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Executive Summary

A35 BREBEMI

ANALYSIS OF THE BENEFITS FOR THE
TERRITORIES 10 YEARS AFTER THE OPENING

INFRASTRUCTURE

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1. INTRODUCTION

PREFACE

The investigation conducted in this Study has allowed a deeper understanding of the impacts that A35 Brebemi's presence has had on the territories it crosses and the surrounding areas in the medium term: 10 years after its opening (2014), and 15 years after the approval of the executive project (which marked the certainty of its realization), it is indeed possible to observe also those effects that unfold more slowly over time.

The infrastructure has activated a series of virtuous circles whose growth follows an exponential trend, slow in the initial phase and then increasingly rapid once the phenomena are triggered. There are various examples, and they concern almost all the areas of analysis in this *Study*.

The increased accessibility of the territories, introduced by the A35, has made the middle plain of Lombardy (the eastern part of the province of Milan and the so-called "lowlands" of Bergamo and Brescia) more attractive for businesses and residents. Being both well-connected areas to major cities of Milan and Brescia and with a less packed real estate market, those areas have seen new companies and families settling and revitalizing towns and villages. This has generated a demand for services that has translated into benefits for existing businesses and the birth of new ones. This, in turn, has made the area more attractive, even for occasional visitors—for work or tourism—who in turn generate further demand for services.

The analysis carried out for this first decade is still partial, and it will be significant to update it to reassess the long-term effects of the infrastructure, also in light of the completion of the Lombardy motorway network currently evolving, with major works still under construction and planning, such as the *Pedemontana Lombarda*, the "*Corda Molle*", and the Bergamo-Treviglio Motorway.

THE 2024 STUDY: THE BENEFITS OF A35 BREBEMI IN THE FIRST 10 YEARS OF OPERATION

This study (hereinafter *Study 2024*) contains an in-depth analysis of the direct and indirect benefits of the A35 Brebemi motorway in the first ten years since its opening in 2014. This work continues the previous studies conducted by Agici, which assessed the economic, social, and environmental impacts of the infrastructure.

The objective of the *Study 2024* is to evaluate the evolution of the benefits generated by the A35 Brebemi over the decade, with particular attention to the economic and social developments, taking into account significant historical events such as the COVID-19 pandemic, the energy crisis, and the rise in inflation.

The Study has highlighted and quantified the following relevant aspects for territories:



1,2 BLN €

the A35 generated significant direct economic, social, and environmental benefits for its users

due to the shift of long distance traffic flows from small local roads to a large motorway



+220% average daily theoretical vehicles

steady growth of traffic volumes on the A35 (2014 - 2023)

which has helped to decongest the ordinary roads of the southern Bergamo and Brescia plains



+84 new productive and logistics settlements

development of the economic-industrial fabric along the motorway



+ REVENUES

for the local Municipalities, linked to compensatory charges and general tax revenue

thanks to new productive and logistics settlements



+5% employment in the affected areas

in the provinces of Milan, Bergamo, and Brescia



+ 2% population growth over 10 years

opposed to the generalized decline observed in small villages



+19% increase in per capita income

exceeding the overall growth of 14% in the affected provinces (2014 - 2023)



+ 9% real estate values

increase in property values in the areas crossed by the A35



+ TOURISM

and hospitality activities, encouraged by better accessibility and visibility of the territories

METHODOLOGY

The methodological approach adopted in the *Study 2024* combines traffic data analysis with a qualitative and quantitative assessment of the direct and indirect benefits of the infrastructure. Direct benefits were quantified using impact valuation methodologies typical of Cost-Benefit Analysis (CBA) based on traffic data provided by AISCAT, Brebemi, and CAL. Indirect benefits were evaluated using information gathered through direct dialogue with various stakeholders (regional administration, local administrations, businesses, associations)⁽¹⁾ and from public sources and databases (ISTAT and Chambers of Commerce).

The direct benefits, arising from the use of the A35, are the following ones:

- ▶ **Economic:** reduction in transportation costs (time, fuel, operational costs).
- ▶ **Environmental:** reduction in CO₂ emissions, environmental pollution, and noise pollution.
- ▶ **Social:** reduction in accident rates, primarily due to decreased congestion on extra-urban roads.

The indirect benefits are the outcomes derived from improved accessibility and connectivity of the middle Lombardy plain with Milan, Brescia, and the entire motorway network. These benefits, summarized in the previous paragraph, are based on virtuous circles triggered by the increased attractiveness of the area for businesses and residents.

2. THE BENEFITS ON THE TERRITORIES OF THE A35

Below are the results of the direct and indirect benefits over the ten years since the motorway opened.

DIRECT BENEFITS

The A35 motorway, which is 62.1 km long, continues to attract long-distance traffic flows that for years were concentrated on the A4; it also alleviates congestion on ordinary roads that burdened the inhabited areas of the Bergamo and Brescia provinces. The A35 has seen a steady increase in traffic, except for 2020, when the pandemic caused a significant drop in traffic flows on all Italian roads and motorway. In its first ten years, the A35's average daily theoretical vehicles (ADTV) increased from almost 8,000 in 2014 to 26,000 in 2023, marking a +220% increase, which translates to an average annual growth of 16%.

This trend could continue, especially thanks to the production hubs established along the motorway axis in recent years, leading to increased traffic, particularly heavy vehicles, with the completion of other critical road infrastructures (such as the completion of the A36 Pedemontana Lombarda and the construction of the "IPB" Bergamo-Treviglio) and the upcoming Milan-Cortina 2026 Winter Olympics.

Between 2014 and 2023, the A35 generated significant direct economic, social, and environmental benefits for its users, estimated at €1.2 billion. Specifically, these benefits include:

- ▶ **Time savings:** Reduction of travel time compared to ordinary roads and the corresponding A4 section by about 2.9 million hours/year, with a total benefit of €820.1 million.
- ▶ **Transportation cost reduction:** Overall savings of €180 million in fuel and operational costs, thanks to cost savings and over 8 million liters/year of fuel saved.
- ▶ **Environmental benefits:** Reduction of pollutant emissions (PM₁₀, NO_x, etc.), CO₂ emissions, and noise, generating environmental benefits amounting to over €165 million. This is because the A35 reduces traffic (especially heavy traffic) in the affected municipalities, ensuring the reduction of over 96,000 tons/year of CO₂ and about 330 tons/year of pollutant emissions.
- ▶ **Accident reduction:** Decrease in accidents on extra-urban roads worth approximately €23 million, with 3 accidents/year avoided on the SS1, due to decongestion from the new infrastructure.

Overall, in its first ten years (2014-2023), the A35 generated benefits amounting to approxi-

(1) The following stakeholders were interviewed: Assessorato alle Infrastrutture di Regione Lombardia; Assessorato al Turismo di Regione Lombardia; Comune di Treviglio; CAL – Concessionari Autostradali Lombarde; Porsche Experience Center Franciacorta; Amazon Italia; Pianura da Scoprire.

mately €1.2 billion. Projecting these estimates for the next seven years (2024-2030), with traffic flows expected to continue increasing, albeit at a slower pace than observed in the 2021-2023 period, the total benefits are estimated to reach €2.6 billion.

INDIRECT BENEFITS

The indirect benefits for the territories related to the presence of the A35 are analyzed from a broad perspective, observing various aspects characterizing the social fabric, economy, and quality of life.

- ▶ One of the most significant impacts of the advent of the A35 Brebemi has been the development of productive and logistics activities along its route. Between 2014 and 2024, there have been at least 84 new establishments of large Italian and foreign companies, including prominent names such as Bianchi, Esselunga, Porsche, DHL, Amazon, MD, and Italtrans. These establishments have primarily involved the logistics, manufacturing, and chemical-pharmaceutical sectors. The temporal distribution of these establishments shows a progressive acceleration over time, with 34 new establishments occurring between 2021 and 2024 alone.
- ▶ The establishment of large production and logistics hubs has stimulated local entrepreneurial activities, positively impacting the number of businesses and employment levels. Although provincial-level employment data does not allow for the specific contribution of the motorway to be identified, it clearly depicts a context of growth in the Provinces of Bergamo, Brescia, and Milan, well above the regional average. According to the collected data, the three affected provinces experienced an employment increase of over 6% compared to pre-motorway levels (vs. a 4% increase in Lombardy).
- ▶ Overall, the attraction of new qualified professionals and the general stimulus to economic activities have led to a 19% increase in per capita income in the areas adjacent to the motorway, compared to an average of +14% for the cities of Milan, Brescia, and Bergamo.
- ▶ New settlements have also increased monetary revenues for the local Municipalities, thanks to compensatory charges linked to new constructions and the raise in general tax revenue, in particular IMU (Municipal property tax) of new buildings. These revenues for many municipalities (especially the smallest one) are an important item of the budget, therefore they are likely to be translated into an improvement in the services provided to citizens.
- ▶ The excellent road connection and economic development have also contributed to a demographic growth of over 2% in the affected areas (the municipalities closest to the motorway have seen a significant increase in the resident population) and a 9% increase in the value of residential properties. The infrastructure is facilitating the repopulation of the territory, driving the demand for both permanent and tourist housing, thus enhancing the value of local real estate.

The increased accessibility provided by the A35 has also had a positive impact on the tourism sector. For instance, Treviglio Fiera saw a significant increase in the number of visitors in 2023, reaching around 200,000, a 20% increase compared to the previous year. Another new hub, the Porsche Experience Center Franciacorta, established in September 2021 at the Autodromo di Castrezzato, attracted over 60,000 visitors in three years. Additionally, initiatives to enhance cultural, historical, naturalistic, and gastronomic heritage have grown over time, thanks to the contribution of the association *Pianura da Scoprire*, which aims to build a comprehensive tourism offer in a joint network logic among medium-small interest sites.

3. CONCLUSION

The study has clearly identified significant positive impacts associated with the first 10 years of the A35 Brebemi's presence, which can be categorized into two distinct areas.

On one hand, the Study demonstrates how the A35, a modern, safe, and uncongested motorway, generates benefits for users in terms of time and fuel savings, as well as for the broader community by reducing emissions and accidents. On the other hand, the Study highlights positive impacts for a historically peripheral region, the middle Lombardy plain. Over 10 years, the region

has become more attractive not only to businesses but also to residents and tourists, leading to improvements in various socio-economic indicators such as per capita income and employment.

The analysis also provided some lessons from the development of the A35 that might prove equally useful for critically evaluating similar transportation infrastructures:

- ▶ The presence of the infrastructure has facilitated the development of peripheral territories, transforming and expanding their economic roles.
- ▶ The municipalities involved have followed different but consistent paths to manage the new context, aligned with their assets, such as choosing diverse development models for managing land demand for new settlements or developing tourism.
- ▶ The impact of large investments (often affecting small municipalities) extends beyond the immediate area of settlement. Therefore, sharing planning decisions (and monetary revenues) regarding industrial growth is increasingly important to ensure equitable and homogeneous development.

For the future, the following prospects emerge:

- ▶ An expected increase in traffic flows, due to the higher presence of people and companies in the reference context, for the reasons described in the study (growth of the productive-logistics sector, demographics, tourism) and specific events (Milan-Cortina 2026 Olympics).
- ▶ The growing need in Lombardy to enhance “peripheral” areas as an alternative to decongest Milan (and other tourist locations, as Lake Garda and Lake Como). From this perspective, the southern Bergamo and Brescia plains can position themselves as residential destinations or temporary accommodation for tourism or business for those heading to Milan and Brescia. They can also serve as locations for businesses that do not require a central position but can benefit from quick connections to Milan’s center and the airports of Linate and Orio.

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