



Introduction to the Seminar

Miguel Caso Flórez

PIARC Technical Director

#PIARCCOVID19

July 9th, 2020

Participation in the seminar.



Your camera and microphone must remain off.



You can ask questions in the chat. At the end of all presentations, Veronica Arias will check the chat and ask questions to the speakers.



A limited number of questions can be answered.



Close the chat to see the full presentations.

Participation in the seminar.

This Seminar is being recorded and will be made public on the PIARC website and the PIARC YouTube channel.



Further seminars will be held in the coming weeks. The next one in Spanish will be in September (to be confirmed), and the next seminars in English on July 15 and 29.

Limits of the seminar

Disclaimer:

Since speed is of the essence, it should be noted that the knowledge and practices shared here may not have been formally approved by the official authorities in each country.

The ideas and examples shared here are for illustrative purposes only. They do not necessarily represent official policy. The ideas presented will be evaluated in more detail and used, in due course, for policy and practice recommendations. While care has been taken in the preparation of this material, no liability will be accepted for any damage that may be caused.

Objectives of the seminar.

Offering answers in the short term: the world is going through a crisis and every day counts.



This is knowledge and practice in the process of being confirmed,



A good idea can save lives, increase the capacity of the economy and/or reduce the disruption of services.



To urgently share knowledge and practices among PIARC member countries to provide support as soon as possible.

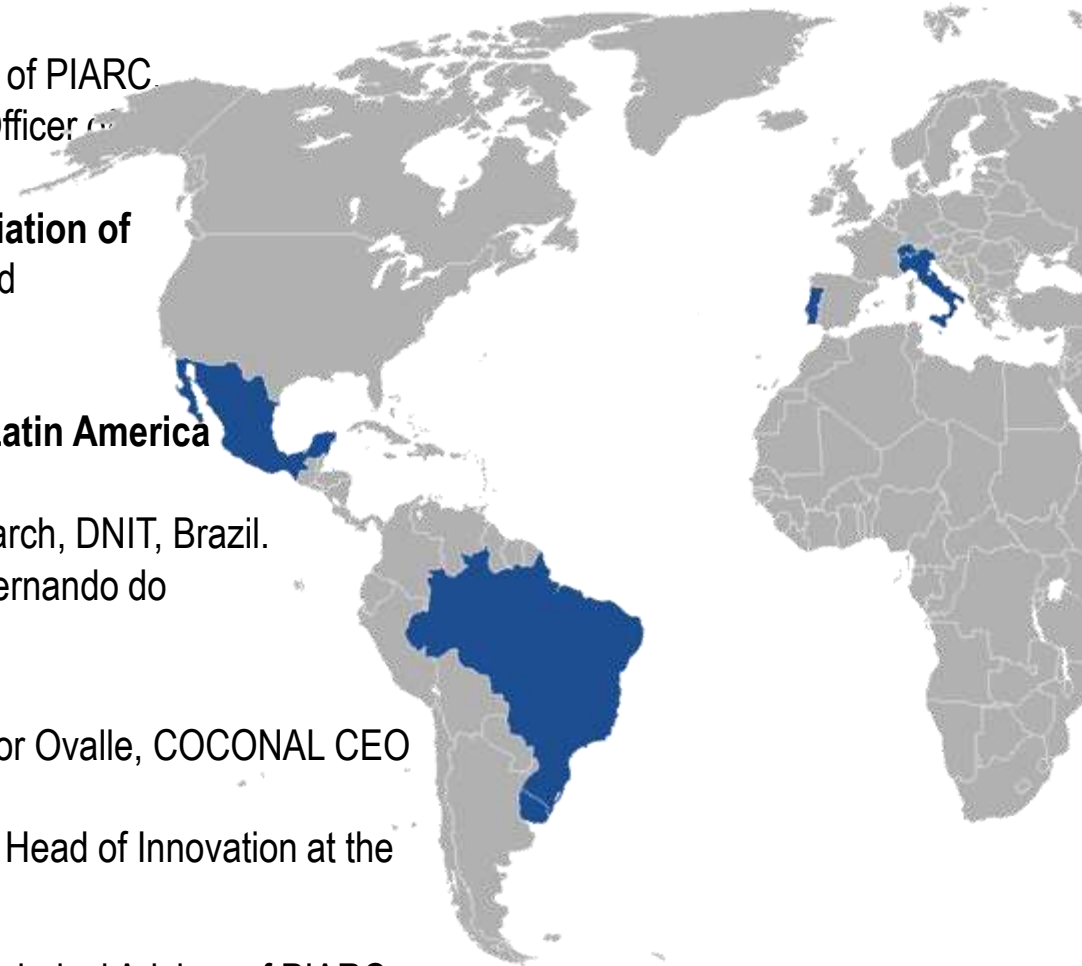


What works in one country may not work in another, but it can inspire you.

Note: PIARC is also working on the medium and long term, but is not the subject of this seminar. Many changes will come to stay.

Program of the seminar.

- **Welcome and introduction to the Seminar**, Ing. Miguel Caso Florez, Technical Director of PIARC.
- **Institutional presentation of PIARC**, Lic. Marina Domingo Monsonís, Communication Officer of PIARC
- **COVID-19 and roads: Implications for PPPs of toll roads and prospects for renegotiation of contracts in the light of COVID-19.** Fabio Pascuali, ANAS General Directorate, Italy, and Chairman of PIARC Technical Committee 1.2 on Socio-economic Development of Roads
- **COVID-19 and roads in Latin America: Roads and CAF, allies against COVID-19 in Latin America**
Héctor Varela, Chief Executive Officer, CAF Latin American Development Bank
- **COVID-19 and roads in Brazil.** Luiz Guilherme de Mello, Director of Planning and Research, DNIT, Brazil.
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- **COVID-19 and roads: shaping the recovery for the road sector** Ing. Gonzalo Alcaraz, Head of Innovation at the International Road Federation IRF, Switzerland
- **Debate and question time through chat**, moderated by Eng. Verónica Arias Espejel, Technical Advisor of PIARC.
- **Conclusions of the Seminar**, Eng. José Manuel Blanco Segarra, Ministry of Transport, Mobility and Urban Agenda.
- **Closing of the Seminar.**





Institutional presentation of PIARC

Marina Domingo Monsonís

PIARC Communications Officer

#PIARCCOVID19

July 9, 2020

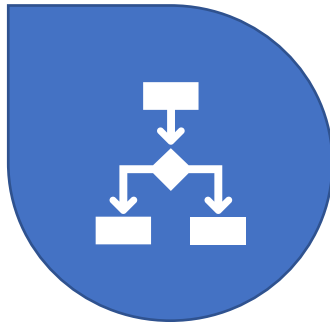
What is PIARC?

- **PIARC** is the new name of the **World Road Association**
- It was **founded in 1909** as a non-profit, non-political association
- It has 124 member countries, regional members, groups and individuals.
- It is the first global forum for the exchange of knowledge, policy and practice on roads and road transport.



PIARC's four key missions

- To be a **leading international forum for the analysis and discussion of** the whole spectrum of transport issues related to roads and related transport.
- To identify, develop and disseminate **good practices** and **facilitate better access to international information.**



- Take due and full account in its activities of the needs of **countries with developing economies and economies in transition.**
- To design, produce and promote **efficient tools for decision making** in matters related to roads and transport.

The Association mobilizes the experience and knowledge of 1,200 experts from more than 80 countries in 22 Technical Committees and Study Groups.

PIARC COVID-19 website

<https://www.piarc.org/en/News-Agenda-PIARC/Coronavirus-PIARC-and-Covid-19>



- The recordings of the Online Seminars "COVID-19 and roads", 10 in English, 3 in Spanish -1 more today- and 2 in French).
- The presentations of these seminars.
- A summary report of the situation "COVID-19 and roads".
- PIARC Technical Reports related to pandemic management



Key issues on COVID-19 and roads 1/2



Ensure as far as possible the health and safety of employees and road users.



Response to transport impacts.



Relationships and collaboration with customers, users and other interested parties Border control.



Maintain activity and continuity of service.



Managing impacts on the economy and supply chains and reviving the economy after the health crisis

Key issues on COVID-19 and roads 2/2



Security (including cyber security).



How well the road sector is complying with the rules.



Impact of enforcement (police checks) on road transport



Technology support (ITS, computer applications) for road management during the crisis

Thank you for your attention!



Marina Domingo Monsonís

Communications Manager
PIARC

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COVID-19 and roads: Implications for PPPs of toll roads and prospects for contract renegotiation

Fabio Pasquali - Anas SpA

Chair of PIARC TC 1.2 - Infrastructure and Road Transport Planning for Economic and Social Development

9 July 2020

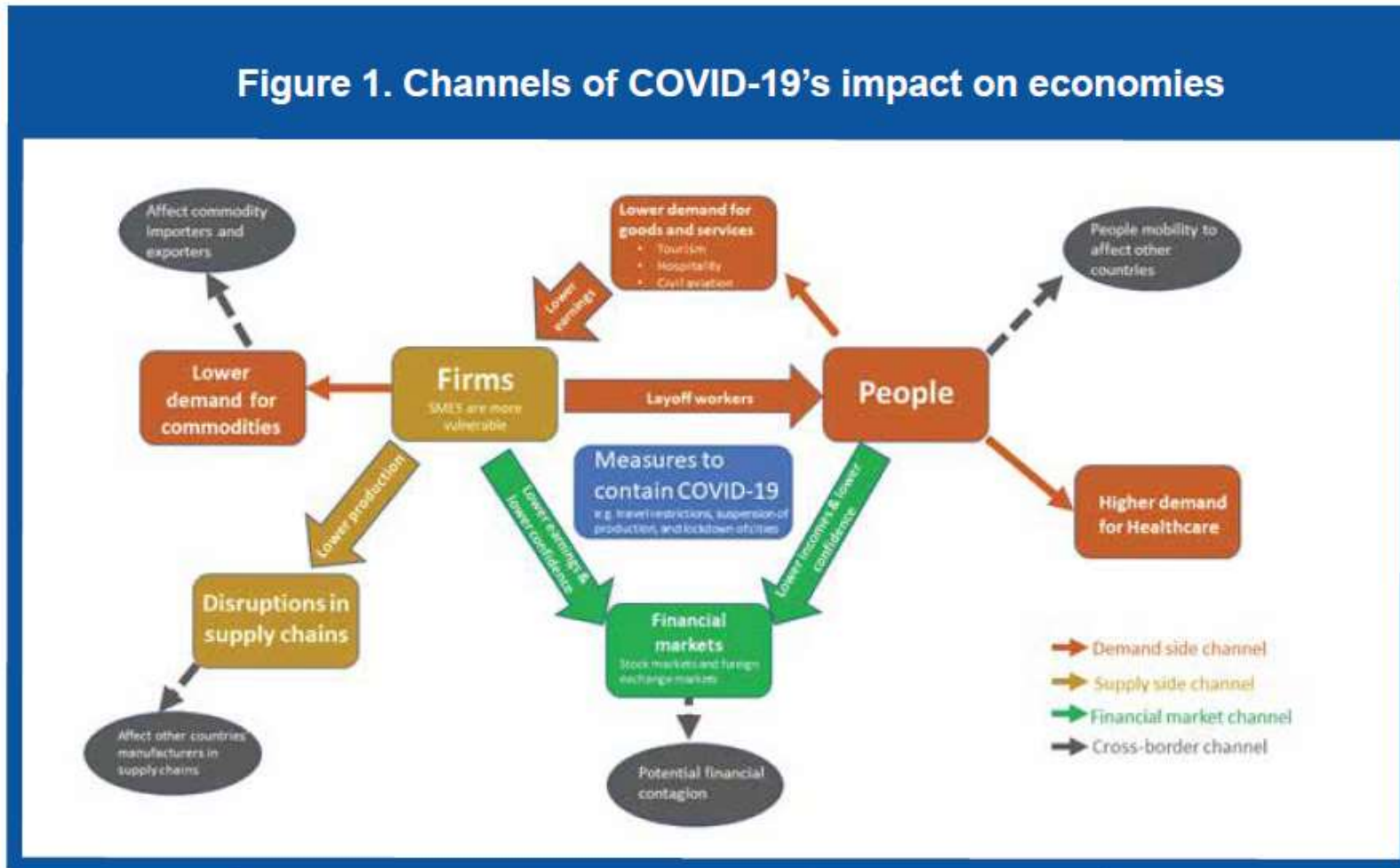
Fabio Pasquali

- **Economist and transport analyst**
 - background in economic and financial analysis of public road and PPP projects, economics and financing of national road authorities, development studies
- **Chair of PIARC TC 1.2**
 - *"Road and transport infrastructure planning for economic and social development"*
- **Anas SpA, Italian National Road Agency**
 - *Chief Economist of the Planning Department*
- **The Intergovernmental Commission for the New Railway between Turin and Lyon**
 - *Secretary-General of the Italian Delegation*
- **CEDR - Conference of European Road Directors**
 - *Co-leader of the "Network Management - Network Governance" Working Group*
- **University of Rome Tre - Political Science**
 - *Professor of Development Economics and Policy*
- **Contact: f.pasquali@stradeanas.it**



1

The overall picture



Source: ESCAP.

1

The overall picture

Toll infrastructures

- High capital requirement and deferred return
- Toll value not high
- Limited technological innovation
- Suitable for the PPP scheme, but exposed to crisis, given the duration of the contract
- Very vulnerable to economic and financial shocks.
- In practice, owned by the lending banks for the duration of the debt

The Covid-19 effect

- Uncertainty
- Instability
- Economic and financial stress

2

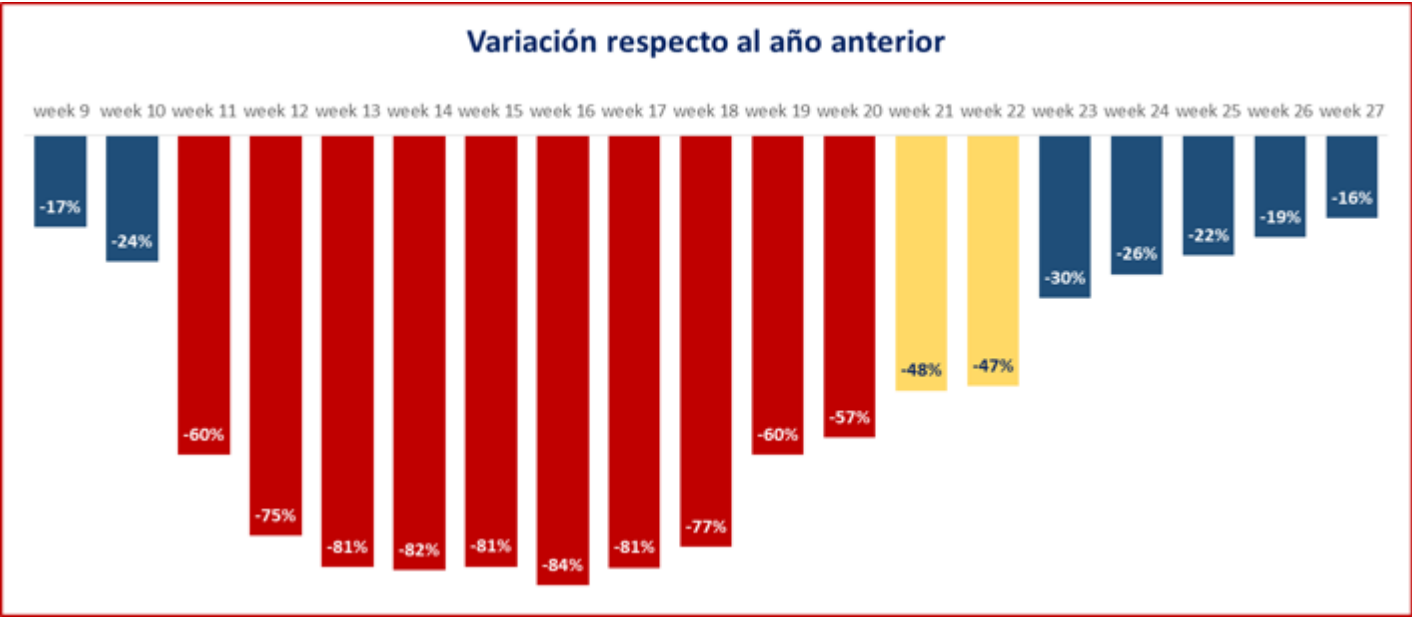
Effects of the Covid on toll roads

Report Standard & Poor 20.6.2020 “Infrastructure; Global Toll Road’Steep Climb out of Covid”

- First phase, strong lockdown, two months, traffic - 50% compared to 2019
- Second phase, limited lockdown, from two to four months, - 25% compared to 2019
- Third phase, 100% return on traffic within 12 months
- Revenue loss compared to baseline 2019 (%)
 - 2020: -15% to -30%
 - 2021: -5% to -10%

5

Effects of the Covid on toll roads



- Lock down period
- 50% containment measures
- 20% containment measures

Weekly traffic variation in the ASPI PPP (Italy)

Change vs equivalent week of 2019 (Preliminary figures)	TOLL ROADS						AIRPORTS	
	Italy (ASPI)	Spain (Abercia)	France (Abercia)	Brazil (Atlantia + Abercia)	Chile (Atlantia + Abercia)	Mexico (Abercia)	ADR (FCO+GA)	NICE
	ADT	ADT	ADT	ADT	ADT	ADT	pax	pax
YTD (1/1/2020 to 5/7/2020)	-37,4%	-38,5%	-33,3%	-14,7%	-33,6%	-15,8%	-69,5%	-68,2%

2

Effects of the Covid on toll roads

Change in the economic model generated by Covid

- New factors to consider
 - Use of data sources in new market segments
 - Changes in the behaviour of people linked to work and study
 - Centrality of online trading
- New Normality:
 - Uncertainties about the PIL
 - Uncertainties about the PIL
- Effetto globale:
 - Lower income
 - Lower margins
 - Lower profits

S&P - Toll Road Company post-Covid rating - 1

European Toll Road Operators Largely Have Ample Liquidity To Weather COVID

	Traffic decline (%)	EBITDA decline (%)	Average FFO-to-debt expected over 2020-2022 (%)	Liquidity
Abertis Infraestructuras S.A.	-20 to -25	-15 to -20	Less than 10	Strong
Sanef	-20	-20	About 15	Adequate
Holding d'Infrastructures de Transport	-20	-20	About 15	Adequate
VINCI S.A.	-20 to -25	-25 to -30	Greater than 25	Strong
Autostrada Brescia Verona Vicenza	-25 to -30	-20 to -25	Greater than 13	Adequate
Atlantia SpA	-25 to -30	-25 to -30	10 to 11	Less than adequate
APRR S.A.	-20 to -25	-20 to -25	Greater than 10	Strong

FFO--Funds from operations. Source: S&P Global Ratings.

S&P - Toll Road Company post-Covid rating - 2

Project	2020 net toll revenue decline versus 2019 (%)	Debt service coverage ratio 2020		Debt service reserve	Additional liquidity
		Pre-COVID base case (x)	COVID-19 revised base case (x)		
407 International Inc.	(30.86)	2.53x	1.96x	One year	Operation and maintenance reserve and US\$1.5 billion in cash balance.
Nouvelle Autoroute 30 S.E.N.C.	(10.23)	1.23x	1.17x	Six months	80% revenues in the form of availability payments. Three-year look forward major maintenance reserve.
ITR Concession Company LLC	(15.99)	1.58x	1.34x	Six months	US\$225 million capital expenditure facility and US\$300 million revolver facility.
Elizabeth River Crossings Opco LLC	(14.45)	1.54x	1.12x	Six months	Equity lock-up of more than one year of debt service, and major maintenance reserve.
95 Express Lanes LLC	(39.41)	2.72x	1.22x	One year	Equity lock-up of more than one year of debt service, three months operation and maintenance reserve, and transit reserve than can cover more than one year of debt service.
Toll Road Investors Partnership II LP	(18.59)	2.35x	1.78x	One year (based on MADS)	Senior debt service reserve equal to the MADS (which occurs in the last year of the concession), as such, it is currently funded at an amount equal to two years of debt service. Additionally, the project is required to reserve the next 12 months of debt service and scheduled early redemption payments. A six-month operating reserve fund and a 12-month major maintenance /improvement fund.
Autopistas Metropolitanas de Puerto Rico LLC	(20.66)	1.55x	1.13x	One year	US\$11 million in a major maintenance spending reserve.

MADS--Maximum annual debt service. Source: S&P Global Ratings.

3 To go: a world to be revised and renegotiated

- Review financial plans for old and new PPP projects
 - Increased safety margins
 - Higher DSCR
- Review and expand traffic and tariff studies and update the study of mobility in metropolitan areas.
 - Passengers and commuters
 - Commercial traffic and intermodal centres
- Re-negotiate, whenever possible, force majeure clauses
- Assume a variable duration of the concession, in a time range
- **Facing a new and uncertain world with dynamic and flexible tools!**

■ ***Thank you for your attention! - Fabio Pasquali - f.pasquali@stradeanas.it***

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Roads and CAF, allies against COVID-19 in Latin America

Hector Varela

Chief Executive of



#PIARCCOVID19

9 July 2020

Roads and CAF, allies against COVID-19 in Latin America

July 9th, 2020

CONTENTS

1. CAF - development bank of Latin America
2. What do we do?
3. Latin America Diagnostic
4. Our vision
5. Regional Challenges vs. CAF

1. CAF - development bank of Latin America

1970 - 1991



- ⊕ Bolivia
- ⊕ Colombia
- ⊕ Ecuador
- ⊕ Perú
- ⊕ Venezuela

1992 - 2000



- ⊕ Bolivia
- ⊕ Colombia
- ⊕ Ecuador
- ⊕ Perú
- ⊕ Venezuela

- ⊕ Argentina
- ⊕ Brasil
- ⊕ Panamá
- ⊕ Paraguay
- ⊕ Chile
- ⊕ Jamaica
- ⊕ México
- ⊕ Trinidad y Tobago

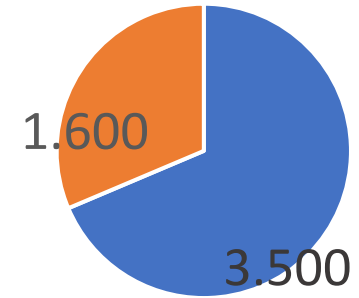
2016



- ⊕ Bolivia
- ⊕ Colombia
- ⊕ Ecuador
- ⊕ Perú
- ⊕ Venezuela
- ⊕ Argentina
- ⊕ Brasil
- ⊕ Panamá
- ⊕ Paraguay
- ⊕ Trinidad y Tobago
- ⊕ Uruguay

- ⊕ Barbados
- ⊕ Chile
- ⊕ Costa Rica
- ⊕ España
- ⊕ Jamaica
- ⊕ México
- ⊕ Portugal
- ⊕ República Dominicana

Portfolio from roads
5,100 millions USD



■ Roads

Fundadores/Miembros Plenos ■
Miembros Serie C ■

2. What do we do?

1. Public sector support:
loans, TC, consultancy

3. Technical
Cooperation

2. Private sector
investment



Supporting countries to INVEST BETTER

Strategic Areas CAF

EFFICIENCY

SUSTAINABILITY

INSTITUTIONALITY

EQUITY

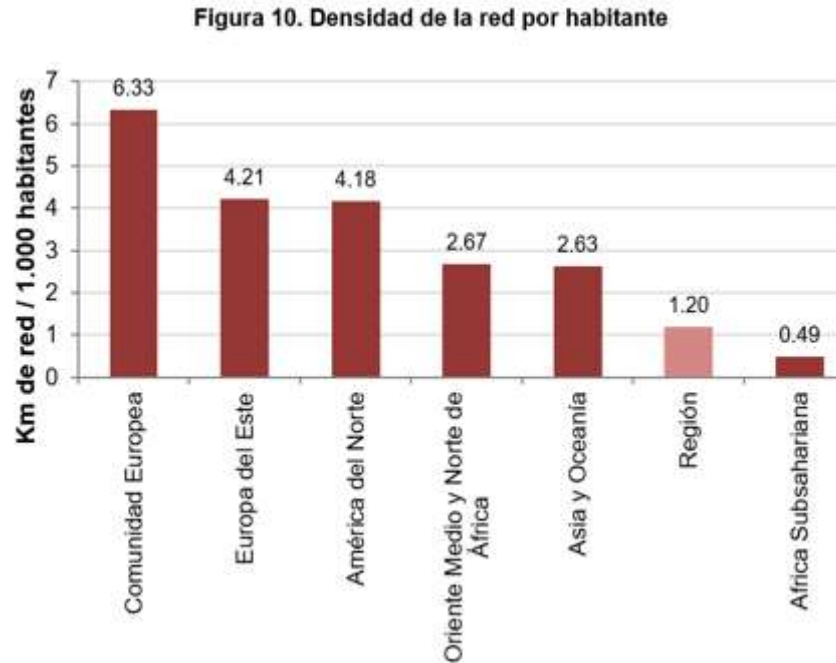
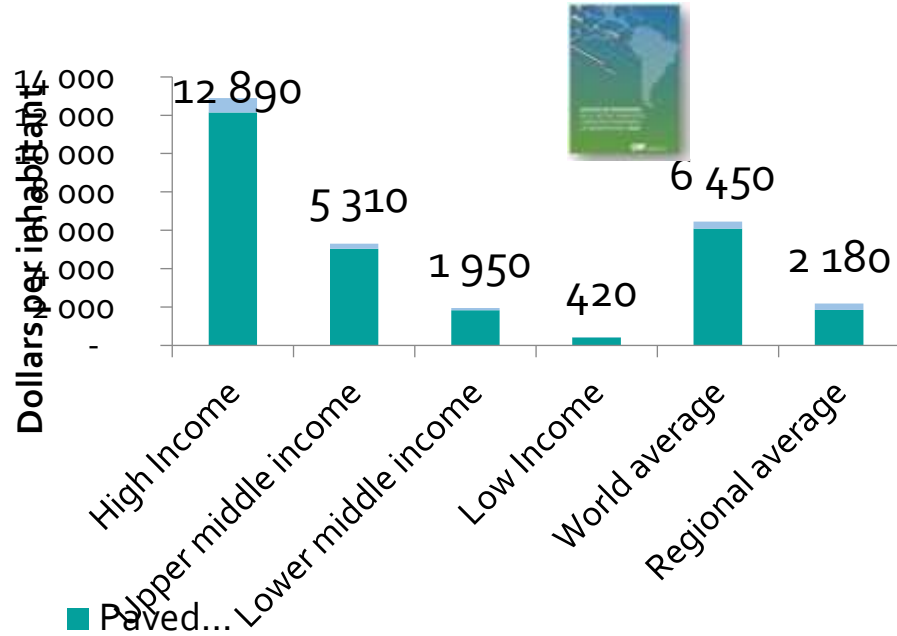
INTEGRATION

Road portfolio (million USD)

Urban	Interurban	TOTAL
3,500	1,600	5,100

3. Diagnosis of Latin America

<https://scioteca.caf.com/>



- Complex geographical context
- Remote demand centres
- Adverse climatic phenomena
- Institutional weakness
- Accidentality
- Large gap in coverage and quality

COVID-19 { 35% drop in freight traffic
75% drop in vehicle traffic

4. Industry overview

1. **Uncertainty** marks the future (new technologies, COVID-19, fiscal space for investments, deglobalization, ...).
2. High **complexity for investment prioritization**. Platform for the development of strategic sectors, which is essential for territorial structuring and social cohesion.
3. The evolution of **governance** is key (effectiveness, quality and good targeting of public sector intervention). Medium and long term transport plans.

5. Regional challenges vs. CAF

Stage 1: immediate challenges

Service guarantee

Proximity, flexibility and knowledge



Stage 2: economic crisis

Implementation of counter-cyclical policies

Identification of high impact projects



Stage 3: New normal

New development models

Sustainable roads, integration, ICTs



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COVID-19 and Roads in Brazil

Luiz Guilherme Rodrigues de Mello

Director of Planning and Research - DNIT

#PIARCCOVID19

9 July 2020

Luiz Guilherme Rodrigues de Mello

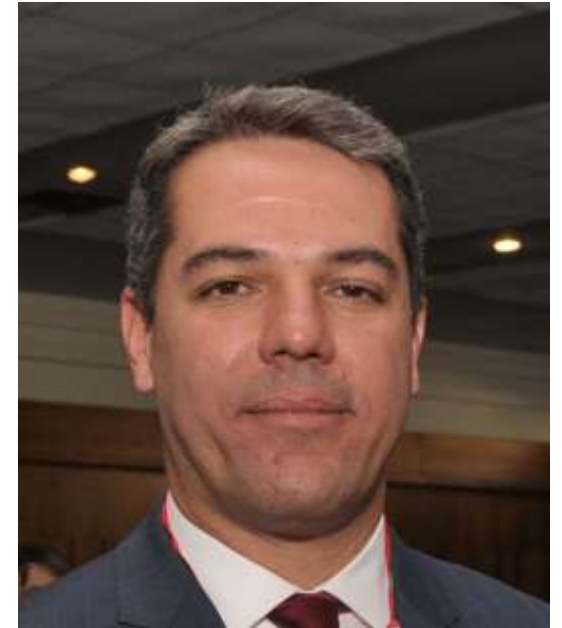
- Director of Planning and Research - DNIT



- Assistant Professor - Federal University of Brasilia



- Deputy Director of the Ibero-American Working Group D.1 - Management of Road Heritage (Cycle 2016-2019)



Index of the presentation

- DNIT in figures
- Deliveries in 2020
- NDT in relation to VOCID-19



O DNIT em números

R\$ 8,453
Bilhões

Orçamento

1.636

Contratos ativos
em 2018

2.259

Servidores

R\$ 58,4
Bilhões

Carteira ativa

7

Diretorias

26

Superintendências

8

Administrações
Hidroviárias - AH's

Ferrovário

27.162,6 Km de ferrovias
17 corredores ferroviários - PROSEFER
5.609 Cruzamentos ferroviários mapeados
Gestão de 33.030 bens não operacionais



Aquaviário

Cerca de 19 mil Km economicamente navegáveis
Atuação em 9 regiões hidrográficas
44 Instalações Portuárias Públicas de Pequeno Porte - IP4 construídas
Intervenções em 6 Portos Organizados



Rodoviário

64.907 km de malha rodoviária sob administração federal;
Atuação em todas as Unidades da Federação

CONSTRUÇÃO:
10.709 empregos diretos

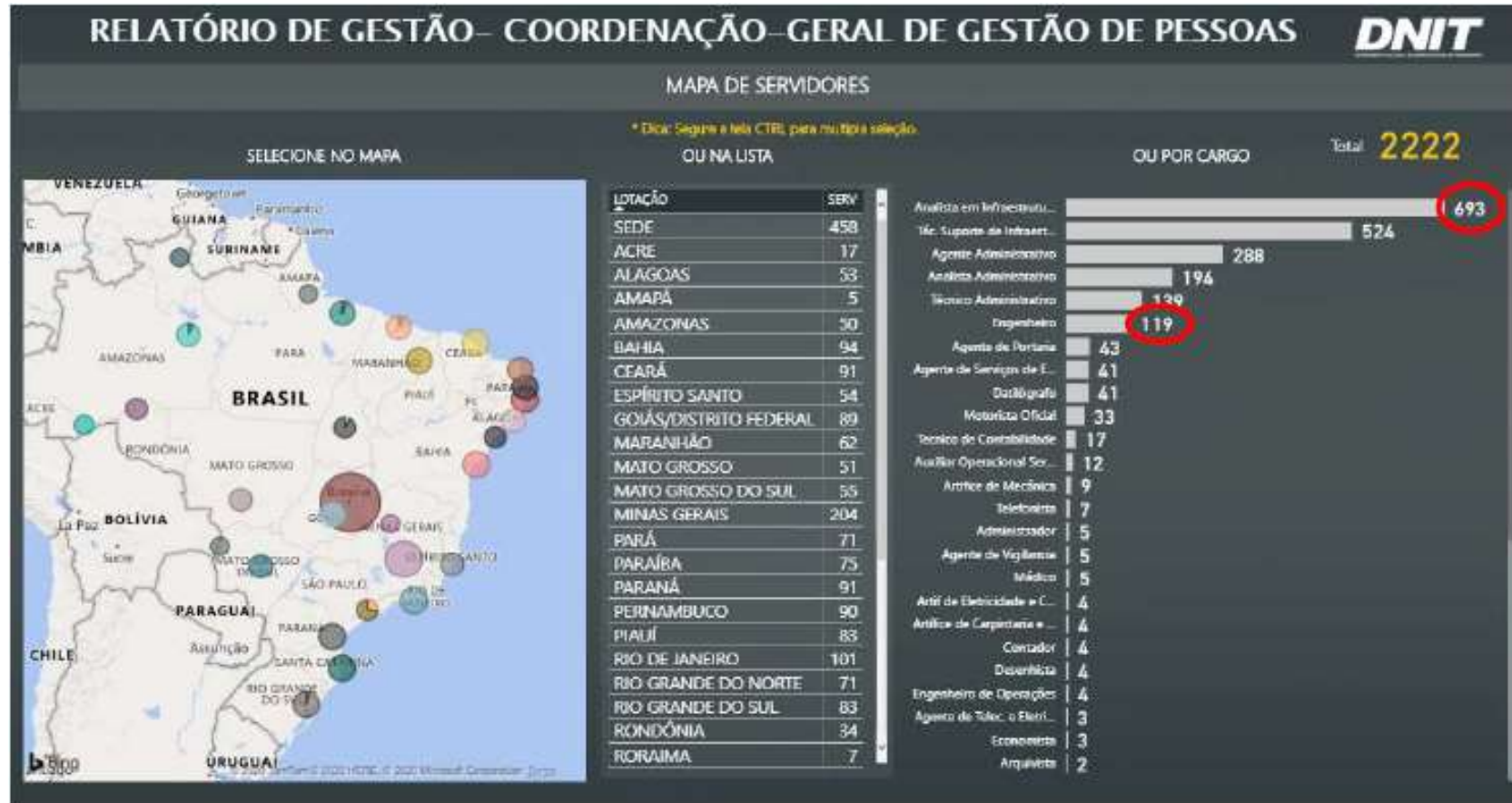
MANUTENÇÃO:
60,2% da malha considerada boa pelo ICM.

OPERAÇÕES RODOVIÁRIAS:
36 unidades móveis de pesagem
582 equipamentos de velocidade em operação
1.319 faixas monitoradas



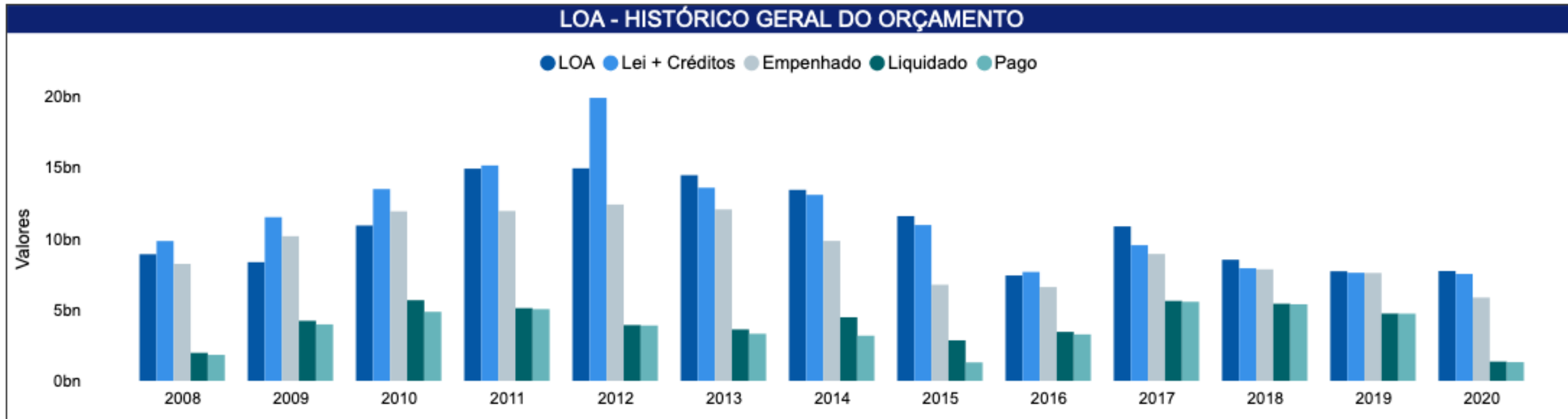
Regional scope

- DNIT is in all units of the Federation through the Regional Superintendencies.



Budget

- The available budget has been restricted, limiting the desired capacity for action.



Deliveries made in 2020 by DNIT

- The NDT continued its work in all regions, even with the pandemic, minimizing the negative impact on the national economy.

✓ 127 km of dual carriage roads;

✓ 88 km of paved roads;

✓ 110 km of soil restoration;



Deliveries made in 2020 by DNIT

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- ✓ 110 km of soil restoration;
- ✓ Functional and structural characterization of 60,000 km of roads;
- ✓ Contracting of the project;



Ensure the maintenance of activities in the pandemic

In an *online* debate this Friday (27), promoted by the Brazilian Chamber of the Construction Industry (CBIC), in concurrence with the National Senate, with businessmen from the infrastructure sector from all regions of Brazil, in another edition of the 'CBIC Dialogues', the general director of the National Department of Transportation Infrastructure (Dnit), General Antonio Leite Santos Filho, said that **Dnit's resources for contracting are guaranteed in this moment of the coronavirus pandemic (Covid-19), with no cuts foreseen.** "We are in a war situation and the aim is to help the country," he said, reinforcing the growing importance of modal transport in this time of crisis.

CBIC

ÁREA DE ASSOCIADOS

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AGÊNCIA CBIC

27/03/2020

Covid-19: Dnit prevê manutenção de recursos para a infraestrutura

Jose Carlos Martins ANDRÉ KLUM Carlos Eduardo General Santos Filho

Almir Taccardi Ricardo Portella Fernando Lima Carlos Oliveira Vladimir Brito

Lucas Vissotto

zoom

Digital transformation

TRANSFORMAÇÃO DIGITAL

Transformação digital facilita acesso a serviços do setor de infraestrutura durante epidemia do COVID-19

:::

Publicado: Quarta, 08 de Abril de 2020, 12h01

Última atualização em Quinta, 09 de Abril de 2020, 09h56



Ministério da Infraestrutura e vinculadas já possuem 94% dos serviços digitalizados e avança na transformação dos restantes

O Ministério da Infraestrutura já disponibilizou canais digitais de solicitação para 94% dos 178 serviços prestados diretamente pelo órgão, pelo DNIT e pelas agências vinculadas, Agência Nacional de Aviação Civil (ANAC), Agência Nacional de Transportes Aquaviários - (ANTAQ) e Agência Nacional de Transportes Terrestres (- ANTT), facilitando o acesso aos serviços do setor durante a crise provocada pela pandemia do COVID-19.

Foram lançadas, no final de março, duas novas funcionalidades no aplicativo **InfraBr** para apoio aos caminhoneiros, possibilitando ao profissional do transporte obter informações sobre o funcionamento de serviços essenciais para continuar nas estradas, como restaurantes, postos de combustíveis, borracharias, oficinas e lojas de autopeças. Além disso, também é possível identificar onde estão os postos de atendimento do Sest/Senat que estão distribuindo kits de higiene e de alimentação.



Digital transformation



The meetings of the Board of Directors are held at a distance every week



COVID-19 Warnings



"DNIT distributes coronavirus pamphlets to residents near the BR-153/SP construction site"

COVID-19 Warnings

"DNIT is working on the logistics for the donation of 15,000 bottles of alcohol gel"



COVID-19 Warnings



Thank you for your attention!
Ask your questions in the chat



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World Road Association PIARC



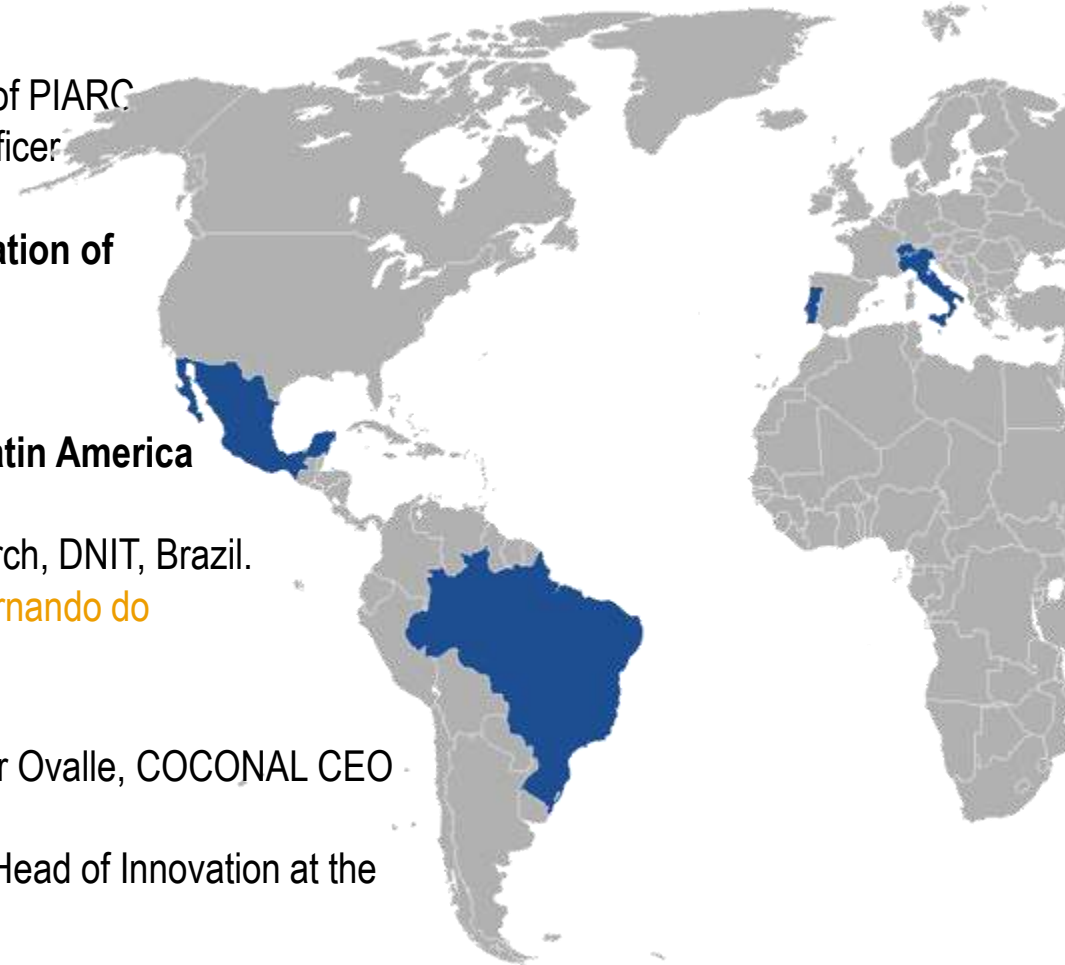
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COVID-19 and Roads in Portugal: *Measures, impacts and perspectives*

João Carvalho

Chairman of the Board of Directors

AMT - Mobility and Transport Authority (Portugal)

#PIARCCOVID19

9 July 2020

João Fernando AMARAL CARVALHO



- **President of the AMT - Mobility and Transport Authority**
(Independent Economic Regulatory Authority with jurisdiction in the
Mobility and Transport Ecosystem, Portugal)
- **Vice-president of DIRCAIBEA - Council of Directors of Roads of Iberia and Latin America**
- Chairman of the Railway Regulators Group - *IRG Rail*
- Chairman of the Board of Directors of the ITM - Institute for Mobility and Transport, I.P.
- Chairman of the Board of Directors of IPTM - Instituto Portuario y Transportes Marítimos, I.P.
- Member of the IPTM Board of Directors
- President of the Lisbon Port Community
- Transinsular Administrator
- Member of the Board of ECSA - *European Community Shipowners' Associations*

Index of presentation

- State of Emergency
- Deconfinement and Calamity, Contingency and Alert Plan
- Main measures in the framework of the Mobility and Transport Ecosystem
- Specific measures for roads
- Impacts
- Perspectives of the evolution



STATE OF EMERGENCY



State of Emergency

- Declaration of the State of Emergency
 - ✓ Decree of the President of the Republic, approved by Parliament and regulated by the Government
 - ✓ 19 March to 2 May 2020 (3 periods of 15 days each)
 - ✓ Temporary limitation of certain rights, freedoms and guarantees, in particular of movement on the public highway
- Mandatory Confinement
 - ✓ Patients with COVID-19, infected with SARS-Cov2 and people under active surveillance
- Special duty of protection (over 70 years old and chronically ill who should be considered at risk) and general duty of care (other citizens)

State of emergency

- Exceptions to driving restrictions on public roads
 - ✓ Tasks and functions related to survival
 - ✓ Health reasons
 - ✓ Functioning of society in general
- Mandatory adoption of the teleworking scheme, when functions permit
- Operation of essential services (transport)
 - ✓ Passenger transport (collective and light vehicle)
 - ✓ *Rent-a-car, rent-a-cargo, sharing* and other micro-mobility solutions (for trips allowed by law)
- Free movement of goods is guaranteed

DECONTAMINATION PLAN AND DISASTER SITUATIONS, **CONTINGENCY** AND ALERT



Deconfinement Plan and Calamity Situation (4 May...)

- General rules
 - ✓ Mandatory confinement of patients and persons under active surveillance, as well as the civic duty of home collection
 - ✓ Prohibition of events and meetings with more than 10 people
 - ✓ Maximum occupancy of 5 people/100 m² in closed spaces
- Public transport
 - ✓ Capacity 2/3
 - ✓ Mandatory use of mask or visor
- Utilities (service by appointment)
- Schools (only final year subjects with higher education entrance examination) and social facilities (with rules of occupation, stay and physical distance)
- Commerce, restaurants and shows (with rules of occupation, stay and physical distance)

July 1-15, 2020 - Alert, Contingency and Calamity Situations

- Alert Situation (Country, except Metropolitan Area of Lisbon)
 - ✓ Mandatory confinement of patients and active surveillance (there is no longer a civic duty to pick up other citizens from their homes)
 - ✓ Prohibition of events and meetings with more than 20 people
 - ✓ Infringement regime (fines from 100 to 500 euros for natural persons and from 1,000 to 5,000 euros for legal persons)
- Contingency Situation (Lisbon Metropolitan Area, except for Parishes in a Calamity Situation)
 - ✓ The rules of the rest of the country, plus
 - ✓ Prohibition of events and meetings with more than 10 people
 - ✓ Commercial establishments close at 8pm
- Calamity Situation (19 Parishes of the Lisbon Metropolitan Area)
 - ✓ Rules of the Metropolitan Area of Lisbon, adding
 - ✓ The civic duty to pick up at home
 - ✓ Prohibition of events and meetings with more than 5 people

MAIN MEASURES IN THE FRAMEWORK OF THE MOBILITY AND TRANSPORT ECOSYSTEM



Main measures in the framework of the Mobility and Transport Ecosystem

- Collective passenger transport
 - ✓ Maximum capacity of 2/3 in land, river and sea transport
 - ✓ Matching supply to demand and transport needs (Transport Authorities)
 - ✓ Mandatory use of masks or visors
 - ✓ Reinforcement of cleaning (daily), disinfection (weekly) and sanitation measures (monthly)
- Allocation of funds and compensation to key transport operators (Q2 2020)
- Taxi and individual and paid transport of passengers in uncharacterized vehicles from an electronic platform
 - ✓ Occupation of the front seats by the driver only and 2/3 of the remaining seats
 - ✓ Renewing the air inside the vehicles and cleaning the surfaces
- Implementation of the "*Clean & Safe*" Seal, within the activity of rent-a-car

Main measures in the framework of the Mobility and Transport Ecosystem

- Driving instruction and professional certifications were suspended between March 16 and May 18, 2020
- Regular inspections of motor vehicles and their trailers were suspended between 24 March and 18 May 2020,
 - ✓ Derogation for the provision of essential services for certain categories of vehicles (mandatory inspections), by means of the
- Exceptional and temporary reintroduction of border control
 - ✓ Period from 16 March to 30 June 2020
 - ✓ Prohibition of movement at land borders, with the exception of international transport of goods, cross-border workers and emergency and rescue vehicles
 - ✓ Establishment of approved crossing points (Green Corridors)
- Derogation from the rules of Regulation (EC) No 561/2006 of 15 March 2006 on driving times, breaks and rest periods for drivers engaged in the carriage of goods by road (until 31 May 2020)

ROAD-SPECIFIC MEASURES



Specific measures for roads

- Reduction or suspension of some of the obligations of road concessionaires (determined by the licensor)
 - ✓ Minimum services to safeguard road safety
 - ✓ Reduction of payments due to the measure of reduction or suspension of those obligations
- Exceptional and temporary financial rebalancing of long-term contracts in the context of the COVID-19 pandemic
 - ✓ Inapplicability of mechanisms to restore financial balance during the State of Emergency
 - ✓ After the State of Emergency, compensation may only be granted by extending the period of service or the duration of the contract
- Tolls on some motorways without the presence of toll collectors, with payment through automatic manual lanes or electronic collection
- Fuel supply and convenience stores that operate with automatic or wicket payment, or with limited entry

IMPACTS AND DEVELOPMENT PROSPECTS



Impacts

- Reduction of traffic on Portuguese motorways
 - ✓ Between 65% and 75%, during the State of Emergency
 - ✓ Between 20% and 30% in heavy duty vehicles (no restrictions)
- Reduction in demand for public passenger transport by approximately 90%.
 - ✓ Variable from one region to another
- Reduction of fare revenues for public transport operators by about 90%.
 - ✓ Variable from one region to another



Perspectives of the evolution

- Importance of the road in the supply chain
- Commitment to innovation, digitalization and decarbonization of the road ecosystem
- Allocation of funds and compensation to key transport operators in the framework of the COVID pandemic -19
 - ✓ Associated with limitation impositions and adjustments to the operation of public passenger transport
 - ✓ Reported as of Q2 2020
 - ✓ Assessment and monitoring of the WTA



Thank you very much.



João Carvalho

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COVID-19 and Roads in Mexico: Public-Private Partnerships versus COVID-19

Hector S Ovalle M

Director - Coconal

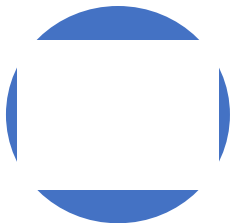
July 2020

Hector Saul Ovalle Mendivil

Mexico



Civil Engineer
Director of COCONAL



Member of TC 1.3 and the SG on
Infrastructure and Transport Security



Former President of the Mexican
Association of Engineering of Land Roads



Discussion Points



Public Private
Partnerships and
Roads



Impact on Transit
Revenue



Ideas

Public-Private Partnerships and roads



Contract based on government payments

Investment recovery

- Performance standards
- Service Availability



Pay-per-user based contract

Investment recovery

- Pay per user of the infrastructure

Impact on transit revenue...



In the first week of March, the decrease in income began, reaching a maximum of 40%. During the month of June there has been some recovery. At least the fall does not continue...



Financial institutions may be nervous/concerned



Possible default on short/medium-term commitments



Momentary financial imbalance that creates uncertainty for the parties

Ideas



Calm and action

The first thing to take into account is that these projects are long term and manage to communicate it in an assertive way.



Reviewing both PPP and financing contracts

- Funding
- Outline for Contingencies
- Financial rebalancing alternatives/mechanisms
- Rate coverage



Review conservation programs for efficiency and resource possible modifications



To have constant contact with the involved/stakeholders parties

Thank you for your attention...



Hector S Ovalle

COCONAL Director

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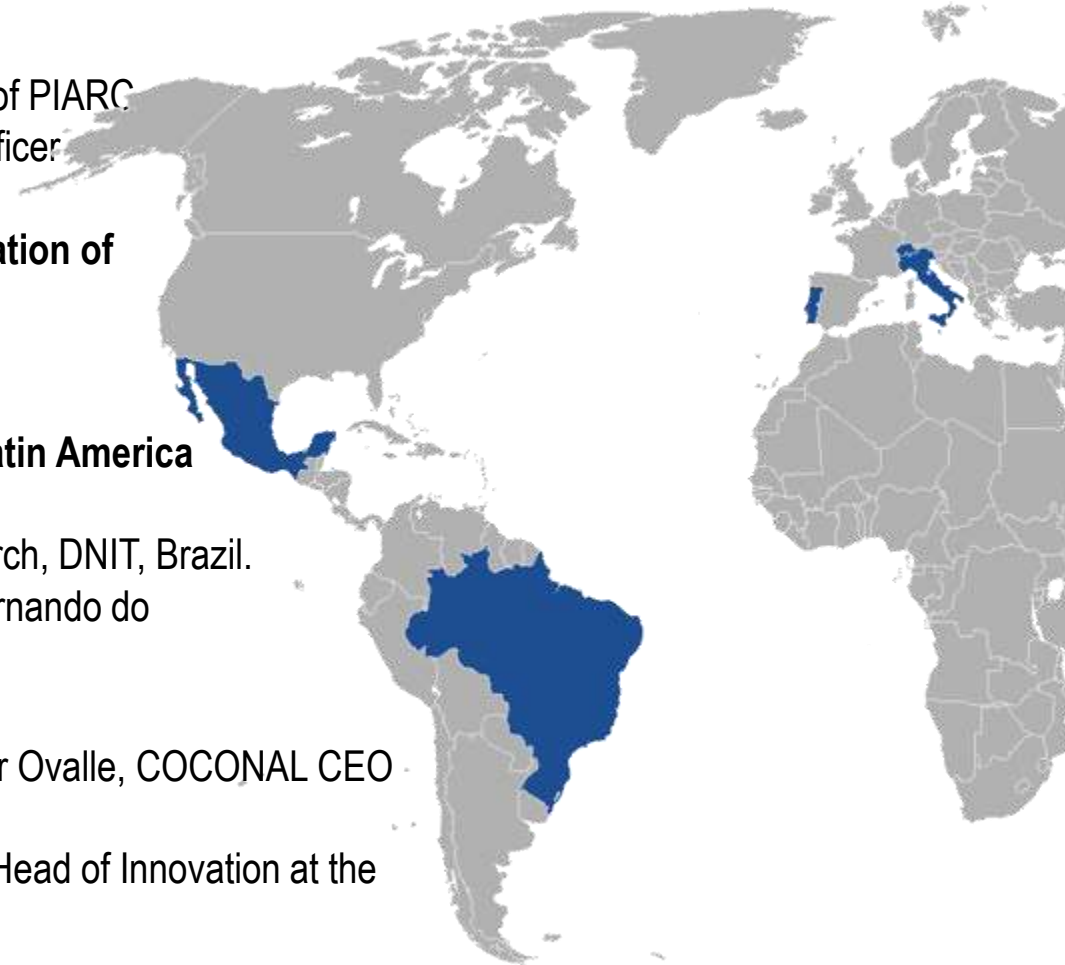
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Questions and Answers

Fabio Pascuali, General Direction
of ANAS.

ITA

Héctor Varela, CAF's Chief
Executive Officer.

CAF

Ing. Luiz Guilherme, Director of
Planning and Research

BRA

João do Amaral, President of the
Mobility and Transport Authority

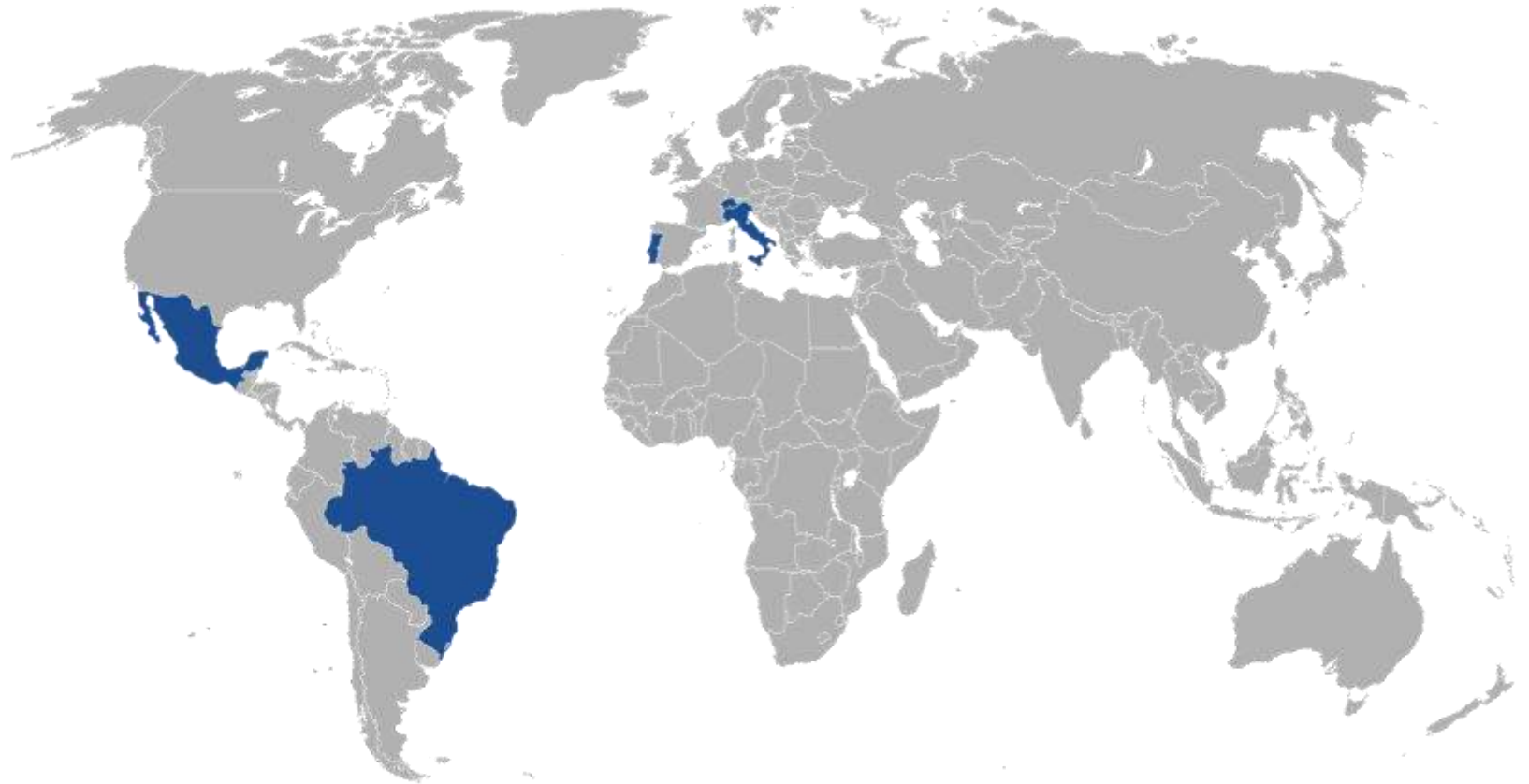
BY

Héctor Ovalle, CEO COCONAL

MEX

Gonzalo Alcaraz, Head of
Innovation

IRF



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Provisional Conclusions PIARC COVID-19 Seminar and Roads (5th Online Seminar in Spanish)

José Manuel Blanco Segarra

PIARC TC 1.1 Spanish-speaking Secretary

#PIARCCOVID19

9 July 2020

José Manuel WHITE SEGARRA



- President of the National Committee "Operation and Financing" (in formation)

(ATC Technical Road Association)



- Dean of the Extremadura Region of the Association of of Civil Engineers
- President of the National Committee "Road Materials" (2000-2012)
- Head of the State Roads Demarcation in Extremadura (2006-2019)
- **Chair of TC A.1 Operation of Transport Administrations (2016-2019)**
- **Current PIARC TC 1.1 Spanish Language Secretary**
"Operation of Transport Administrations"
- **Member of the PIARC Response Team to COVID-19**



FINAL PRE-CONCLUSION

THE CRISIS IS AN OPPORTUNITY FOR CHANGE, INNOVATION, THE DEFINITIVE INTRODUCTION OF NEW TECHNOLOGIES AND NEW OBJECTIVES (SUSTAINABILITY, RESILIENCE, DECARBONIZATION...) THE RECONSIDERATION OF WHAT WE WANT, WHAT OUR VISION OF THE FUTURE SHOULD BE IN THE FACE OF DIFFERENT POSSIBLE SCENARIOS, AND WHAT THE PRIORITIES SHOULD BE.

WE PROFESSIONALS IN THE SECTOR KNOW HOW TO DO IT. NOW IT'S OUR TURN TO KNOW HOW TO COMMUNICATE AND CONVINC...

PROVISIONAL CONCLUSIONS

- From the first online seminar organized by PIARC to discuss the effects of the COVID-19 pandemic, and the responses from the Road and Transport Administrations, held on March 25th, to today's seminar (the 22nd, being the 5th in Spanish), an increasingly clearer picture has developed of the immediate effects (impacts) of COVID-19 in all areas, and of the most effective responses, according to the different circumstances and possibilities, applied.
- As the pandemic has spread and evolved, **the focus has broadened to include economic recovery, changes that will remain, "the new normal"...**
- **Faced with a global scenario of economic and budgetary restrictions, the road sector has to show its economic and social usefulness.**

PROVISIONAL CONCLUSIONS

- **Seminar objective: to inspire and highlight the value and usefulness of roads for economic and social development and to focus correctly on post-pandemic recovery and medium- and long-term planning. This crisis is an opportunity to rethink what mobility we want and the priorities.**
- **As is logical, the first concern and focus of action, in all countries, has been the care of sick people and the adoption of measures to try to avoid massive contagion, even at the cost of sacrificing economic activity to a greater or lesser extent.**
- **It has quickly become clear that road transport and road networks play an essential role in providing the general population, and especially the essential services and sectors of each country, with the necessary mobility of people and goods.**

PROVISIONAL CONCLUSIONS

- This has quickly led to the conviction that the road networks must continue to be served as a priority and developed as far as possible, so that the flow of people and essential goods can be maintained **now and in the future under all circumstances and** reach the most remote places.
- This need is further reinforced by the increasingly perceived risk of a possible resurgence of the pandemic, which would again disrupt our way of life and our economies. **The road is one of the great instruments for health, because without it there would be no effective health.**
- We professionals in the sector are well aware of all this, although **we have not always known how to disseminate it to society** in order to achieve fair recognition, and **thus lessen difficulties in competing for funding.**

PROVISIONAL CONCLUSIONS

- But it is not only that road networks are important in themselves for the daily life of people and the smooth functioning of services and sectors of activity in each country.
- **The road is also a magnificent instrument of recovery and development, economic and social, generating direct and indirect employment, energizing companies and developing the potential of each region or place, with a "capillary" effect both economic and social and human that reaches far beyond the road itself and its immediate environment, contractors, consultants and workers and employees of the "supply chains" of each agency, body or road administration.**
- In other words, forgetting about the road because we want to pay more attention to sectors that are perhaps more "media-friendly" would be a mistake with consequences.

PROVISIONAL CONCLUSIONS

- Today, **Héctor Varela (CAF's Chief Executive)** explained to us the **great instrument that the CAF (Latin American Development Bank) is in itself, for the broad Latin American world**, supporting the road sector (USD 5.1 billion in portfolio) **through loans to the public and private sectors**, advisory services and technical cooperation.
- He has explained to us the still difficult context of the road, better than in the past, but which still has much to do to overcome the difficulties of its enormity and geographical, climatic and institutional complexity, etc.
- It highlights the **uncertainties about the new mobility paradigm**.
- **It concludes that we must continue to invest in road networks, knowing how to plan for the medium and long term**, prioritize and apply new technologies to them, with good governance and a clear vision of social aspects.

PROVISIONAL CONCLUSIONS

- Indeed, **Luiz Guilherme Rodrigues de Mello (DNIT, Brazil)** has provided us with figures that show the **magnitude and scope of the road heritage, and** has highlighted the **importance of road works to minimize the economic impacts of the pandemic and** the willingness to continue, despite the pandemic, taking appropriate preventive measures, and **without making budget cuts in** order to "**help the country**" because "the importance of modal transport is growing at this time of crisis.
- In addition, efforts have been redoubled in the **complete digital transformation to** facilitate access to the services provided by the Ministry, NDT and related agencies, with the consequent positive and permanent effect on the post-pandemic situation.

PROVISIONAL CONCLUSIONS

- **Héctor Ovalle (Director of the Mexican company COCONAL) explained to us the modalities of PPPs in Mexico and the impacts caused by COVID-19 on toll systems, and how much he explained is applicable to almost any other country in our environment:** rapid and deep decline in traffic revenues, now in a phase of containment of the fall, momentary financial imbalance, uncertainty...
- **As well as what he has told us about how to deal with it well:** calm, vision of the future, looking for alternatives for financial rebalancing, reviewing conservation programs looking for greater efficiency, maintaining contacts with all interlocutors (involved parties, stakeholders). **And always, know how to communicate.**

PROVISIONAL CONCLUSIONS

- Similarly, **Fabio Pasqualli (ANAS, Italy)** has explained to us the impacts of COVID-19 on toll roads in Europe and how it has added uncertainty and financial instability to these PPP contracts, **which are in practice owned by the lending banks (hence the importance of agents such as the CAF).**
- On the toll motorways in Europe the drop in traffic has been up to more than 80%, and now less than 20%. Lower revenues = lower margins = lower profits. **Uncertainties about people's future behaviour** (mobility) (work, study)
- **This situation calls for a review of** financial plans, traffic studies, tariffs, metropolitan mobility, **consideration of** "force majeure", and a **reconsideration of the** duration of concessions.

PROVISIONAL CONCLUSIONS

- Particularly in Portugal, **João Carvalho (President of the C. Admón of the AMT and Vice-president of DIRCAIBEA)** has exposed us the firm measures adopted, in a graded way, during the successive states of emergency "decontamination plan and situation of calamity" and the situations "of alert" and the consequences in the intensities of circulation, collective transport, taxis, rent, drivers of vehicles of goods, borders... (confirming and extending all that is resulting in the celebrated seminars).
- **Measures to support transport operators** (funds and compensation, as the reduction was 90%) **and concessionaires**: reduction of certain obligations, exceptional and temporary financial rebalancing through extension of deadlines.

PROVISIONAL CONCLUSIONS

- And it has also advanced **some of the prospects for evolution:**

Innovation

Digitization

Decarbonization

Allocation of funds and compensation to essential transport operators, associated with the imposition of limitations and adjustments to operations.

PROVISIONAL CONCLUSIONS

- What the other panellists have said has been confirmed and reinforced by what **Gonzalo Alcaraz (IRF, International Road Federation, based in Geneva, Switzerland)** has said about "shaping the recovery for the road sector" and highlights that **the crisis is an opportunity to rethink our priorities and what kind of mobility we want:**
 - We must collaborate in **health (saving lives)** by redefining spaces and taking measures in the design (project) construction and maintenance.
 - We are a perfect mechanism for **economic recovery by** creating jobs, training workers and improving infrastructure. **There are governments and administrations that have not only failed to slow down but have accelerated action on roads.**

PROVISIONAL CONCLUSIONS

- Investment must be designed with **sustainability and resilience in mind.**
- **Encourage innovation:** digitisation, materials, automation, redefining acquisition processes, and incentivising new technologies.
- And it encourages us to **"take advantage of post-COVID-19 financing mechanisms"** from global agencies, governments, development banks, PPPs and even the private sector itself.

FINAL CONCLUSION

- **From what the panellists have said, it is clear that this is the case:**
 - **Roads and road transport have been essential elements during the most acute phases of the pandemic in each country.**
 - **The impacts have been strong, and there are many uncertainties, but we must remain calm and optimistic, and know how to communicate in order to solve the problems of obtaining funds and financing.**
 - **The concessionaire sector has been hit hard by the huge drops in traffic generated by the pandemic and the measures taken against it, so compensation mechanisms must be found and agreed upon.**
 - **Investment in roads is a valuable and effective instrument for post-COVID-19 economic and social recovery.**

FINAL PRE-CONCLUSION

THE CRISIS IS AN OPPORTUNITY FOR CHANGE, INNOVATION, THE DEFINITIVE INTRODUCTION OF NEW TECHNOLOGIES AND NEW OBJECTIVES (SUSTAINABILITY, RESILIENCE, DECARBONIZATION...) THE RECONSIDERATION OF WHAT WE WANT, WHAT OUR VISION OF THE FUTURE SHOULD BE IN THE FACE OF DIFFERENT POSSIBLE SCENARIOS, AND WHAT THE PRIORITIES SHOULD BE.

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TO **GET FUNDING.****

Thank you for your attention!



José Manuel Blanco Segarra

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PIARC Online Seminar COVID-19 and roads 10 and 11 June 2020

**Thank you very much.
for your attention!**



Visit the PIARC & COVID-19 page

<https://www.piarc.org/es/actualidad-agenda-PIARC/Coronavirus-PIARC-y-COVID-19>