



46TH ASECAP STUDY & INFORMATION DAYS

Tolling: Public acceptance is not always a given-The Greek experience.

Grand Hotel Union, Ljubljana, Slovenia
6-8 June 2018

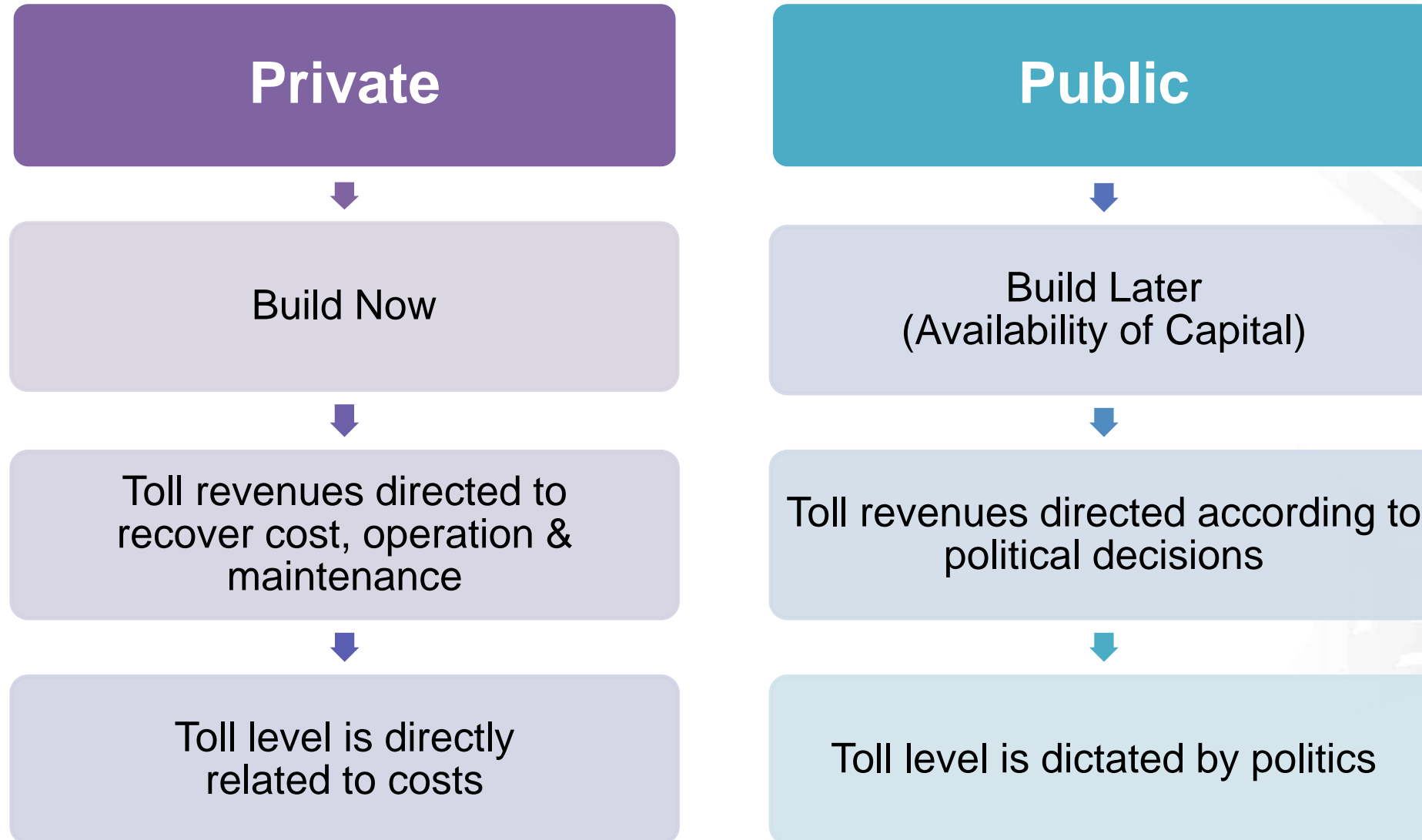
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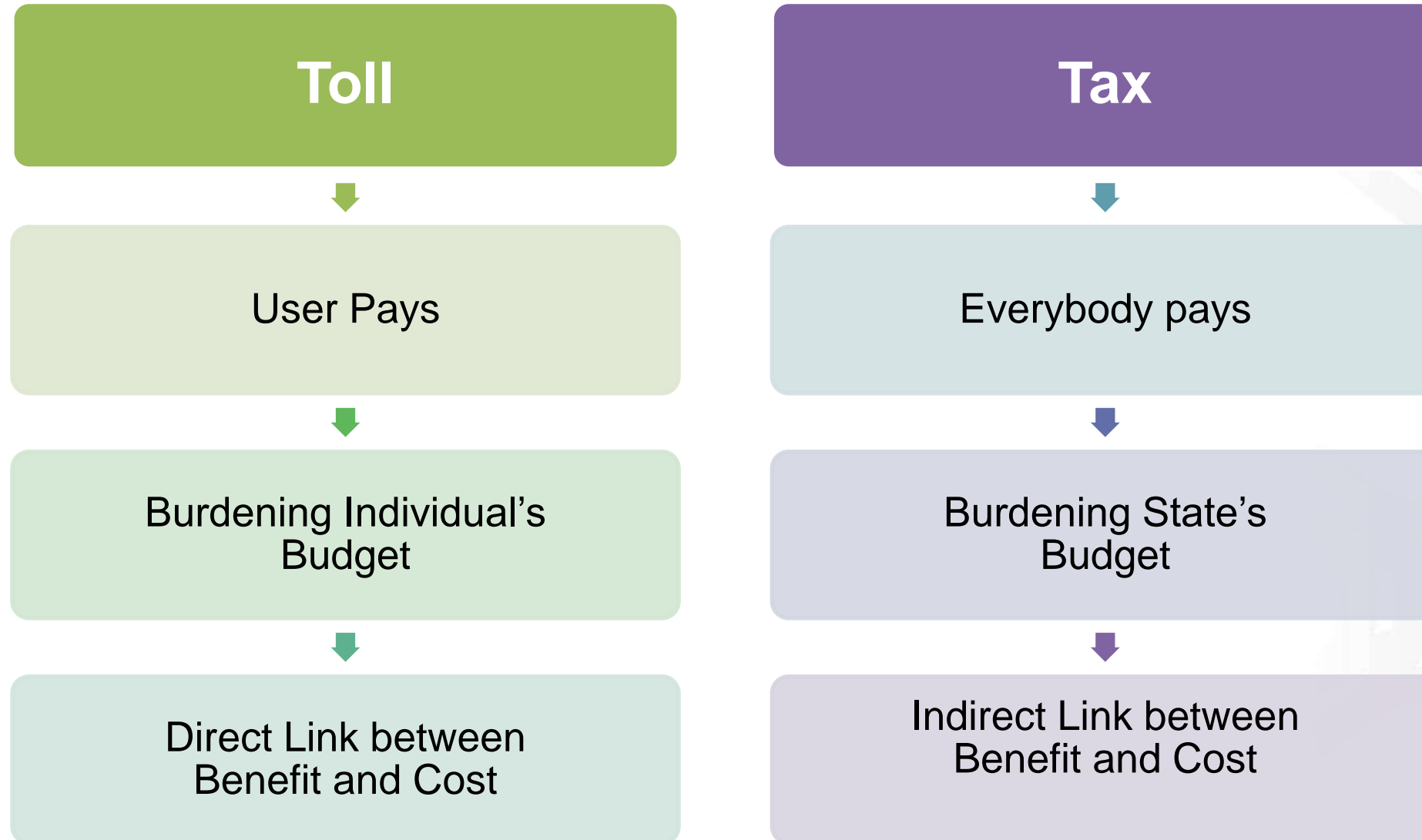


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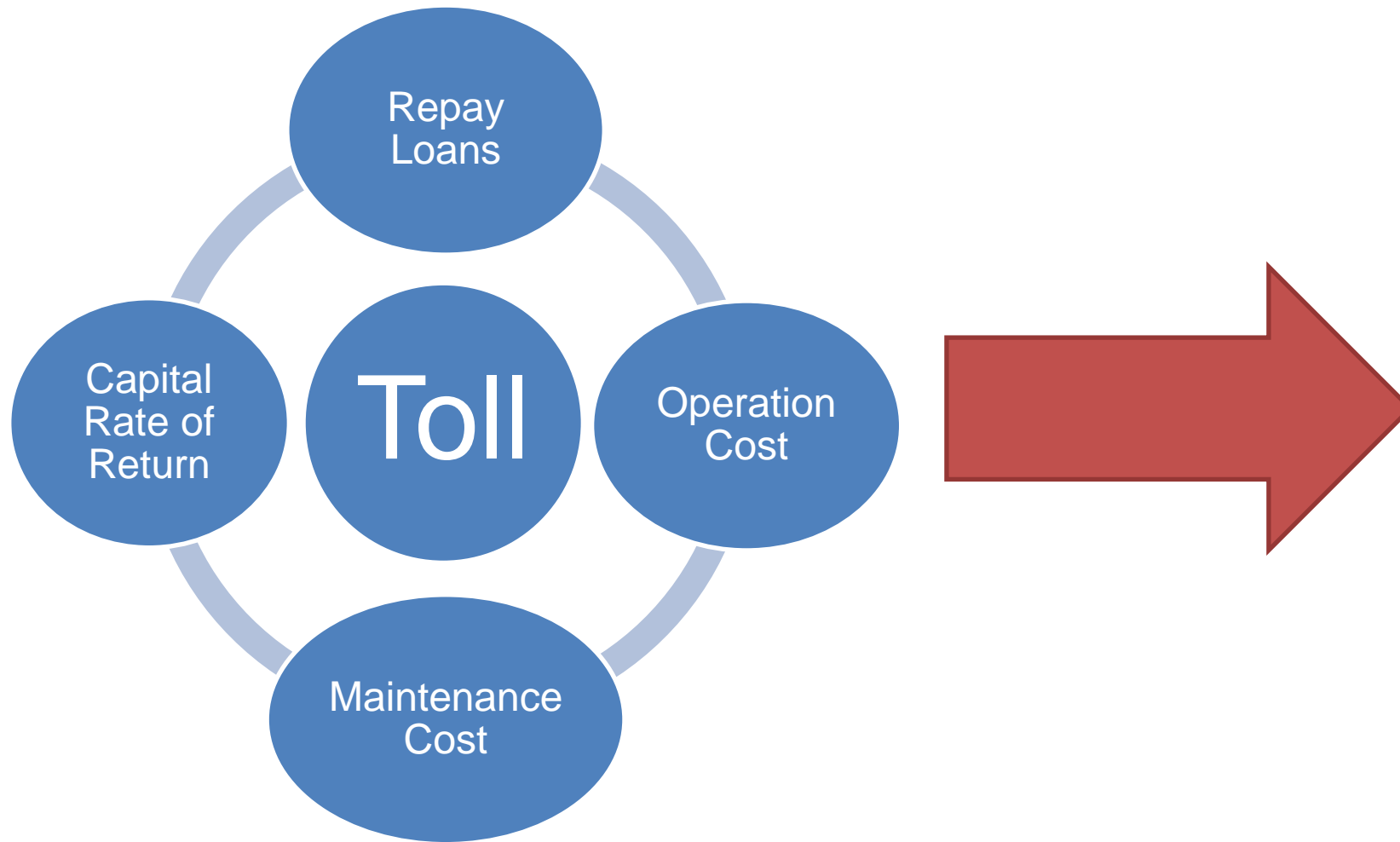
Development of Road infrastructure: Private or Public?



Tolls or Taxes?



Toll: the price of a service



Road infrastructure & Tolling

Politicians welcome new road infrastructure and they are always there to cut the ribbon....



BUT in most of the cases they are critical about tolls and their level...

Road infrastructure & Tolling



**Also, citizens demand
modern infrastructure...
but they don't like to
pay Tolls!**

As a consequence, we have protests against Tolls...

GREECE – 2011



No Tolls.
Free Motorways
For All
I won't Pay

Neither Tolls
nor IMF



I won't pay



But citizen protests are not only a Greek phenomenon...



Mersey Gateway Bridge, UK



Tien Giang province, Vietnam



France, Brittany



Skye Bridge, UK



Peru, Lima

Citizens protest against Tolls around the globe



South Africa



Moscow, Russia

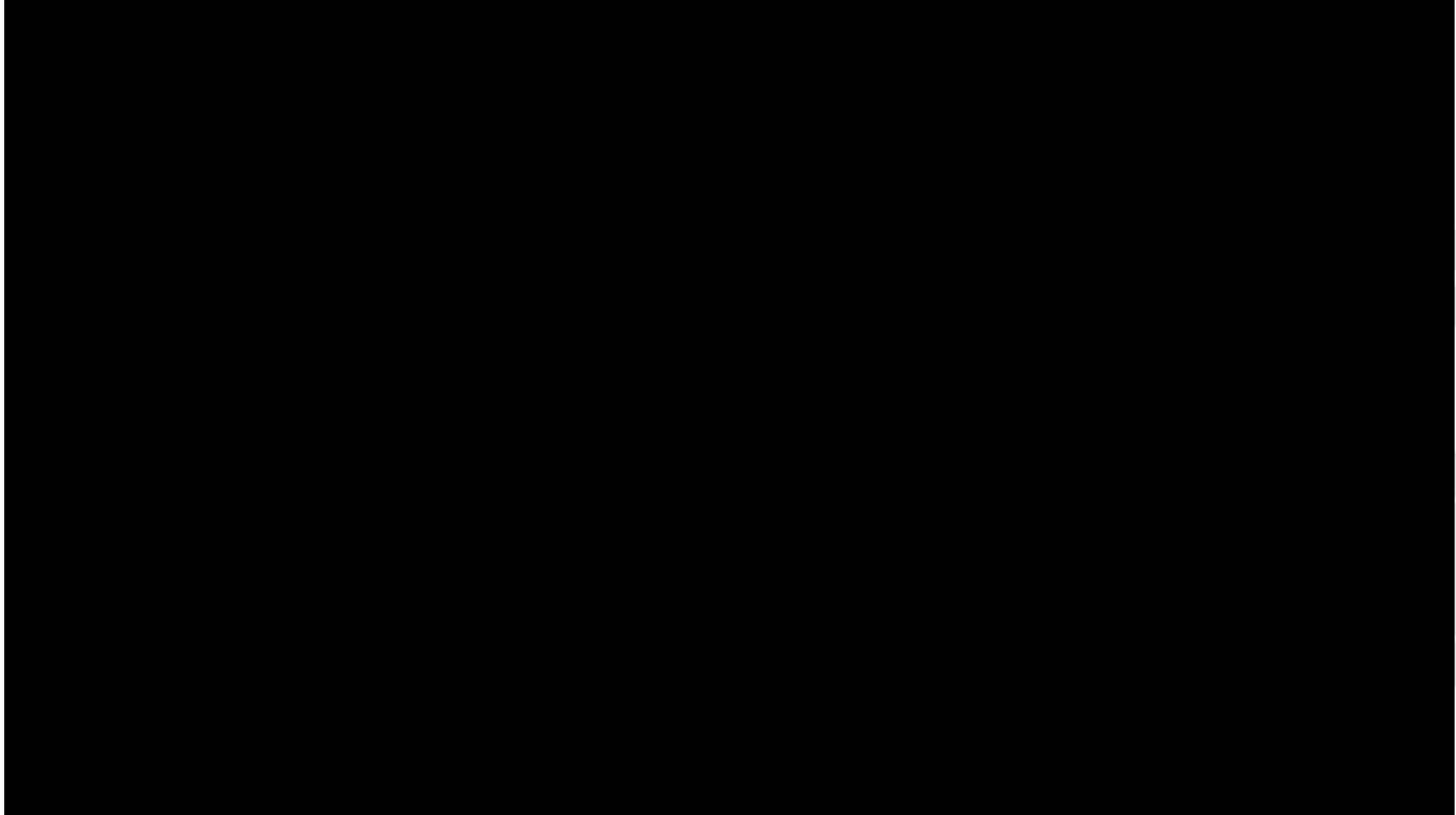


Spain

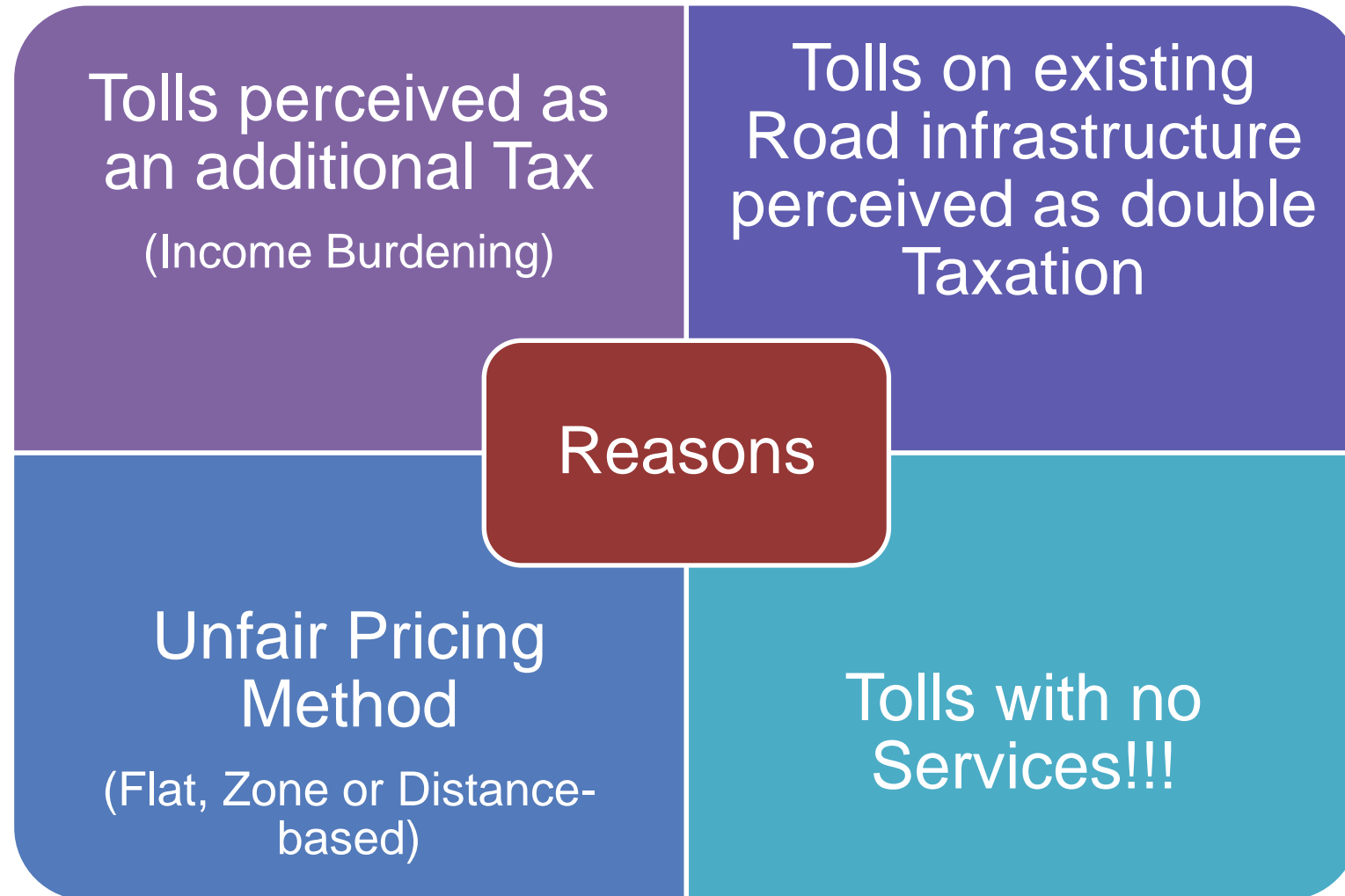


Lekki, Nigeria

And some times, in an extreme way...



Why all these reactions?



The resistance to tolls in Greece: History of Tolls...

- Tolls exist in Greece since 1865: flat toll fee for the trip from Lamia to Stylida (2,8Km) (Horses 5 cents, Donkeys 5 cents, Horse Carts 10 cents)
- In 1927, the National Road Construction Fund (TEO) was established for the collection of Tolls on the national roads.
- Toll revenues were directed to the general budget of the state and a small amount was redirected to the maintenance of the tolled motorways.
- The toll rates which existed on the Interurban Motorways were frozen for many years before the Concession Projects started, with an average price of 1,8 cents per kilometer.



Korinthos-Patra Tolled National Road
(2007)

The resistance to tolls in Greece: How it started....

For Existing Road Infrastructure:

- Tolls increased before the start of any construction activities.
- Tolls perceived as double taxation with construction already payed by taxpayers.
- Higher Tolls were due, although conditions were degraded during construction
- Toll Pricing Approach was perceived as Unfair (Flat or Zone-based).
- Toll levels were perceived as irrational and in contrast to the economic condition of the country.

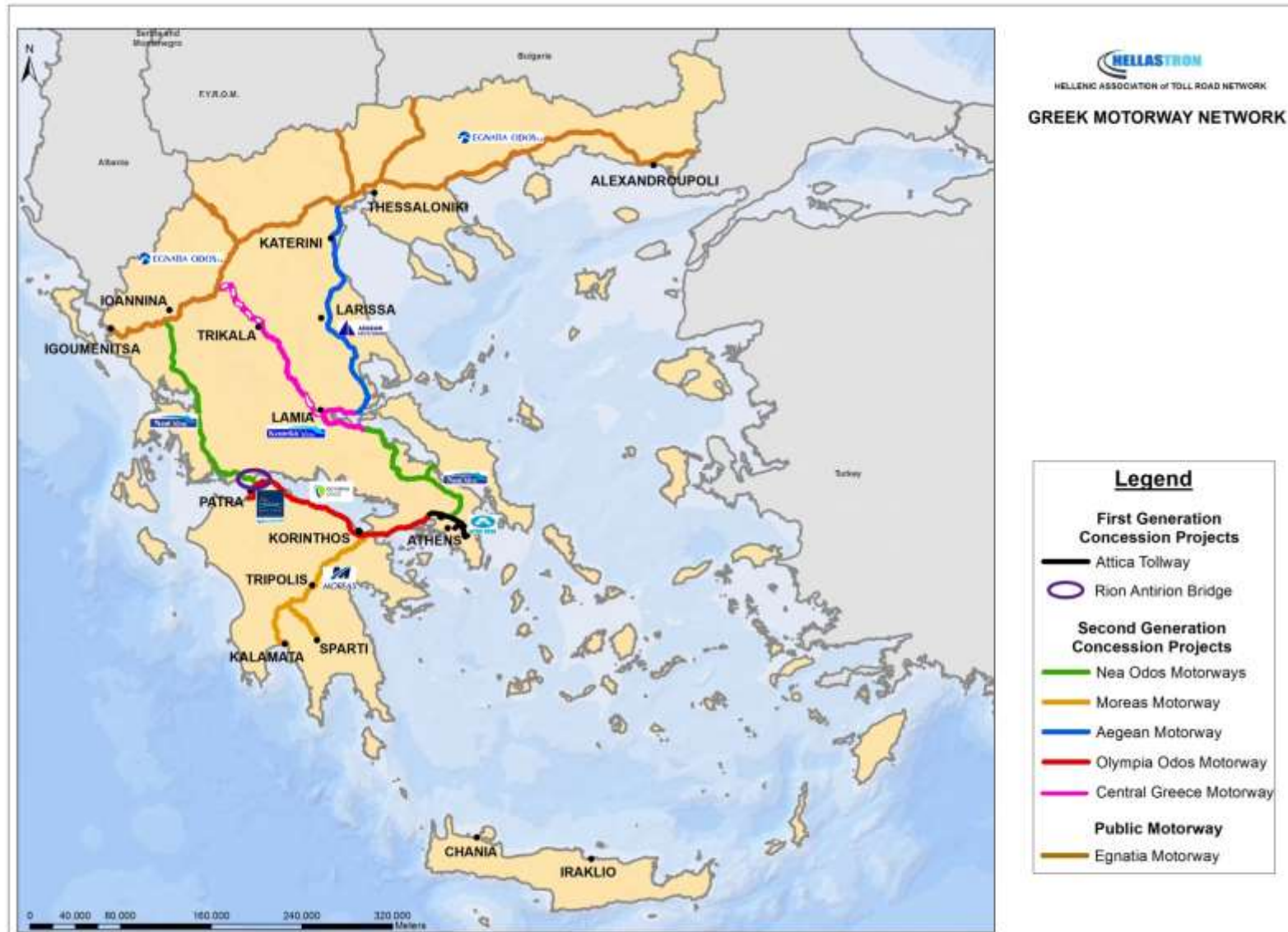


The resistance to tolls in Greece: The consequences....

- Even the first generation of Concession projects (Attiki Odos and the Rion-Antirion Bridge), which had wide acceptance during the first years of their operation, were subjected to protests.
- Weekly protests occurred on major toll plazas.
- There were revenue losses of up to 17% due to these protests, on some tolled motorways.
- Toll plazas and motorway infrastructure incurred damages of hundreds of thousands of euros.
- PPP Projects were in high risk due to revenue loss and financing of construction was put on hold.



The Greek motorway network

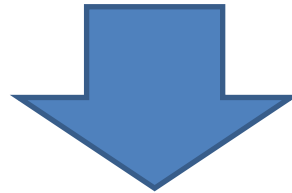


Recession made things worse

- For the completed projects of the 1st Generation Concessions, the revenue reduction has not affected the viability of the projects, although the Concessionaire returns have been significantly reduced.
- For the projects of the 2nd Generation, which were under development, a reset was necessary, in order to restart construction that had stopped for 3 years due to doubts about the economic viability of the Projects.

True spirit of Public Private Partnership (PPP)

- Negotiations between all parties involved i.e. the Greek State, EU Institutions, Concessionaires, EIB and Commercial Banks
- Renegotiation of Concessionaire's claims resulted in partial compensation



- Reset of concessions with adjustments to the Projects' scope
- Redefinition of risk allocation
- Preservation of allocated European funds

A positive outcome

The results of the true PPP:

- Non-payment of tolls diminished
- Projects completed within 2017, securing EU funding

The outcome of this partnership:

- Modern motorway network links all parts of Mainland Greece
- Promotion of distance-based tolling, in line with the European Directives, currently underway

The result: The completion of HELLASTRON network

A Modern, Comfortable and Safe Infrastructure

This is now the picture...



Instead of this.



HELLASTRON members contributed to the outcome

**Concessionaires were always there offering
24/7/365 Monitoring & Intervention Services**



- Traffic Information
- Incident Response

- Traffic Management
- Incident Management



Campaigns by HELLASTRON members

Highlight the “content” of the Service offered to Toll payers

Customer Support Services



- **Subscription Information**
- **Travel Information**
- **Complaints & requests**

e-Tolling



- **Subscription & Discounted Programs**
- **Electronic Toll Collection lanes**

CSR by HELLASTRON members

Campaigns to highlight the “content” of the Service payed by Toll

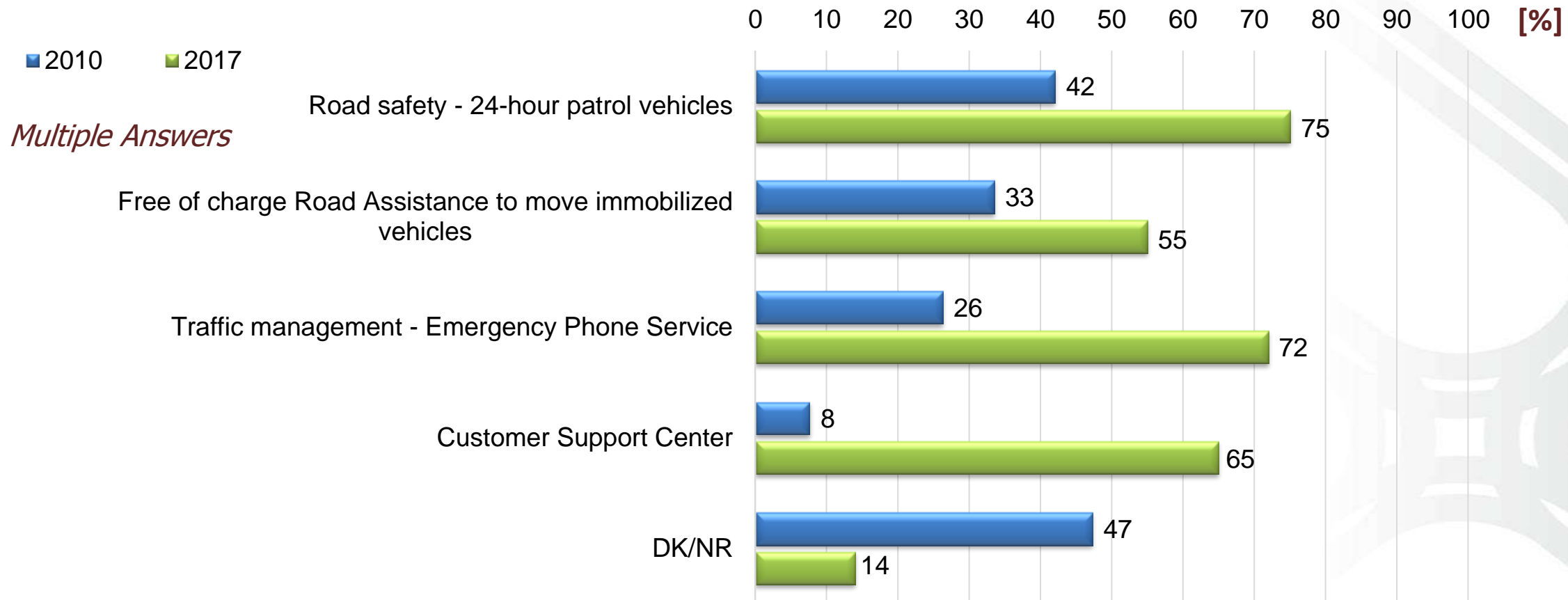
**Road Safety and
Driving Culture Development**

**Support to Emergency Services
(Police and Fire Brigade facilities and vehicles)**



HELLASTRON Promoted Public Awareness

User Awareness of Tolled Motorway Services



Q: «Which of the following services do you know to be offered by the Motorway's Operator?» MULTIPLE LIST

Actions taken by HELLASTRON Members

**At "HELLASTRON"
we believe that our effort
returns the appropriate "VALUE"
for the TOLL paid by our users.**



THANK YOU!



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