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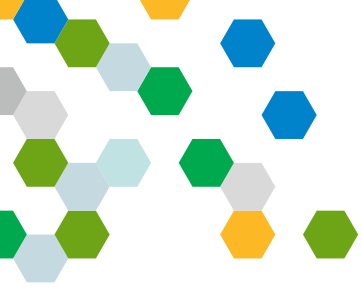
## SPAIN: SURVEY ON POTENTIAL REPEAT OF GENERAL ELECTIONS

January, 2016

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# Executive Summary

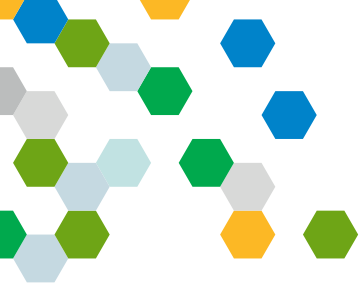
## THE MOST IMPORTANT CONCLUSIONS DRAWN FROM THE STUDY ARE AS FOLLOWS

- Voter turnout would be lower than that of 20-D; dropping from 73 % to 69 %.
- PP and PSOE are on an upward trend: PP would rise by 2.7 points compared to the results obtained on 20-D and PSOE would improve by 1.5 points. Together, they would account for 55 % of the votes. This rise would result in 136 seats for PP (13 more than on 20-D) and 96 for PSOE.
- Podemos and its allies would drop by 1.2 points, which would entail a loss of 6 seats.
- Ciudadanos would experience a drop of 2.1 points, although it would actually translate into a strong loss of seats, falling from 40 to 29. Most of the votes lost by Ciudadanos would go to PP.
- Izquierda Unida's performance would worsen, losing one of its two seats.
- As regards Catalonia, "Democracia y Libertad" –promoted by CDC– would also be weakened, losing one of its eight seats. It should be noted that the fieldwork was carried out throughout the days when the Catalanian parties reached an agreement to elect Carles Puigdemont as the new President of the Region.

## FURTHER RELEVANT DATA

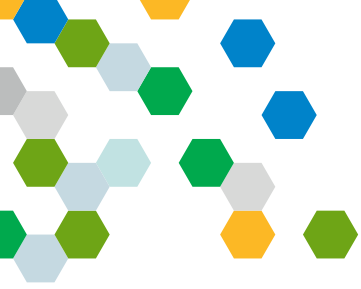
- Currently, **17.7 % of the Spanish population is considering whether to vote for a different party if the country were to hold new elections:**
  - » 71 % of respondents confirmed that they would vote for the same party again, 10.6 % would definitely vote for a different group and 7.1 % may vote for another faction.

- » The most loyal voter base is that of PP: 94.5 % of their previous supporters stated that they would definitely vote for the aforementioned party. The two parties with the most fragile voter bases were Ciudadanos and IU. Los dos electorados con una fidelidad más frágil son los de Ciudadanos e IU.
- » Only 66 % of the people who voted for Ciudadanos would definitely do it again, 16.4 % said that they might vote for another party and 9.8 % have already decided to vote for a different political organization.
- Given the situation resulting from the 20-D Elections, the public opinion is divided over the best course of action:
  - » **38.5 % would prefer several parties to reach an agreement and form a government.** This approach is supported by 52 % of PSOE voters, 57 % of Podemos members and 42 % of Ciudadanos backers.
  - » **29.2 % would rather have the most voted party govern** even if it implies a minority cabinet. This idea is greatly supported by PP voters (70.3 %) and received much less support among the rest of the parties.
  - » **27.8 % would prefer to repeat elections.**
- **Mariano Rajoy and Pedro Sánchez have the majority support of their voters to run again for president** if the elections were to be repeated:
  - » 58.7 % of potential PP voters stated that Rajoy should be the candidate again, while 23.4 % would rather have a different candidate.
  - » As regards PSOE, 72.4 % of their voters support Pedro Sánchez to run again for President and 14.9 % would prefer a different candidate.



## Introduction

- The outcome of the 2015 General Elections held in Spain on December 20 has confirmed the political upheaval experienced in the aforementioned country over the last two years. The process **ending with the bipartisanship model**, which prevailed since the democratic transition, began at the European Elections held in May 2014 with the emergence of the newly created political party Podemos, achieving over 1,200,000 votes in its first elections. Regional and local elections held in May 2015 confirmed the growth recorded by this left-wing party as well as the appearance of Ciudadanos on the national scene –a Centre party from Catalonia– which almost achieved 1.5 million votes throughout Spain.
- On December 20, 2015, Spain decided that, unlike what happened in 2011, **no party shall be able to govern by itself**, not even through a relative majority. The fall in seats recorded by both PP and PSOE was accompanied by the entry into Parliament of Podemos and Ciudadanos (C's), without any possible combination between just two political parties (with the exception of the two main forces) to enable the inauguration of the President. Given the fact that PSOE has categorically ruled out the possibility of forming a Government with the PP, the only alternative implies collaboration between three or more political parties voting for or abstaining from voting in the election of a new President, who, in any case, shall form a minority government.
- Given the possibility of not reaching the required majority in order to elect a new president, this survey aims at **clarifying whether holding new elections would entail substantial variations**, as well as the trend and strength of the aforementioned changes.
- The size of the analyzed sample amounted to **1,000 interviews, carried out throughout the country**. Data collection was performed by the Instituto IMPO via telephone, between January 9 and 11, 2016, exclusively interviewing people entitled to vote in the general elections. The margin of error is  $\pm 3.1$  ( $p=q=50\%$ ), at a confidence level of 95.5%. Regional projection data was obtained through a social simulation based on historical vote distribution in Spain.



# Preferred solution to solve the current deadlock

**38.5 % of respondents would prefer an Agreements' Government, while 27.8 % would rather hold new elections.**

**NO PARTY ACHIEVED ENOUGH SUPPORT TO FORM A GOVERNMENT IN THE LAST ELECTIONS. WHICH OF THE FOLLOWING OPTIONS WOULD YOU RATHER IMPLEMENT?**

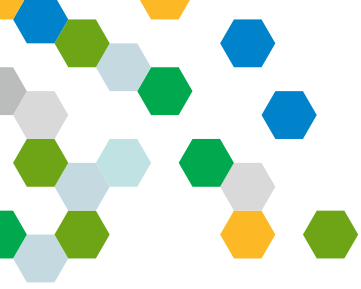
	Voters					
	%	PP	PSOE	PODEMOS*	C'S	IU
Most voted party shall govern even through a minority gov.	29,2	70,3	11,6	5,5	32,8	0,0
Agreement between several parties to form a government	38,5	19,7	52,0	57,0	42,0	67,3
Hold new elections	27,8	8,3	34,5	36,3	25,3	31,3
DK/NA	4,5	1,7	1,8	1,3	0,0	1,3

Source: own elaboration

\*Includes En Comú Podem (Catalonia), Compromís-Podemos (Valencian Community) and En Marea (Galicia).

The leading option (38.5 %) is that there is an agreement between parties to form a government, although the other two choices received significant support.

The results are clearly marked by the massive support of PP voters for the possibility of a government formed by the most voted party. If we exclude the aforementioned group, only 18 % of the voters supported this option, while 45 % preferred an agreement between parties and 31 % would rather hold new elections.



# Electoral Loyalty

**Were the elections to be repeated, 71 % of the electorate would vote for the same party.**

**The electoral bases of PP, PSOE and Podemos would remain quite loyal (95 %, 87 % and 84 % respectively).**

**The parties with the most fragile electoral bases are IU and Ciudadanos, losing almost 33% of the votes obtained on 20D.**

## IF THE ELECTIONS WERE TO BE REPEATED...

	Voters					
	%	PP	PSOE	PODEMOS*	C'S	IU
Would definitely vote for the same party	71,0	94,5	87,2	83,7	65,9	67,2
May vote for a different party	7,1	1,5	4,7	6,1	16,4	15,6
Would certainly vote for a different party	10,6	1,1	4,6	9,9	9,8	9,0
Would probably not vote	9,2	2,5	2,5	0,2	1,9	8,2
DK/NA	2,1	0,5	1,0	0,0	6,0	0,0

Source: own elaboration

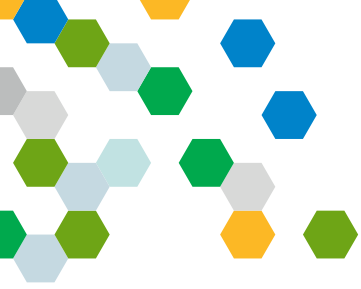
\*Includes En Comú Podem (Catalonia), Compromís-Podemos (Valencian Community) and En Marea (Galicia).

PP has a very loyal electoral base, close to 95 %. PSOE and Podemos also maintain a high percentage of voters' loyalty, over 80 %. 9 % of PSOE supporters and 16 % of Podemos voters may vote for a different party.

Clearly, the most fragile electoral base is that of Ciudadanos. Only 66 % of those who supported them on 20-D would definitely do it in a new elections. Up to 26 % could vote for a different party (16 % may do it and 10 % stated that they would certainly do it). To this must be added the fact that 6 % of C's voters did not

respond to this question, a significantly higher figure than that of the other parties.

IU's electoral base is not very loyal either: 67 % would vote for the aforementioned party again, while 25 % may vote for a different party. The percentage of people who would not vote for anyone in a new elections is quite high compared to the figures recorded among the electoral bases of the remaining parties (8.2 %); this result is likely caused by disappointment entailed by the poor profitability of their vote (with over 900,000 votes, IU merely won two seats).



## Candidates Preferences

Potential PP and PSOE voters mostly prefer the same candidates if the elections were to be repeated.

Support among PSOE voters for Pedro Sánchez is much greater (72.4 %) than that of PP voters in relation to Mariano Rajoy (58.7 %).

**IF THE ELECTIONS WERE TO BE REPEATED, WHICH CANDIDATE WOULD YOU PREFER?  
(EXCLUSIVELY ASKED TO PP AND PSOE VOTERS)**

	Voters	
	PP	PSOE
	Mariano Rajoy	Pedro Sánchez
Same candidate	71,0	94,5
Different candidate	7,1	1,5
Irrelevant	10,6	1,1
DK/NA	9,2	2,5

Source: own elaboration



# Voting intentions in repeat elections

Participation may be significantly lower than that of 20-D (69 % and 73 % respectively).

Emerging parties might suffer a setback: Ciudadanos -2.1 % and Podemos -1.2 %.

Traditional parties may improve their results: PP +2.7 % and PSOE +1.5 %.

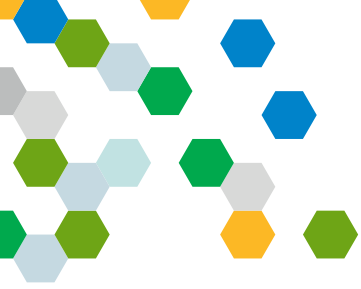
## IF NEW GENERAL ELECTIONS WERE TO BE CALLED, WHO WOULD YOU VOTE FOR?

	Direct Voting Intention	Voting Intention + Calibration	Forecasts	20-D Results	Differences between vote fore-casts and 20-D
PP	32,7	32,1	31,4	28,72	+2,68
PSOE/PSC	21,3	22,2	23,5	22,01	+1,48
PODEMOS (*)	20,6	19,2	19,5	20,66	-1,16
Ciudadanos	12,3	12,6	11,8	13,93	-2,13
Unidad Popular/Izquierda Unida	3,6	3,9	3,4	3,67	-0,27
CDC / Democracia y Libertad	0,9	1,1	1,8	2,25	-0,45
ERC	2,0	1,9	2,3	2,39	-0,09
PNV	1,6	1,6	1,2	1,2	-
EH-Bildu	0,4	0,5	0,9	0,87	0,03
Others	3,0	3,9	3,4	1,2	2,2
Blank Vote	1,6	1,4	0,8	0,75	0,05

Source: own elaboration

\*Includes En Comú Podem (Catalonia), Compromís-Podemos (Valencian Community) and En Marea (Galicia).





## Voters' shift

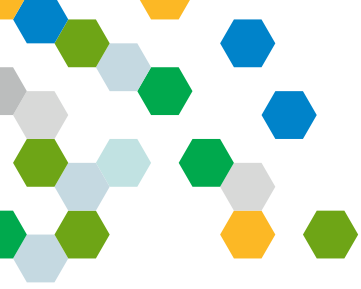
The most significant change in the new elections would be the shift from Ciudadanos' voters towards PP –567,000 people–.

### VOTES' SHIFT OVER THE ONES OF THE 20-D ELECTIONS

	PP	PSOE	PODEMOS*	C'S	IU	OTROS
PP	83,4	2,0	5,3	16,2	--	1,4
PSOE	0,5	82,1	6,0	1,2	4,1	4,2
PODEMOS*	0,4	3,2	82,7	5,6	5,5	2,8
CIUDADANOS	4,5	--	0,9	62,5	2,3	1,4
IU	--	0,6	0,4	--	70,9	--
OTROS	--	--	--	--	3,6	57,7
En blanco	0,7	1,2	--	--	--	5,6
None/Would not vote	1,5	0,8	--	1,9	--	12,7
DK/NA	8,9	10,2	4,7	12,7	13,6	14,1

Source: own elaboration

\*Includes En Comú Podem (Catalonia), Compromís-Podemos (Valencian Community) and En Marea (Galicia).



# Distribution of seats based on expected participation

**Expected participation: 69 %.**

**There are two potential distributions of seats: the first is based on the current situation and parties, and the second envisages the possibility of an alliance between Podemos and IU.**

**In both scenarios, both PP and PSOE improve their results and C's suffers a major setback.**

**Thanks to a potential alliance between Podemos and IU the coalition between PSOE and Podemos would be close to absolute majority.**

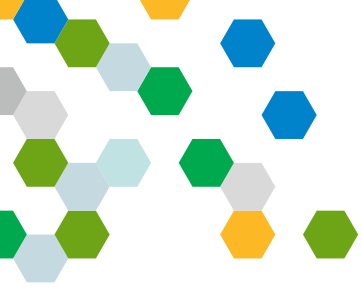
	FORECAST: Current parties		FORECAST Podemos+IU	20-D	
	%	SEATS	SEATS	%	SEATS
PP	31,4	136	128	28,7	123
PSOE/PSC	23,5	96	93	22,0	90
PODEMOS (*)	19,5	63	78	20,7	69
Ciudadanos	11,8	29	26	13,9	40
Unidad Popular/Izquierda Unida	3,4	1	-	3,7	2
CDC / Democracia y Libertad	1,8	7	7	2,3	8
ERC	2,3	9	9	2,4	9
PNV	1,2	6	6	1,2	6
EH-Bildu	0,9	2	2	1,0	2
Others	3,4	1	1	3,3	1
Blank Vote	0,8	--	--	0,8	--

Source: own elaboration

\*Includes En Comú Podem (Catalonia), Compromís-Podemos (Valencian Community) and En Marea (Galicia).

Regarding the consequences of a potential alliance between Podemos and IU, it should be noted that alliances between political parties do not usually translate into an exact sum of their previous electoral

bases, but the survey already includes the alienation experienced among IU voters (abstention) and thus the final result could be close to the previously mentioned figure.



# Distribution of seats by province, forecast based on current parties

Data broken down by region (Autonomous Communities).

In some key regions the last seat has moved from Ciudadanos or Podemos to PP or, rarely, towards PSOE.

REGION	SEATS	RESULTS	PP	PSOE	PDMS*	C'S	IU	CDC	ERC	PNV	EH	CC
ANDALUSIA	61	Forecast	23	24	8	6						
		20-D	21	22	10	8						
ARAGON	13	Forecast	7	4	1	1						
		20-D	6	4	2	1						
ASTURIAS	8	Forecast	3	2	2	1						
		20-D	3	2	2	1						
CANARY ISLANDS	15	Forecast	6	4	3	1						1
		20-D	5	4	3	2						1
CANTABRIA	5	Forecast	3	1	1							
		20-D	2	1	1	1						
CASTILE-LA MANCHA	21	Forecast	12	8	1	0						
		20-D	10	7	1	3						
CASTILE AND LEON	32	Forecast	18	10	3	1						
		20-D	17	9	3	3						
CATALONIA	47	Forecast	5	9	12	5		7	9			
		20-D	5	8	12	5		8	9			
EXTREMADURA	10	Forecast	5	5	0							
		20-D	4	5	1							
GALICIA	61	Forecast	11	6	6	0						
		20-D	10	6	6	1						
BALEARIC ISLANDS	13	Forecast	3	2	2	1						
		20-D	3	2	2	1						
LA RIOJA	8	Forecast	2	1	1							
		20-D	2	1	1							
MADRID	15	Forecast	14	7	8	6	1					
		20-D	13	6	8	7	2					



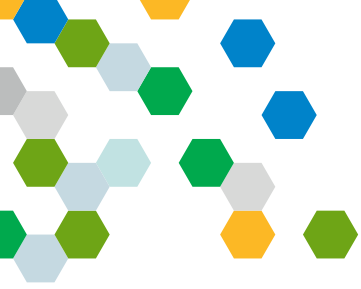
REGION	SEATS	RESULTS	PP	PSOE	PDMS*	C'S	IU	CDC	ERC	PNV	EH	CC
MURCIA	5	Forecast	5	2	1	2						
		20-D	5	2	1	2						
NAVARRRE	21	Forecast	2	1	2							
		20-D	2	1	2							
BASQUE COUNTRY	32	Forecast	2	3	5					6	2	
		20-D	2	3	5					6	2	
VALENCIAN COMMUNITY	47	Forecast	13	7	7	5						
		20-D	11	7	9	5						
CEUTA	10	Forecast	1									
		20-D	1									
MELILLA		Forecast	1									
			1									
<b>TOTAL</b>	<b>350</b>	<b>Forecast</b>	<b>136</b>	<b>96</b>	<b>63</b>	<b>29</b>	<b>1</b>	<b>7</b>	<b>9</b>	<b>6</b>	<b>2</b>	<b>1</b>
		<b>20-D</b>	<b>123</b>	<b>90</b>	<b>69</b>	<b>40</b>	<b>2</b>	<b>8</b>	<b>9</b>	<b>6</b>	<b>2</b>	<b>1</b>

Source: own elaboration

\*Includes En Comú Podem (Catalonia), Compromís-Podemos (Valencian Community) and En Marea (Galicia).

### SIGNIFICANT DIFFERENCES

- In Andalusia, PP would win a seat in Almeria at the expense of Podemos and 1 in Seville at the expense of C's. PSOE would win a seat in Cordoba, lost by C's and one further seat in Huelva –which had previously been won by Podemos–.
- In Castile-La Mancha, PP would obtain an additional seat in Guadalajara and Toledo at the expense of C's. In Albacete, it would be PSOE who would improve by one seat thanks to C's. C's would lose all current seats –3–.
- In Castile and Leon, PP would take one seat from C's in Salamanca. PSOE would win a seat in Leon. C's would merely retain one of the three seats it currently has.
- In Madrid, both PP and PSOE would win a further seat at the expense of C's and IU respectively.
- In the Valencian Community, PP would win two additional seats (Alicante and Valencia) at the expense of Podemos, losing two of its nine seats.



# Distribution of seats by province, forecast based on a potential alliance between Podemos and IU

Data broken down by region (Autonomous Communities).

With the addition of IU votes, Podemos would win more seats and prevent losses in the regions where their seats are at risk.

REGION	SEATS	RESULTS	PP	PSOE	PDMS*	C'S	IU	CDC	ERC	PNV	EH	CC
ANDALUSIA	61	Forecast	22	22	13	4						
		20-D	21	22	10	8						
ARAGON	13	Forecast	5	4	3	1						
		20-D	6	4	2	1						
ASTURIAS	8	Forecast	3	2	2	1						
		20-D	3	2	2	1						
CANARY ISLANDS	15	Forecast	5	4	4	1						1
		20-D	5	4	3	2						1
CANTABRIA	5	Forecast	3	1	1							
		20-D	2	1	1	1						
CASTILE-LA MANCHA	21	Forecast	11	7	3	0						
		20-D	10	7	1	3						
CASTILE AND LEON	32	Forecast	18	10	3	1						
		20-D	17	9	3	3						
CATALONIA	47	Forecast	6	9	11	5		7	9			
		20-D	5	8	12	5		8	9			
EXTREMADURA	10	Forecast	4	5	1							
		20-D	4	5	1							
GALICIA	23	Forecast	11	6	6	0						
		20-D	10	6	6	1						
BALEARIC ISLANDS	8	Forecast	3	2	2	1						
		20-D	3	2	2	1						
LA RIOJA	4	Forecast	2	1	1							
			2	1	1							



REGION	SEATS	RESULTS	PP	PSOE	PDMS*	C'S	IU	CDC	ERC	PNV	EH	CC
MADRID	36	Forecast	13	7	10	6	-					
		20-D	13	6	8	7	2					
MURCIA	10	Forecast	5	2	2	1						
		20-D	5	2	1	2						
NAVARRRE	5	Forecast	2	1	2							
		20-D	2	1	2							
BASQUE COUNTRY	18	Forecast	2	3	5					6	2	
		20-D	2	3	5					6	2	
VALENCIAN COMMUNITY	32	Forecast	11	7	9	5						
		20-D	11	7	9	5						
CEUTA	1	Forecast	1									
		20-D	1									
MELILLA	1	Forecast	1									
			1									
<b>TOTAL</b>	<b>350</b>	Forecast	<b>128</b>	<b>93</b>	<b>78</b>	<b>26</b>	<b>-</b>	<b>7</b>	<b>9</b>	<b>6</b>	<b>2</b>	<b>1</b>
		20-D	<b>123</b>	<b>90</b>	<b>69</b>	<b>40</b>	<b>2</b>	<b>8</b>	<b>9</b>	<b>6</b>	<b>2</b>	<b>1</b>

Source: own elaboration

\*Includes En Comú Podem (Catalonia), Compromís-Podemos (Valencian Community) and En Marea (Galicia).

### SIGNIFICANT DIFFERENCES

- The most important consequence entailed by this alliance would take place in Andalusia, where Podemos would win one seat in Malaga and one in Seville at the expense of C's and a further seat in Jaen (PSOE). The aforementioned party would win an additional seat in Cordoba and PP would improve by one seat in Almeria, both at the expense of C's, dropping from 8 to 4 seats.
- In Castile La Mancha, Podemos would take two seats from C's in Albacete and Guadalajara. On the other hand, PP would win the last seat of C's.
- In Madrid, Podemos would take the two seats that IU currently has and would prevent PP from winning an additional seat, as the latter would go to PSOE.
- In the Valencian Community, Podemos –thanks to IU– would not lose any seats; results would remain unaltered.

# Reputation Management, Communication and Public Affairs

## Leader in Spain, Portugal and Latin America

LLORENTE & CUENCA is the **leading Reputation, Communication and Public Affairs management consultancy in Spain, Portugal and Latin America**. The team comprises 21 partners, of which 19 are professionals and two are financial, along with **more than 450 professionals** that provide strategic consultancy services to companies in all business sectors with operations targeted at the Spanish- and Portuguese-speaking markets.

LLORENTE & CUENCA currently has its own offices in **Argentina, Brazil, Colombia, Chile, Ecuador, Spain, United States** (Miami), **Mexico, Panama, Peru, Portugal and the Dominican Republic**. It is also able to offer its services through affiliate companies in **Bolivia, Paraguay, Uruguay and Venezuela**.

In 2015, the firm's international development earned it 56th position on the **Global Ranking of the most important communication companies in the world**, a leader board drawn up by The Homes Report.

It is the **communications firm that has won most awards in the markets where it operates**. So far this year it has won **fifty four awards** through campaigns carried out for clients like Embratur, Coca-Cola Iberia, Avon, Antamina, Gas Natural Fenosa, Gonvarri Steel Industries, CaixaBank, SABMiller or L'Oréal, inter alia, and corporate projects like the launch of the new corporate site, the annual report 2014 or the interactive animation document "Entertainment Territory". Furthermore, it competed in the LinkedIn #PremiosIN2015 to be the company that best communicates on LinkedIn in Spain.

## Team of Specialists

### **Joan Navarro**

Partner and Vice-Chairman of Public Affairs at LLORENTE & CUENCA Spain  
jnavarro@llorentecuenca.com

### **Cristobal Herrera**

Manager of Public Affairs at LLORENTE & CUENCA Spain  
cherrera@llorentecuenca.com

# LLORENTE & CUENCA

## CORPORATE MANAGEMENT

José Antonio Llorente  
Founding Partner and Chairman  
jalloriente@llorenteycuenca.com

Enrique González  
Partner and CFO  
egonzalez@llorenteycuenca.com

Adolfo Corujo  
Partner and Chief Talent and  
Innovation Officer  
acorujo@llorenteycuenca.com

Jorge Cachinero  
Corporate Director of Innovation  
jcachinero@llorenteycuenca.com

## MANAGEMENT - SPAIN AND PORTUGAL

Arturo Pinedo  
Partner and Managing Director  
apinedo@llorenteycuenca.com

Goyo Panadero  
Partner and Managing Director  
gpanadero@llorenteycuenca.com

## MANAGEMENT - LATIN AMERICA

Alejandro Romero  
Partner and CEO Latin America  
aromero@llorenteycuenca.com

Luisa García  
Partner and CEO Andes' Region  
lgarcia@llorenteycuenca.com

José Luis Di Girolamo  
Partner and CFO Latin America  
jldgirolamo@llorenteycuenca.com

## HR MANAGEMENT

Daniel Moreno  
HR Manager for Spain  
and Portugal  
dmoreno@llorenteycuenca.com

Marjorie Barrientos  
HR Manager for Andes' Region  
mbarrientos@llorenteycuenca.com

Karina Valencia  
HR Manager for North America,  
Central America and Caribbean  
kvalencia@llorenteycuenca.com

Karina Sanches  
HR Manager for  
the Southern Cone  
ksanches@llorenteycuenca.com

## *Cink.*

Sergio Cortés  
Partner. Founder and Chairman  
scortes@cink.es

Calle Girona, 52 Bajos  
08009 Barcelona  
Tel. +34 93 348 84 28

## SPAIN AND PORTUGAL

### Barcelona

María Cura  
Partner and Managing Director  
mcura@llorenteycuenca.com

Muntaner, 240-242, 1º-1ª  
08021 Barcelona  
Tel. +34 93 217 22 17

### Madrid

Joan Navarro  
Partner and Vice-president  
of Public Affairs  
jnavarro@llorenteycuenca.com

Amalio Moratalla  
Partner and Senior Director  
amoratalla@llorenteycuenca.com

José María de Urquijo  
Vice-President of Corporate and  
Financial Communications  
jmurquijo@llorenteycuenca.com

José Isaías Rodríguez  
Vice-President of European Affairs  
jirodriguez@llorenteycuenca.com

Lagasca, 88 - planta 3  
28001 Madrid  
Tel. +34 91 563 77 22

Ana Figueira  
Managing Director of  
Impossible Tellers  
ana@impossibletellers.com

Diego de León, 22, 3º izq  
28006 Madrid  
Tel. +34 91 438 42 95

### Lisbon

Madalena Martins  
Partner  
mmartins@llorenteycuenca.com

Tiago Vidal  
Managing Director  
tvidal@llorenteycuenca.com

Carlos Ruiz  
Director  
cruiz@llorenteycuenca.com

Avenida da Liberdade nº225, 5º Esq.  
1250-142 Lisbon  
Tel. + 351 21 923 97 00

## UNITED STATES

### Miami

Alejandro Romero  
Partner and CEO Latin America  
aromero@llorenteycuenca.com

600 Brickell Ave.  
Suite 2020  
Miami, FL 33131  
Tel. +1 786 590 1000

## MEXICO, CENTRAL AMERICA AND CARIBBEAN

### Mexico City

Juan Rivera  
Partner and Managing Director  
jrivera@llorenteycuenca.com

Av. Paseo de la Reforma 412, Piso 14,  
Col. Juárez, Del. Cuauhtémoc  
CP 06600, México D.F.  
Tel. +52 55 5257 1084

### Panama City

Javier Rosado  
Partner and Managing Director  
jrosado@llorenteycuenca.com

Av. Samuel Lewis  
Edificio Omega - piso 6  
Tel. +507 206 5200

### Santo Domingo

Iban Campo  
Managing Director  
icampo@llorenteycuenca.com

Av. Abraham Lincoln 1069  
Torre Ejecutiva Sonora, planta 7  
Tel. +1 809 6161975

## ANDES' REGION

### Bogota

María Esteve  
Managing Director  
mesteve@llorenteycuenca.com

Carrera 14, # 94-44. Torre B - of. 501  
Tel. +57 1 7438000

### Lima

Luisa García  
Partner and CEO Andes' Region  
lgarcia@llorenteycuenca.com

Av. Andrés Reyes 420, piso 7  
San Isidro.  
Tel. +51 1 2229491

### Quito

Alejandra Rivas  
General Manager  
arivas@llorenteycuenca.com

Avda. 12 de Octubre N24-528 y  
Cordero - Edificio World Trade  
Center - Torre B - piso 11  
Tel. +593 2 2565820

### Santiago de Chile

Claudio Ramírez  
Partner and General Manager  
cramirez@llorenteycuenca.com

Magdalena 140, Oficina 1801.  
Las Condes.  
Tel. +56 22 207 32 00

## SOUTH AMERICA

### Buenos Aires

Pablo Abiad  
Partner and Managing Director  
pabiad@llorenteycuenca.com

Enrique Morad  
CEO for Southern Cone  
emorad@llorenteycuenca.com

Daniel Valli  
Senior Director of New Business  
Development for the Southern Cone  
dvalli@llorenteycuenca.com

Av. Corrientes 222, piso 8. C1043AAP  
Tel. +54 11 5556 0700

### Rio de Janeiro

Yeray Carretero  
Director  
ycarretero@llorenteycuenca.com

Rua da Assembleia, 10 - Sala 1801  
RJ - 20011-000  
Tel. +55 21 3797 6400

### Sao Paulo

Marco Antonio Sabino  
Partner and Brazil Chairman  
masabino@llorenteycuenca.com

Juan Carlos Gozzer  
Managing Director  
jcgozzer@llorenteycuenca.com

Rua Oscar Freire, 379, Cj 111,  
Cerqueira César SP - 01426-001  
Tel. +55 11 3060 3390





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