



*Association Européenne des Concessionnaires  
d'Autoroutes et d'Ouvrages à Péage*

*European Association of Toll Road Infrastructure Operators*

# ASECAP MANIFESTO

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Safeguarding Europe's Mobility: Fair, Resilient, Sustainable  
and Competitive through the Toll Road Concession Model

**THERE ARE NO FREE ROADS**



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## 1. Context

Europe's motorway network is a strategic asset supporting economic growth, territorial cohesion, market integration, climate objectives, and the free movement of people and goods. Yet, several Member States have recently considered or implemented partial toll abolition. Italy, Ireland, the Netherlands, and Poland are reviewing their tolling frameworks, while Spain and Portugal have already removed tolls on specific corridors.

These are not isolated national decisions: they create a destabilising trend that risks undermining three pillars of EU transport policy:

- environmental sustainability,
- fiscal responsibility,
- and the consistent provision of high-quality infrastructure.

Tolling, grounded in the user-pays and polluter-pays principles, is more than a financing tool. It is a cornerstone of resilient, climate-aligned and future-ready mobility. Weakening this framework jeopardises Europe's capacity to maintain, modernise and decarbonise its strategic road network.

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## 2. Why Concessions Matter

The concession model is a proven, robust framework that has enabled Europe to develop high-quality transport infrastructure without burdening public budgets. The network operated by ASECAP members totalizes more than 82,700 km of tolled road, forming the backbone of the Single Market:

- 92.9% of inland passenger transport is by road;
- 74.4% of inland freight depends on motorways;
- road transport emissions account for 73.2% of all transport GHG emissions and 21.1% of total EU emissions;
- freight demand has grown +38.6% since 2000.

This network is indispensable for competitiveness, trade, supply-chain resilience, tourism, daily commuting, and cohesion across rural, peripheral and outermost regions. These figures are evidence-based arguments—grounded in the 2024 PwC study commissioned by ASECAP.

This model ensures:

- efficient infrastructure delivery without pressure on public budgets,
- transfer of operational, financial and performance risks to concessionaires,
- high standards of safety, maintenance and environmental responsibility,
- long-term investment cycles and continuous innovation,
- transparency through clearly defined contractual obligations.
- reinforced integrity through corporate compliance frameworks.

Concessionaires finance, maintain and operate the network in exchange for user revenues. This aligns economic responsibility with environmental impact, making the user-pays / polluter-pays framework essential for sustainable development.

**This European model has been extended worldwide.**



### 3. Tolling: A Tool for the Future

Tolling is far more than a payment mechanism. It is a strategic enabler of Europe's next generation mobility. It supports:

- integrated traffic management and congestion reduction;
- rapid decarbonisation of road transport;
- climate-resilient infrastructure;
- digitalisation of motorways, including C-ITS and CCAM deployment;
- preparedness for military mobility;
- integration of EVs, autonomous vehicles and shared mobility services;
- equitable access to safe and high-quality mobility across all regions.

Toll revenues, when reinvested, enable continuous upgrades: zero-emission infrastructure, free-flow systems, digital corridors, and long-term adaptation to climate impacts.

### 4. Investment Gap & Needs

A transition to a greener, safer and more digital road system requires major investment.

According to the PwC-Strategy 2024 study commissioned by ASECAP, €71.861 billion in additional investments (2025-2035) are needed – beyond existing concession obligations.

Distribution of needs:

- €48.5 billion for sustainability (68%);
- €17.3 billion for safety (24%);
- €6.1 billion for digitalisation (8%)

These investments are not funded under current national budgets and are indispensable to meet the Green Deal, Fit for 55 and TEN-T objectives, as well as to address the EU's latest priorities on Defence, AI, the Industrial Green Deal, and other emerging goals that the future will bring.

Without a stable tolling and concession framework, these investments will not materialise, shifting the burden to taxpayers or resulting in infrastructure degradation.



### 5. The User-Pays Principle: A Foundation of Fairness and Sustainability

For over two decades, the EU has consistently upheld the user-pays and polluter-pays principles through several directives or acts, most recently:

- Directive (EU) 2022/362 – mandating CO<sub>2</sub>-differentiated tolling for heavy-duty vehicles.
- AFIR (2023) – requiring widespread deployment of charging and hydrogen refueling points.
- TEN-T Regulation – requiring infrastructure modernisation and multimodal integration.
- Eurovignette Directive (1999/62/EC) and latest revision (2022/362) – phasing out time-based vignettes and reinforcing distance-based tolling.

These measures, embedded in the Sustainable and Smart Mobility Strategy (2020), confirm the EU's commitment to user-pays and polluter-pays principles as a cornerstone for sustainable financing and fair mobility.

Tolling is the only instrument that fully internalises costs, sends the right price signals, and avoids shifting the burden to non-users. The user-pays principle ensures that those who benefit from the use of infrastructure contribute to its upkeep and modernization. It is a fair mechanism that incentivizes efficient transport behavior and reduces externalities such as congestion and emissions, while aligning with the polluter-pays principle. By applying the user-pays approach, it also creates a framework to internalize all relevant externalities, not only current ones like road wear or emissions, but also potential future considerations such as road safety impacts and the social cost of mobility, ensuring a comprehensive and adaptable system for sustainable transport financing.

Abandoning tolling weakens this link. It removes incentives for responsible mobility, compromises the ability to invest in cleaner infrastructure, and shifts the burden to taxpayers—many of whom may not use the infrastructure in question. It also threatens the fiscal sustainability of governments already under pressure to fund critical social services.



ASECAP members operate 82,700 km of motorways through 130 companies, employing 48,000 people, generating €36.8 billion in toll revenue and €7.5 billion in investment in 2024. Tolling also produced €6 billion in VAT, returning €13.5 billion to governments for other priorities.

## 6. Socioeconomic Benefits

The PwC study demonstrates that implementing the €71.9 billion investment programme would generate:

- €72.7 billion of additional EU GDP,
- 96,006 full-time jobs per year,
- €21.2 billion in tax revenue (53% social contributions, 25% PIT, 12% VAT, 10% CIT).

Toll-financed infrastructure is therefore not a cost: it is a high-return economic catalyst aligned with EU policy objectives.

## 7. Concession Tolling and the EU Roadmap Based on Green Deal and Fit for 55 Objectives

The European Green Deal sets a clear path: carbon neutrality by 2050 and enhanced protection of biodiversity. Achieving these goals requires more than declarations—it requires the mobilization of substantial financial and technical resources. The user-pays and polluter-pays model is already aligned with these goals and should be leveraged, not dismantled.

Toll concessions directly support EU climate and sustainability objectives by enabling:

- deployment of AFIR-compliant EV charging and hydrogen refuelling networks,
- free-flow tolling and ITS reducing CO<sub>2</sub>, noise and congestion,
- smart lighting, photovoltaics, eco-design and biodiversity protection,
- C-ITS, data-driven asset management, and 5G/6G corridors,
- climate-resilient infrastructure and extreme-weather preparedness.

Notably, 38% of required investments already meet the criteria of the EU Taxonomy for climate mitigation or adaptation.



## 8. A Call for Visionary Policy

We urge European institutions and national governments to:

- **Recognise tolling as a strategic enabler of sustainable mobility** and maintain it as a central pillar of transport policy;
- **Defend the user-pays and polluter-pays principles** as just and equitable mechanisms to support green investments;
- **Promote the concession model** as a successful example of public-private partnership delivering high-quality, efficient, and climate-aligned infrastructure;
- **Ensure policy coherence** so that short-term political gains do not undermine long-term environmental and fiscal goals;
- **Reinvest in tolling frameworks** that are transparent, socially acceptable, and environmentally responsible.
- **Strengthen coherence between TEN-T, AFIR, Eurovignette and Green Deal law.**

## 9. The Concession Model and Tolling Mechanisms, Instruments for Building the Road Infrastructure of Tomorrow

The concession model and tolling mechanisms are not relics of the past—they are instruments for the future. They have enabled Europe to build one of the safest, most advanced road networks in the world. They are now essential to transform that network to meet the demands of a new era.

Decarbonising transport, supporting the Military Mobility Plan, improving mobility, protecting biodiversity, and ensuring economic cohesion across Europe all require bold, coherent action—and sustainable financing.

**Let us not dismantle a model that delivers. Let us strengthen it, evolve it, and unlock its full potential – building the green, resilient, and inclusive mobility system Europe urgently needs.**

*The analyses, figures and policy references contained in this manifesto are based on the following sources:*

- PwC – Strategy & Part of the PwC network (2024), study commissioned by ASECAP on Quantifying the investments to upgrade the European motorway network and assessing their socioeconomic impact.
- ASECAP institutional data.
- Eurostat / DG MOVE.
- European Union legislative framework: Directive (EU) 2022/362, the Alternative Fuels Infrastructure Regulation (AFIR), the TEN-T Regulation, and the overarching European Green Deal and Fit for 55 initiatives.



ASECAP is the European Association of Operators of Toll Road Infrastructures across 17 member countries representing 130 companies. They operate, maintain and manage a network of 82,700 km with a long-term vision that ensures highest quality standards to make the road infrastructure safest, reducing carbon footprint and preserving the environment thanks to the user-pays and polluter-pays principles providing sustainable financing.



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