



Fortezza da Basso • FLORENCE (Italy) 30th September • 2nd October 2019



37TH INTERNATIONAL
NO - DIG
FLORENCE 2019

THE ITALIAN MARKET

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IATT

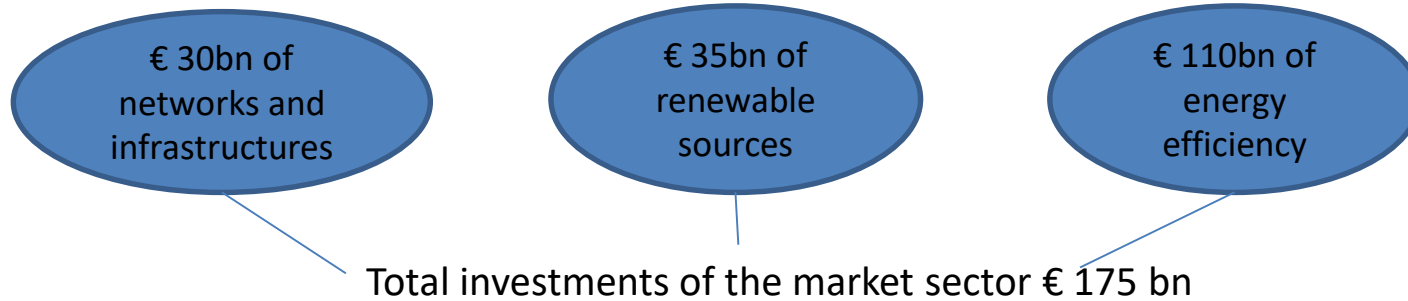


OIL & GAS SECTOR



Companies operating in the energy sector are facing with two challenges:

- satisfy growing energy needs;
- limit their emissions in the atmosphere.



Trenchless technologies usually applied for the laying of new infrastructures :

| | |
|------------------------|------------|
| Microtunnelling | 56% |
| HDD | 30% |
| Direct pipe | 14% |

Annual investment in trenchless technologies approx. € 170 mln



WATER & WASTEWATER SECTOR



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Acqueduct network: 490.000 km

Sewage network: 450.000 km

Population: 55 mln

More than 1,800 agencies operate in the sector, of which 1,600 are directly managed by municipalities, mainly located in the South of Italy.

Top 15 agencies manage around 45% of the population.

Water and wastewater networks still show unsatisfactory performance compared to Europe:

- between 38% to 45% of annual losses, compared to 20% in Europe
- territorial aqueduct coverage 95%
- territorial sewer coverage 93%
- 85% purification which is reduced to 72% if the actual operating capacity is considered

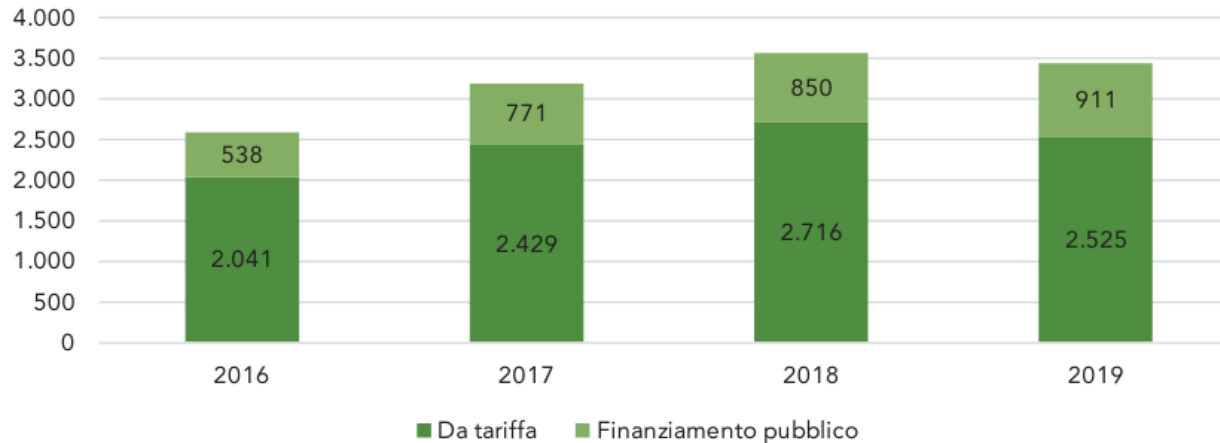


WATER & WASTEWATER SECTOR



Investment in water and wastewater sector

Investimenti nel Servizio Idrico Integrato (in mln €)



The estimated annual investment needed in Italy should be € 5 bn. Actually € 3,5 bn have been allocated in 2018 and € 3,4 bn in 2019

If we consider only pipelines network, investment is approx. € 1.7 bn per year. Use of trenchless technologies could be estimated in 500 mln per year.



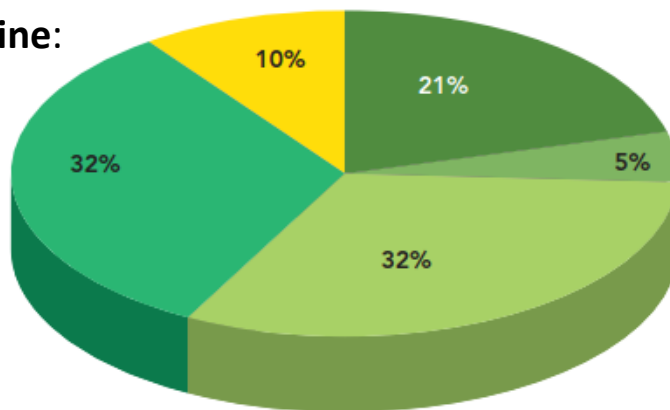
WATER & WASTEWATER SECTOR



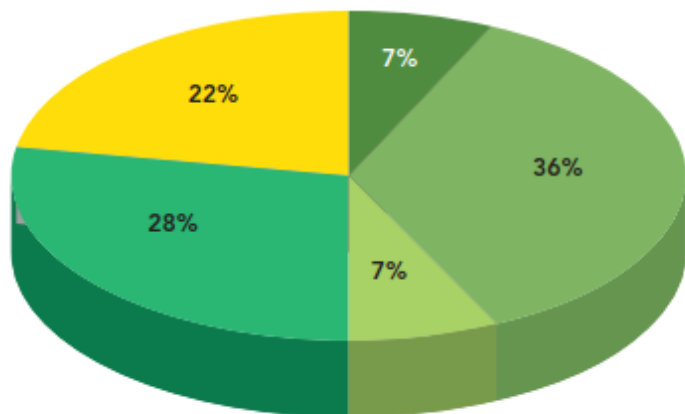
More than 50% of pipeline network has an average life of 40 years.

Type of aqueduct pipeline:

- Iron 32%
- Polyethylene 32%
- Cast iron 21%
- Concrete 5%
- Other 10%



- Ghisa
- Cemento
- Acciaio
- Polietilene
- Altro



- Ghisa
- Cemento
- Acciaio
- Polietilene
- Altro

Type of sewage pipeline:

- Polyethylene 28%
- Concrete 36%
- Iron 7%
- Cast iron 7%
- Other 22%

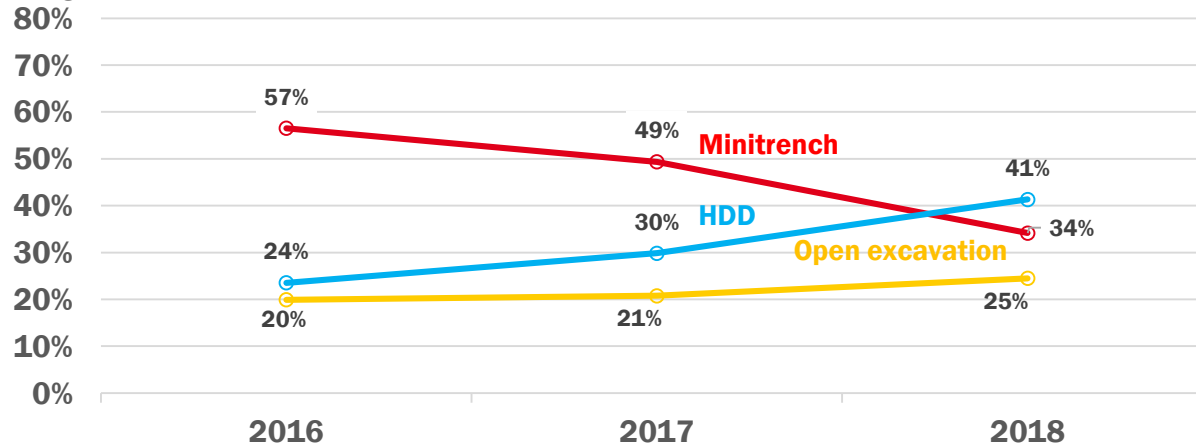


TELECOMMUNICATION SECTOR



Investments planned for the three-year period 2018-2020 (Large Broadband) from network agencies amount to approx. 10 bn euros, to which we must add 4 bn euro allocated by Italian Government.

Type of work



| | 2016 | 2017 | 2018 |
|-----------------------------|-------|-------|-------|
| Traditional excavation (km) | 875 | 913 | 1.153 |
| minitrench (km) | 2.482 | 2.169 | 1.607 |
| HDD (km) | 1.033 | 1.313 | 1.944 |



OS35 BID



| Amount in Euro/mnl | 2017 | 2018 | 2019 |
|----------------------|------|------|------|
| | | | |
| Directional drilling | 12,3 | 18,8 | 5,5 |
| | | | |
| Relining | 29,5 | 8,2 | 33,8 |



THANK YOU FOR YOUR ATTENTION