

PRESS RELEASE

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2016-2026: ART celebrates 10 years of motorway regulation for the benefit of users

In 2016, the “Macron” law entrusted the French Transport Regulatory Authority (ART) with an economic regulation mission based on transparency, expertise and balanced contractual negotiations. Over the decade, ART has accompanied major developments in the sector, from the implementation of major investment programmes protecting users' interests to participation in the public debate on the future of the concession model. In particular, it has contributed to improving transparency on the economics of concessions and to rebalancing relations between the State and concession companies. Its actions have produced tangible results for users: substantial toll savings, more controlled fuel prices and restored competition for motorway works contracts. Nearly €330 million in tolls and up to 10 cents per litre of fuel have been saved on service areas opened to competition through the action of the regulator.

A REGULATORY FRAMEWORK TO ADDRESS THE IMBALANCES OF THE CONCESSION MODEL

Established to bring balance and transparency to relations between the State as grantor and motorway concession companies, the sector regulation provides an independent perspective on complex contractual relations, characterised by significant economic and financial stakes and an information and negotiation asymmetry between the grantor and motorway concession companies.

Ten years after its introduction in 2016 by the “Macron” law, the economic regulation of concession motorways exercised by ART is now an integral part of a concession model adapted to better protect users' interests.

TANGIBLE RESULTS FOR USERS AND MORE ROBUST ECONOMIC INFORMATION TO INFORM AND ENRICH THE PUBLIC DEBATE

Over the decade, the economic regulation of concession motorways has profoundly transformed the functioning of the sector. While room for progress remains, all parties agree that there is a before and after the introduction of the regulator: the expertise developed by ART has in particular made it possible to improve transparency on the economics of concessions and to rebalance relations between the State and concession companies.

The regulator's action has produced tangible results:

- nearly €330 million in tolls avoided through independent review of amendments to concession contracts;
- up to 10 cents less per litre of fuel at service areas opened to competition;
- strengthened oversight of works contract procurement, reducing the use of affiliated companies and promoting more effective competition.

Beyond these direct impacts, the regulator aims to build a technical consensus on the economics of motorway concessions. Through the regular publication of consolidated data and reference reports, ART has contributed to making more objective a model long marked by controversy, by placing its analysis in a long-term perspective – the only relevant one for assessing the balance of a concession contract.

A KEY ROLE TO PLAY IN THE UPCOMING CHALLENGES OF CONCESSION RENEWAL

As the end of the historic concessions approaches, expected between 2031 and 2036, the decisions ahead will involve major issues: maintenance and adaptation of infrastructure to climate change, changing usage patterns and also the possible in-depth overhaul of transport financing arrangements.

In this context, economic regulation provides essential structural support for public decision-making. The work carried out by ART on the general economics of concessions provides an analytical foundation for assessing the financial balance of the model and anticipating the economic consequences of future decisions.

According to Thierry Guimbaud, President of ART: *"Over ten years, the economic regulation of the concession motorway sector has demonstrated its effectiveness in the service of public action resolutely focused on users. As the historic contracts reach their end and the question of establishing a renewed concession model arises, it can be a key tool for creating the conditions of trust necessary for an overhaul of the financing principles of the motorway sector – and even of the transport sector as a whole."*

Consult (in French): [the brochure: 10 years of motorway sector regulation](#)

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About the French Transport Regulatory Authority (ART)

Since 2010, the French railway sector has had an independent authority to accompany its gradual opening to competition: the Autorité de régulation des activités ferroviaires (Araf). Law 2015-990 of 6 August 2015 on growth, activity and equal economic opportunity extended the regulator's powers to road activities - coach transport and motorways. On 15 October 2015, Araf became the Autorité de régulation des activités ferroviaires et routières (Arafer), with the mission to contribute to the proper functioning of public service and competitive activities for the benefit of rail and road transport customers.

With competence for the regulation of airport charges since 1 October 2019, Arafer became the Transport Regulatory Authority (ART) on that date. Lastly, Law No. 2019-1428 of 24 December 2019 -mobility act- extended ART's powers and missions to autorite-transport.fr

the opening up of mobility and ticketing data, as well as to the regulation of infrastructure manager activities and security activities carried out by RATP in Île-de-France. Its opinions and decisions are adopted by a college of five independent members chosen for their economic, legal or technical skills in the field of digital services or transport, or for their expertise in competition matters. It is chaired since 29 December 2023 by Thierry Guimbaud.