



“Communications and marketing initiatives carried out in Spain in the COVID-19’s year”



1. SEOPAN at a glance

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1.1. Main figures

SEOPAN: Asociación de Empresas Constructoras y Concesionarias de Infraestructuras. Association of Infrastructure Contractors and Concessionaires.

Was founded in 1957 and has, at the present time, 40 full members dedicated to the construction and management of public infrastructure.

SEOPAN members' turnover in 2019 reached 70 B€. 76% is international activity. Permanent presence in 82 countries and a workforce over 450.000 employees.



1. SEOPAN at a glance

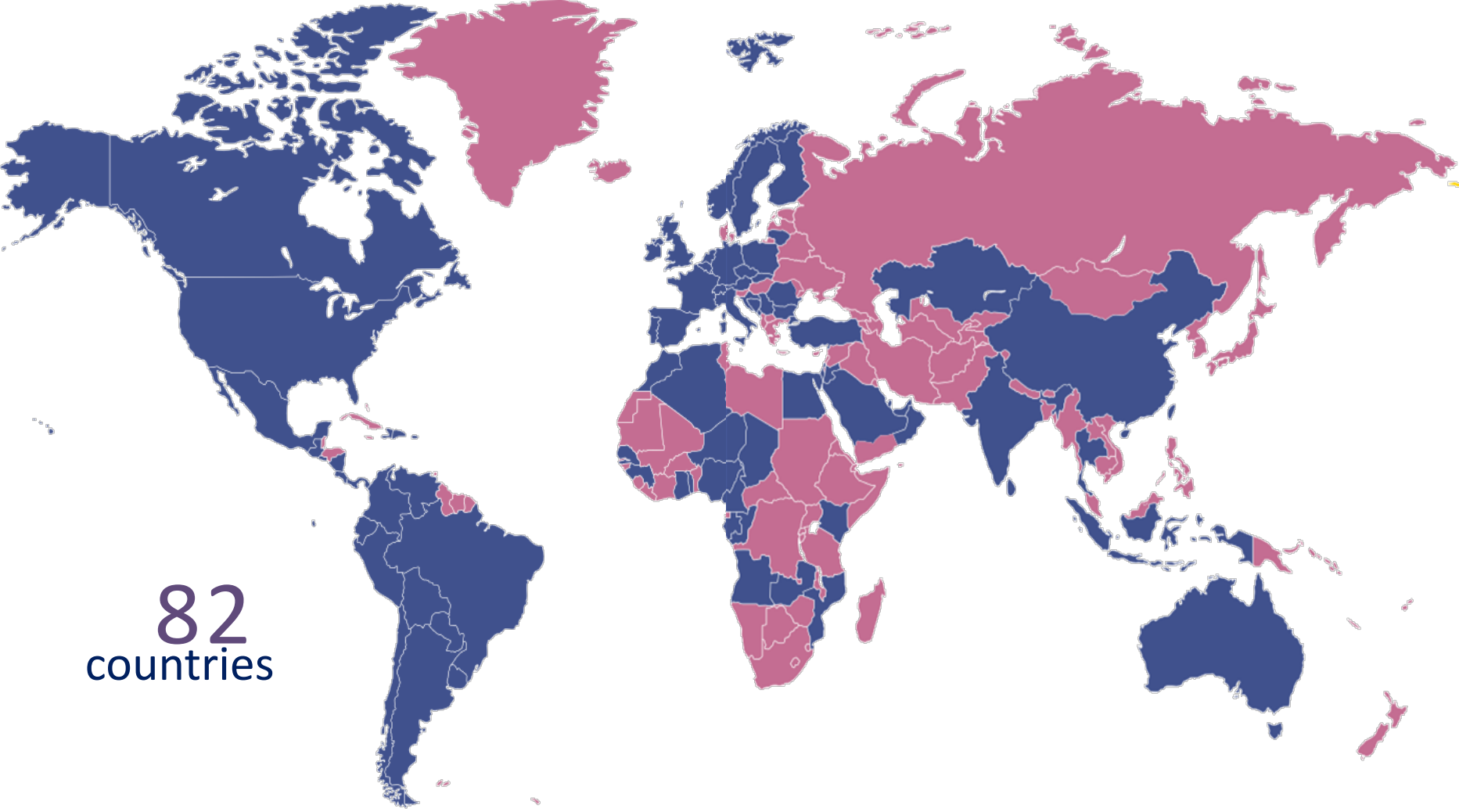
1.2. Activity's Figures

Million €	2019		2020		Variation	
	Amount	Distrib.	Amount	Distrib.	Amount	%
Total Sales	75.392		68.870		-6.522	-8,7%
National	18.623	24,7%	16.679	24,2%	-1.944	-10,4%
International	56.769	75,3%	52.191	75,8%	-4.578	-8,1%
Construction	47.747	63,3%	44.211	64,2%	-3.536	-7,4%
Concessions	9.727	12,9%	7.783	11,3%	-1.944	-20,0%
Other activities	17.918	23,8%	16.876	24,5%	-1.042	-5,8%
Construction sales	47.747		44.211		-3.536	-7,4%
National	5.185	10,9%	5.284	12,0%	99	1,9%
International	42.562	89,1%	38.927	88,0%	-3.635	-8,5%
Other activities sales*	27.645		24.659		-2.986	-10,8%
National	13.438	48,6%	11.395	46,2%	-2.043	-15,2%
International	14.207	51,4%	13.264	53,8%	-943	-6,6%
Total EBITDA	12.078		9.608		-2.470	-20,5%
Construction	2.558	21,2%	2.501	26,0%	-57	-2,2%
Concessions	6.365	52,7%	4.515	47,0%	-1.850	-29,1%
Other activities	3.155	26,1%	2.592	27,0%	-563	-17,8%
Portfolio	105.091		96.639		-8.452	-8,0%
National	11.373	10,8%	10.151	10,5%	-1.222	-10,7%
International	93.718	89,2%	86.488	89,5%	-7.230	-7,7%
Portfolio (Months)	26,4		26,2			
Workforce average	482.508		460.908		-21.600	-4,5%

* including concessions.

1. SEOPAN at a glance

1.3. Permanent international presence



82
countries

1. SEOPAN at a glance

1.4. SEOPAN member companies

Construction companies	Concessionaires	Water Technology companies
Acciona Construcción (Grupo ACCIONA)	ABERTIS Autopistas España (Grupo ABERTIS)	Acciona Agua (Grupo ACCIONA)
Aquambiente (Grupo SUEZ)	ACCIONA Concesiones (Grupo ACCIONA)	Aqualia Infraestructuras (Grupo FCC)
ASCAN, Empresa Constructora y de Gestión	ALEATICA	Cadagua (Grupo FERROVIAL)
COMSA Corporación	Cintra Infraestructuras (Grupo FERROVIAL)	DEISA (Grupo COMSA)
CONSTRUCCIONES Y PROMOCIONES COPROSA	COMSA Concesiones (Grupo COMSA)	Drace Infraestructuras (Grupo ACS)
Constructora SANJOSE (Grupo SANJOSE)	FCC Concesiones (Grupo FCC)	Obrascón Huarte Lain (Grupo OHL)
DRAGADOS (Grupo ACS)	Globalvia Infraestructuras	Sacyr Industrial (Grupo SACYR)
Eurofinsa	Iridium Concesiones de Infraestructuras (Grupo ACS)	Suez Advanced Solutions (Grupo SUEZ)
FCC Construcción (Grupo FCC)	Itínere Infraestructuras	Tecnocontrol (Grupo SANJOSE)
Ferrovial Construcción (Grupo FERROVIAL)	OHL Concesiones (Grupo OHL)	VIAS (Grupo ACS)
LICUAS	Roadis Transportation B.V.	
OSEPSA - OBRAS Y SERVICIOS PÚBLICOS	SACYR Concesiones (Grupo SACYR)	
OHL Construcción (Grupo OHL)	SANJOSE Concesiones y Servicios (Grupo SANJOSE)	
PAVASAL EMPRESA CONSTRUCTORA	Suez Advanced Solutions (Grupo SUEZ)	
PECSA, Promociones, Edificios y Contratas	VIAS Y CONSTRUCCIONES (Grupo ACS)	
Sacyr Ingeniería e Infraestructuras (Grupo SACYR)		
VÍAS Y CONSTRUCCIONES (Grupo ACS)		

1. SEOPAN at a glance

1.5. Presence in International Associations



European International Contractors (EIC), federation that represents national Member Federations from 15 European countries. <http://www.eic-federation.eu/>



Association Européenne des Concessionnaires d'Autoroutes et d'Ouvrages à Péage (ASECAP), brings together operators responsible for the management of more than 50.000 km of motorways, bridges and tunnels in 22 countries. <http://www.asecap.com/>



International Bridge, Tunnel and Turnpike Association (IBTTA), is the worldwide association representing toll facility owners and operators and the businesses that serve them from 25 countries on all continents. <https://www.ibtta.org/>

Presence in other organizations:

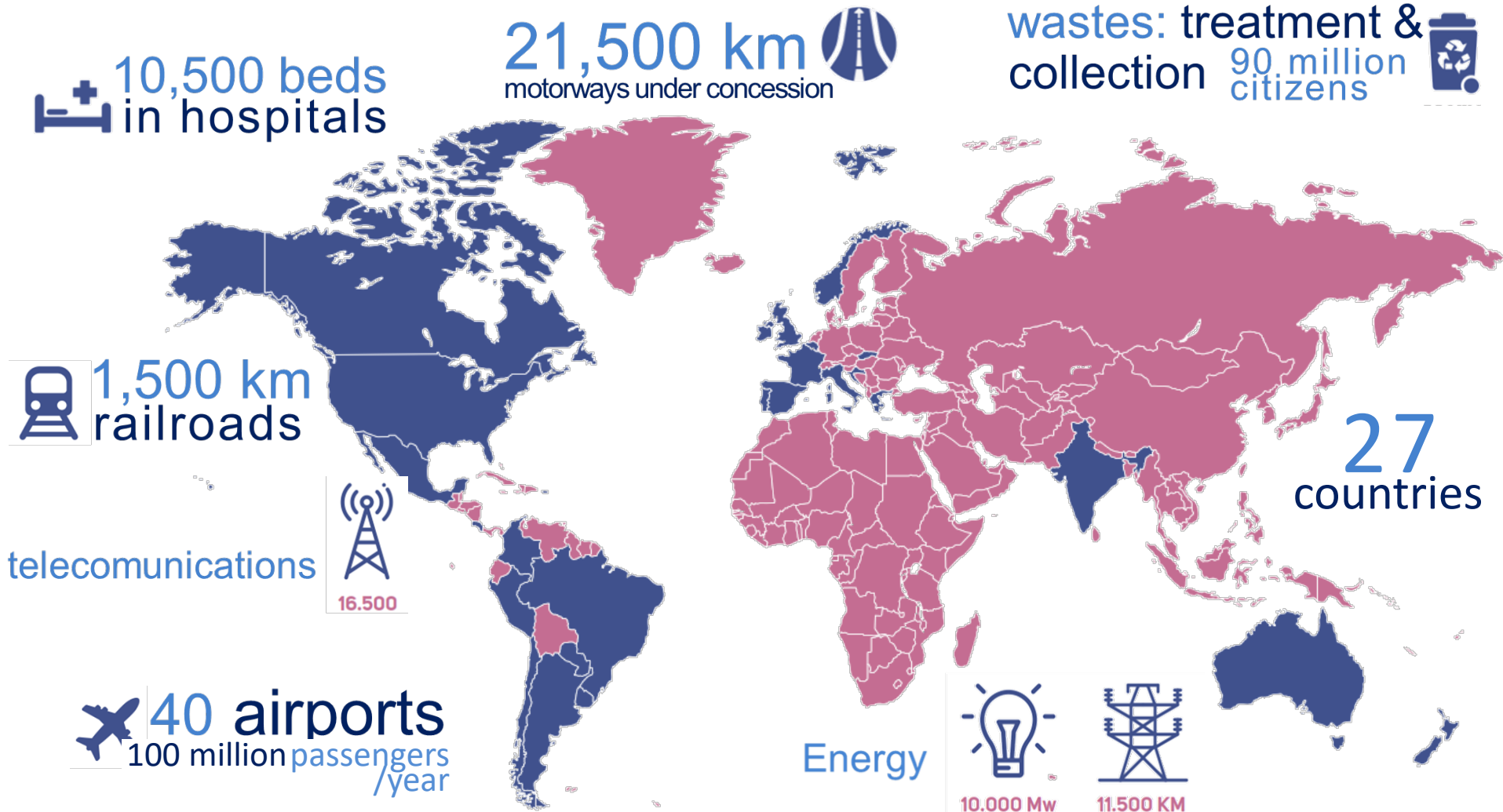
- **European Construction Industry Federation (FIEC)**, represents via its 29 national Member Federations in 26 countries (23 EU, 2 EFTA and Turkey) construction enterprises. SEOPAN is a member through the Spanish Confederation of Construction (CNC). <http://www.fiec.eu/>
- **Confederation of International Contractors' Associations (CICA)**, represents the Construction Industry on a global scale. SEOPAN collaborates through the friendship of EIC. <http://www.cica.net/>
- **BusinessEurope**, speaks for all-sized enterprises in 34 European countries whose national business federations are their direct members. SEOPAN is a member through CEOE. <https://www.businesseurope.eu/>



2. Spanish leadership in infrastructure concessions worldwide

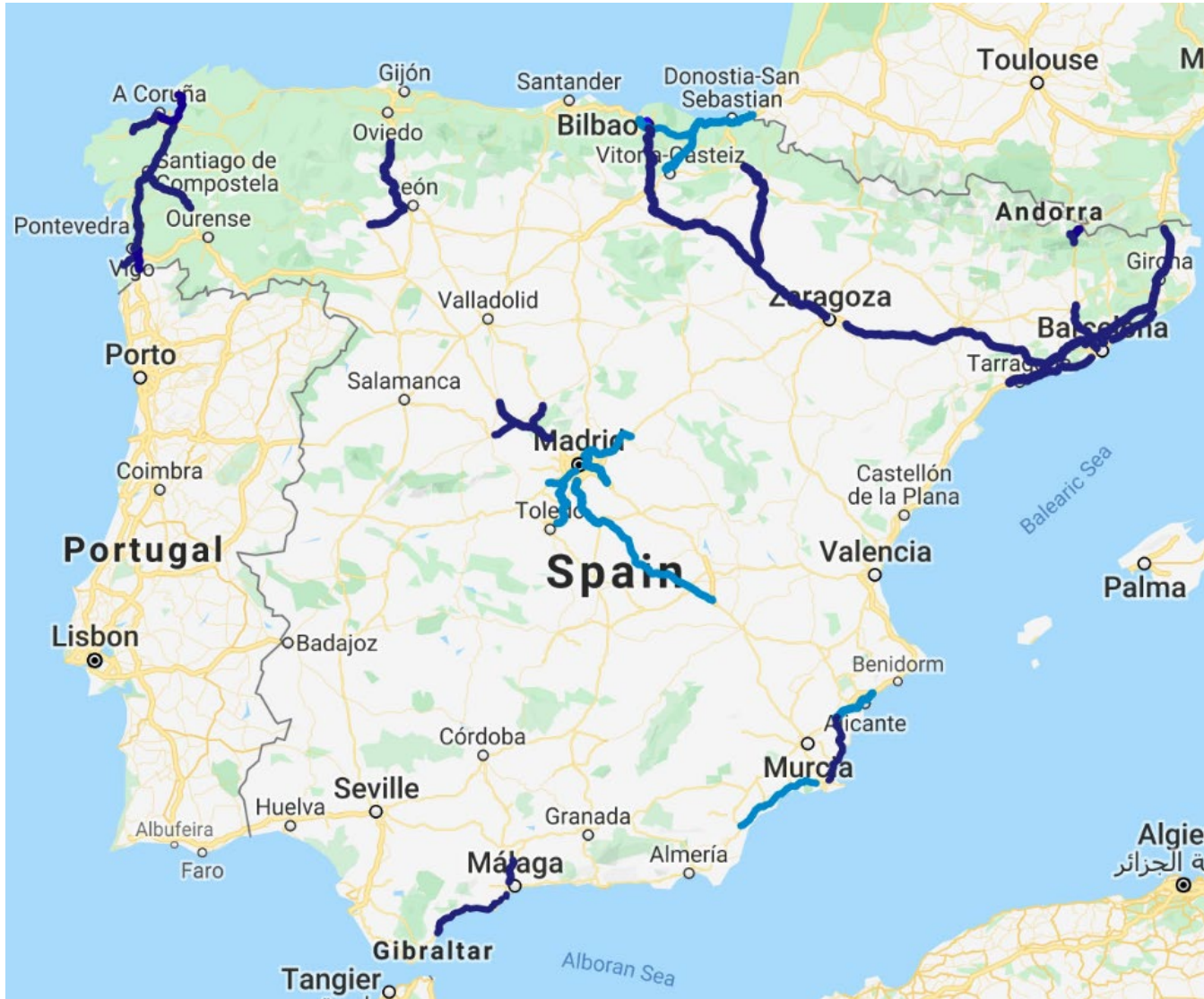
2. Spanish leadership in infrastructure concessions worldwide

2.1. Spanish concessionaires worldwide



2. Spanish leadership in infrastructure concessions worldwide

2.1. Spanish concessionaires Spain



1,900 KM
Toll motorways
network

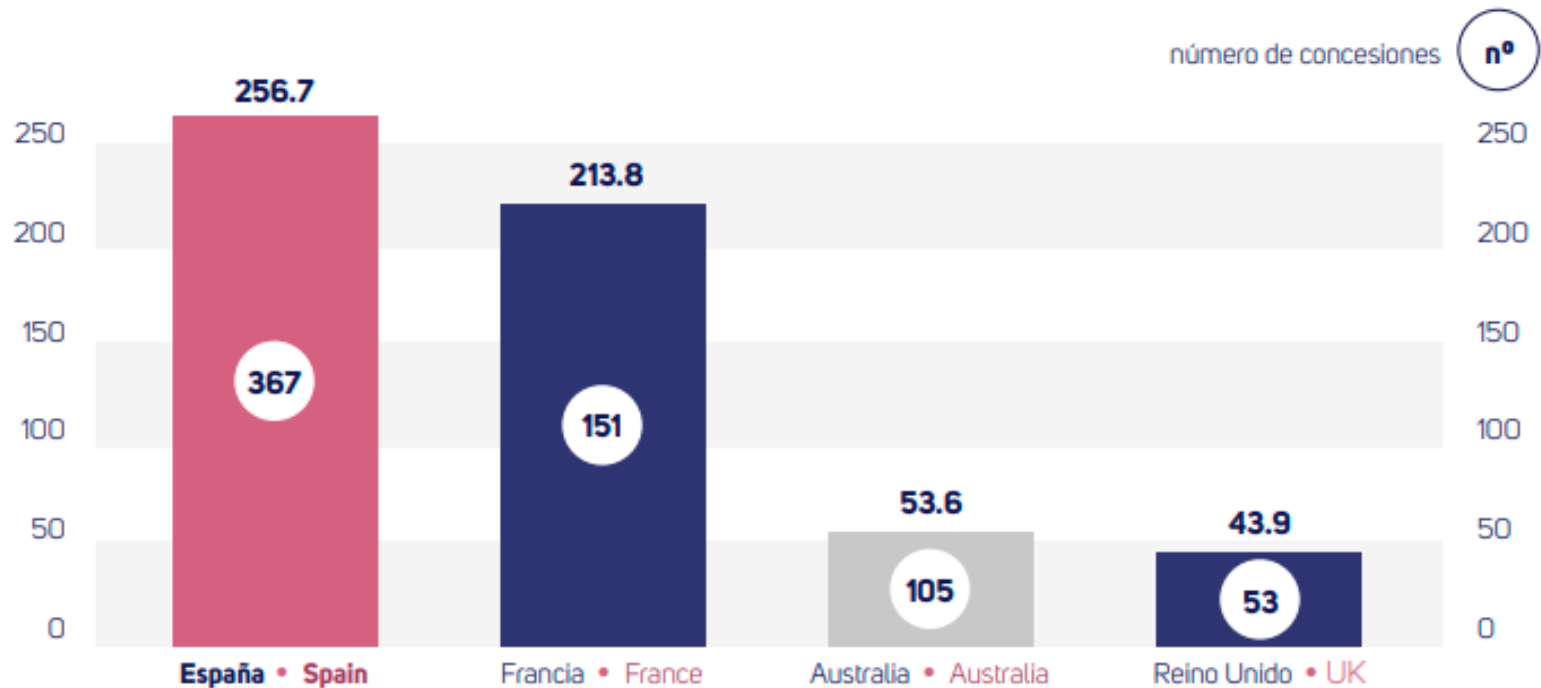
2. Spanish leadership in infrastructure concessions worldwide

2.2. Global Leadership

Distribución de las 20 principales concesionarias de infraestructuras de transporte del mundo por país de origen

(miles de millones de € invertidos desde 1985)

Major 20 global transport infrastructure concessionaries by origin



Fuente • Source

Public Works Financing 2018

2. Spanish leadership in infrastructure concessions worldwide

2.3 Main concessionaires in transport infrastructure: investment

Rank	Company	Country	Total investment * (millones \$)	
1	ACS (Iridium + Hochtief)	Spain	101.680	Main Spanish concessionaires accumulate 256.7 B\$ of investment in 277 concessions (45% of top ten PWF database) (01/10/2018)
2	Ferrovial (Cintra)	Spain	94.935	
3	Vinci	France	82.900	
4	Macquarie	Australia	53.550	
5	Meridiam	France	53.835	
6	Bouygues	France	48.800	
7	John Laing	United Kingdom	43.885	
8	Sacyr	Spain	32.600	
9	Egis Projects	France	28.280	
10	Globalvia	Spain	27.500	

* aggregate value (in nominal dollars) of all of a firm's transportation P3 since 1985 for which financing was arranged as of October 1, 2018

Source:



2. Spanish leadership in infrastructure concessions worldwide

2.4. Main concessionaires in transport infrastructure: # concessions

Rank	Company	Country	num. concessions		
			Operating / under construction	Sold or expired	Pursuits
1	ACS Group/Hochtief	Spain	50	66	48
2	Vinci	France	48	9	15
3	Macquarie	Australia	40	30	5
4	Abertis	Spain	40	21	na
5	Ferrovial/Cintra	Spain	38	30	14
6	Meridiam	France	33	1	4
7	Sacyr	Spain	31	25	6
8	Egis	France	26	2	16
9	Globalvia	Spain	25	12	1
10	John Laing	UK	25	10	7
11	Bouygues	France	25	7	4
⋮					
19	Acciona	España	13	16	7
⋮					
23	Roadis	España	10	2	2
⋮					
30	Itínere	España	6	0	na

As per number of contracts under construction/operation: 5 among 10 major transport infrastructure concessionaires are Spanish. And 8 among 30 (01/10/2018)

Source:



* concesiones de carreteras, puentes, túneles, puertos y aeropuertos con inversión en construcción/operación superior a 50 M\$ a 1/10/2018.



3 ■ Spanish infrastructure companies during Covid-19 crisis; actions and communication plans

3. Spanish infrastructure companies during Covid-19 crisis; actions and communication plans

Support and reinforcement of HEALTH:



- Technical support to the Primary Care Management (Control Center for Flying Units for home care of detected cases of COVID19).
- DONATIONS to hospitals of sanitary material, machinery and food.



- Contributions of funds to vulnerable sectors and families, to organizations (*Cruz Roja...*), and to institutions for vaccine research.
- Collaboration with hospitals for the TRANSPORTATION of medication to those affected and health care and assistance services at the Barajas airport.



- Participation in the IFEMA Field Hospital and provision of services (for example: design and installation of a medical gas pipeline for 1,600 beds). Expansion of the capacity of other hospitals.



- Logistical support and assistance to the Public Administrations for: i) disinfection of hospitals, hotels and sports centers to house health personnel, and ii) of sidewalks and driveways.
- Actions in OTHER COUNTRIES, Latin America, to provide basic services to populations of extreme poverty, construction of hospitals and shipment of medical.

Maintenance of ESSENTIAL SERVICES:



- Light, water, railway station maintenance, waste management and cleaning.



- Transport: aid to transporters with free stays in the Truck Parks.
- Agreement with the Ministry of Defense to exempt from toll payment the movements of military personnel”.
- Expansion of PUBLIC SCHOOL CENTERS to guarantee social distancing: supply of prefabricated modules.
- CUSTOMERS, and Spanish SMEs, have favored the deferral of payments for the electricity supply service.



SAFETY PROTOCOLS for the performance of the activity of workers in the sector:



Guide to preventive action due to COVID-19 in work centers in the construction sector. Guide for action in preventive, initial matters, for the restart of public works activity (civil works, residential and non-residential construction) and for the construction of new private works. Management safety protocols for EMPLOYEES of associated infrastructure companies: i)



ii) reorganization of office work by applying hygiene measures, favoring teleworking and limiting trips abroad. ii) creation of security centers to monitor and provide support.

3. Spanish infrastructure companies during Covid-19 crisis; actions and communication plans

3.1. Specific plans for toll concessions

- Because of the transportation sector is an essential activity during the state of alarm, several of our companies offered free transit through toll roads to the Army, patients, and medical personnel and supplies. In addition, free stays were offered at the *Truck Parks* and the option of free breakfasts and menus for transporters.
- The concessionaires made machinery and volunteer personnel available to the government to carry out disinfection tasks.
- Awareness campaigns "Your safety, our priority". And they summarize a series of measures in terms of hygiene and personal safety that drivers must take into account when using their vehicle and when making stops during their road trips: Use of masks, cleaning the vehicle, personal disinfection or extreme concerns at the stops.
- Protect the health of employees by favoring payment through electronic toll collection and card so as not to endanger the health of the people who are in the toll booths. Establishment of automatic and dynamic roads as priority lanes for the payment of tolls to avoid the contagion of the coronavirus between drivers and collectors.

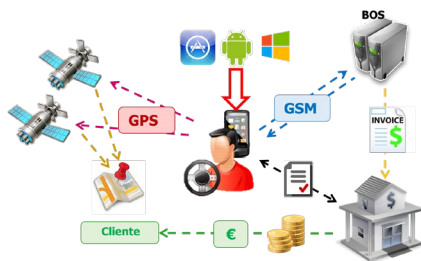


3. Spanish infrastructure companies during Covid-19 crisis; actions and communication plans

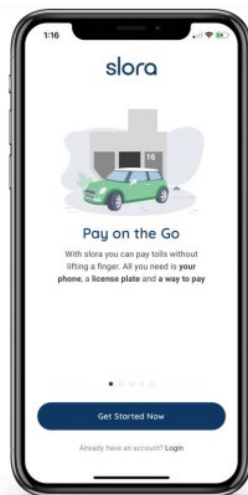
3.2. APPs to pay tolls

In addition to our traditional ETC System (Via-T), toll concessionaire companies have promoted additional contact-less solutions to pay tolls:

Mobile APP (GNSS positioning)



CINTRA



GLOBALVÍA

Mobile payment (Bluetooth)



ABERTIS



4. Concessionaires road projects; examples

4. Concessionaires road projects



Toll system - Newport Pell Bridge – United States of America



4. Concessionaires road projects: toll motorways

Montreal A-30 Highway concession_Canadá



4. Concessionaires road projects: toll motorways **cintra**

LBJ Express Highway Dallas_Texas



4. Concessionaires road projects: toll motorways

Mersey bridge_UK



4. Concessionaires road projects: toll motorways

A23-Beira Interior Highway – Portugal



4. Concessionaires road projects: toll motorways



I-595 Highway (United States)



4. Concessionaires road projects: toll motorways **ROADIS**

Panipat-Jalandhar Highway (NH-1), India





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