



ASECAP THINK TANK

Paris, 6 February 2015

**Service area management along
the Italian toll highways network**

Andrea Manfron – AISCAT



A brief overview on AISCAT.....

Italian Association of Toll Highways and Tunnels Operators

AISCAT represents 27 Concessionaire Companies, which are in charge of construction and management of Toll Highways and tunnels



Together we are
road safety

AISCAT has subscribed the European Road Safety Charter



Service areas: some figures ...

Italian Tollo Highway Network (operating at 31.12.2013)

KM. 5.813,5

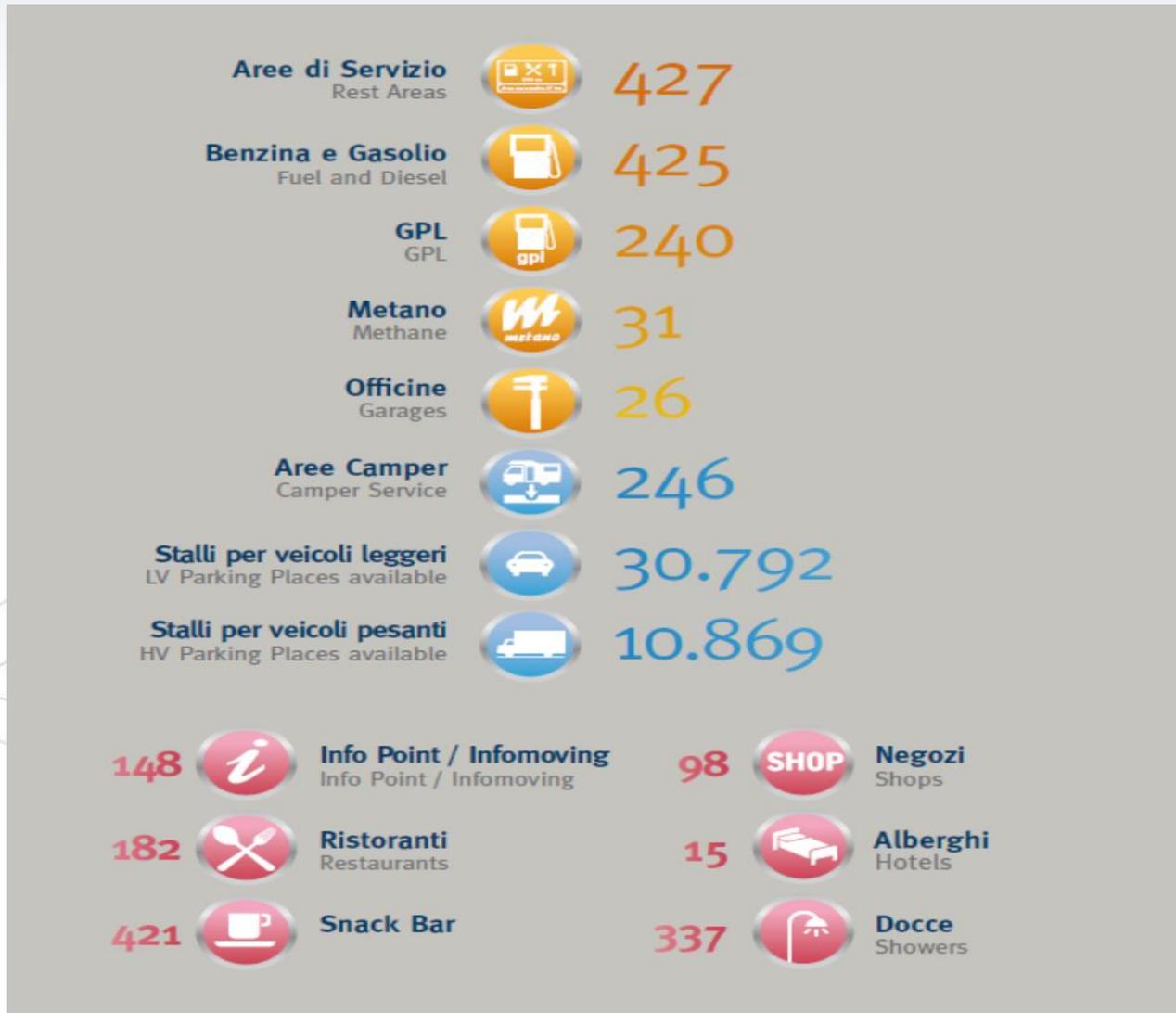
Service areas along tolled highways network

427

Service areas average distance

Nearly 30 KM (for each sense of circulation)

Service areas: facilities



Service areas: facilities

FAMIGLIE | Families

Fido Park Dog Park		41
Area gioco Playing Area		63
Nursery Nursery		285
Servizi per disabili Services for Disabled		422

BUSINESS | Business

Sale riunioni Meeting Rooms		8
Wi-fi Wi-fi		78
Fax Fax service		327
Bancomat ATM		67



Service areas and the concession contracts

Service areas have been included as an **obligation** in the concession contracts.

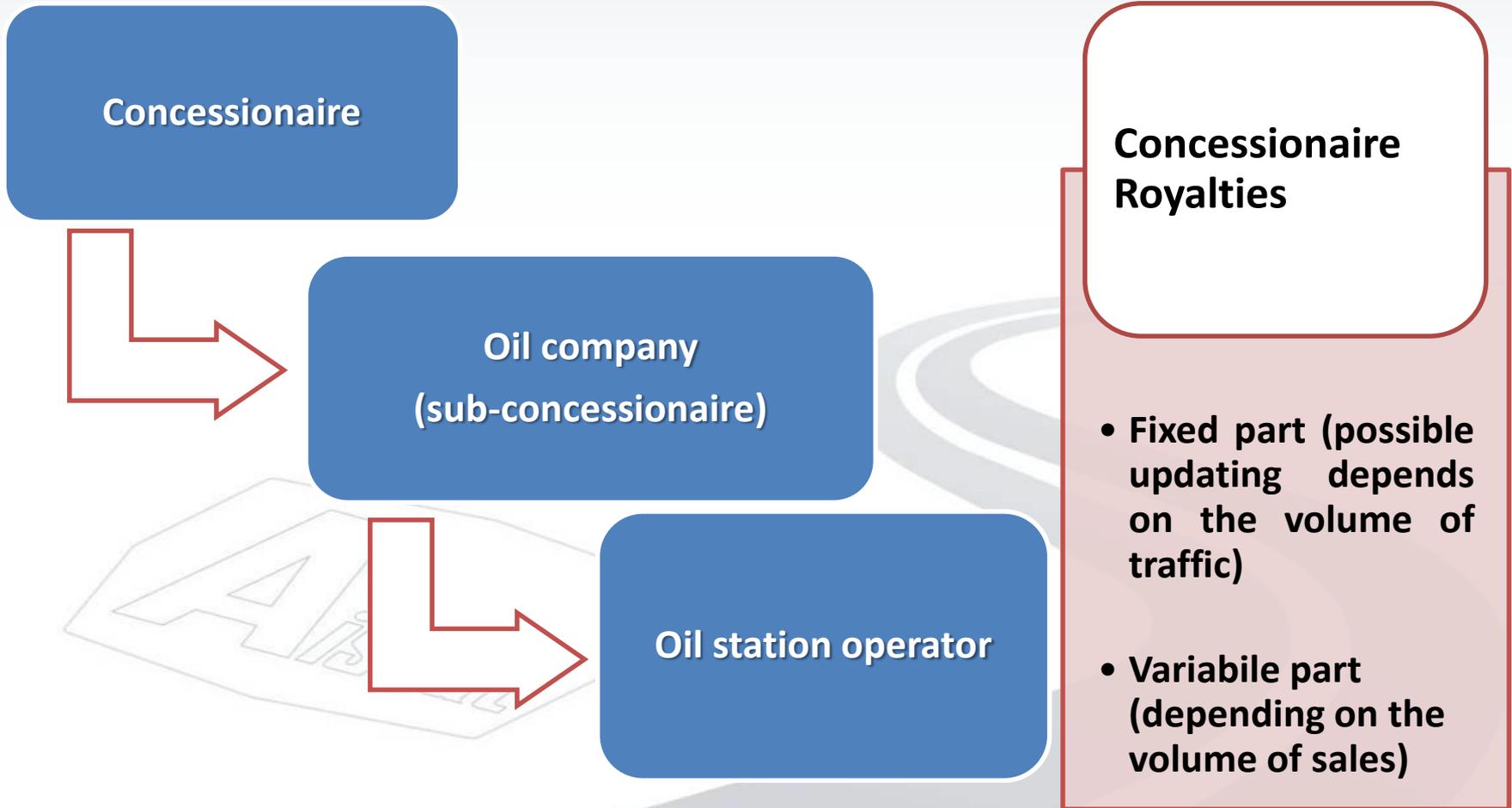
In accordance with Italian Road Code (Legislative Decree 285/1992) every highway shall include service areas

The existence of service areas along the highways' network is **foreseen by the infrastructure's projects** and successive modifications/integrations of these projects.

Services' operation (both oil products and restaurant services) is **awarded** by the Highway concessionaire **to third parties**, according to sub-concession services' contracts. These contracts are awarded following a competitive tendering procedure.

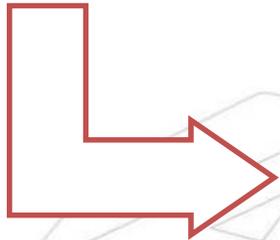
Awarding sub concessions services to third parties is not mandatory for the concessionaire (**self-managing is possible but not used**).

A Management service areas' italian model (OIL)



A Management service areas' italian model (NON OIL)

Concessionaire



Food Company
(sub-concessionaire)

Concessionaire
Royalties

- Fixed part (possible updating depends on the volume of traffic)
- Variable part (depending on the volume of sales)



Awarding of services areas

Usually oil and non-oil services on the same service area are awarded to third parties separately

A Ministerial Directive foresees joint awarding (both oil and non oil services) for areas with low sales (less than 3 Mln/liters per year)



Awarding of services areas: evaluation of bids

Awarding to third parties

EVALUATION OF BIDS

Technical and qualitative criteria (i.e. number and quality of services offered; energy production from renewable sources; maintenance plan ...) should have higher weighting than economic criteria (Royalties offered by competitors).

Convention contracts

Law n. 498/1992

Directive (Infrastructure and Transport Ministry – February 2009)



Guidelines for the service areas' rationalization along the Italian highways' network

During the last years, the service areas business along the Italian highway network has decreased: because of the traffic reduction by nearly 9%, oil sales have fallen by 38%; non oil sales have decreased by 20%.

All the above is contributing to create financial difficulties, especially for some marginal service areas

Italian Ministry of Infrastructure and Transport and Ministry of Economic Development recently issued "guidelines" for service areas' "rationalization" (29.01.2015)

The «rationalization» guidelines aim at supporting service areas' economic sustainability, guaranteeing (at the same time) high level quality of services



Rationalization plan: some examples to support service areas with low sales...

Reduction of management costs

- Oil and non oil joint management (joint awarding);
- Service areas' joint management;
- Increasing self service (operational staff presence reduction);
- Revision of some planned investments in services areas.

Closing some services areas

- Only if the area is not able to guarantee an adequate level of customer service along the highway (i.e.: the distance between the service areas can not be higher than 50km)



Next steps

According to the guidelines, concessionaires will prepare a specific rationalization plan for each stretch of their competence.

Plans will be approved by Ministry of Infrastructure and Transport and Ministry of Economic Development.



Thank you!

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