Spain is the fourth economy in the euro zone, the fifth in the European Union and the world’s twelfth largest economy, in terms of GDP.

It is the world’s tenth largest investor, with a direct investment stock abroad of €500,000 millions, and the world’s second largest investor in Latin America, only after the United States.

Furthermore, Spain has a powerful network of infrastructures, placed among the world’s top ten countries with the best quality in this field (according to the Global Competitiveness Index 2012–2013), and the world leader in terrestrial infrastructure (measured in kilometres of highway / motorway per capita and high speed railways). It has the world’s second largest high-speed railway network, as well as the most modern and technologically advanced train fleet in Europe. It ranks Europe’s third in terms of passenger air traffic and fourth in the European Unión in maritime freight transport.

Spain’s leadership in the infrastructure’s sector is one of the key factors, together with its favourable foreign direct investment (FDI) framework with the fewest restrictions, for its positioning as the world’s seventh economy in terms of international investment inflow (according 2010 aggregated foreign investment stock data). In fact, 11,000 foreign capital companies are established in Spain, employing more than 1.3 million people, constituting 6.6% of the national working population. Additionally, Spain counts upon a relevant geostrategic position: as EU member, bridge between Africa and Europe, and key party for establishing relationships with Latin America.

As for the internationalization process carried out by Spanish companies in recent decades, more than 60% of the IBEX 35 listed entities’ turnover is currently generated abroad, accounting for an even higher percentage in some cases, even nearing 100%. Spanish corporations are world leaders in key sectors such as renewable energies, infrastructure management, high-speed railways, biotechnology, naval technology, environmental technology, and air and space systems, among others. Spanish societies can currently be found, either established and / or providing different services, throughout the world: the busiest airport in the world, Heathrow, is managed by a Spanish company; many underground railway lines have been built and are managed by Spanish corporations; a third of the world’s air traffic, as well as 100% of Germany’s airspace, is managed through systems developed and installed by a Spanish company; the world’s largest firm in the textile sector, with more than 5,500 stores around all five continents
Spanish; being these only some highlights of Spanish companies’ leadership.

A clear example of Spain's relevant international presence were the latest Olympic Games held in London, where a significant proportion of services and installations were rendered or carried out by Spanish companies. As brief overview of main services provided: Heathrow Airport, operated by Ferrovial received 80% of the Olympics’ attendees through its new terminal; Luton Airport, with Abertis as its main manager, also played a very active role; FCC was responsible for the design, construction, maintenance, interior architecture and electrical and mechanical installations of the international communications centre; Telefónica's subsidiary, O2, was one of the principal mobile, land and broadband telephone service suppliers; Mondo supplied the tartan of the London Olympics athletics track; Acciona built the new desalination plant in Beckton that provided water for more than one million people, using a unique technology.

Detailed snapshot of Spain's leadership in strategic sectors

1> Technologies for producing and managing energy

- In the field of renewable energies, Spain is a world leader both for the high development reached by certain technologies in our territory as well as for having an industrial network competitively positioned throughout the world as a result of its R&D&I investment, which has given them a competitive advantage vis-à-vis the rest of the world.
- Spain is the first country in Europe in production of wind power, and the fourth worldwide in terms of installed capacity.
- The world’s leading company in renewable energies is Spanish.
- The world’s top producer of wind power is also Spanish.
- Spain ranks third in Europe in terms of installed power, and fourth worldwide in photovoltaic solar energy.
- Spain has the largest installed capacity in the world as regards thermosolar energy.
- One of the five largest electric companies in the world—the third largest with private capital—is Spanish.
- Three of the world’s five leading companies in the thermosolar sector are Spanish.
- The world’s fourth manufacturer of wind turbines is Spanish.
- The principal private generator of power in Mexico, and the second generator of electricity in that country is a Spanish company.
- The largest constructor of wind farms is a Spanish company.
- The world’s largest offshore wind farm in deep waters is being built by a Spanish company.
- The first commercial tower plant in the world was built by a Spanish company, as well as the first commercial tower technology plant with molten salt storage.
- The world’s most prestigious concentrating solar research centre built through public initiative is Spanish, as well as the one built through private initiative.
- The largest private utility in Latin America is Spanish.
- Europe’s leading company in the field of refining is Spanish.
- The leading distributor of natural gas is Spanish.
The leading—and largest—gas and electricity company in Latin America is Spanish.

One of the main liquefied natural gas operators in the world is also Spanish.

2 > INFRASTRUCTURES SECTOR

The great vitality and advanced technology of Spanish companies in this field have placed Spain in a leadership position in this sector, with companies operating throughout the world in the most important projects, having earned unquestionable prestige.

2.1 > Transport infrastructures

The largest highway concessions company in the world is Spanish.

The four largest companies worldwide in infrastructure concessions are Spanish.

Seven of the world’s ten largest companies in infrastructure management are Spanish.

The largest Western construction company, focusing on worldwide infrastructure development is Spanish.

Seven Spanish companies build or manage 40% of the principal transport concessions in the world, mainly airports, ports and highways.

The world’s leading airport operator in terms of passengers, with 192.8 million recorded passengers in 2010, is Spanish, followed at a distance by the Port Authority (USA). In terms of volume of air traffic, Spain ranks third in Europe.

The leading private infrastructure operator in the world is a Spanish company.

The United Kingdom’s largest private construction contract, Heathrow Airport’s new Terminal T2A (totalling around €900 million), which will be used by twenty million passengers a year, is being implemented by a Spanish company.

One of the most important engineering works in the world, the enlargement of the Panama Canal, has been carried out by a consortium led by a Spanish company.
The world’s first all-electronic toll highway without the need for toll barriers (free flow) that allows very high traffic volumes handled without long waiting times, the 407 ETR (Toronto), was built by a Spanish company.

2.2 Transport management

A third of the world’s air traffic is managed through systems developed and installed in more than ninety countries by a Spanish company that is the world leader for Flight Data positioning systems.

100% of Germany’s airspace is controlled by a Spanish company, which is also leading the Single European Sky project managed by Eurocontrol.

Two of the best private transportation assets in the world: Heathrow Airport in London, with the greatest volume of international traffic in the world, and the 407 ETR highway in Toronto, are managed by a Spanish company.

3 Railway infrastructures and high speed railways

Spain is an undisputed reference in this field: our railway sector is present in all five continents. Many countries have visited Spain to learn about our high speed railway model, and the consolidation of consortiums between Spanish companies to develop high speed railways has been very successful.

The Spanish high speed railway network enjoys worldwide renown and prestige. Our signage system has become the European standard, and Spanish companies are a reference in building and managing railway infrastructures—they are participating in the world’s most important projects in more than 90 countries in all five continents. This is reflected in:

The most important infrastructure project in the Arab world in recent decades—due to its significance and visibility, in addition to the amount—is going to be implemented by a Spanish–Saudi consortium, the Al Shoula Group, made up of twelve Spanish companies and two Saudi companies: the Mecca–Jeddah–Madinah high speed line, totalling around € seven billion. This project involves the construction, exploitation and maintenance of the railway line and of the trains for a period of twelve years. The
line will be 450 km long, and will serve more than 160,000 pilgrims per day.

- The high speed line between Ankara and Istanbul, another one of the three largest international railway works adjudicated in 2011, connecting the railway lines of the European side and those of the Asian side, and which will enable the circulation of high speed trains between both continents, is being built by a Spanish company.

- A Spanish company is among the ten most important manufacturers worldwide in terms of the design, manufacturing, maintenance and supply of equipment and components for railway systems, using cutting-edge technology.

4> INFRASTRUCTURES AND AIR AND SPACE SYSTEMS

- Spain is the seventh power in manufacturing satellites. A Spanish company is the world’s leading provider of Satellite Control Systems and the first in terms of orbital dynamics systems.

- Spanish Aeronautics ranks eighth worldwide, and half of the world’s commercial airplanes include Spanish technology.

- Spain is currently one of the few countries in the world capable of designing, manufacturing, assembling, certifying and maintaining a full airplane.

- Spain is the world’s second manufacturer of airplanes for military transport, in-flight refuelling and missions.

- Spain is the European leader in space programmes. In the recent exploration of Mars by Mars Curiosity rover, part of communications between the surface of Mars and Earth are managed through Spanish technology.

- The second-ranking European company in simulation of aeronautical platforms is Spanish, and has led significant projects such as the Eurofighter simulator.

- A Spanish airline is the top carrier between Europe and Latin America.

5> NAVAL TECHNOLOGY

- Spain is also a leader in military naval technology. A Spanish company is one of the top three designers of hi-tech military vessels.
6 **AUTOMOTIVE SECTOR**

- We rank second among European vehicle manufacturers, and ninth in the world, topping the rank in industrial vehicles.

- In the component industry, we are the world’s leading manufacturer of interior components and of hubcaps and trims, as well as of rear-view mirrors.

7 **FINANCIAL SECTOR**

- Two of the world’s principal financial institutions are Spanish.

- The best bank in the world is Spanish.

- 12% of the British banking system is controlled by a Spanish bank.

8 **INFORMATION AND COMMUNICATION TECHNOLOGIES (ICT) SECTOR**

- The largest bank in the euro zone in terms of stock market capitalization, and the world’s largest in terms of retail banking, is Spanish.

- The largest financial institution in Mexico is Spanish.

- Two Spanish banks dominate the Latin American banking system.

- Latin America’s leading insurance company is Spanish.

- In telecommunications, Europe’s leading company—and fifth in the world—in terms of turnover is Spanish. Present in twenty countries, and with a customer base of 312 million accesses, it is the world’s top integrated telecommunications company in terms of number of accesses outside its home market.

- Spain is a world leader in the development and implementation of electronic ID technologies and biometric solutions. Spain’s electronic ID card and passport is one of the world’s most ambitious and pioneering experiences.

- In e-government, Spain is the world’s ninth most advanced country, and fifth in Europe.
A Spanish company is a leader in global distribution systems (GDS), and the largest transaction processor for the worldwide travel and tourism sector.

As regards security, the company ranking third in the world in terms of turnover is Spanish.

**HEALTH TECHNOLOGIES**

In biotechnology, Spain ranks first in Europe and third in the world in the field of agrobiotechnology, and fifth in biochemistry and molecular biology.

A Spanish company is the world’s third largest producer of blood products and plasma, diagnostic systems, and medical and healthcare materials.

In transplants, Spain is the country with the highest donation rate in the world. Donations are always made altruistically, with a rate of 35.3 donors per million people, nearly doubling the EU rate (18.1), and eight points above that of the United States. Moreover, the Spanish model for transplant management is considered exemplary worldwide. In fact, it is being implemented in much of the world with an absolutely innovative and efficient system for managing communication and transfer of organs to the appropriate centre. The "Spanish model", as it is known, consists of a series of measures adopted in our country to improve organ donation. This model, widely described in scientific literature, has been recommended by the World Health Organization (WHO) and is being implemented throughout the world with very similar results to those achieved in our country.

**ENVIRONMENTAL TECHNOLOGIES**

As regards water treatment and desalination plants and waste water treatment plants, Spain is a world leader, and the top producer of desalinated water in Europe and Latin America. A Spanish firm is the world leader on the treatment of water and reverse osmosis desalination technology. Seven of the twenty largest international desalination companies are Spanish.

The first desalination plant in the United Kingdom, which provided water for the tourists
attending the Olympic games, was built by a Spanish company.

- The largest desalination plant in the USA was also built by a Spanish company.

- A Spanish company ranks fourth in the world in water management, and first in Latin America.

**11 \> OTHER INDUSTRIAL SECTORS**

- Spain is Europe’s third manufacturer of machine tools, third exporter and ninth worldwide.

- A Spanish firm is the world leader in terms of installed capacity in the production of stainless steel and the only manufacturer with four factories in four different continents. It is a leading producer and seller of stainless steel in the USA.

- The only producer in the world with the necessary technology for all families of cellulose, collagen, fibrous and plastic casings for the meat industry is a Spanish company. It is the world’s leading manufacturer of cellulose casings and ranks second in collagen casings, covering 36% of the worldwide market and 60% in cellulose casings.

**12 \> DISTRIBUTION AND FASHION**

- The world’s largest fashion distribution group, with a unique product strategy that is studied at the best business schools in the world is Spanish. Its business model associated with fashion is the greatest worldwide success in this sector, with 5,527 stores in eighty-two countries in all five continents. A Spanish firm tops the world ranking in the wedding dress market.

- A Spanish company is responsible for finishing 15% of the jeans manufactured in the world.

- We are the world’s third manufacturer of eyeglasses.

**13 \> PUBLISHING INDUSTRY**

- Spain ranks fourth in the world, after the USA, the United Kingdom and Germany, with very strong companies in this sector.
14 HABITAT SECTOR

- The world’s leading manufacturer of sanitation facilities is a Spanish company present in more than one hundred and thirty countries, in four continents.

- A Spanish company is a world leader in quartz surfaces.

- It is also Spanish the company spearheading the sector of ceramic floor and wall tiles.

15 FOOD AND AGRICULTURE SECTOR

- A Spanish company is the leading world producer of rice and the second of pasta.

- Spain is the top producer and exporter of olive oil.

- Spanish oils rank among the top for quality in all the international competitions held in this field.

- We are world leaders in producing and marketing table olives.

- We are the world’s top exporter of fruit and vegetables, ahead of the USA and the Netherlands.

- Spain is the EU’s second producer—and the world’s fourth—of pork meat.

- Spain has the world’s largest extension of vineyards, and is the world’s third-ranking producer of wine and the second-ranking worldwide exporter.

- A Spanish company spearheads the world’s production of sparkling wine.

- Also Spanish is the world’s leading fishing company, operating throughout the world.

- Spain is a leader in ecological agriculture. It dedicates the largest surface in the EU to ecological production.

16 TOURISM SECTOR

- Spain is the world’s top holiday tourism destination, the second most visited country in the world, the world’s third destination in number of international meetings and the
second-ranking country in terms of tourism revenue, after the United States and before France, Italy, China and Germany.

- It is the second country with the most world heritage, after only Italy, with forty three World Heritage sites; it ranks third in number of natural spaces declared Biosphere Reserves by United Nations Educational Scientific and Cultural Organization – UNESCO –.

- The Camino de Santiago, the route travelled by pilgrims from all over the world to reach Santiago de Compostela, has been declared First European Cultural Itinerary, and has been included in UNESCO’s list of World Heritage.

- Spain is also the third country in the world in number of hotel rooms.

- Five Spanish companies are among the world’s thirty most important hotel groups, and one of them is the world’s leading holiday hotel chain.

- Europe’s largest ecological reserve, Doñana National Park, is in Spain, and we rank second in Europe in terms of extension of natural spaces.

- We have the largest number of Blue Flag beaches in the northern hemisphere: 511.

- We rank second in the world in biosphere reserves on the UNESCO list, with forty two, after only the USA, which has forty seven.

- In the gastronomy sector there has also been a profound change and nowadays Spain is the fifth country with the most Michelin stars, after France, Japan, Germany and Italy. Spain has some of the world’s best chefs and restaurants. The great Spanish chefs have been trailblazers in the field of creative and modern cuisine, and are present and renowned all over the world.

- Spain is one of the few countries with a culinary university—the Basque Culinary Center—in Mondragón, with an R&D&I centre managed by all the most prestigious and Michelin star-winning chefs in Spain.

17 SPORTS

In sports, Spain has been growing in recent years, is currently acknowledged as a great power in many different sports and our athletes are the great ambassadors of Marca España.

- In football, Spain’s National Team’s latest triumph—winning the European Cup for the second time—has made it the first team in the world to win a European Cup, a World Cup, and
another European Cup consecutively, with Iker Casillas, Xavi Alonso, Arbeloa, Fernando Torres, Iniesta, etc.

Spain has also been world champions in basketball, handball, water polo, indoor football, roller hockey, rhythmic gymnastics, karate, swimming, and synchronized swimming. In tennis, the Spanish team has won the Davis Cup on five occasions.

Real Madrid is the leading football club in terms of revenue. Real Madrid and F.C. Barcelona are two of the most awarded clubs in history.

On the continental level, Real Madrid is the team that has won the most European championships, both in football (the current Champions League), with nine victories, and in basketball (Euroleague), with eight. F.C. Barcelona, with four and two victories respectively, is also outstanding in handball (eight European victories) and roller hockey (nineteen European victories).

Individually, in tennis, Rafa Nadal, the first player in the world to win the Roland Garros tournament seven times, is considered the best player in history on clay, and leads the "Spanish Armada"; Carlos Moyá and Juan Carlos Ferrero have also occupied top positions in the world ranking.

In the motor field, Spain plays a key role. In motor racing, worldwide championships have been twice won by Fernando Alonso. As for motorcycle, eleven victories have been achieved in World races (four by Jorge Lorenzo in MotoGP; two by Marc Márquez and Pol Espargaró in Moto2, respectively; three by Maverick Viñales in Moto3). Indeed, Spain is the only country that has won all three motorcycle races in the same year: Moto1, Moto2 and Moto3. Nonetheless, Ángel Nieto is the second most awarded pilot racer in history, with thirteen world victories. Moreover, at rally driving, Marc Coma (on three occasions), Nani Roma (once) and Carlos Sainz (once) achieved the five Spanish victories in the prestigious Paris–Dakar rally.

Spain also ranks top in other sports, such as cycling (Miguel Indurain, Alberto Contador, Carlos Sastre...), golf (Severiano Ballesteros, Txema Olazábal...), sailing and a number of athletics disciplines (1.500, 20 km., race walk, marathon...).
On the European level, we have been champions of football (in all categories, and also the women's team), basketball (also the women's national team), volleyball, indoor football, beach football, roller hockey (also the women's national team), hockey, rhythmic gymnastics, karate, taekwondo, Olympic shooting, triathlon, sailing, karate, swimming, synchronized swimming, weightlifting and baseball.

In basketball, the Spanish team was second in the London Olympic Games. Pau Gasol was the first Spaniard to win an NBA ring, once in 2009 and again in 2010. After his arrival in the NBA, a slew of Spaniards also joined: Raúl López, José Manuel Calderón, Jorge Garbajosa, Juan Carlos Navarro, Sergio Rodríguez, Marc Gasol, Rudy Fernández and Ricky Rubio.

We could mention more sports in which Spanish teams and athletes are in top world positions. With their efforts and dedication, these athletes embody the pride of being Spanish.

Moreover, many Spanish companies are dedicated to manufacturing sports equipment, and they are in leading positions worldwide. For example, the largest manufacturer of cutting-edge synthetic turf is a Spanish company.

18 EDUCATION

Spain has some of the three best business schools in the world, ranking first, fifth and twelfth in the Financial Times business school rankings.

19 THE SPANISH LANGUAGE

Spanish is the second most widely spoken language in the world, after Mandarin; the second most important language in international communications, and the second language most used on the Internet.

More than 495 million people speak Spanish, including native speakers, speakers of Spanish as a second language, and speakers of Spanish as a foreign language.
By 2050, the United States will be the number-one Spanish-speaking country in the world.

For demographic reasons, the percentage of world population speaking Spanish as a native language is increasing, whereas the proportion of speakers of Chinese and English is diminishing.

By 2030, 7.5% of the world’s population will be Spanish-speaking (a total of 535 million people), a significant distance ahead of Russian (2.2%), French (1.4%) and German (1.2%). By then, only Chinese will have more native speakers than Spanish.

In three or four generations, 10% of the world’s population will be able to communicate with each other in Spanish.

The image of Spanish language is associated with quality international culture.

Instituto Cervantes is seeing an annual growth of 8% in enrolment of students of Spanish.

We have seven Spanish Nobel Laureates: five in Literature and two in Medicine.

The Prince of Asturias Awards and the Cervantes Awards enjoy great international prestige.
SP AIN'S POSITIONING - LEADERSHIP KEY FACTORS
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