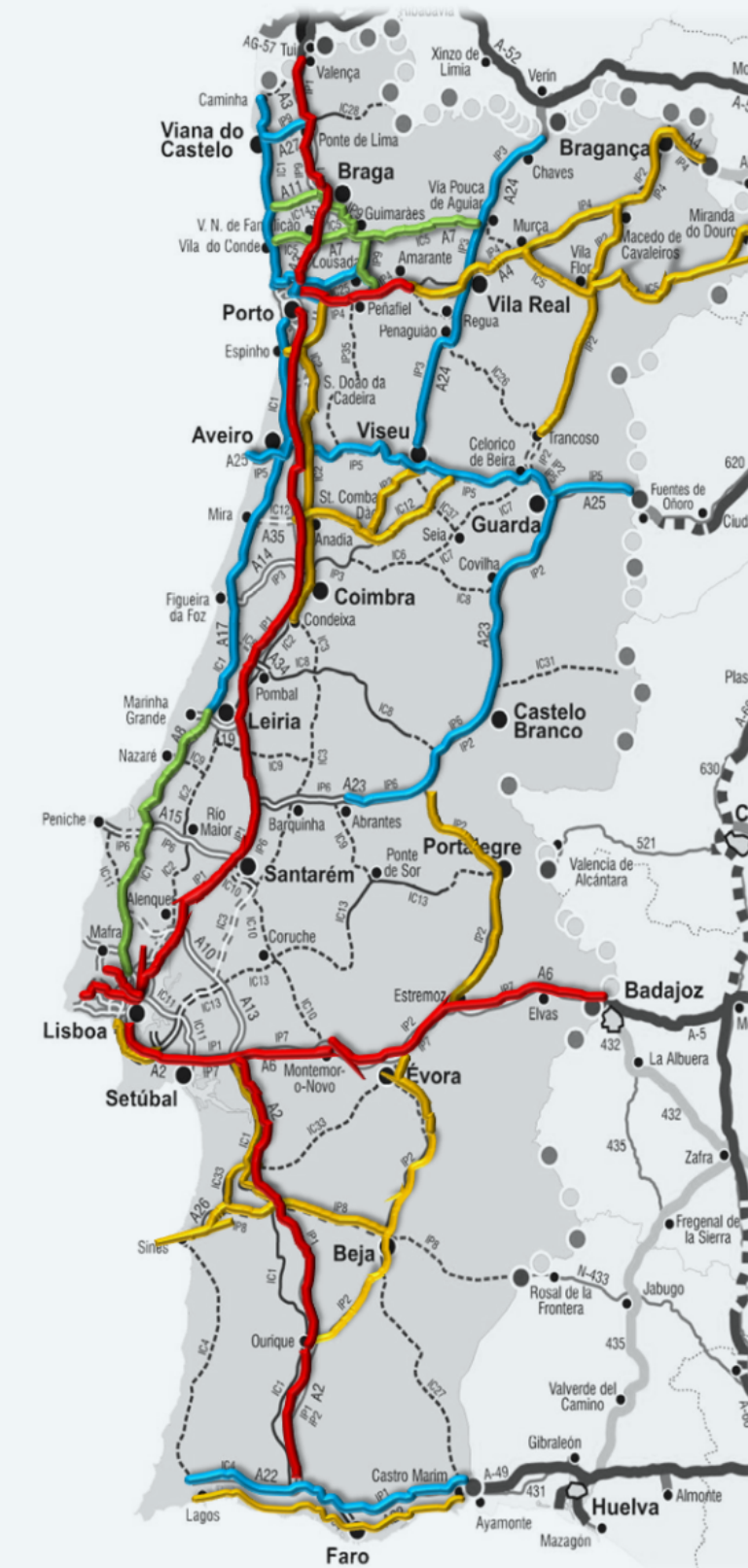
Portuguese Toll History Timeline



until 1997
■ Real Toll



1997-2007
■ Shadow Toll
■ Real Toll in PPP



2007-2011
■ Subconcessions (MLFF- Multi Lane Free Flow)

2

APCAP in numbers



Now 24 associates on
APCAP: 3580km

(25% of Portuguese National Network)

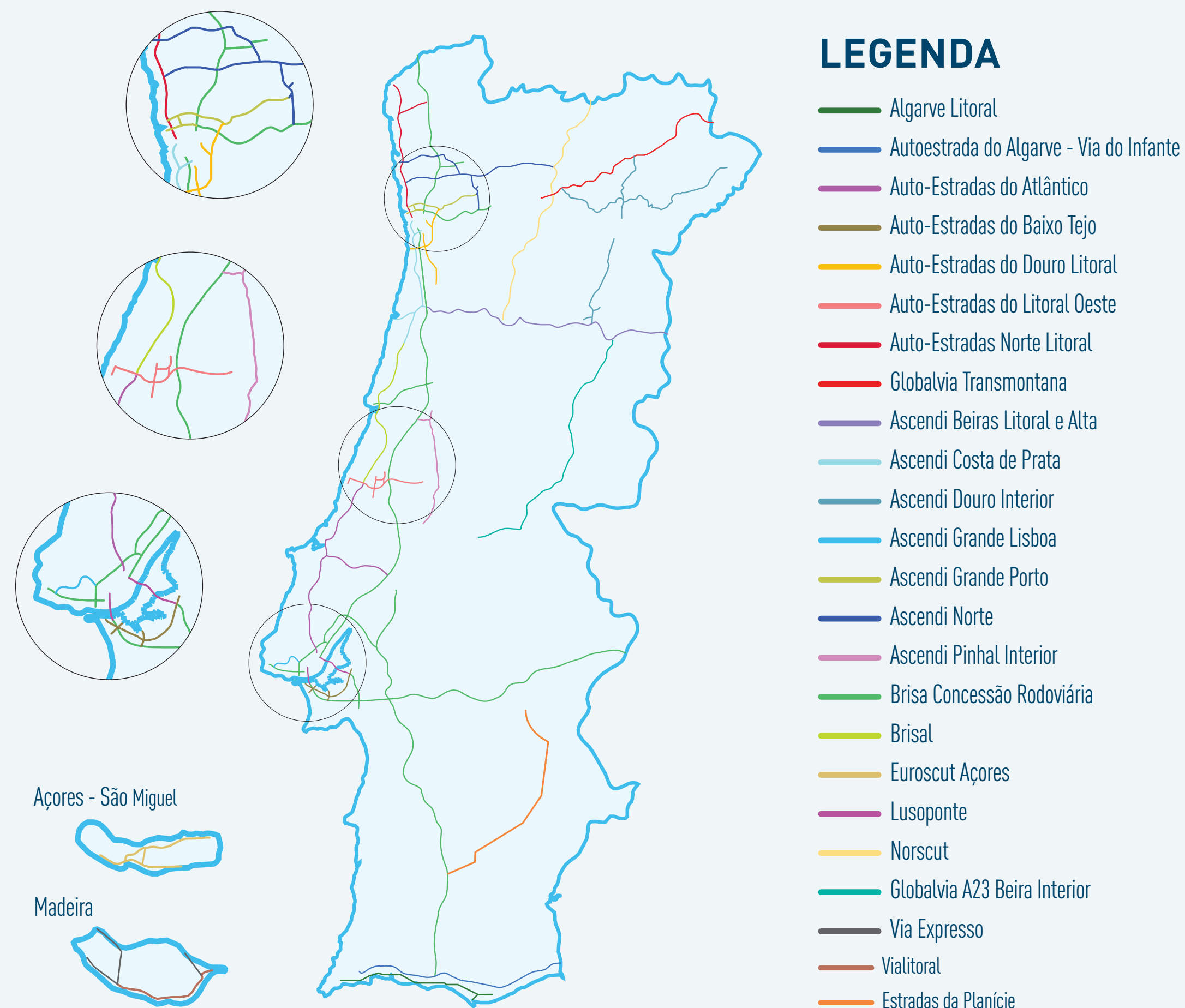
2540 km of tolled network
505 km of single lanes

AAADT₂₀₁₈ = 15,764

AAADT_{2019/2018}: +5%

Quality of Road
Infrastructure: **Ranking 8**

Source: World Economic Forum



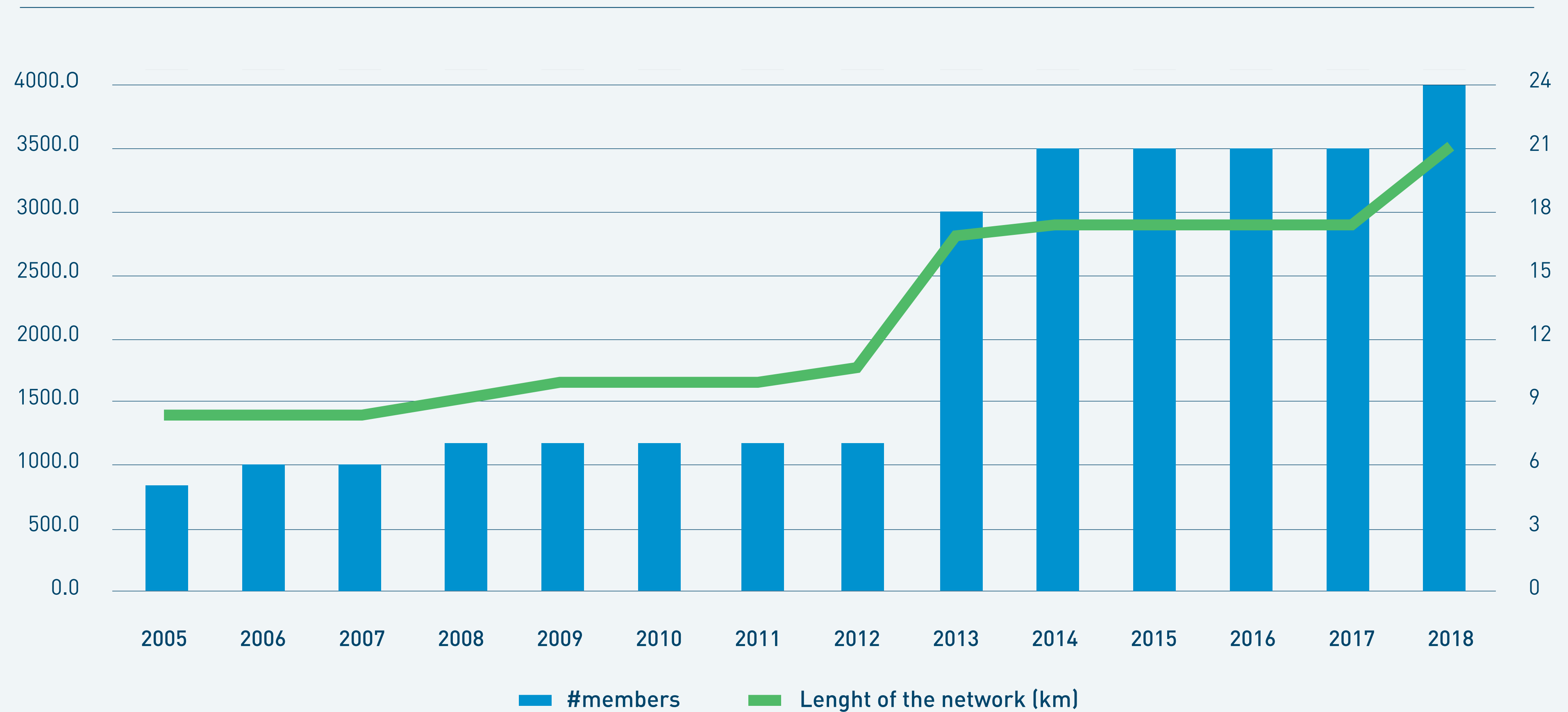
2

APCAP in numbers

APCAP was founded in 2002 with 3 members and has 24 members since 2018



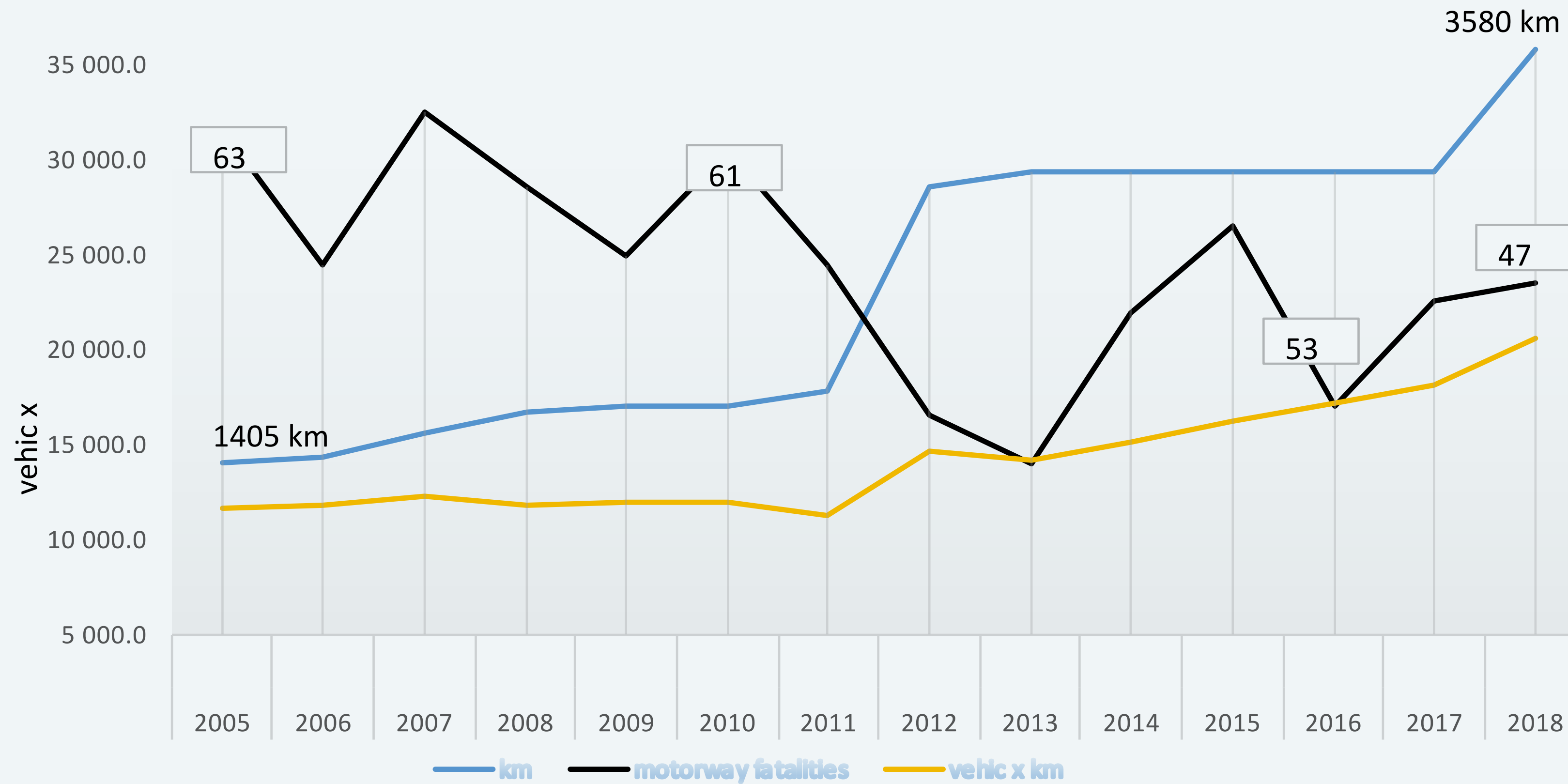
Km/members apcap



2

APCAP in numbers

Effects of 20 bn invested in roads on the last 20 years

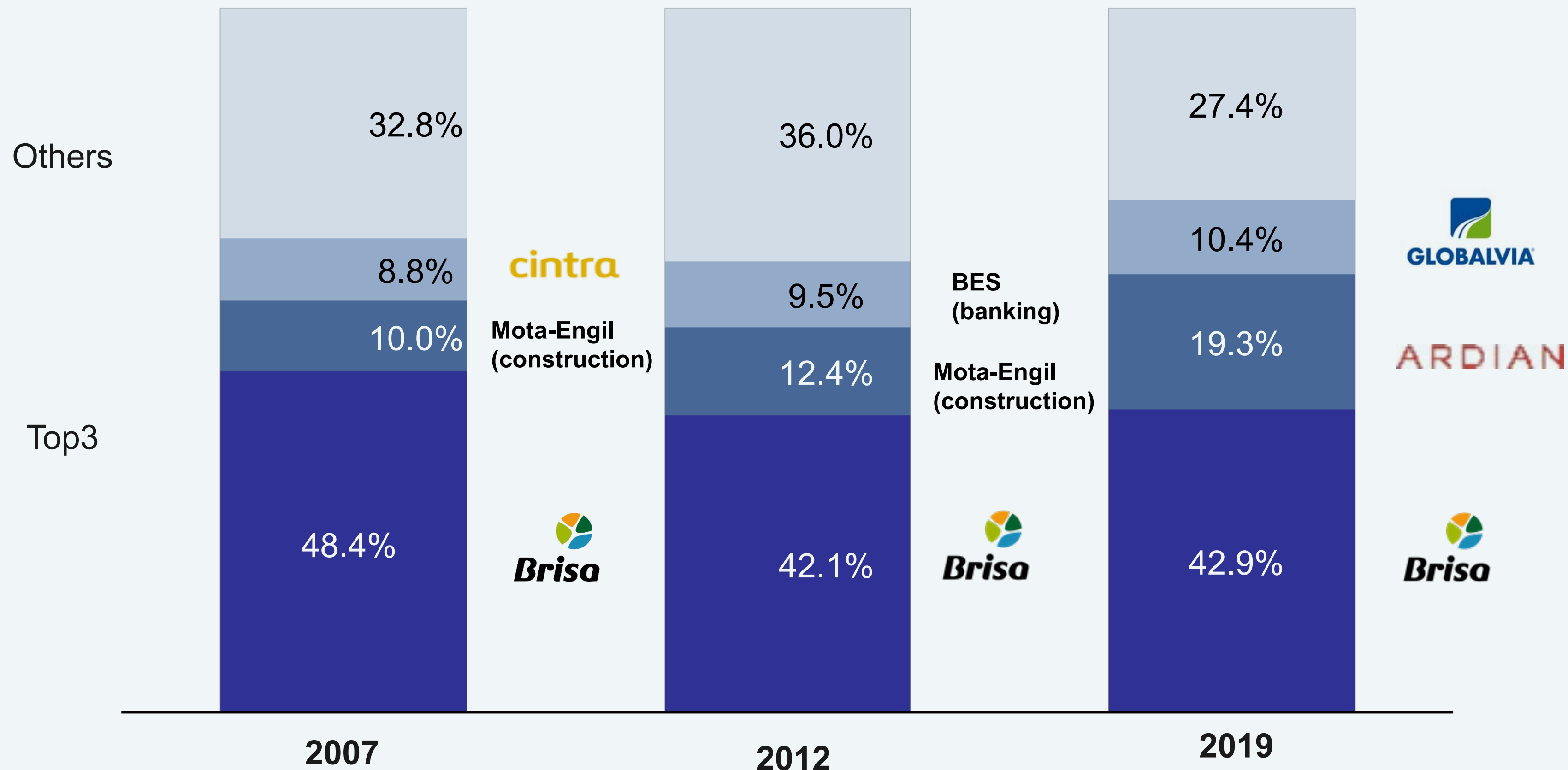


While the **network** expands 250% and the **circulation** 180% the number of **fatalities** drop to 70% than 15 years ago

2

APCAP in numbers

The players have changed from contractors to international players; Brisa is the major player



Market concentration, % of kms in operation and under construction

2

APCAP in numbers 2018



km travelled (million km)	20 576,0
% heavy vehicles	6,5%
Number of toll transactions - total	525 327 630,0
Total number of ETC transactions	430 085 513,0
% of manual transactions	18%
% of ETC transactions	82%
Toll Revenues (million euros)	1 113,9
Toll tariff - light vehicles (€/ km)	0,08
Toll tariff - heavy vehicles (€/ km)	0,17
Number of OBUs in operation	3 933 739

3

APCAP in
ASECAP
context



Network ASECAP **30.317km:** 16 Full Members

(+ 5 associated members)

ASFA – França 9.170 km

AISCAT – Itália 6.000 km

APCAP – Portugal 3.580 km

SEOPAN – Espanha 2.350 km

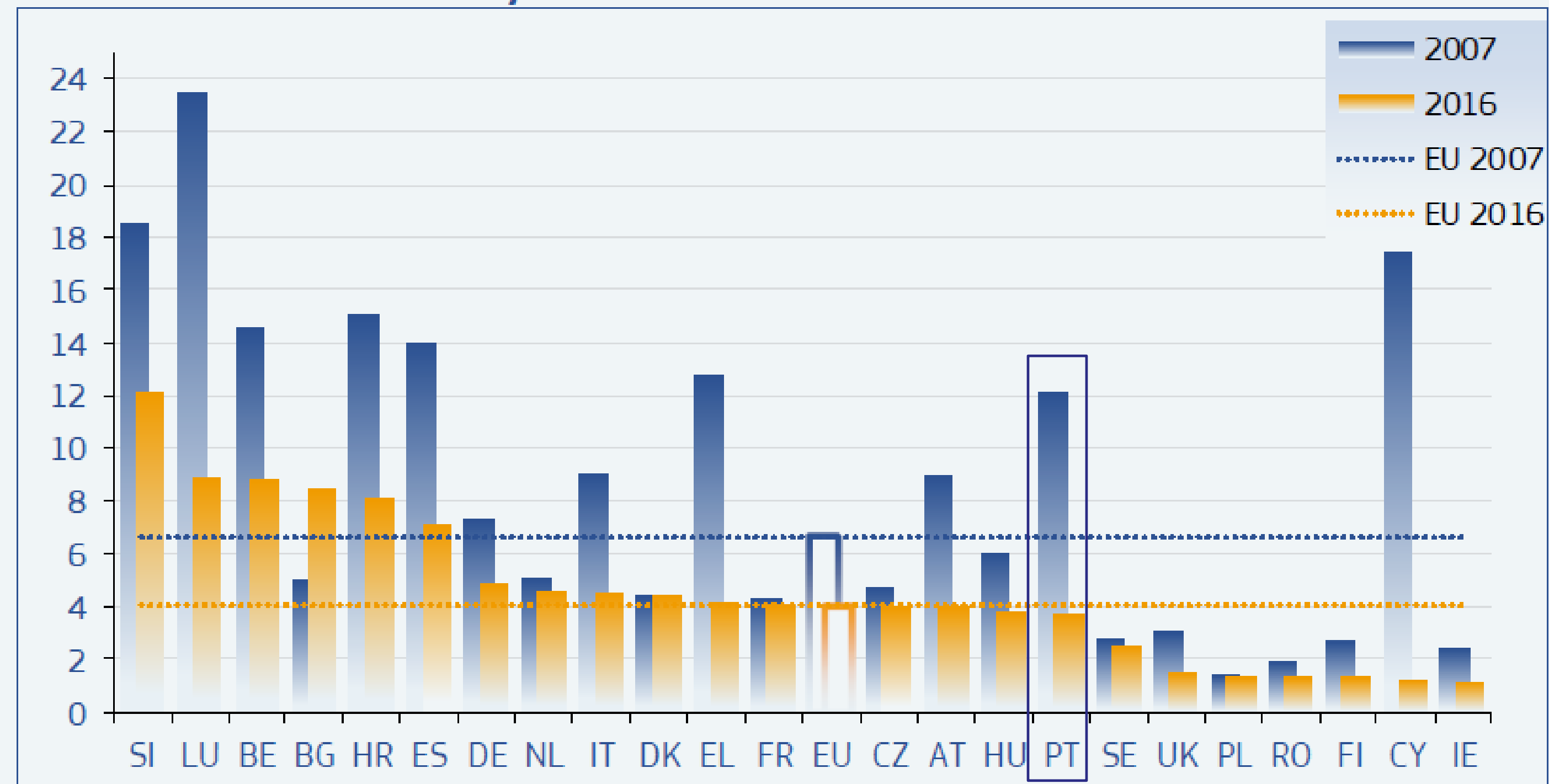
HELLASTRON – Grécia 2.130 km

HUKA – Croácia – 1310 km

**APCAP replaced Brisa
(ASECAP founder) at
ASECAP board in 2005**

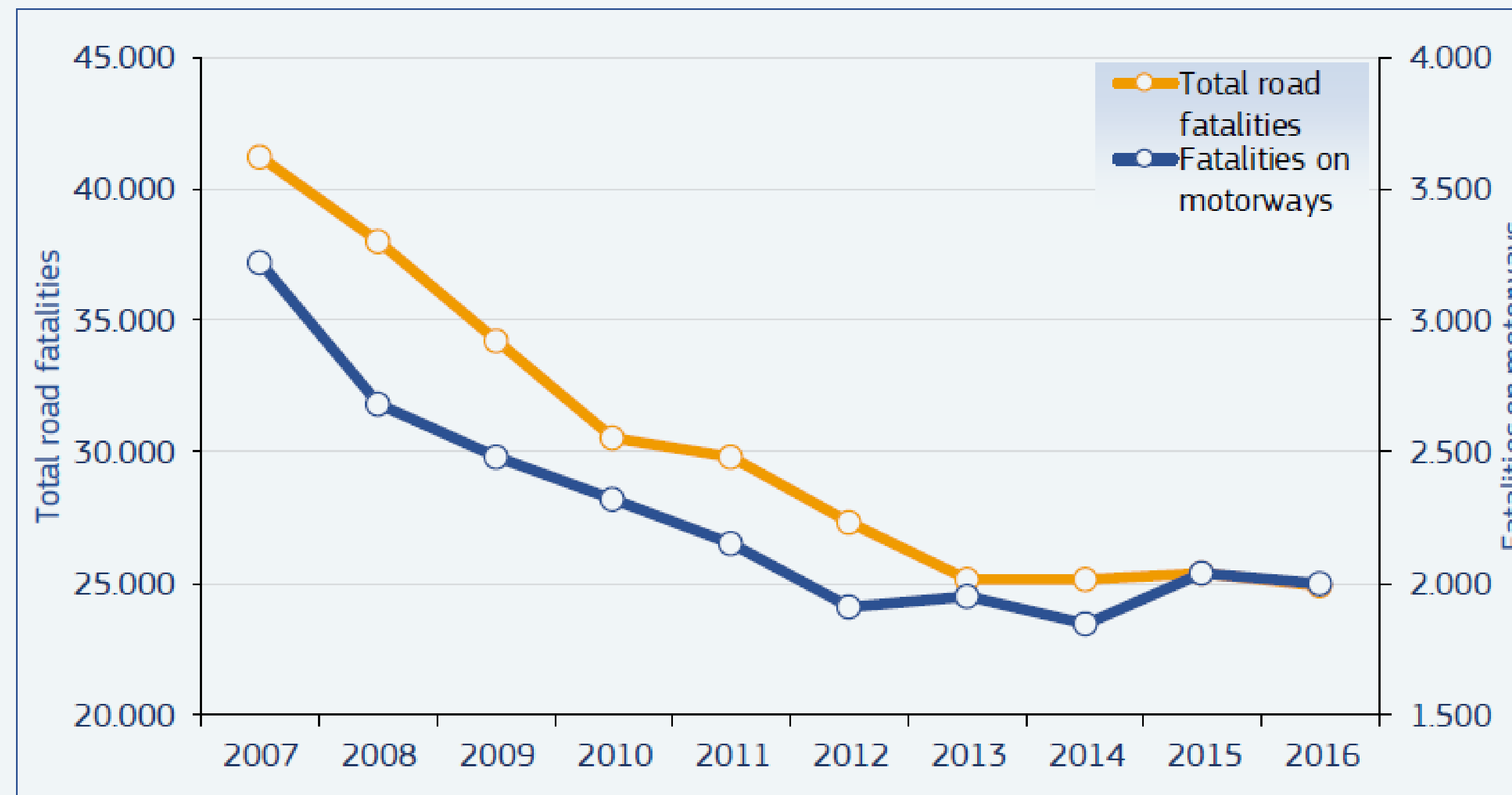


Figure 3: Motorway fatality rates per million population by country, 2007 and 2016 or latest available year



Sources: CARE database (EUROSTAT for population data). data available in May 2018

Figure 1: Number of fatalities on motorways and all road fatalities, EU, 2007-2016



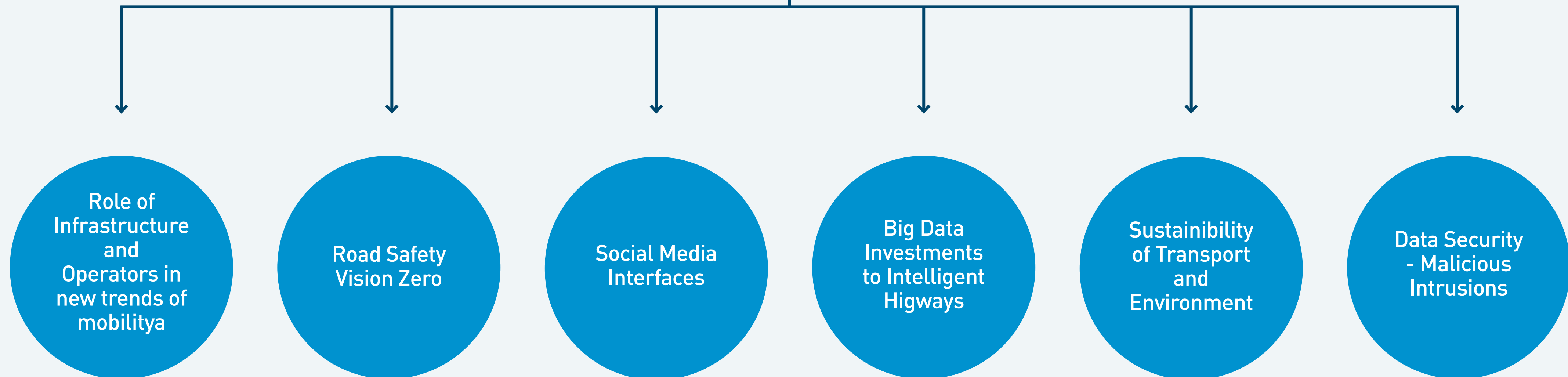
Source: CARE database, data available in May 2018

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Key
Challenges



Key Challenges



5 ↘

Key Challenges



Road Safety – Vision Zero

Safer Roads, Safer Equipments, Better Surveillance and Road Assistance

Role of Infrastructure and Operators in new trends of mobility

New Interfaces, BUS/HOV Dedicated Lanes, MAAS, Interoperability

Big Data Investments to Intelligent Higways

New Fully Automated Traffic Control Centers – Interfaces

Road/Vehicle/Users

Sustainability of Transport and Environment

Decarbonization Measures, Environmental Protection, Noise Safe Zones

Data Security - Malicious Intrusions

Terrorism Attack Prevention, Data Protection

Social Media Interfaces

Users dialogue, Imediate Interventions



Thank You

apcar@apcar.pt

www.apcar.pt

