



Fortezza da Basso • FLORENCE (Italy) 30<sup>th</sup> September • 2<sup>nd</sup> October 2019



37<sup>TH</sup> INTERNATIONAL  
**NO - DIG**  
FLORENCE 2019

# THE ITALIAN MARKET

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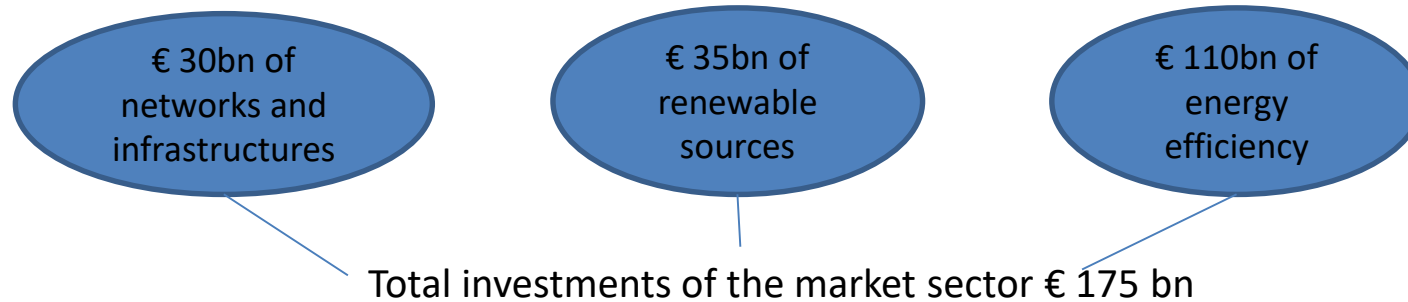
# OIL & GAS SECTOR



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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 :

<b>Microtunnelling</b>	<b>56%</b>
<b>HDD</b>	<b>30%</b>
<b>Direct pipe</b>	<b>14%</b>

Annual investment in trenchless technologies approx. € 170 mln



## WATER & WASTEWATER SECTOR



**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:

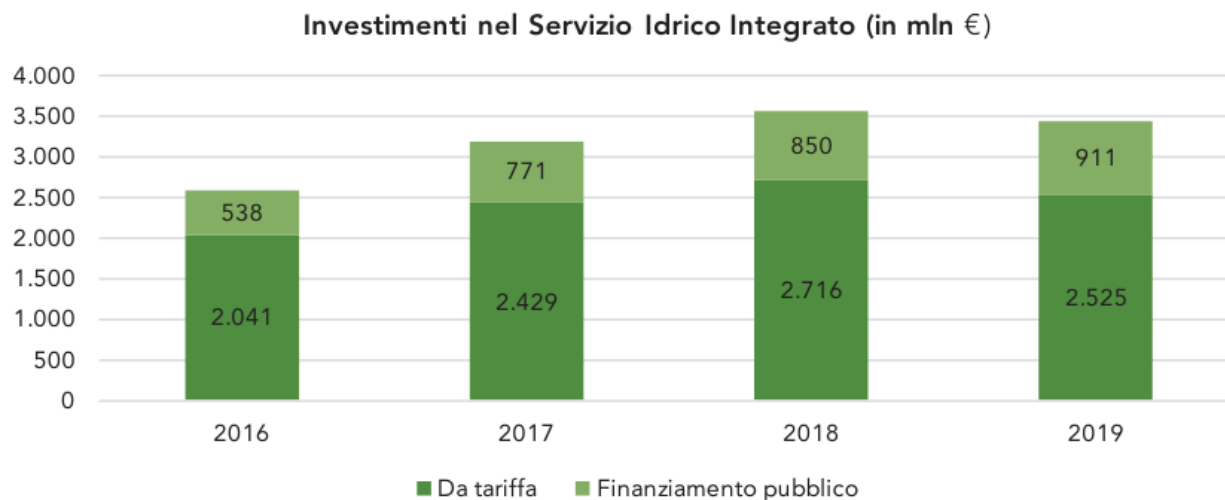
- between 38% to 45% of annual losses, compared to 20% in Europe
- territorial aqueduct coverage 95%
- territorial sewer coverage 93%
- 85% purification which is reduced to 72% if the actual operating capacity is considered



# WATER & WASTEWATER SECTOR



## Investment in water and wastewater sector



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.

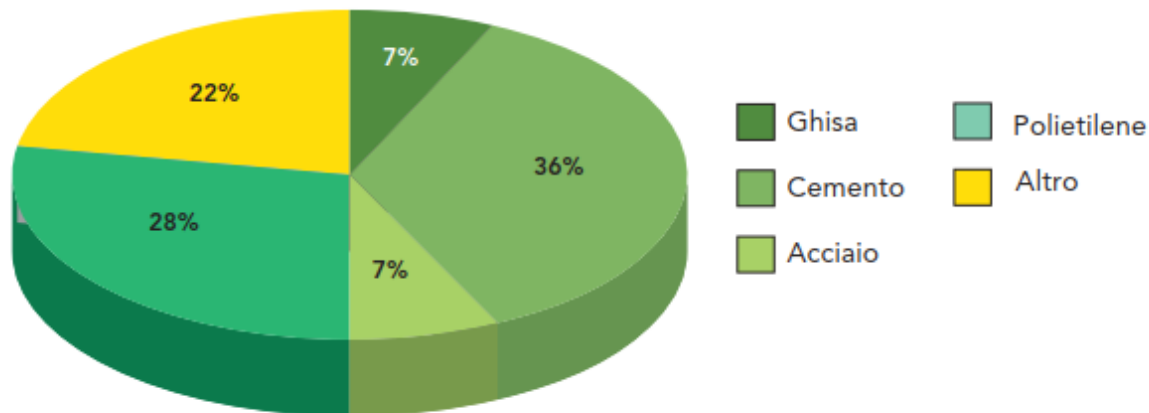
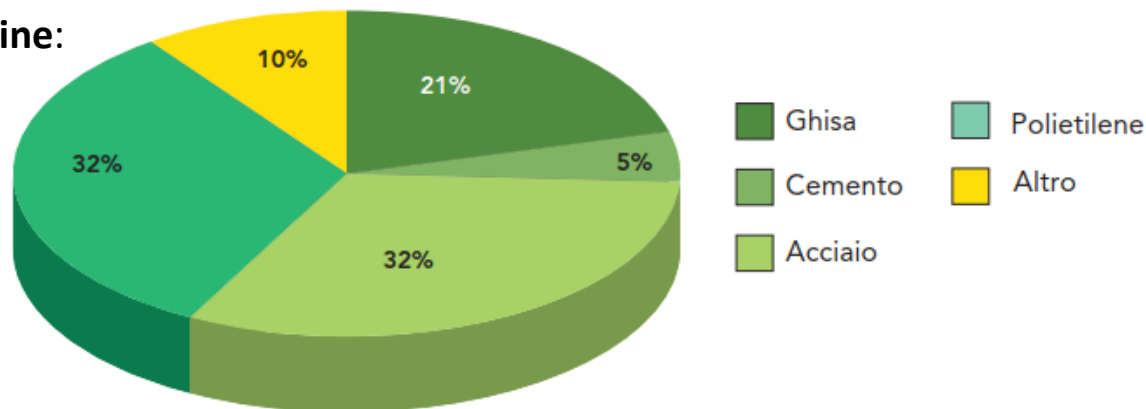


# WATER & WASTEWATER SECTOR

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%



## Type of sewage pipeline:

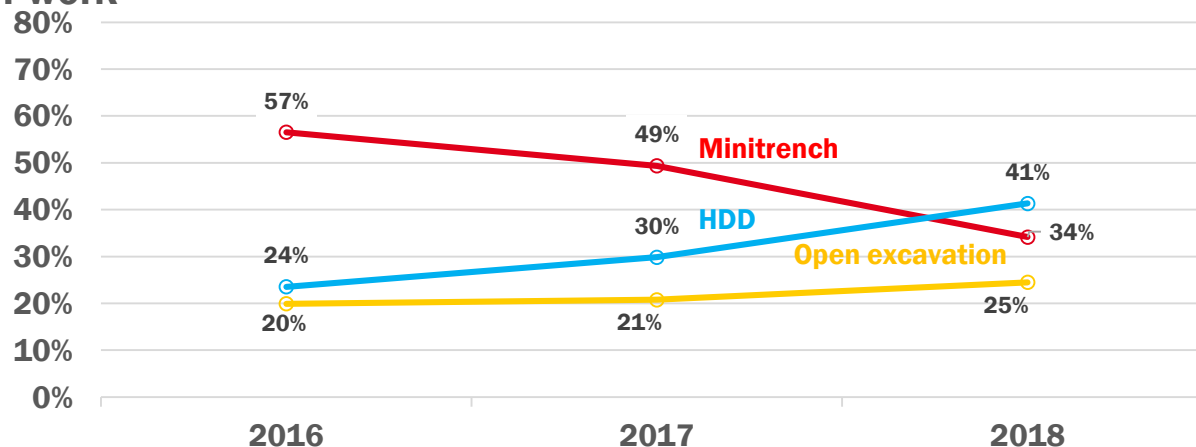
Polyethylene 28%  
Concrete 36%  
Iron 7%  
Cast iron 7%  
Other 22%



# 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**