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 31.12.2018**

**XLVII ASECAP Study and Information Days
Costa Navarino - Greece**

ITALIAN NATIONAL REPORT
ASECAP STUDY AND INFORMATION DAYS
COSTA NAVARINO (GREECE), 29 - 31 MAY 2019

Network length

| | |
|---|-------------------|
| Tolled Motorways Network in 2018 | km 6,003.4 |
| 2 x 2 lanes | km 4,070.6 |
| 2 x 3 lanes | km 1,802.0 |
| 2 x 4 lanes | km 129.0 |
| 2 x 5 lanes | km 1.8 |
| Tunnels (*) | km 865.2 |
| Bridges (*) | km 1,034.7 |

(*) *Lenght > 100 m*

| | |
|----------------------------------|------------|
| Tolled Motorways Network in 2017 | km 6,003.4 |
|----------------------------------|------------|

Traffic

In 2018 the total registered trips along the network have overcome the threshold of 84 billion of vehicles/km.

The year had as well an additional increase – though limited (+0.4%) – of the traffic volumes, thus confirming the increasing growing trend of traffic started in 2014 and consolidated in the following years with increasing and definitely more consistent rates.

Entering more into the details of the different vehicles components, we can see how the increase can be substantially attributable to the heavy traffic, increased of an additional + 2.2%, compared to the already significant increases (between 3.5% and 3.6%) started in 2015. The heavy traffic represents more than 23% of the total annual traffic, with nearly 19.6 billion of vehicles/km.

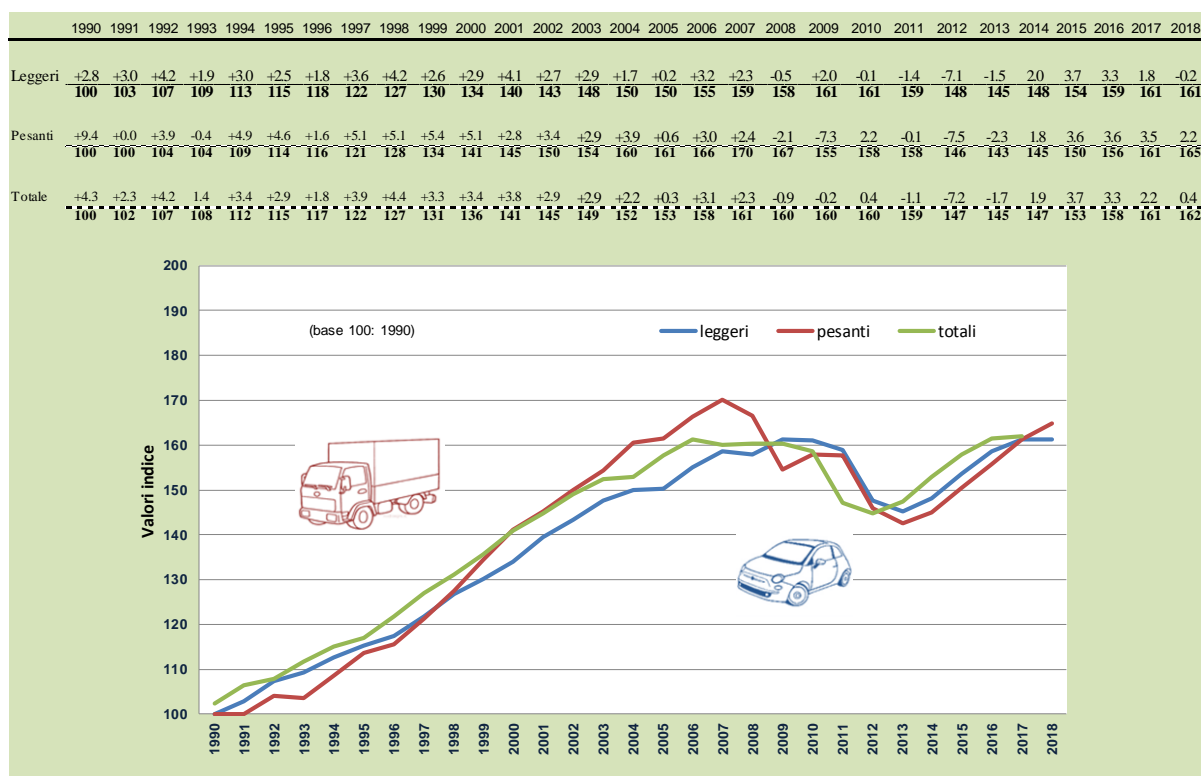
Concerning light vehicles we registered a light decrease of nearly 120 million of vehicles/km, equal to the -0.2% , with a total annual value of around 64.5 billion of vehicles/km.

The disaggregation of the traffic on a monthly basis reflects the classical distribution of the trips along the whole year.

This distribution is surely due to the extreme weather conditions in the second half of February, with an exceptional cold and intense snow falls which have impacted on a great part of the Country, mainly on the Central and Southern regions.

- **2018:** 84,129 (10^6 x km)
- **2017:** 83,832 (10^6 x km)

Traffic: annual percentage increases and index values 1990 – 2018



Tolling system and related technologies

The Italian Highways' tolling system is inter-connected, because it has eliminated almost the totality of the tolling barriers along the borders of the different concessionaires and it is interoperable along the whole National territory: electronic toll collection is based on the micro-waves short range technology DSRC on the frequency of 5.8 GHz.

Tariffs

Average tariff on the whole network in 2018:

- LVs: 0.0819 Euros
- HVs: 0.1414 Euros

Toll incomes

In 2018 the registered brut toll income amounts to 8.3 billion of Euros, with an increase, compared to the previous year, due both to the tariffs' adjustments recognized by the Infrastructure Ministry and to the traffic's evolution.

This amount includes, as always, both the brut incomes directly pertaining to the concessionaire companies (increased to 6.15 billion of Euros) and the additional components such as the fee to be corresponded to ANAS (increased to 660 million of Euros) and the VAT (with a percentage of 22% amounting to nearly 1.5 billion of Euros). In fact, if we consider fees, direct and indirect taxation, etc. almost the 50% of the toll incomes goes directly to the State.

Concerning the tariffs' adjustments since January 1st 2018, the adjustments have been pretty diversified according to the particular situations of each single concessionaire company. In fact the recuperation of previous years, still blocked, has been recognized, as well as the conclusion of the up-dating process of the economic-financial plans. Furthermore, in several cases, the recuperation of the adjustments foreseen for the period 2015-2016, "blocked" in agreement with the Transportation and Infrastructure Ministry in order to ease the economic recovery have been as well recognized.

Regarding the application of specific tariffs' discounts, the one applied to the commuters came to its deadline after four years and the Transportation and Infrastructure Ministry did not send any request of further extension, while the experimental tariffs' modulation applied to motorcycles having an ETC contract continued in 2018.

Net concessionaire companies' income (in Millon of Euros)

- **2018** = 6,151
- **2017** = 5,944

Safety

| | <i>Definition and method of calculation</i> | <i>In number for 100 millions-km travelled in 2018</i> | <i>Variation in % in 2017/2018</i> |
|-----------------------------|---|--|------------------------------------|
| <i>Personal injury rate</i> | Persons having injuries following the accident | 12.27 | -5.0 |
| <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 | 0.22 | -4.3 |
| <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 | 0.30 | 11.1 |

The analysis of the accidents' trend along the network has been strictly connected to some events which occurred and which influenced in a negative way 2018.

Absolutely exceptional events according to the typology, the dynamic and the effects, which have to be mentioned for a better and more comprehensive understanding of the data related to road safety.

The total number of deaths is indeed highly influenced by including in the calculation the victims of the Genoa bridge's collapse, although the event, undoubtedly tragic, cannot be comparable to a road accident in its strict sense, being attributable to an infrastructure collapse.

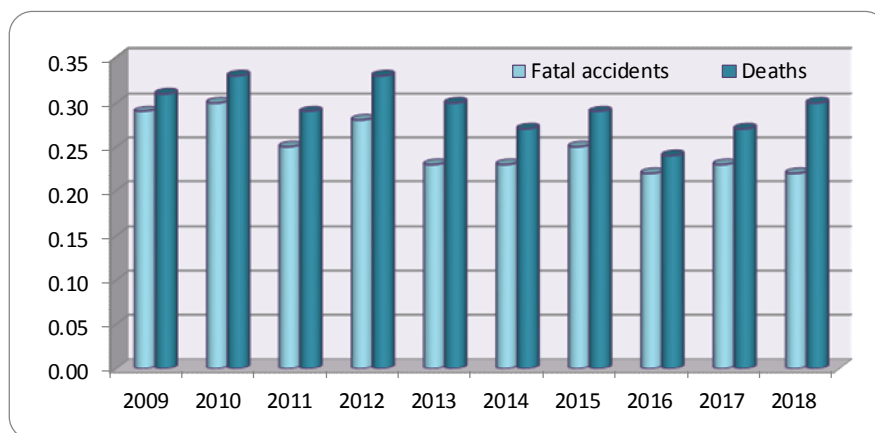
Bearing in mind the above, in 2018 the registered accidents having consequences on the persons have been reduced - compared to 2017 - of nearly 170 units (amounting to - 2.7%) and the registered accidents with injured people have been reduced - compared to 2017 - of nearly 500 units (amounting to - 4.7%). Deaths have on the contrary increased of 30 units - compared to 2017 - with an increase of +12.8%.

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

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

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|-----------------|------|------|------|------|------|------|------|------|------|------|
| Accidents (1) | 9.97 | 9.56 | 8.90 | 8.45 | 8.49 | 8.18 | 8.02 | 7.66 | 7.56 | 7.23 |
| Fatal accidents | 0.29 | 0.30 | 0.25 | 0.28 | 0.23 | 0.23 | 0.25 | 0.22 | 0.23 | 0.22 |
| Deaths | 0.31 | 0.33 | 0.29 | 0.33 | 0.30 | 0.27 | 0.29 | 0.24 | 0.27 | 0.30 |

(1) - Accidents with injuries and/or deaths



Taking into account the increase of the network and of the total traffic volumes in the last years, we have to highlight the results reached regarding accidents of injured people, both in absolute terms and – even more – in the rates: the above mentioned figures represent indeed the best results ever registered along the network and the comparison with the data of the beginning of the 2000s give an additional confirmation to that statement.

KEY FIGURES

| Country: ITALY | | DATI 2018 |
|--|---|------------------|
| Network length (km) | | 6,003.4 |
| 2 x 2 lanes (km) | | 4,070.6 |
| 2 x 3 lanes (km) | | 1,802.0 |
| 2 x 4 lanes (km) | | 129.0 |
| 2 x 5 lanes (km) | | 1.8 |
| Number of km in construction | | 134.3 |
| Forecasts of opening motorways section | | N.A. |
| Annual toll revenues* (in millions of Euros) | Included the additional fee given to ANAS and the VAT | 8,309 |
| VAT % (Indicate the VAT % percentage to the toll revenues) | | 22% |
| Permanent staff | | 12,880 |
| Average daily traffic (light vehicles) | | 30,693 |
| Average daily traffic (heavy vehicles) | | 9,313 |
| Average daily traffic (total = light + heavy vehicles) | | 40,006 |
| Total number of accidents | | 23,887 |
| Number of personal injury accidents | | 6,167 |
| Number of dead | | 256 |
| Fatality rate | | 0.22 |
| Kilometres travelled (10 ⁶ x km) | | 84,129 |

| Country: ITALY | | DATI 2018 |
|---|---|------------------|
| Number of toll transactions (Total) | | 1,625,457,722 |
| Number of toll transactions (light vehicles): | | N.A. |
| Number of toll transactions (heavy vehicles): | | N.A. |
| Number of toll stations | | 525 |
| Number of toll lanes | | 4,450 |
| Number of ETC lanes | | 2,597 |
| Number of ETC subscribers (Total): | | 10,200,000 |
| 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 2 service areas temporarily closed because of re-structuring | 407 |
| Number of rest areas | | 246 |
| Number of restaurants | | 168 |
| Number of hotels | | 8 |