

ASECAP WEBINAR ON EU RECOVERY PLAN

CEO: ROBERTO TOMASI

A rapidly evolving context...

...which will modify the lifestyle and way of travelling in the future

Infrastructures



Network Modernization

Infrastructure in increasing need of modernization and upgrading, due to :

- Volumes of **past investments lower than the European average** (0.2% GDP in Italy vs. 0.4% UE)
- Increasing **fragility of Italian territory** (~7,000 municipality in areas at risk from landslides and rockslides), further worsened by **the climate change** in place
- **High orographic complexity** of the Italian territory



Digital Infrastructure

Network increasingly connected (30% to 2030) through sensors and 5G technologies to facilitate:

- **Smart road** applications (e.g., smart lightning, dynamic signal system)
- **V2I¹ Connection** (e.g., road conditions sent real-time to the vehicle)
- **Smart city** applications (e.g. wireless sensor networks) also driven by increasing urbanization

Traffic - people



Modal Shift

Implications of the COVID-19 pandemic on **travelers' habits**:

- **Reduced mobility** as a result of **smart working**
- **Reaffirmation of private mobility** perceived **as safer**



Sustainable Mobility

Evolution of the way of travelling with a view to sustainability, mainly through:

- **Shared mobility** (~10% in major Italian cities by 2030) including **robotaxi** and **AD³ shuttle**
- **Mobility-as-a-Service** (e.g., modal integration platform for end-to-end travel)
- **Full electric** (10-15% of electric cars in cities C40² to 2030)

Traffic - goods



2.0 Goods

- Increasing **fragmentation of the purchases** through e-commerce (~18% to 2030) with necessity to **review the logistic and distributive model**, in particular in the urban centers
- Increased use of self-driven vehicles (50-60% of L3-L4⁴ vehicles by 2030) with the need to **rethink freeway infrastructure**

Availability of funds



Recovery fund and other funds

- Confirmation of the **Recovery Fund** to be allocated to digitization projects, sustainability etc.
- **Increase in public funds** to cope with the crisis triggered by the COVID-19 (MIT funds for railways and roads)



1 Vehicle-to-Infrastructure

2 A network of 40 major global cities working to develop and implement policies and programmes to reduce greenhouse gas emissions.

3 Autonomous Driving

4 Vehicle automation levels (L3: acceleration range, braking, direction; L4: L3 + traffic control)

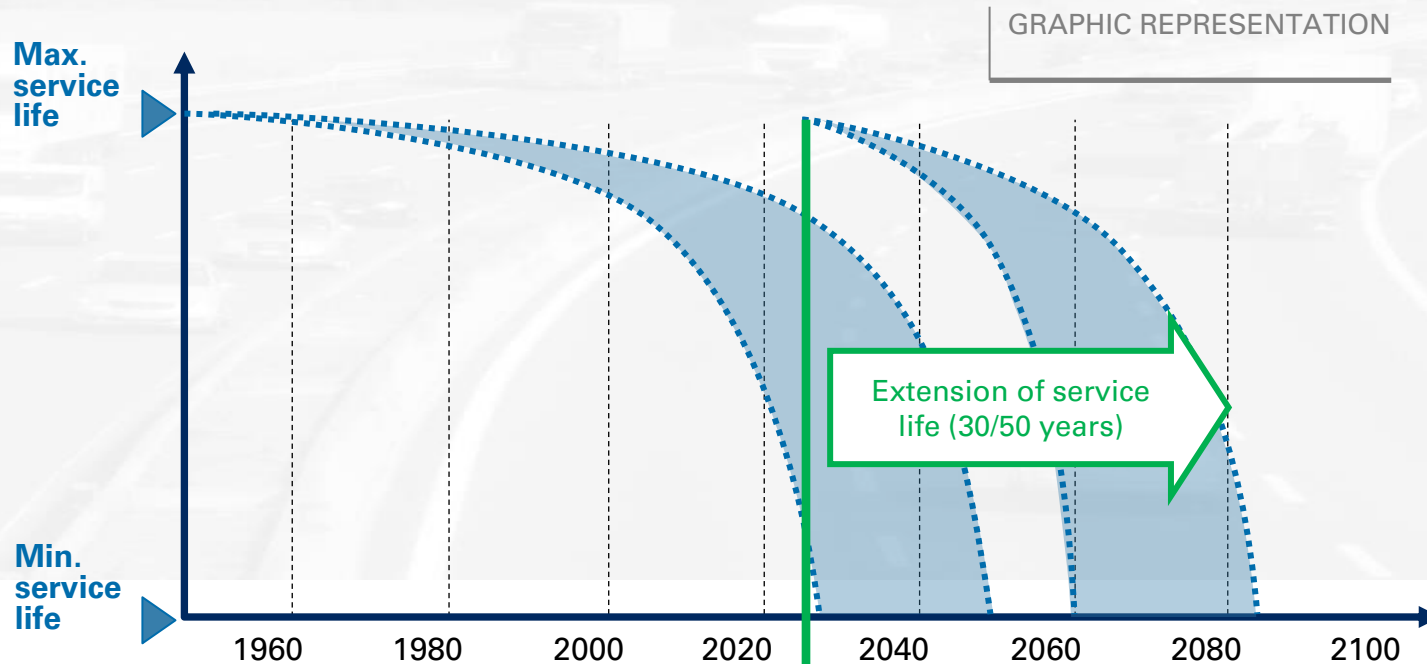
Infrastructure - A new Modernised Plan

~50%

of bridges and viaducts built **before 1970** (and ~93% before 1990)

~35%

of km of tunnels built **before 1970** (and ~78% before 1990)



Investment programme enabled by a thorough effort for the "assessment" of bridges, viaducts and tunnels, started in 2019

100%

of the assets subject to "assessment" and intervention



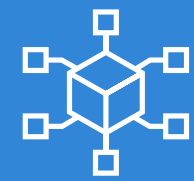
Bridges and Viaducts



Tunnels

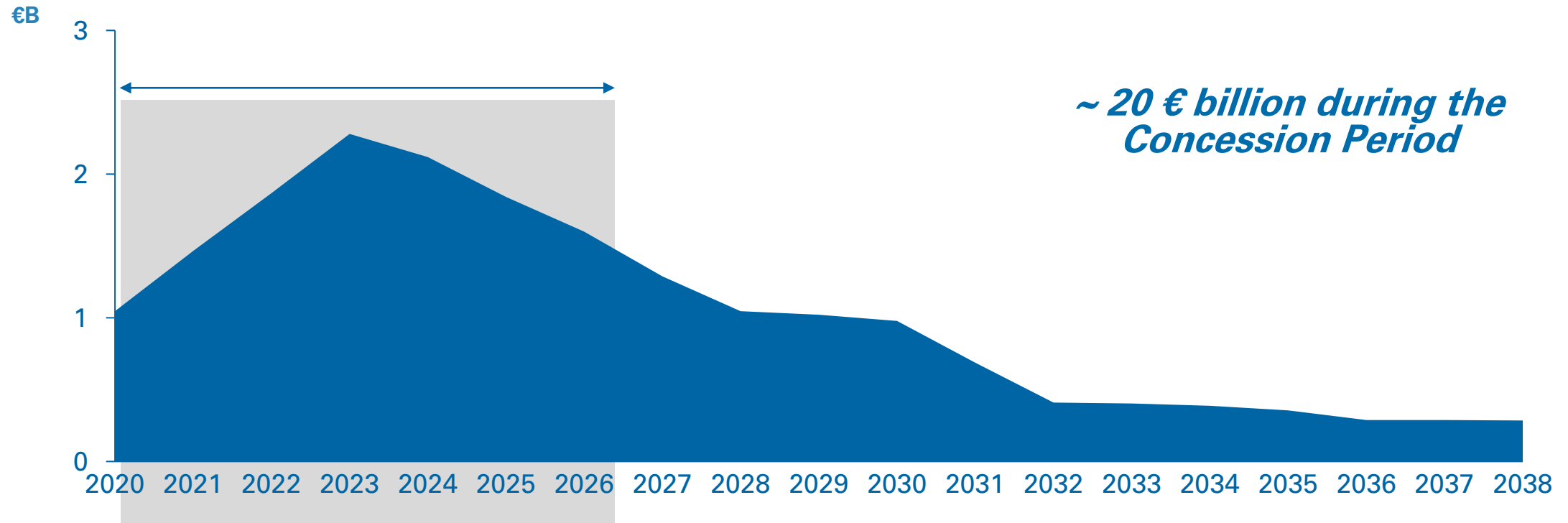


Barriers (safety noise remediation)



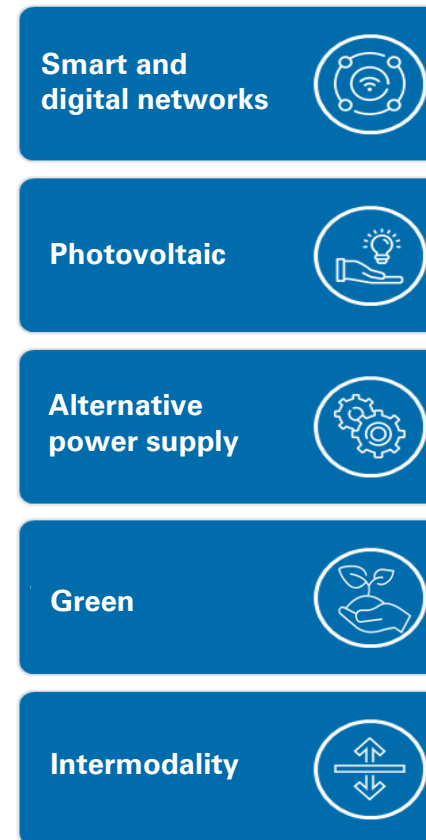
Plants

Infrastructure - Maintenance and Capex Plan



**An exceptional effort in both investment and maintenance,
with a peak in the 2021-2026 period**

What's Next



In this context, the new vision of Highway Network is...

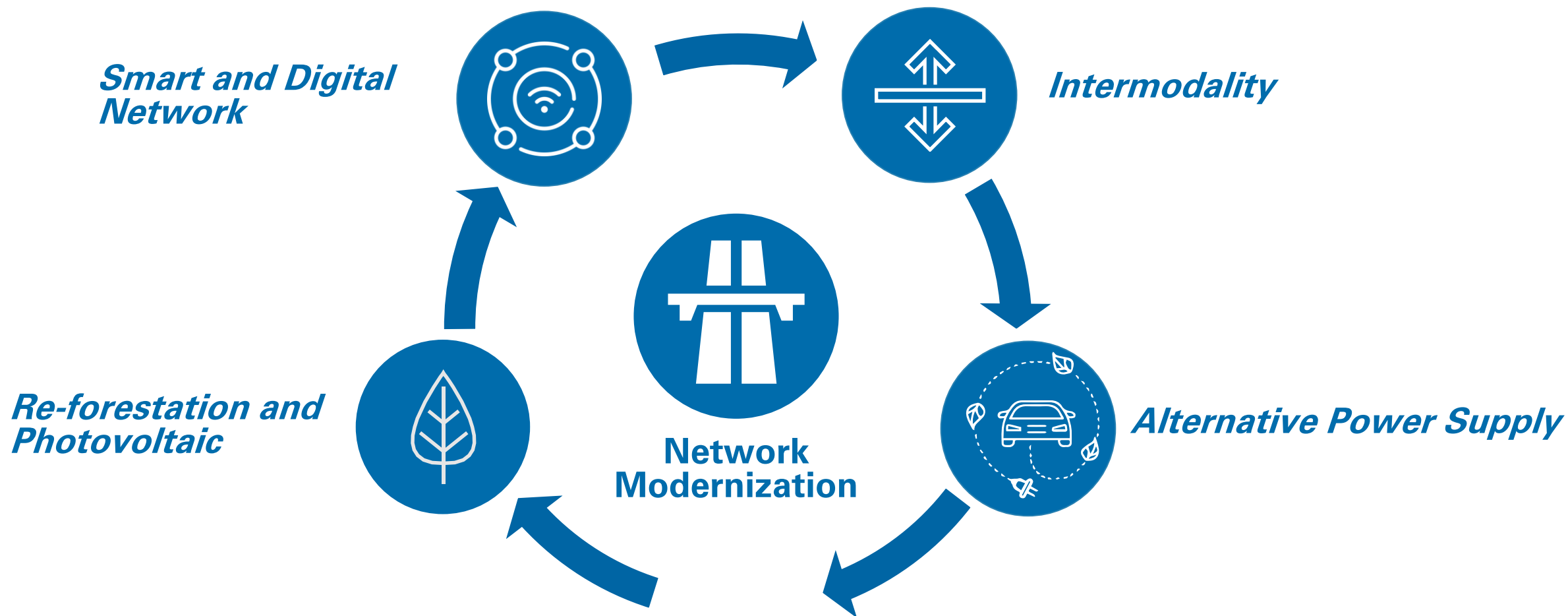
...to be a **leader** for the **development, management and maintenance** of the national **infrastructure**...

...to enable a new model of **mobility**: more **sustainable, safer, more digital**....

... to become a **driving force for the growth of the "Italian System"**, through a significant contribution to investments in infrastructure and to the efforts in R&D

Consistent with Recovery Funds Guidelines and AISCAT intervention Areas

The key to Success



Investment in smart and digital, alternative power supply and intermodality all along a renewed infrastructure a key factor to travel the future.

Recovery Fund a unique enabler to fund an integrated transformation