



**ITALIAN MOTORWAY SYSTEM  
AS FOR 31.12.2010**

**XXXIX ASECAP Study and Information Days  
Brussels - Belgium**

## **39<sup>th</sup> ASECAP STUDY AND INFORMATION DAYS**

**Brussels (Belgium), 29<sup>th</sup> – 31<sup>st</sup> May 2011**

### **THE MOTORWAY SECTOR**

CIPE (Inter-ministerial Committee for Economic Planning) provisions relating to the frameworks for a single agreement governing relationships between Italian Motorway concessionaire companies and the state were implemented during 2010: therefore procedures for Motorway companies, whose agreements had not yet come into effect, were also successfully finalised.

Accordingly, 2011 is the year in which the regulatory framework for the whole sector shall finally be defined, providing reliable and concrete support to companies' investment plans to improve and modernise the country's infrastructure.

This promising situation also marks the transition from a planning phase to a construction phase for concessionaire company's, with worksites for the construction of new motorway sections on top of the network's renovation and development works already in progress.

Lastly, it is worth remembering the efforts that the whole sector has made in terms of daily operations, ordinary and extraordinary maintenance, and innovations in systems and technology – all of which go towards ensuring that road users enjoy the highest possible quality and safety standards.

**1. The Italian motorway network as of 31.12.2010****NETWORK'S EXTENSION**

	<b>Km in service</b>	<b>Km under construction</b>	<b>Km planned</b>	<b>Total</b>
<b>Concessions</b>	5,737.8	151.5	521,2	6,410.5
<b>A.N.A.S.</b>	904.6	0	0	904.6
<b>Alpine tunnels</b>	25.4	0	0	25.4
<b>Total</b>	6,667.8	151,5	521,2	7,340.5

**NETWORK UNDER CONSTRUCTION****NEW SECTIONS**

<b>Concessionaire Company</b>	<b>Sections affected by the works</b>	<b>KM</b>
<b>Autostrada Asti – Cuneo S.p.A.</b> A33 Asti-Cuneo	Cuneo-Castelletto Stura- Consovero Cuneo-S.S. 231 Isola d'Asti-Rocca Schiavino	10.2 3.8 2.3
<b>Autostrada Brescia-Padova S.p.A.</b> A31 Trento-Valdastico-Vicenza-Riviera Berica-Rovigo	Vicenza-Rovigo (SS.434 Transpolesana)	<b>54.1</b>
<b>Società di Progetto Brebemi SpA</b> Direct motorway connection Brescia-Milano	Works related to the motorway stretch from the junction with Sp19 (province of Brescia) to the interconnection with the TEM (province of Milano)	<b>62.1</b>
<b>Autostrada Pedemontana Lombarda S.p.A.</b> Dalmine-Como-Varese-Valicodel Gaggiolo (with direction towards A8 and East Milano Ring Road)	Cassano Magnago – A8 – Turate A9	<b>15.0</b>
<b>Società Autostrada Tirrenica S.p.A.</b> A12 Livorno-Civitavecchia	Rosignano – S.Pietro in Palazzi	<b>4.0</b>
<b>TOTAL NEW SECTIONS</b>		<b>151.5</b>

**EXENSION WORKS**

<b>Concessionaire Company</b>	<b>Sections affected by the works</b>	<b>KM</b>
<b>Autostrade per l'Italia S.p.A.</b> A1 Milano-Napoli 3 <sup>rd</sup> carriageway improvement works	Firenze Scandicci-Firenze Sud La Quercia – Barberino	<b>13.5</b> <b>39.3</b>
A1-D18 3 <sup>rd</sup> carriageway	Fiano R – Settebagni	<b>15.9</b>
A9 Lainate – Como Grandate 3 <sup>rd</sup> carriageway	Lainate – Como Grandate	<b>23.2</b>
A14 Bologna – Taranto 3 <sup>rd</sup> carriageway	Rimini Nord – P.to S. Elpidio	<b>122.7</b>
<b>Autostrade Meridionali S.p.A.</b> A3 Napoli – Salerno 3 <sup>rd</sup> carriageway	Napoli sud – Ercolano Ercolano – Torre del Greco Torre del Greco – Torre Annunziata sud Torre Annunziata nord – Torre Annunziata sud	<b>5.0</b> <b>2.6</b> <b>5.1</b> <b>1.6</b>
<b>TOTAL EXTENSIONS</b>		<b>228.9</b>

## 2. Traffic

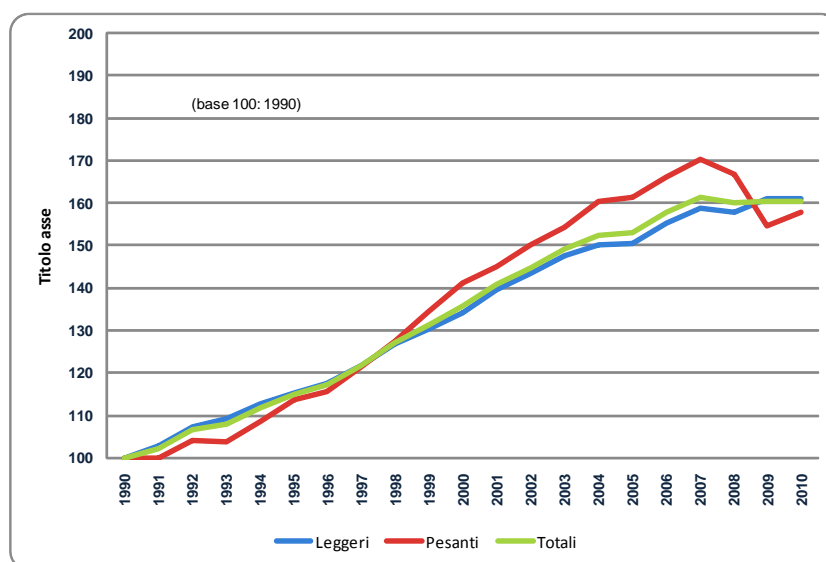
After two years of slowdowns in overall traffic levels (mainly observed in the heavy vehicles sector), 2010 marked a trend inversion with a marginal increase (+ 0.4%) bringing total vehicle-kilometres above 83 billion (83.3 billion).

Even though this figure is still below 2007 peak levels (recorded before the global economic downturn), it is nevertheless an important indicator of recovery in the country's demand for mobility, especially for the transportation of goods.

Indeed, whilst Light vehicle traffic has remained somewhat unchanged (- 0.1%), heavy vehicle traffic increased 2.2%, increasing overall traffic levels.

**Traffic: annual percentage increases and 1990-2010 index values**

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Leggeri	+2,8	+3,0	+4,2	+1,9	+3,0	+2,5	+1,8	+3,6	+4,2	+2,6	+2,9	+4,1	+2,7	+2,9	+1,7	+0,2	+3,2	+2,3	-0,5	+2,0	-0,1
	100	103	107	109	113	115	118	122	127	130	134	140	143	148	150	150	155	159	158	161	161
Pesanti	+9,4	+0,0	+3,9	-0,4	+4,9	+4,6	+1,6	+5,1	+5,1	+5,4	+5,1	+2,8	+3,4	+2,9	+3,9	+0,6	+3,0	+2,4	-2,1	-7,3	2,2
	100	100	104	104	109	114	116	121	128	134	141	145	150	154	160	161	166	170	167	155	158
Totale	+4,3	+2,3	+4,2	1,4	+3,4	+2,9	+1,8	+3,9	+4,4	+3,3	+3,4	+3,8	+2,9	+2,9	+2,2	+0,3	+3,1	+2,3	-0,9	-0,2	0,4
	100	102	107	108	112	115	117	122	127	131	136	141	145	149	152	153	158	161	160	160	160



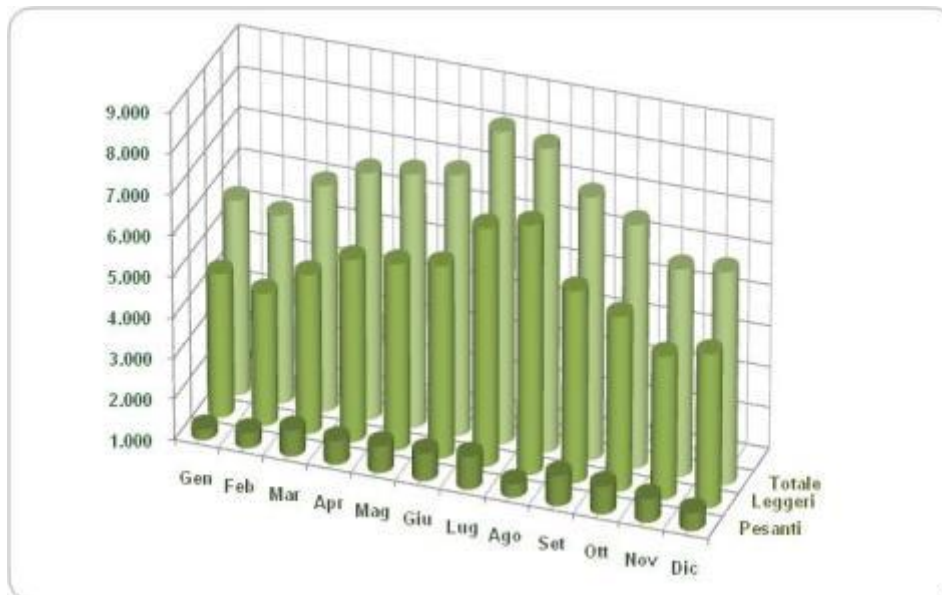
Light Heavy Total

**Motorway traffic levels (billions of vehicle-km) over the last 10 years**

<b>ANNI</b>	<b>TOTALE PERCORRENZE</b> (miliardi di veic-km)	<b>PERCORRENZE AGGIUNTIVE</b> (miliardi di veic-km)
2001	73,1	2,6
2002	75,2	2,1
2003	77,4	2,2
2004	79,1	1,6
2005	79,4	0,4
2006	81,9	2,5
2007	83,8	1,9
2008	83,1	-0,7
2009	82,9	-0,2
2010	83,3	0,4

**Totale percorrenze / Total traffic levels**  
**Percorrenze Aggiuntive / Year-on-Year difference**

**2010 Monthly Traffic Levels**  
**(millions of vehicle-km)**



### 3. Safety

Last year saw yet further progress in terms of accident levels, with a decrease of more than 4% in the number of accidents and of 3% in the number of injuries, consolidating the trend of constant improvement recorded over the last decade.

In terms of fatalities, 2010 ends with 275 accident deaths (a fatality rate of 0.33 per 100 million km driven), which, although positive in absolute terms, is slightly higher than the 2009 level when the lowest level of fatalities ever witnessed on the tolled motorway network was recorded).

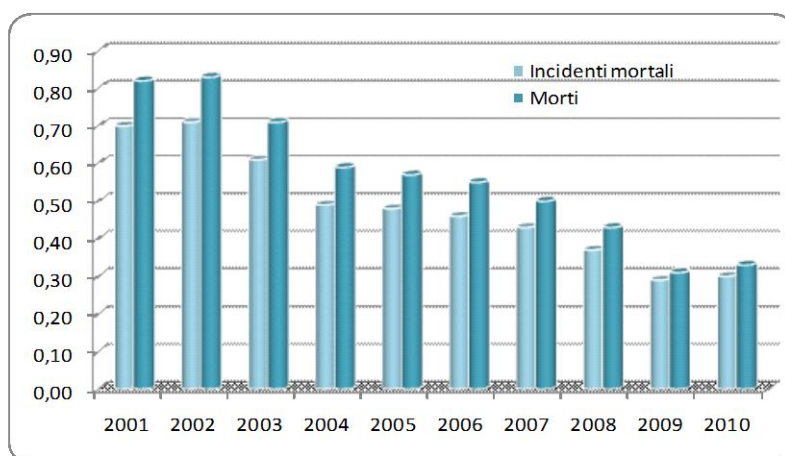
The tolled motorway network continues to be the only national road system to have respected, with a 54% reduction, the objective set by the European Union of halving the number of road accident over the 2001-2010 period. This objective has recently been renewed through the European Commission's communication relating to the 4<sup>th</sup> EU Road Safety Action Plan for the period 2011-2020 <sup>1</sup>.

#### RATE OF ROAD ACCIDENTS

(values per 100 million vehicle-km)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>Incidenti (1)</b>	15	15	14	12	13	12	11	10	10	10
<b>Incidenti mortali</b>	0,70	0,71	0,61	0,49	0,48	0,46	0,43	0,37	0,29	0,30
<b>Morti</b>	0,82	0,83	0,71	0,59	0,57	0,55	0,50	0,43	0,31	0,33

(1) - Incidenti con feriti e/o con morti.



*Incidenti/Accidents    Incidenti mortali/Fatal accidents    Morti/Deaths*

<sup>1</sup> "Towards a European Road Safety Area: 2011-2020 Road Safety Policy Orientations" – COM (2010) 389 fin. of 20.07.2010



Accidents – 3,358 (-30%)  
 Percentage -38%

Deaths -323 (-54%)  
 Percentage – 60%

Injuries -5,394 (-29%)  
 Percentage -38%

#### **4. Toll collection**

Overall concessionaire Companies' toll collection in 2010 amounted to approximately 4,836 million Euro, with a 6.3% increase on 2009. The increase was driven by increased traffic levels, especially increased heavy vehicles traffic.

The additional fee to be paid to ANAS (in compliance with Law Decree 78/09, converted into Law 102/99, which simultaneously abolished the previous overprice provided for under Law 206/06) and amounting to more than 382 million Euro has to be added to the above amount, as well as 20% VAT on tolls – amounting to 1,040 million Euro – meaning that gross collections amounted to 6,258 million Euro.

Finally, it must be remembered that pursuant to Law Decree 78/10 (converted into Law 122/10), effective from 1<sup>st</sup> July 2010. an additional fee on top of the ANAS fee has been levied on Concessionaire companies, which have therefore increased toll tariffs without however earning an increased profit.