A map of Italy, rendered in a light grey 3D style, showing the outline of the country and its islands. Overlaid on the map is a network of green lines representing the motorway system. The network is dense in the northern and central regions and sparser in the south. The map is set against a background of a light green grid that recedes into the distance, creating a perspective effect.

**ITALIAN MOTORWAY SYSTEM  
AS FOR 31.12.2009**

**XXXVIII ASECAP Study and Information Days  
Oslo - Norway**

**38<sup>th</sup> ASECAP ANNUAL STUDY AND INFORMATION DAYS  
Oslo (Norway), 30<sup>th</sup> May -2<sup>nd</sup> June 2010**

**NATIONAL REPORT - ITALY**

After a period of great uncertainty relating to the regulatory context and infrastructure development policies, the institutional horizon change that took place in Italy in 2008 has re-established a framework of reliability and certainty, so fundamental especially for public and private relations, for full scale implementation of Italian concessionaire companies' investment plans.

The change has in fact affected the sector's operations in 2009, with the unblocking or definitive kick-off of important projects and initiatives for motorway network development (such as new sections, third lanes, etc) confirming the central role played by concessionaire companies (through improvement of Italy's infrastructure) also in terms of enticing and sustaining national economic and productive progress, especially in a period of deep financial crisis such as the one experienced over the last two years.

Within this scope, we must underline the continuous financial and manpower effort made by the sector towards maintenance and technological upgrading, with constant improvements in service and safety levels to guarantee that road users receive a safe, technologically efficient and sustainable service. The sector has also continuously pursued the objectives and wishes of European transportation policy authorities.

Specifically addressing the association's members, we highlight a decrease in the number of effective members, now 23, following the exit of *Società Venezia-Padova* effective 1<sup>st</sup> December 2009 upon expiry of its concession agreement. The motorway sections previously operated by the company have now been taken over by *Società Concessioni Autostradali Venete – CAV SpA* (owned 50% by Regione Veneto and 50% by ANAS), which also operates the new A4 motorway "Mestre Link Road", inaugurated February last year.

## 1. The Italian motorway network as of 31.12.2009

### LENGTH OF THE NETWORK

	km in service	km being built	scheduled km	Total
<b>In concession</b>	5.731,3	62,8	614,6	6.408,7
<b>A.N.A.S.</b>	904,6	0,0	0,0	904,6
<b>Alpine Tunnels</b>	25,4	0,0	0,0	25,4
<b>Total</b>	<b>6.661,3</b>	<b>62,8</b>	<b>614,6</b>	<b>7.338,7</b>

### NETWORK UNDER CONSTRUCTION

	CONCESSIONAIRE COMPANY	SECTION AFFECTED	KM
<b>NEW SECTIONS</b>	<b>Autostrada Brescia-Padova S.p.A.</b>		
	A31 Trento-Valdastico-Vicenza-Riviera Berica-Rovigo	Vicenza-Rovigo (SS. 434 Transpolesana)	<b>53,9</b>
	<b>Società Autostrada Tirrenica S.p.A.</b>		
	A12 Livorno-Civitavecchia	Rosignano-S. Pietro in Palazzi	<b>4,0</b>
	<b>Autovie Venete S.p.A.</b>		
	A28 Portogruaro-Conegliano	Godega S.Urbano-Conegliano	<b>4,9</b>
	<b>TOTAL NEW SECTIONS</b>		<b>62,8</b>

(\*) - Lavori consegnati il 15.12.2009

<b>EXTENSIONS</b>	<b>Autostrade per l'Italia S.p.A.</b>			
	A1 Milano-Napoli	3 <sup>a</sup> corsia	dal km 279+000 a 281+150 (in corrispondenza interconnessione A1/A11)	
		3a corsia	Firenze Scandicci-Firenze Sud	
		potenziamento fuori sede	La Quercia- Barberino	
		3a corsia	Casalecchio-Sasso Marconi	
		A1-D18 3a corsia	Fiano R.-Settebagni	
		A9 Lainate-Como-Chiasso 3a corsia	Lainate-Como Grandate	
		A14 Bologna-Taranto 3 <sup>a</sup> corsia	Rimini Nord-P.to S. Elpidio	
		<b>Autostrade Meridionali S.p.A.</b>		
		A3 Napoli-Salerno 3 <sup>a</sup> corsia	Napoli sud - Ercolano	
		Ercolano-Torre del Greco		
		Torre del Greco- Torre Annunziata sud		
		Torre Annunziata nord - Torre Annunziata sud		
	<b>TOTAL EXTENSIONS</b>		<b>267,4</b>	

## 2. Traffic

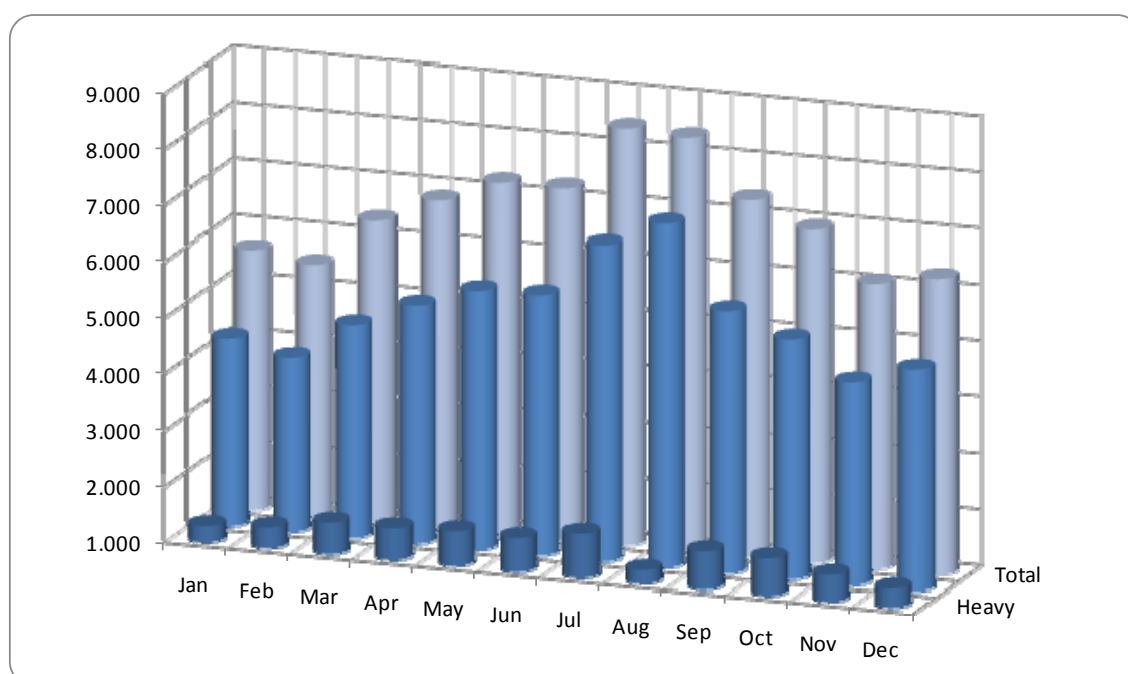
In 2009, and especially in the first months of the year, the effects of the harsh crisis that hit the economies of all industrialised countries starting from the second half of 2008 were felt across all sectors of production, and consequently also on the finances of families, in Italy just as abroad.

Traffic levels were naturally also affected by the strong drop in demand and production, levelling off at 82.3 billion vehicle-km (less than one percentage point compared to 2008) confirming, overall, the journeying contraction trend along the network which started at the end of 2008.

However, if we turn to traffic details, whilst light vehicle traffic actually showed a slight increase (+ 1.3%), the overall reduction was affected by the significant drop in heavy vehicle traffic (- 7.8%), despite constant recovery over the last months.

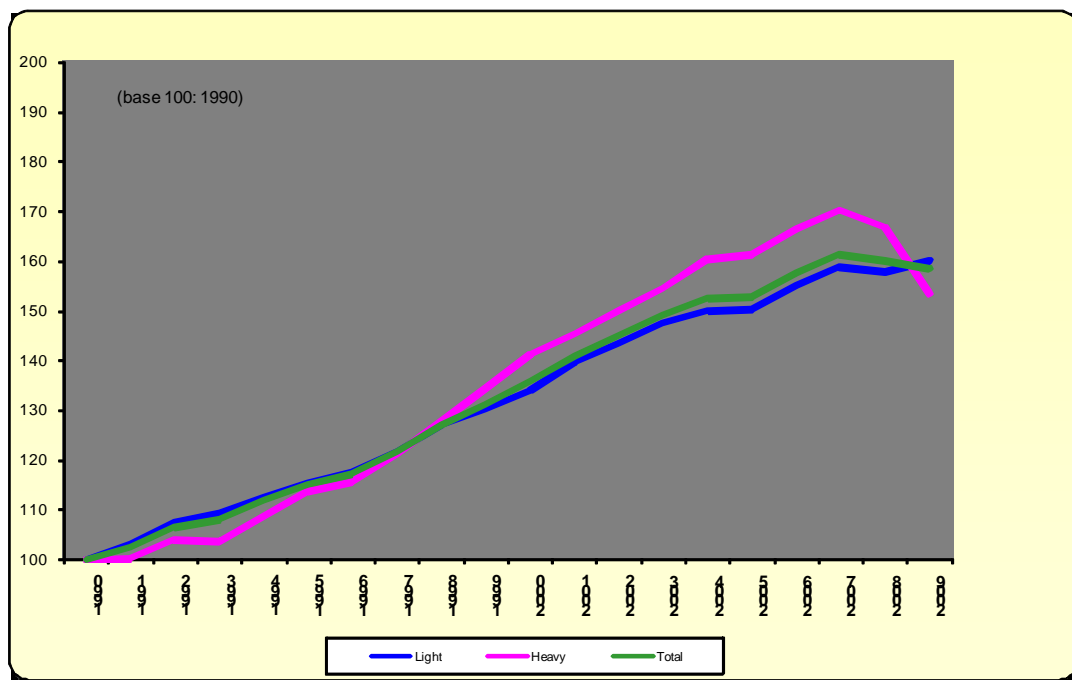
We must also underline how these results are affected by the one day difference between 2008 (a leap year) and 2009, as well as by the particular weather conditions characterising the winter months.

**2009 Monthly Traffic**  
(millions of vehicle-km)



**Traffic: annual percentile increases and index values  
or the period 1990 – 2009**

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



**Trend in motorway mobility  
over the last 10 years**

<b>YEARS</b>	<b>TOTAL JOURNEYING LENGTH</b> (billions of vehicle-km)	<b>ADDITIONAL JOURNEYING</b> (billions of vehicle-km)
2000	70,5	2,3
2001	73,1	2,6
2002	75,2	2,1
2003	77,4	2,2
2004	79,2	1,7
2005	79,4	0,2
2006	81,8	2,5
2007	83,8	1,9
2008	83,1	-0,7
2009	82,3	-0,7

### 3 Safety

Last year's results are the most concrete and tangible demonstration of the sector's effort in the area of safety, as well as in the effectiveness of technical-managerial solutions implemented by concessionaire companies across the network (especially towards prevention of improper behaviour by road users) with the important operative support of the Road Police.

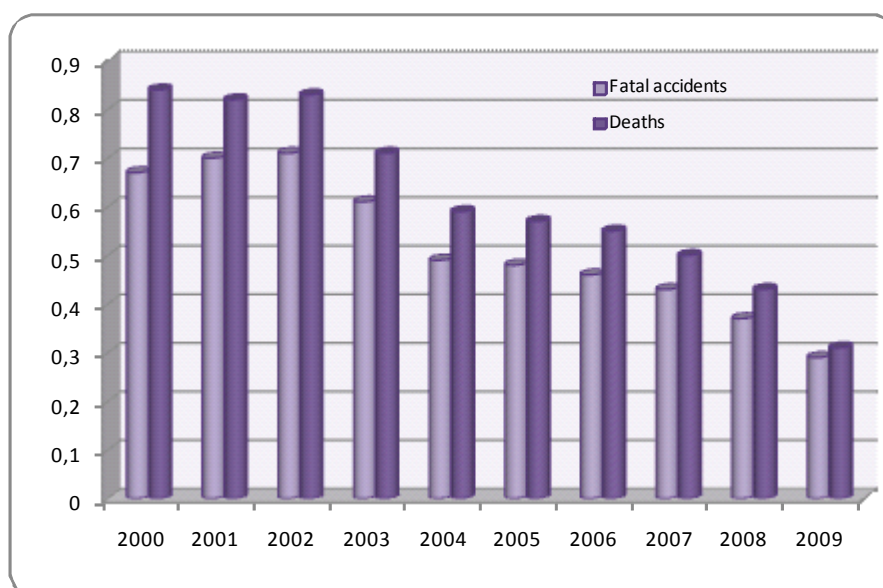
With the constant decrease in accident rates, and especially fatality rate (-21.6%), now at 0.31 deaths per 100 million km travelled, 2009 is the best year ever recorded for the Italian motorway network.

These results confirm the progressive and constant improvement of safety levels on motorway sections operated under concessions, and make the concessionary system the only one to have obtained the European objectives of halving the number of road accident victims by 2010.

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

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Accidents (1)	15	15	15	14	12	13	12	11	10	10
Fatal accidents	0,67	0,7	0,71	0,61	0,49	0,48	0,46	0,43	0,37	0,29
Deaths	0,84	0,82	0,83	0,71	0,59	0,57	0,55	0,5	0,43	0,31

(1) - Accidents with injuries and/or deaths



#### **4 Toll revenues**

In terms of traffic along the network, 2009 recorded a slight increase (+0.25%) in toll revenues compared to 2008, estimated at approximately 4,545 million Euro.

On top of this amount we must then add the premium amount due to ANAS – almost 297 million Euro – and VAT on toll payments amounting to 969 million Euro, giving gross collections of approximately 5,811 million Euro.

Lastly, we must underline the contribution made by the sector towards the anti-crisis measures proposed by the Italian government last year for the benefit of families and the domestic economy. This meant a 4-months suspension to tariff increases, provided for under the agreements, with increases deferred from 1<sup>st</sup> January 2009 to 1<sup>st</sup> May 2009.