

A stylized map of Italy with a network of blue lines representing motorways. The map is set against a light blue background with a grid pattern and a large, faint circular graphic behind it.

# **ITALIAN MOTORWAYS NETWORK AS FOR 31.12.2015**

**XLIV ASECAP Study and Information Days  
Madrid - Spain**

**ITALIAN NATIONAL REPORT  
ASECAP STUDY AND INFORMATION DAYS  
MADRID, 23 - 25 MAY 2016**

***Network length*** (\*)

<b>Tolled Motorways Network in 2015</b>	<b>km 5.979,6</b>
2 x 2 lanes	km 4.064,3
2 x 3 lanes	km 1.800,0
2 x 4 lanes	km 115,3
Tunnels (**)	km 855,2
Bridges (**)	km 1.013,0

(\*) *Data in course of consolidation*

(\*\*) *Lenght > 100 m*

Tolled Motorways Network in 2014	km 5.906,5
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***Traffic***

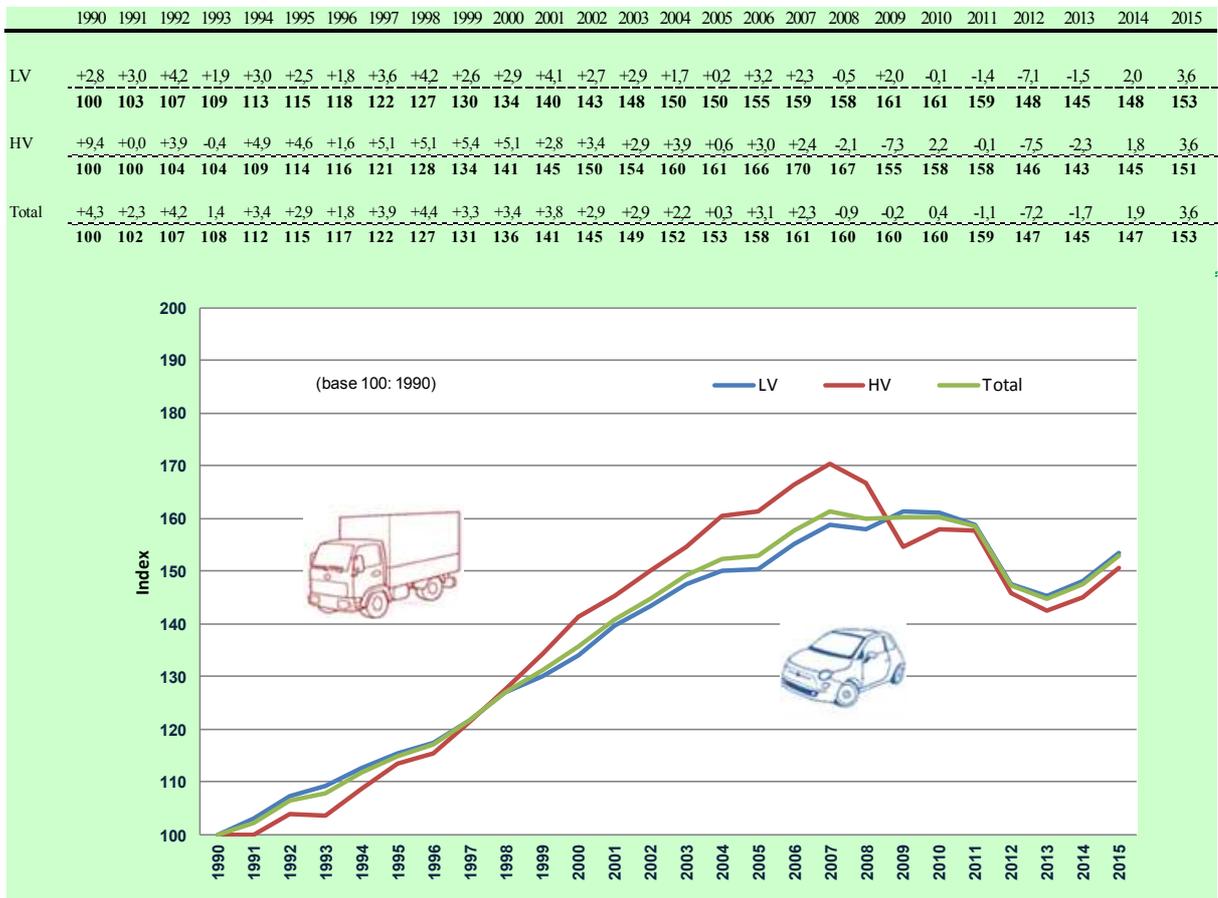
During 2015 the traffic growth, already started in 2014, has been consolidated, after six years of substantial mobility decrease.

Since 2008 indeed, when the National and International economic downturn consequences started to appear, traffic levels progressively and constantly decreased and they came back to the figures of the first '2000s.

Although the overall economic situation is still difficult for families and companies, with a stagnation in consumption and production, however the turnaround already registered in 2014 (when traffic increase was of +1,0%), was definitely reinforced last year with an overall traffic increase of +3,6%. This increase is due both to the LVs (+3,6%) and to the HLs (+3,8%), showing a promising recovery both for private and freight mobility.

- **2015:** 79.352 (10<sup>6</sup> x km)
- **2014:** 76.574 (10<sup>6</sup> x km)

**Traffic: annual percentage increases and index values  
1990 – 2015**



**Tolling system and related technologies**

The Italian Motorways tolling system is inter-connected and fully interoperable along the whole National territory: ETC is based on DSRC technology.

**Tariffs**

The average toll tariffs along the whole network in 2015 were:

- LVs: 0,07796 Euros
- HLs: 0,13721 Euros

## ***Toll incomes***

The positive trend already mentioned for traffic increase had an impact on the economic results of 2015; taking into account the effect of the tariffs' adjustments recognized by the State to the concessionaire companies according to the contracts in force, an increase of the brut toll incomes amounting to 7,4 Billions of Euros (whose 5,5 Billions of Euros directly attributable to the concessionaire companies) has been registered last year.

Similarly, also the other components of the brut toll incomes have consequently increased, namely the VAT component (rate of 22%) amounting to more than 1,3 Billions of Euros and the “additional fee” to be given to ANAS<sup>1</sup> (according to the provisions of Law 102/2009 and Law 122/2010 for activities of strengthening ANAS network aimed at improving access and exit traffic to and from the Motorways network) whose total amount has reached more than 611 Millions of Euros.

Moreover, it has also to be underlined that from the above mentioned toll incomes of the concessionaire companies it has to be subtracted the “concession fee” - regulated by the provisions of Law 537/1993 as modified by Law 296/2006 – calculated as the 2,4% of the toll incomes.

Concerning the above mentioned tariffs' adjustments, it has to be highlighted that, since the 1<sup>st</sup> of January 2015, several concessionaire companies were allowed to provisionally get

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<sup>1</sup> ANAS is the National Road Authority in Italy. It is a company whose sole Associate is the Economy Ministry and it is submitted to the control and the technical and operational monitoring of the Italian Ministry for Transportation and Infrastructure.

“controlled” tariffs’ increases (and in any case not higher than 1,5%), following a specific agreement with the Ministry of Transportation and Infrastructure in its quality of Grantor.

The Motorway sector indeed, taking into consideration the economic downturn and the difficult financial situation for several families and workers, in a spirit of responsibility and proactive collaboration with the State, decided to sign (by each of the concessionaire companies directly involved) different Memoranda of Understanding with the Transportation and Infrastructure Ministry, aimed at recovering - at a later stage – the remaining part of the tariffs’ increase due to the concessionaires, following the approval of the financial and economic plans of each company by the 30<sup>th</sup> of June 2015, approval that however did not yet take place and that has been further postponed.

Moreover, it has to be underlined that also in 2015 the system of tariffs’ discounts for commuters has been applied along a travel of maximum 50 km, for those users having an ETC Telepass’ subscription and for a given amount of travels per month.

**Net toll incomes of the concessionaire companies  
(Millions of Euros)**

- **2015** = 5.455
- **2014** = 5.177

## Safety

	<i>Definition and method of calculation</i>	<i>In number for 100 millions-km travelled in 2015</i>	<i>Variation in % in 2014/2015</i>
<i>Personal injury rate</i>	Persons having injuries following the accident	14,21	3,35
<i>Fatal accident rate</i>	Accidents in which one or more deaths occurred among the injured persons within 30 days by the date of the accident	0,25	8,7
<i>Rate of dead</i>	Persons having, after the accident, such severe injuries to cause their death at the moment of the accident or within 30 days from the date of the accident	0,29	7,4

After nearly fifteen years of consistent improvement of the statistics related to road safety, which contributed to reach in 2010 the EU objective of halving the number of road victims by 50% since 2001, and after having reached in 2014 the lowest fatality rate ever known along the tolled network, 2015 unfortunately registered a slight increase of the fatality indicators. Whereas the data of the first months of the year were indeed in line with the correspondent data of the previous year (indicating for sure a substantial standstill phase, but anyways maintaining the excellent achieved results), since the Summer period a turnaround of the positive trend has been registered, although certain fluctuations, in any case restrained, represent the usual “physiological” deviations from the minimum values.

The disaggregated data’s analysis of the different accidents’ parameters per vehicle category shows indeed, for LVs a

reduction of the accidents and, on the contrary, an accentuated increase for the accidents involving HLs.

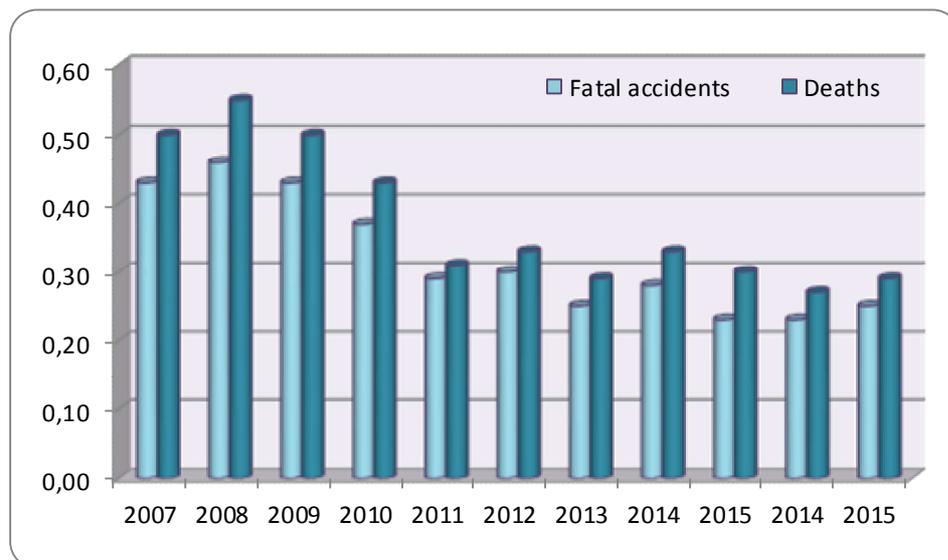
However, the registered percentage variations are more relevant if one takes into account the effects, i.e. injured people and deaths. This means that unfortunately it is the accidents' severity which has increased, with a greater seriousness of the consequences: on this aspect for sure the psychological and physical status of the users has had an impact, as well the wider increase of dangerous and incorrect driving behaviors (such as the smartphones use during driving, even for texting messages), as it has been demonstrated by several events that have been also reported by the media.

What happened along the Italian Motorways network represents however a more complex and global phenomenon which affects not only our Country, but the entire European Union, where a general worsening of the road accidents' rate has been registered, underlining then – as also recently highlighted by the EC Transportation Commissioner Violeta Bulc – the need of a renewed engagement at all levels in order to reverse the course and reach the EU Road Safety objectives for 2020 and beyond.

## ***RATE OF ACCIDENTS*** ***(values per 100 million vehicle-km)***

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2014	2015
Accidents (1)	11,39	12,11	11,39	10,19	9,97	9,56	8,90	8,44	8,49	8,18	7,99
Fatal accidents	0,43	0,46	0,43	0,37	0,29	0,30	0,25	0,28	0,23	0,23	0,25
Deaths	0,50	0,55	0,50	0,43	0,31	0,33	0,29	0,33	0,30	0,27	0,29

(1) - Accidents with injuries and/or deaths



### ***Long term forecasts and trends***

In the framework of the active and continuous commitment demonstrated by the Motorways sector along the years, with the opening of important working sites for strengthening and further developing the National Motorways system, in 2015 several works have been completed, with the opening of new stretches for more than 70 km.

The works realized with better – in certain cases – schedules compared to the foreseen ones, together with the opening to the circulation of 105 km in the previous years, reflect undoubtedly the commitment and the engagement of the Motorways sector for

contributing to modernize the network and to help the infrastructure development in our Country.

Along a total tolled network which has almost reached 6.000 km of length, the concessionaires' activities go on without interruption in order to fulfill – despite of the general recession and of the critical aspects of the approval phases due to the overall regulating and bureaucratic context – the commitments agreed with the State in order to provide the Country with the best possible mobility offer and with an always safer, efficient and high quality road network.

With an average annual expense which, in the last seven years was amounting to nearly 2,5 Billions of Euros in investments and maintenance operations (the latter ones constantly overcoming the average of 100.000 Euros/km per year), the Motorways sector confirms itself as being one of the principal National investors, always attentive to the road system's development and to the structural and technological equipment's improvement.

## KEY FIGURES

<b>Country: ITALY</b>		<b>2015 Figures</b>
Network length (Km)		5.979,6
2 x 2 lanes (Km)		4.064,3
2 x 3 lanes (Km)		1.800,0
2 x 4 lanes (Km)		115,3
Number of km in construction		40,0
Forecasts of opening motorways section		N.A.
Annual toll revenues* (in millions of Euros)	Included the additional fee given to ANAS and the VAT	7.400,1
VAT % (Indicate the VAT % percentage to the toll revenues)		22%
Permanent staff		13.461
Average daily traffic (light vehicles)		29.406
Average daily traffic (heavy vehicles)		8.563
Average daily traffic (total = light + heavy vehicles)		37.969
Total number of accidents		22.860
Number of personal injury accidents		6.344
Number of dead		227
Fatality rate		0.25
Kilometres travelled (10 <sup>6</sup> x km)		79.352

<b>Country: ITALY</b>		<b>2015 Figures</b>
Number of toll transactions (Total)		1.570.794.918
Number of toll transactions (light vehicles):		N.A.
Number of toll transactions (heavy vehicles):		N.A.
Number of toll stations		517
Number of toll lanes		4.346
Number of ETC lanes		2.472
Number of ETC subscribers (Total):		8.822.518
Number of ETC subscribers (light vehicles):		N.A.
Number of ETC subscribers (heavy vehicles):		N.A.
Number of service areas (equipped with petrol stations)	Included 12 service areas temporarily closed because of re-structuring	407
Number of rest areas		230
Number of restaurants		172
Number of hotels		12