



## **Colombia as a destination for BPO – ITO – KPO**

**2012**

• *Promoção de Turismo, Investimento e Exportações* • Förderung von Tourismus, Investition und Export • *Promotion du Tourisme, de L` Investissement et des Exportations* • Tourism, Foreign Investment and Exports Promotion • *Toeristische, Buitenlandse Invetiringen en Export Promotie* • **Promoción de Turismo, Inversión y Exportaciones** • *Promoção de Turismo, Investimento e Exportações* • Förderung von Tourismus, Investition und Export • *Promotion du Tourisme, de L` Investissement et des Exportations* • Tourism, Foreign Investment and Exports Promotion • *Toeristische Buitenlandse Invetiringen en Export*

# WHO WE ARE

**Proexport is Colombia's entity in charge of the promotion of International Tourism, Foreign Direct Investment, and non-traditional exports**

## EXPORTS



## INVESTMENT



## TOURISM



# Proexport's network: 28 offices around the world and 8 offices in Colombia



<b>Colombia</b>	1	Joint working plans with entrepreneurs interested in exports.
	2	Commercial Information and offer adjustment trough different areas such as Zeiky, DEI and Cooperation.
	3	Buyer missions
<b>Colombia and overseas</b>	4	Business Matchmaking
	5	International Fairs
	6	Technical Support and Commercial Missions
	7	Showrooms
	8	Web page for exporters and buyers
<b>Overseas</b>	9	Commercial Agendas
	10	Exporter Missions



# Recent investment projects supported by Proexport



Established one of its two world class R&D centers.

Opened a new Data Center oriented to Systems Integration, Outsourcing and Support Services.



Opened a new global service center in Medellin

Develop a Sugarcane ethanol project on approximately 10,000 hectares.



Opened a new business hotel offering 264 rooms, located in the heart of Bogotá's financial district.

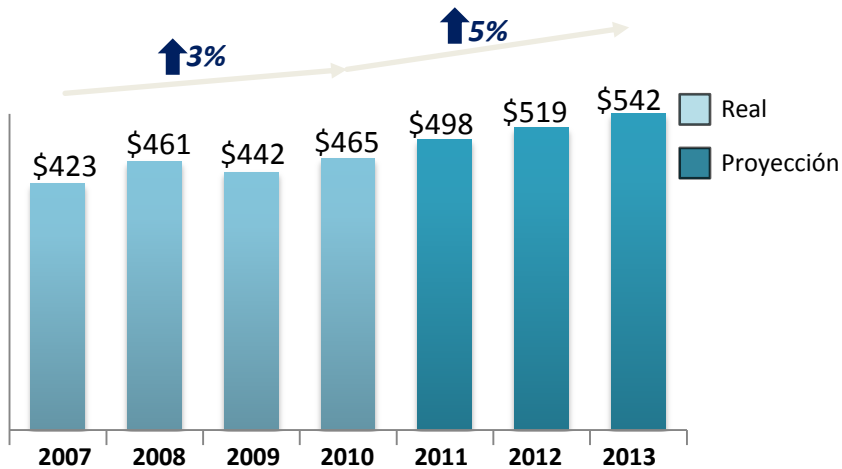
Acquired *ESI de Colombia*, a value added reseller of industrial electrical equipment and engineering services



# **BPO- KPO - ITO**

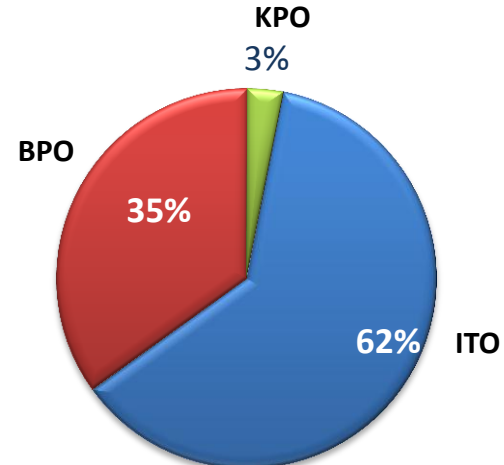
## **Global Sector**

## Global Market Share for ITO, BPO y KPO USD Thous. Millions.



Sustained Growth; for 2013 it is expected to grow up to USD 500 BM

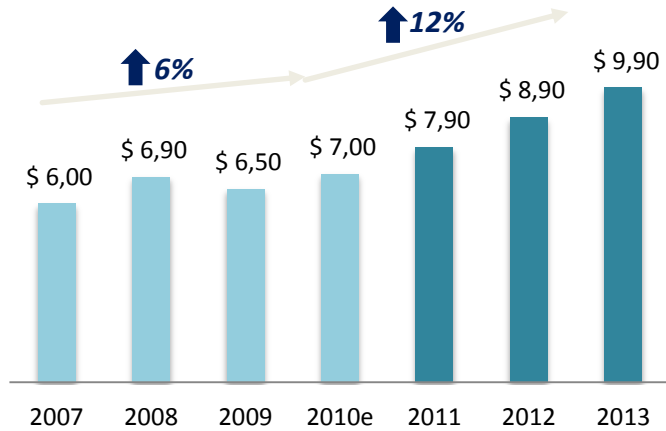
## Global Market Share for *Outsourcing* 2010



- For 2013 it is expected an annual growth of 6%, mainly represented in KPO (more than 20% YoY)
- ITO represents 62% of the Market



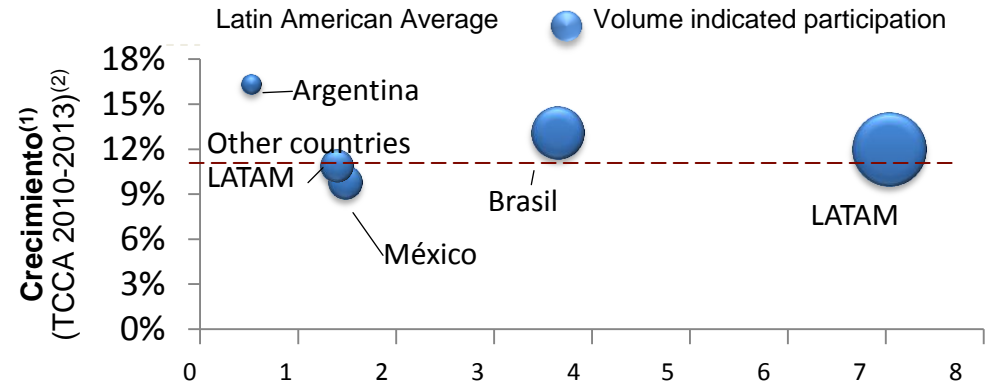
## BPO Market in Latin America US\$ Thous. Millions.



## BPO Market in Latin America



## Latin America BPO Demand Market



Size 2010  
(USD Millions)

(1) Crecimientos y participaci3n por pa3s tomados de Hfs, *How Latin America Powers Global IT Delivery*, 2011

(2) TCCA se refiere a Tasa de Crecimiento Compuesto Anual  
Fuente: Gartner, *Forecast Business Process Outsourcing, Worldwide 2000-2014*, 3Q 2010

## IN THE WORLD

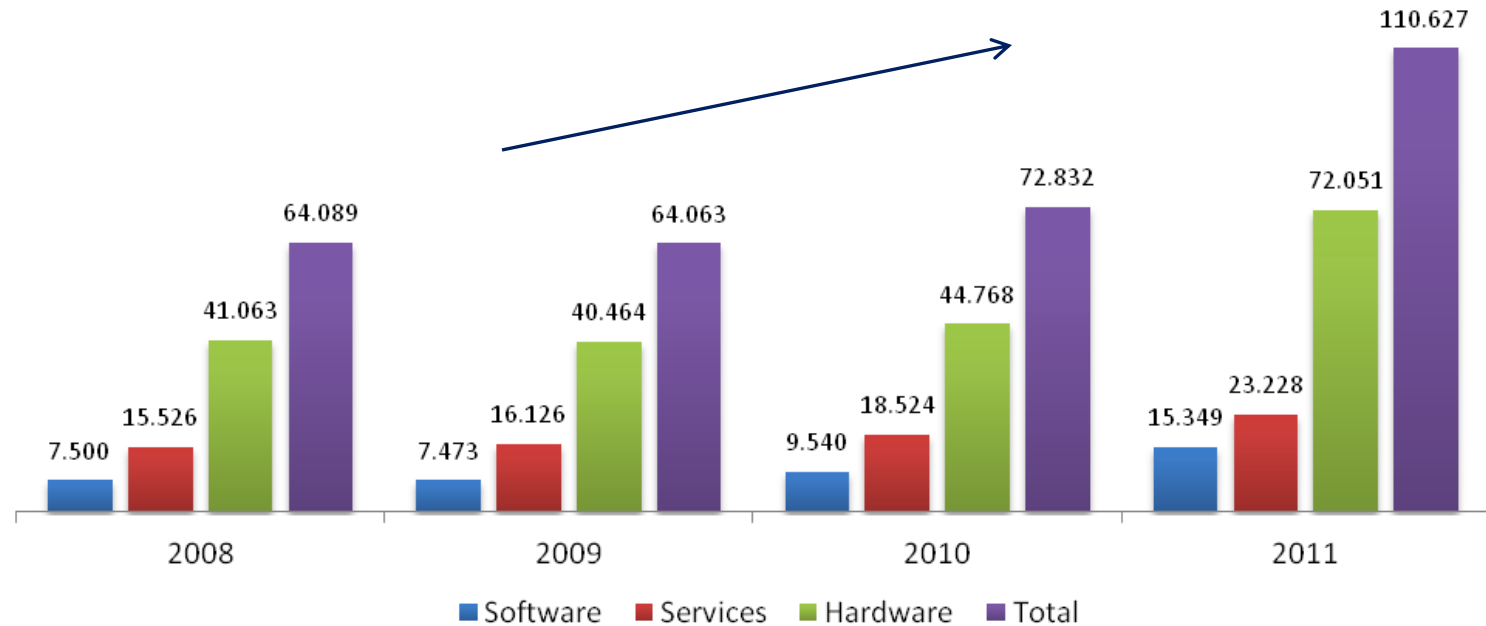
- Bigger services outsourcing.
- More competitive BPO offer.
- Shared services turned into BPO enterprises.
- Bigger interest in integrated services offers.
- Emergent markets leading the growth in BPO and ITO.
- Growth in KPO up to 5 times bigger than ITO and BPO.
- KPO mainly in data management and health services.

## IN THE REGION

- Growth up to 10 percent in the BPO and ITO markets.
- Captive Centers which provide services to other enterprises and/or acquired by BPO.
- Chile, Colombia and Central America are attracting every time more investment to the sector.
- Government's boost to the sector development through incentives and investments support.
- KPO growth.

# **BPO- KPO - ITO Industry in Colombia**

## Evolution of the IT Market in Latin America 2008-2011 US\$ Million



- IT Market L.A.: US\$ 110.63 billion

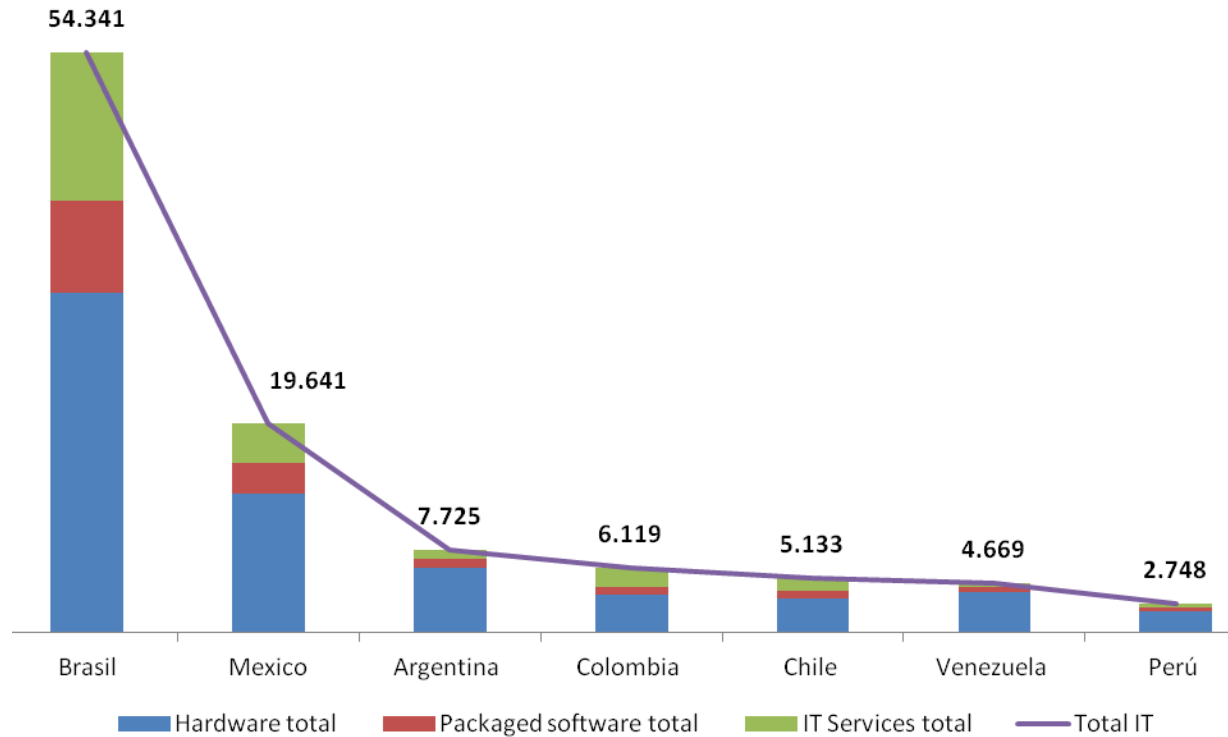
- IT Market in Colombia: US\$ 6.11 billion,

- Emerging countries considered as key players in the industry according to IDC

# Colombia: one of the countries in the region investing the most on IT

## IT Sales - América Latina 2011

US\$ MII.



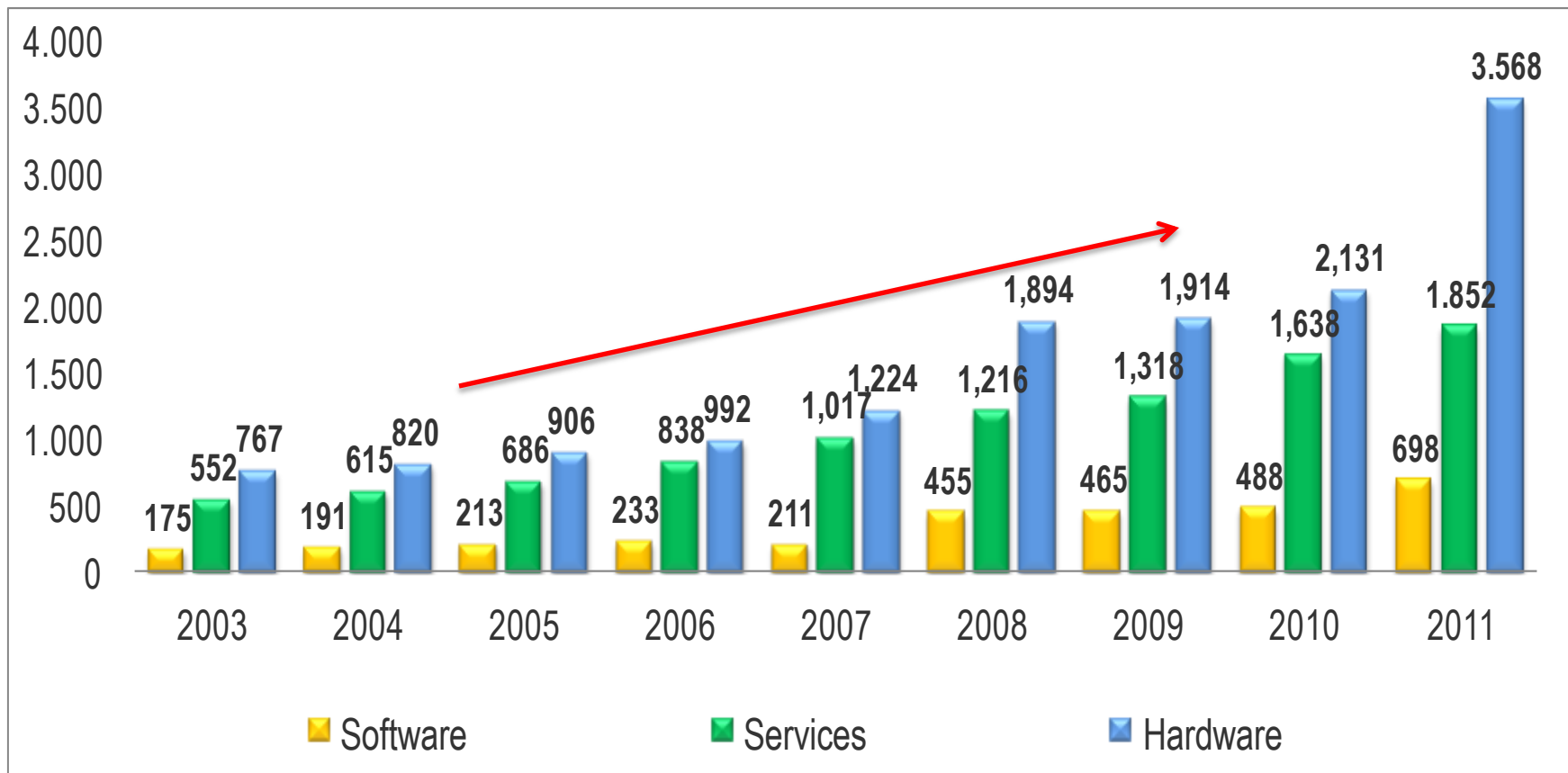
IT investment in the region is focused on the **hardware industry**.

In **Colombia**, the investment is focused on Hardware and IT Services.

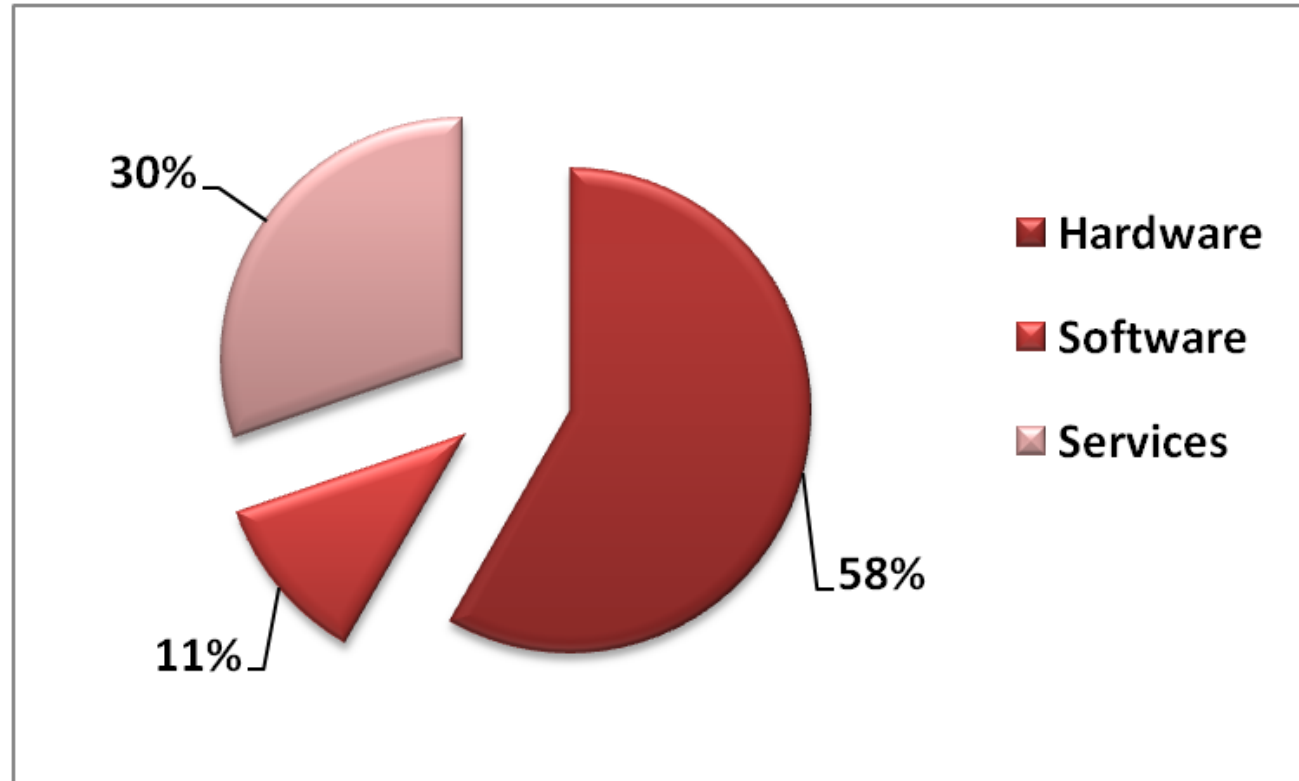
	Argentina	Brasil	Chile	Colombia	Mexico	Perú	Venezuela	Rest of Latin America
<b>Hardware total</b>	\$ 6.005,71	\$ 31.800,09	\$ 3.225,73	\$ 3.568,53	\$ 12.955,06	\$ 2.044,76	\$ 3.748,38	\$ 8.702,50
<b>Packaged software total</b>	\$ 916,02	\$ 8.579,70	\$ 644,43	\$ 698,68	\$ 2.899,87	\$ 297,55	\$ 467,68	\$ 844,60
<b>IT Services total</b>	\$ 803,39	\$ 13.961,43	\$ 1.263,33	\$ 1.851,99	\$ 3.786,03	\$ 405,67	\$ 452,56	\$ 703,40
<b>Total IT</b>	\$ 7.725,12	\$ 54.341,22	\$ 5.133,49	\$ 6.119,20	\$ 19.640,96	\$ 2.747,98	\$ 4.668,62	\$ 10.250,50

# According to IDC, Colombia's IT services revenues have almost doubled since 2005

## Revenues (sales) 2003-2011 US\$ Million

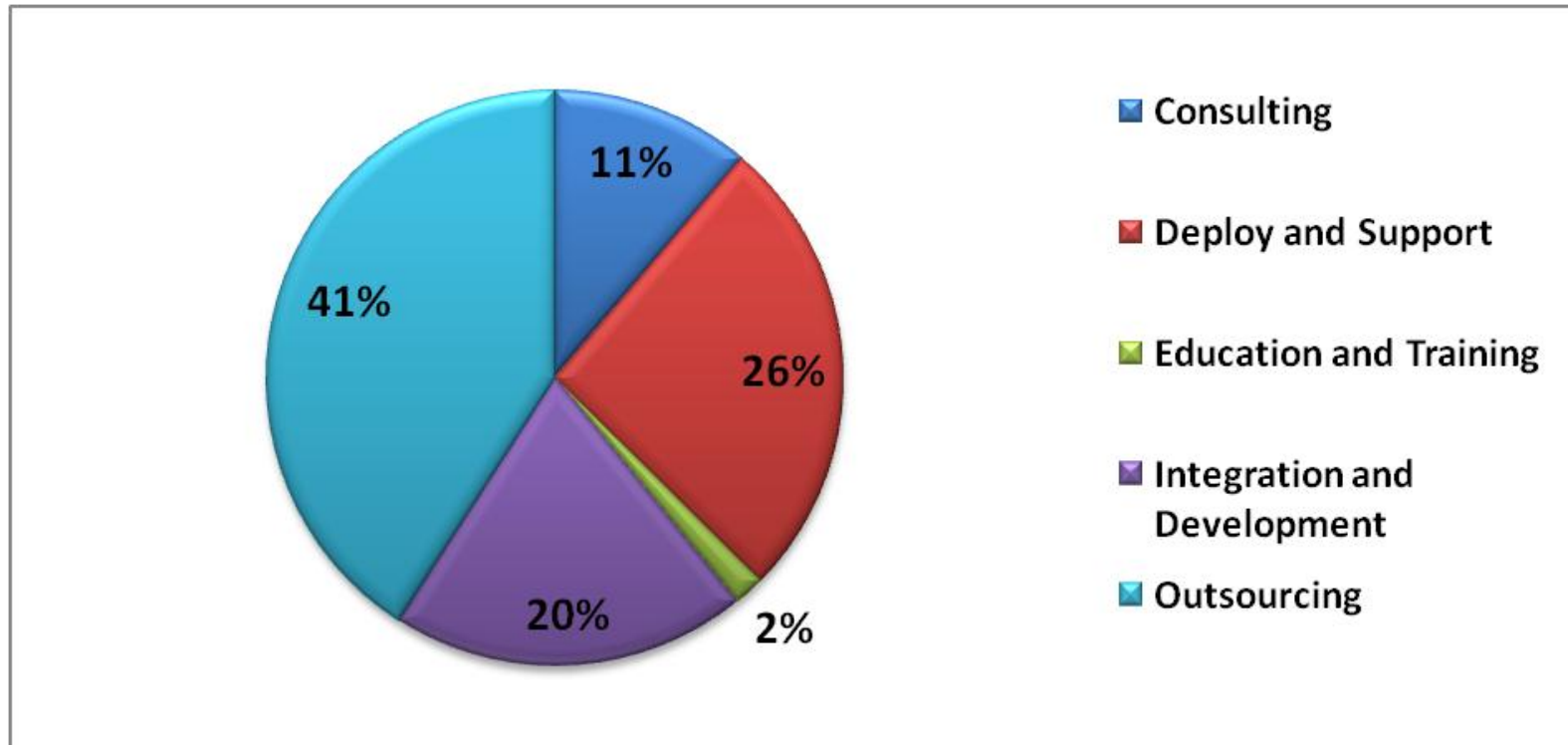


## Market Share per Technology Market 2011 % Sales



**IT Market Value 2011:  
US\$ 6.119 MI.**

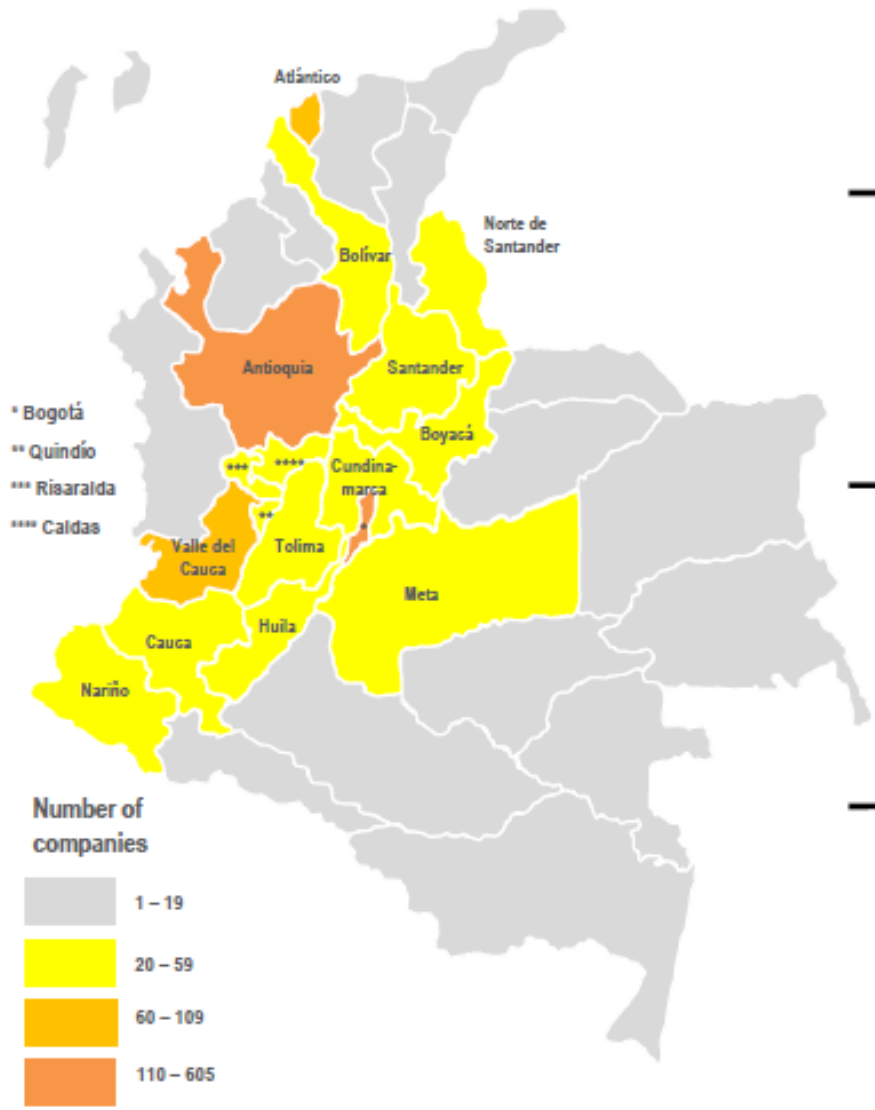
## Market Share per Service 2011 % IT Services Sales



**IT Services value:  
US\$ 1.852 MI.**



# Geographic positions of IT Services in Colombia



**Companies:**

- ✓ 27% of total companies are call centers
- ✓ 73% of total companies are providers of Professional Services

**Jobs:**

- ✓ The industry employs over 84,000 people: 16,000 are software employees, 10,000 IT Services employees and 58,000 Call Centers employees.

**Revenues:**

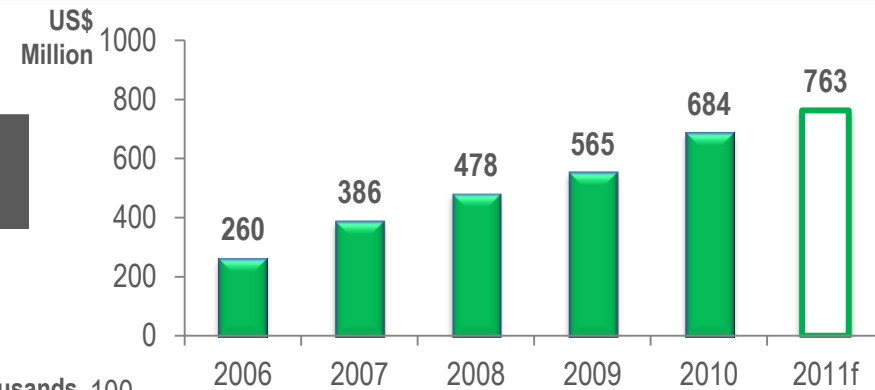
- ✓ 2009 industry sales: US\$ 2.5 millones
- ✓ 57% of the total sales are generated by Professional Services companies
- ✓ 43% of the total sales are generated by Call Centers

Figures from a survey of 164 leading IT services companies

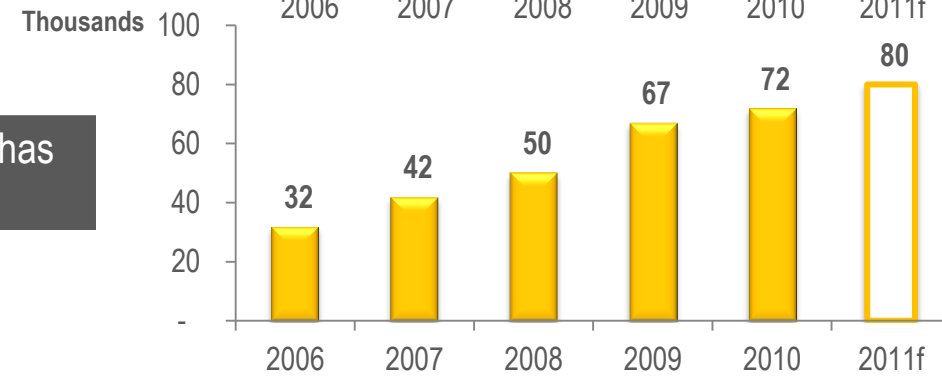
Source: The 5000 companies – Dinero Magazine, Ministry of Information Technologies and Communications, BPR Associates - ISI Emerging Markets. Proexport Calculations

# The segment of Call Centers has shown a sustained growth

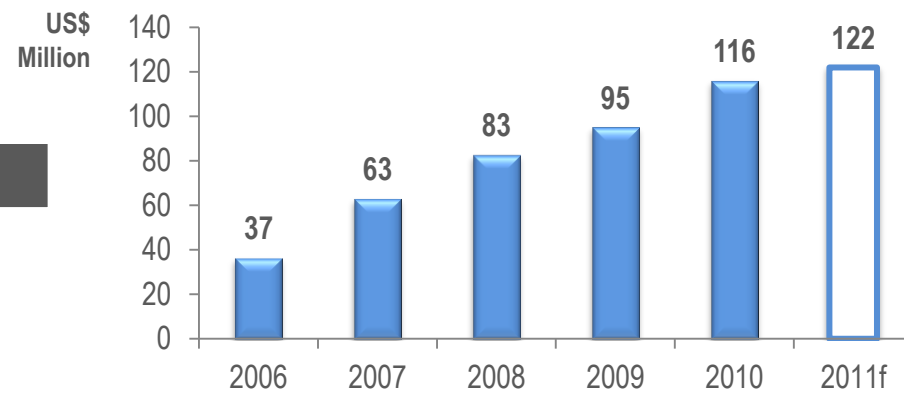
→ Revenues in the Contact Center Industry segment have almost doubled in less than three years



→ The number of Jobs in the Contact Center segment has doubled since 2006



→ Exports have grown by more than 150% since 2006



Source: ACDCC. Asociacion Colombiana de Contact Center y BPO

F: forecast

# Onshore, Nearshore and Offshore Services

Colombia has become an export platform for Latin America, USA, and Europe providing voice and non-voice services in Spanish, English and Portuguese

## BPO Solutions

- H.R Management
- Sales and Customer Care  
E – commerce
- Credit, Risk and Collection  
Management
- Database Management
- Helpdesk
- Backoffice: Document  
Management, printing,  
procurement.

## IT Services Solutions

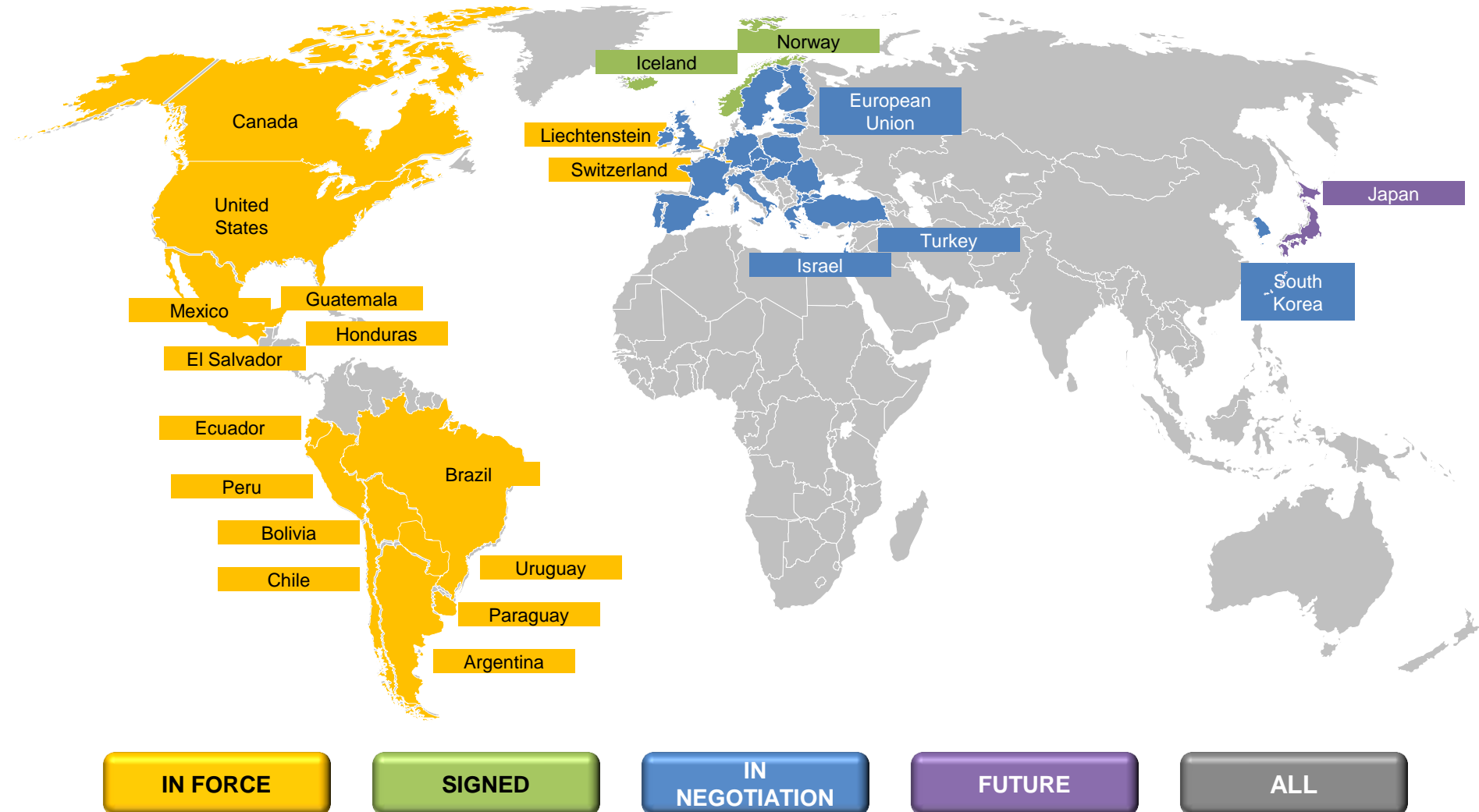
- Software Technology Services
- Integration and Technical  
Services
- Application Development and  
Modernization
- Infrastructure Technology  
Outsourcing
- Support Services
- Data Center Management

## Verticals

- Finance
- Telecommunications
- Insurance
- Industry and Customer
- Transportation
- Media
- Health
- Public Administration

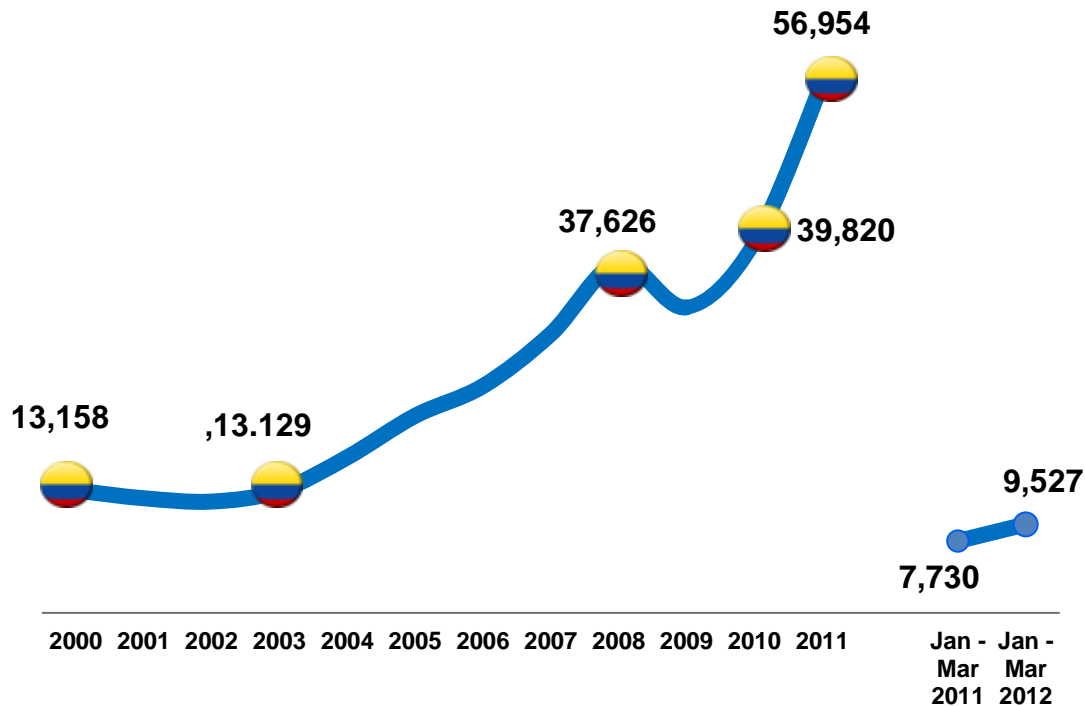
# Opportunities in the BPO – KPO – ITO Industry in Colombia

# Colombia as an export platform: 11 free trade agreements (FTA), allowing preferential access to over 1,500 million consumers



# Remarkable export growth

## Exports, 2000 – March 2012 US \$Million



## Top Exports Destinations 2011



### United States

- US \$21,720 million
- 38.1% Share



### Netherlands

- US \$2,524 million
- 4.4% Share



### Chile

- US \$2,205 million
- 3.9% Share



### China

- US \$1,989 million
- 3.5% Share

Variation 2009 - 2010: -21.2%

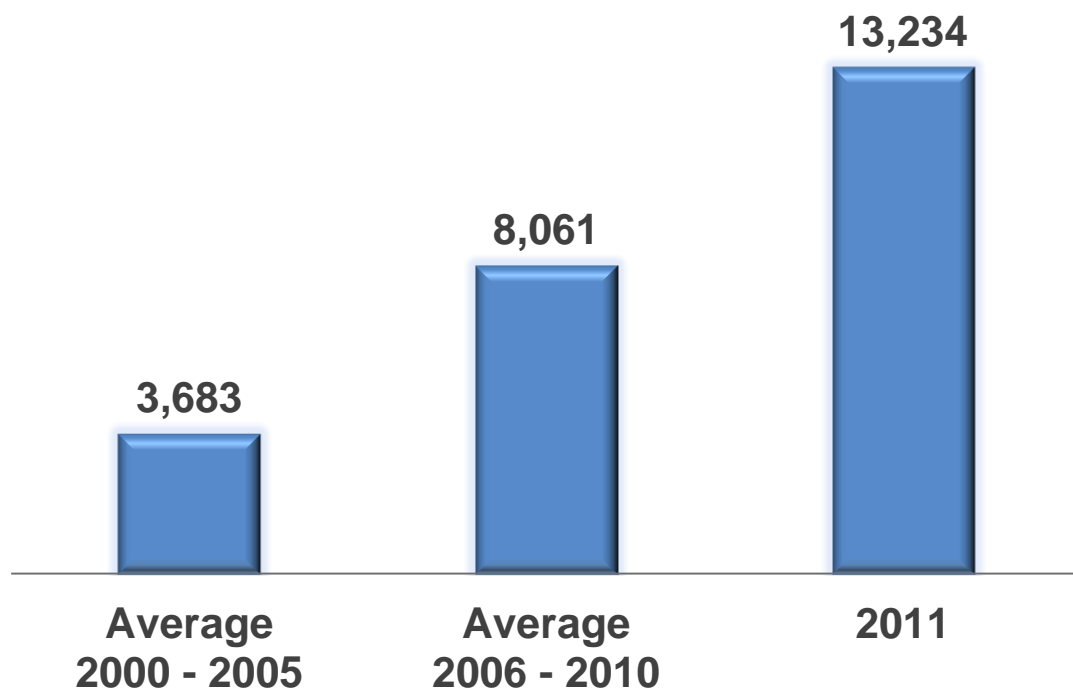
Variation 2010 - 2011: 43%

Variation Jan - Mar 2010 vs. Jan - Mar 2011: 23.2%

Source: DANE (National Department of Statistics)

# FDI inflows reached a record in 2011

## IED, 2000 –2011 US\$ Millons



## Main Investing Countries in Colombia 2000 – 2011\*



### United States

- Accumulated US \$9,595 million
- Share of 24.8%



### England

- Accumulated US \$5,684 million
- Share of 14.7%



### Spain

- Accumulated US \$3,431 million
- Share of 8.9%



### Canada

- Accumulated US \$1,373 million
- Share of 3.6%

Variation 2010–2011: +92%

Figures obtained through the foreign currency balance of the Bank of the Republic.

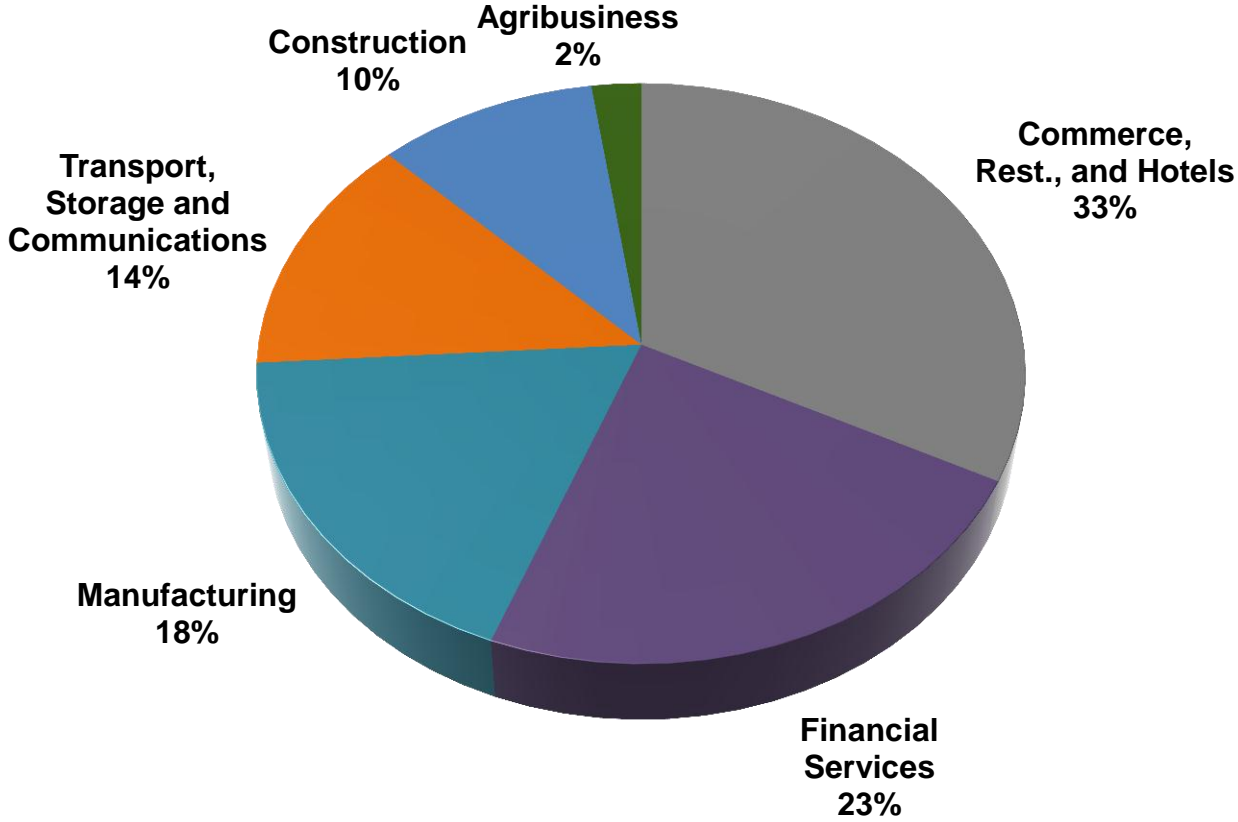
\*Share of all countries with positive cumulative investment, without reinvested profits or investments in the oil sector. Accumulated value 2000 – 2011: US \$38,615 million

Note: the list of the top countries investing in Colombia does not include Anguilla or Panama, in third and fourth place.

Source: Central Bank- Balance of Payments

# Around 70% of non-traditional sectors FDI in Colombia goes to the Services Sector

### FDI in Colombia by Non Traditional Sectors 2009 - 2011



% Share by total FDI of positive flows by origin country, without reinvesting profit and not including the petroleum sector.  
Total investment 2009 – 2011: US\$ 27,629 million.  
Source: Banco de la República.





The **financial sector** has shown the biggest dynamics in the outsourcing services demand, where the **4 main local banks** plan investments over **US\$ 1.000 million** in the next few years.

The **manufacture and Oil & Gas** sectors are demanding every time more services related to basic activities such as contact centers and bigger **added value like F&A and engineering** for its everyday activities.



The **telecommunications sector** is also helping develop the ITO sector, based on **technical and technological support**. This growth will hold a growing trend thanks to the Ministry of Telecommunications efforts.

# Broad local business base

## BPO Solutions

- Human Resources Management
- Sales and Customer Service
- E-commerce
- Credit, Risk and Collecting Management
- Data Base Management
- Helpdesk
- Back office: Management of documents, printing,
- Acquisitions

Colombia has become an **exports platform for Latin America, USA and Europe**, offering voice and data services in Spanish and English.

## IT Services

The presence of numerous enterprises of all of the productive sectors in the country are **pressuring a high demand on IT services** for its businesses, with a sustained growth of the industry as reference.

- Technology Software Services
- Integration and Technical Services
- Applications development and Modernization
- Technological Infrastructure Outsourcing
- Support Services
- Data Center Management

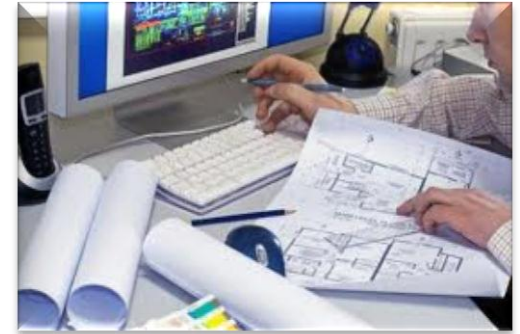
## Verticals

- Finance
- Telecommunications
- Insurances
- Industry and Client
- Transportation
- Media
- Health
- Public Administration

The country offers a **wide range of sectors** that demand a high component of outsourced services, not just the enterprises that invest in the country, but also the **base of national enterprises** that require these services.

# Migrating towards a model of higher value added Services

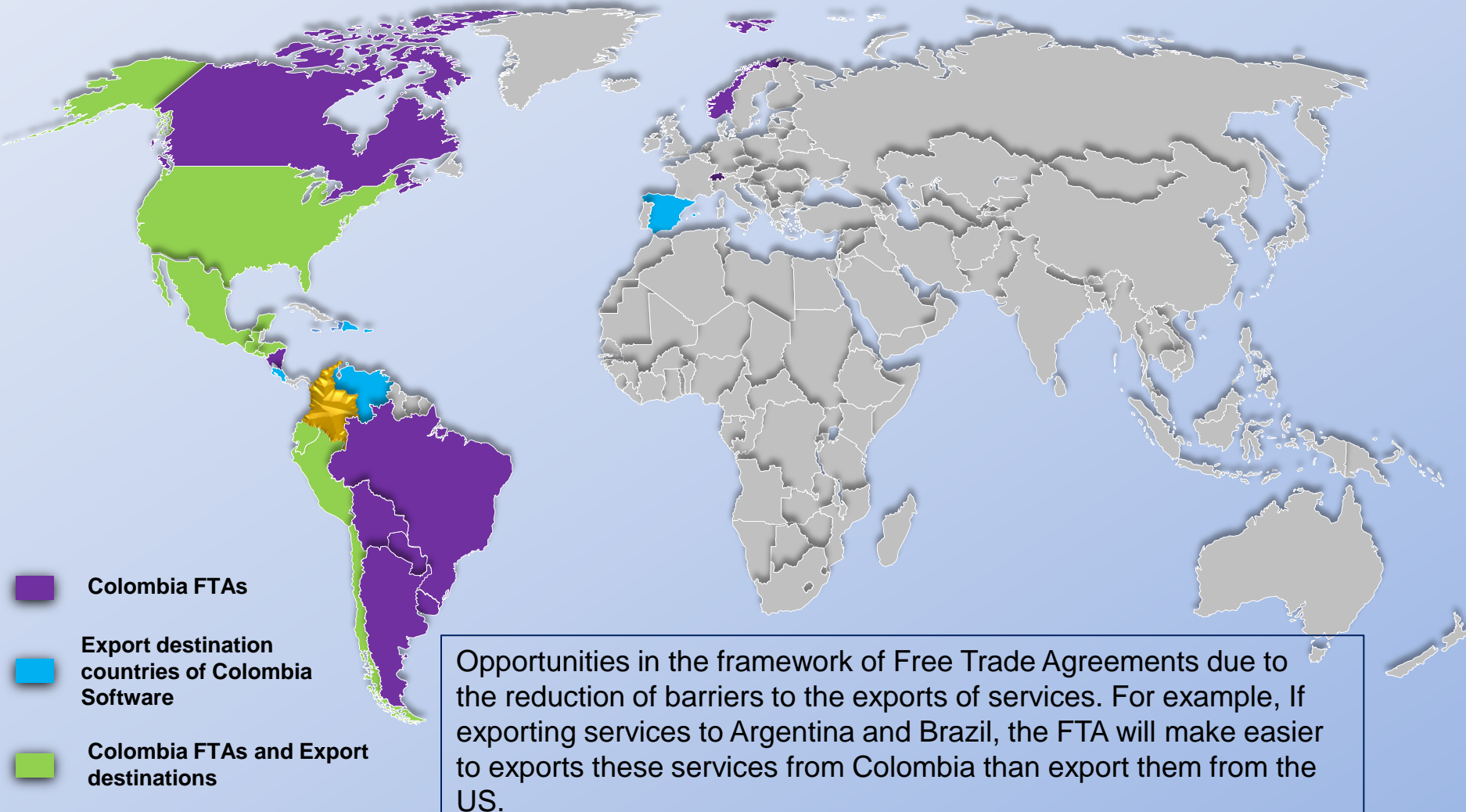
**Knowledge Process  
Outsourcing**



- The government is promoting the migration from a basic BPO industry to **an industry with higher value added services**,
- HHRR training program/grant.

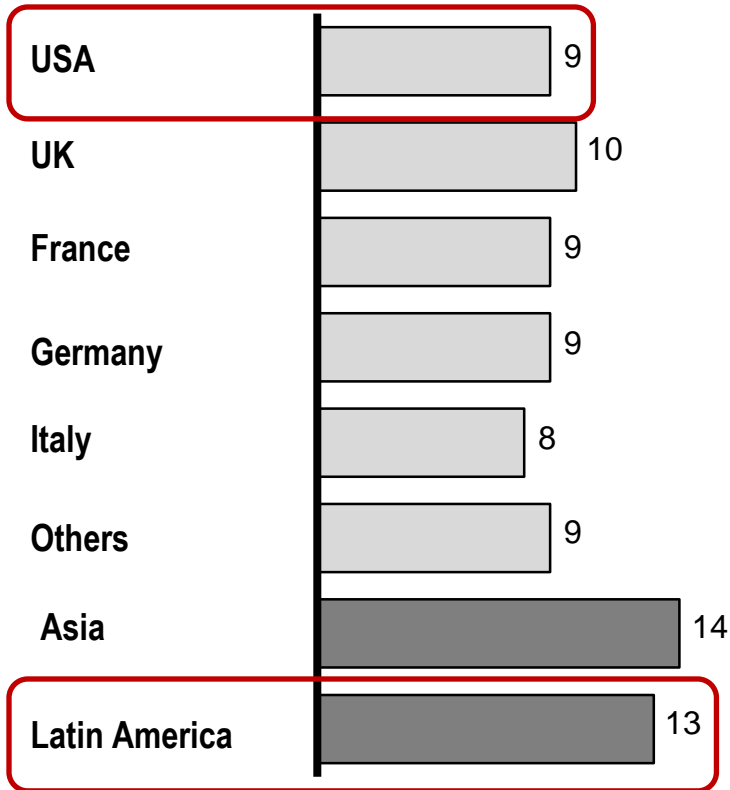


# Export Opportunities for Services under the Free Trade Agreements



# Spanish BPO market is expected to growth faster than English market

**BPO&O Market Expected Growth  
2007–2012 (%)**



An important share of BPO market growth in the United States relies on Spanish BPO voice market due to the important latin community currently living in the USA.

Due to its size and importance in the global macroeconomic scene, these countries are of great interest to Colombia and are part of its geostrategic area of influence, in which there is a large market of continuing growth to be explore.



Estados Unidos



Brasil

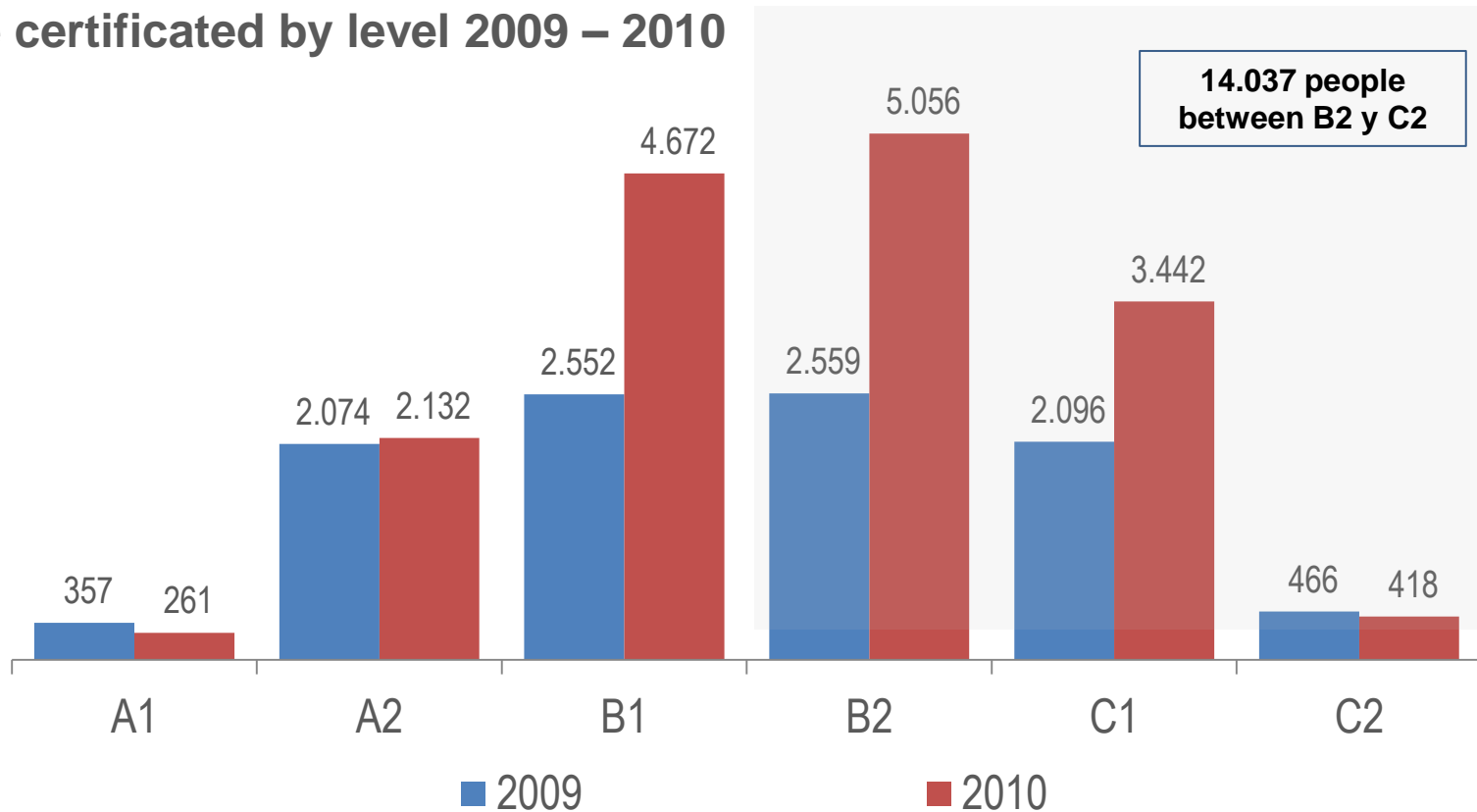
Services demand growth throughout Latin America has been on significant importance for the past years - This would represent an interesting business opportunity for Colombia to become a leading services supplier in the region.



# Opportunities for Bilingual Voice Services offering

Country effort to provide national and foreign companies information about nationals certificated on English language skills with professional purposes.

## People certificated by level 2009 – 2010



# A country of regions and differentiated opportunities for investors



- **Caribbean Region:** Tourism, Logistics, Petrochemical, Construction Supplies  
**Atlantic Export Platform**

- **Central/Andean Region:** Outsourcing Services, high value-added manufacturing, hub to cover domestic market, specialized agribusiness

- **Pacific Region:** Manufacturing, Agribusiness, logistics, biotechnology,  
**Pacific export platform**

- **Orinoquía Region:** Agriculture, forestry, biofuels, hydrocarbons

- **Amazon Region:** Conservation, ecotourism (Leticia)

# Colombia in the Top 30 countries for Offshore services



Gartner identified the following items as the main strengths of Colombia for the provision of Offshore Services:

Criterion	Rating
Cost	Good
Political and Economic Environment	Good
Cultural Compatibility	Good
Government Support	Good
Human Resources Availability Re	Good



*Main countries in BPO&O  
Selected by Gartner:*

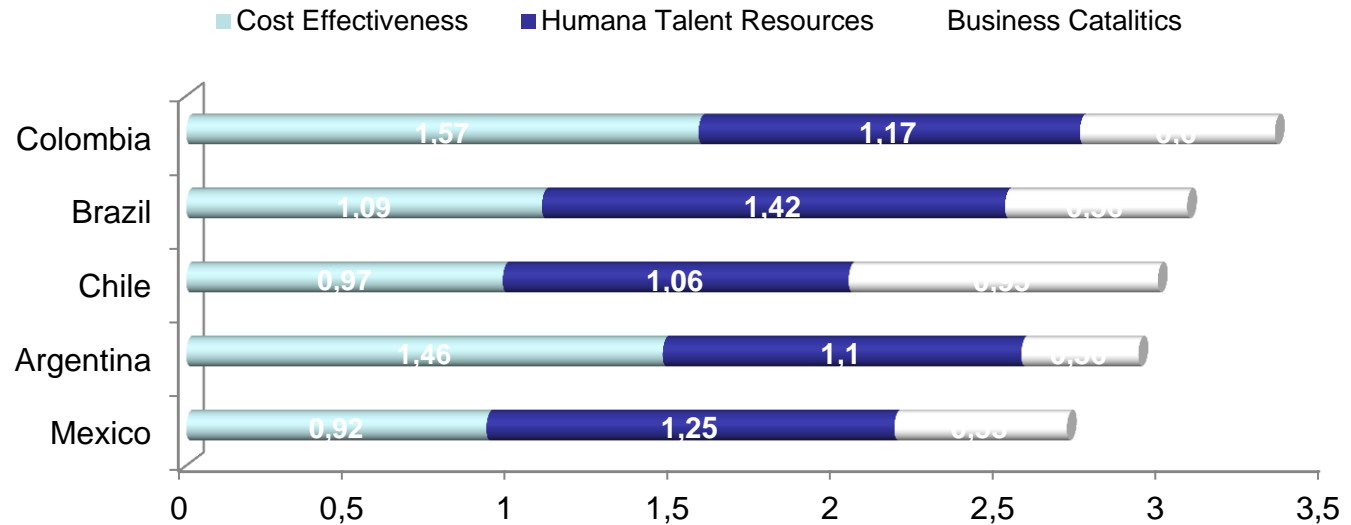
<i>Argentina</i>	<i>Costa Rica</i>
<i>Brazil</i>	<i>Mexico</i>
<i>Chile</i>	<i>Panama</i>
<i>Colombia</i>	<i>Peru</i>

This is the second consecutive year that Gartner has included Colombia in its Top 30 ranking of countries for Offshore Services. This year, Colombia presents an improvement in aspects such as Government and Human Resources Availability.

# International Consulting Firms consider Colombia as a key actor in the Services Sector



Wipro: America Latina  
– A new option for  
Global Off shoring



Source: Wipro Consulting research (March 2011)



## Colombia: The hidden star of Latin American Outsourcing

According to Tholons, the following sectors will be the KPO sectors for Colombia in 2014:

1. Pharmaceutical I&D
2. Engineering Services (ESO)
3. IT Services (ITO)
4. Other KPO

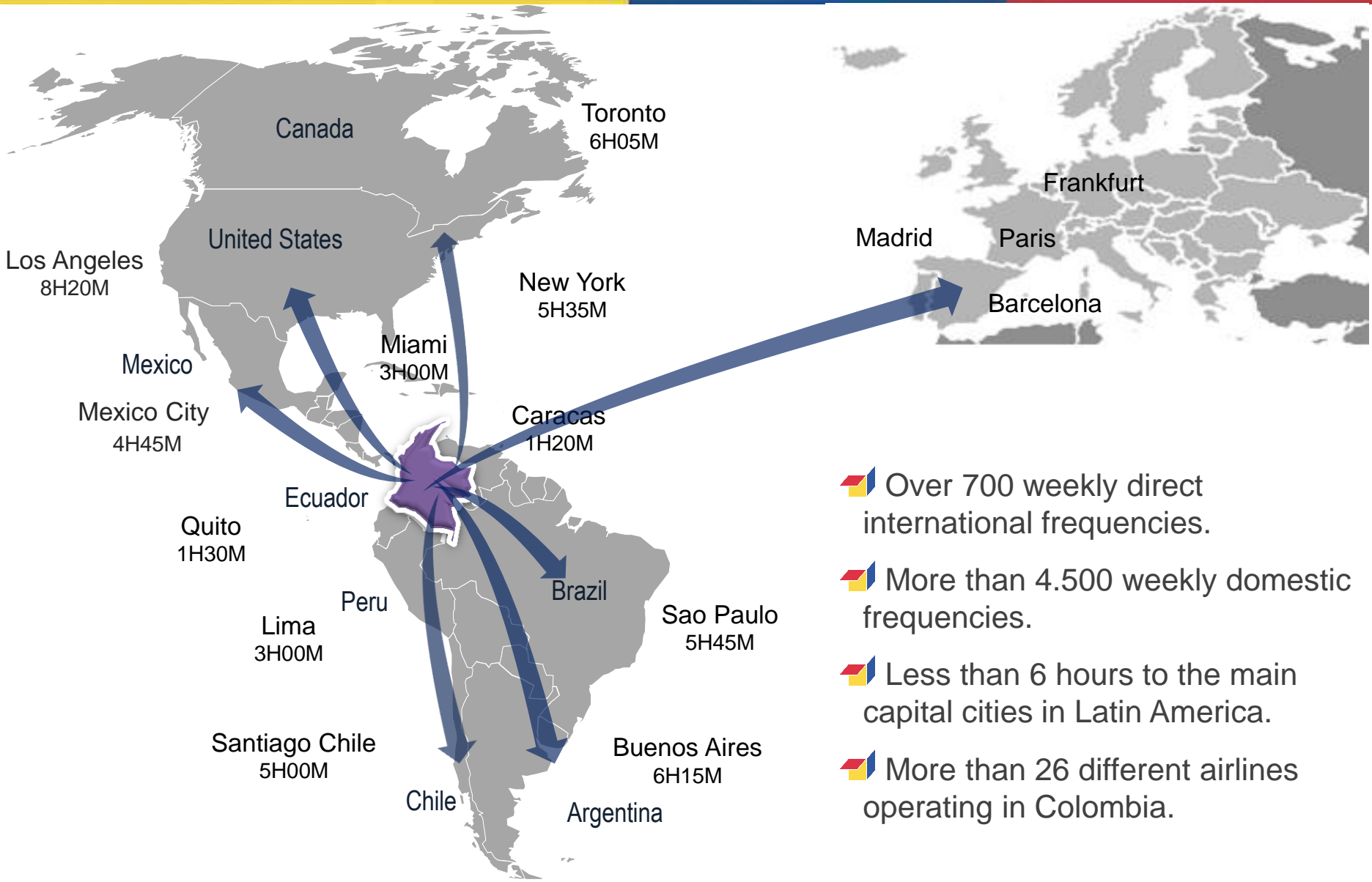
**KPO Market Value in 2014:**





**USD 1.745 millions**

Source Tholons (September 2010)

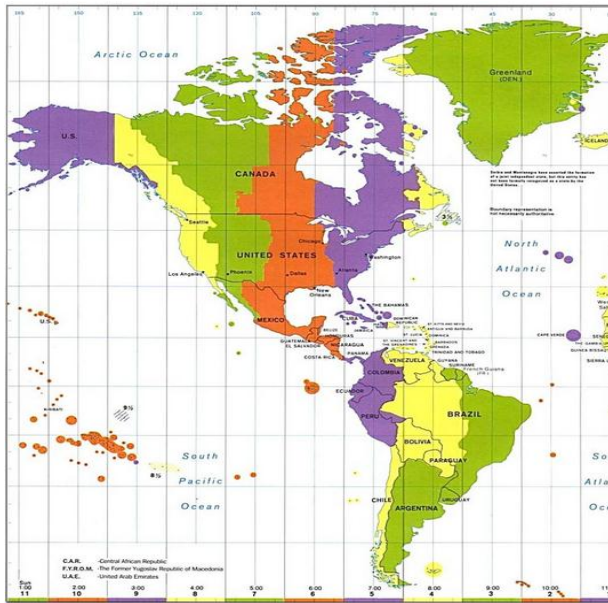
# **Colombia's Value Proposition for BPO – ITO – KPO Operations**

# A competitive location with easy access to markets around the globe



-  Over 700 weekly direct international frequencies.
-  More than 4.500 weekly domestic frequencies.
-  Less than 6 hours to the main capital cities in Latin America.
-  More than 26 different airlines operating in Colombia.

# Colombia is in the middle of 5 time zones



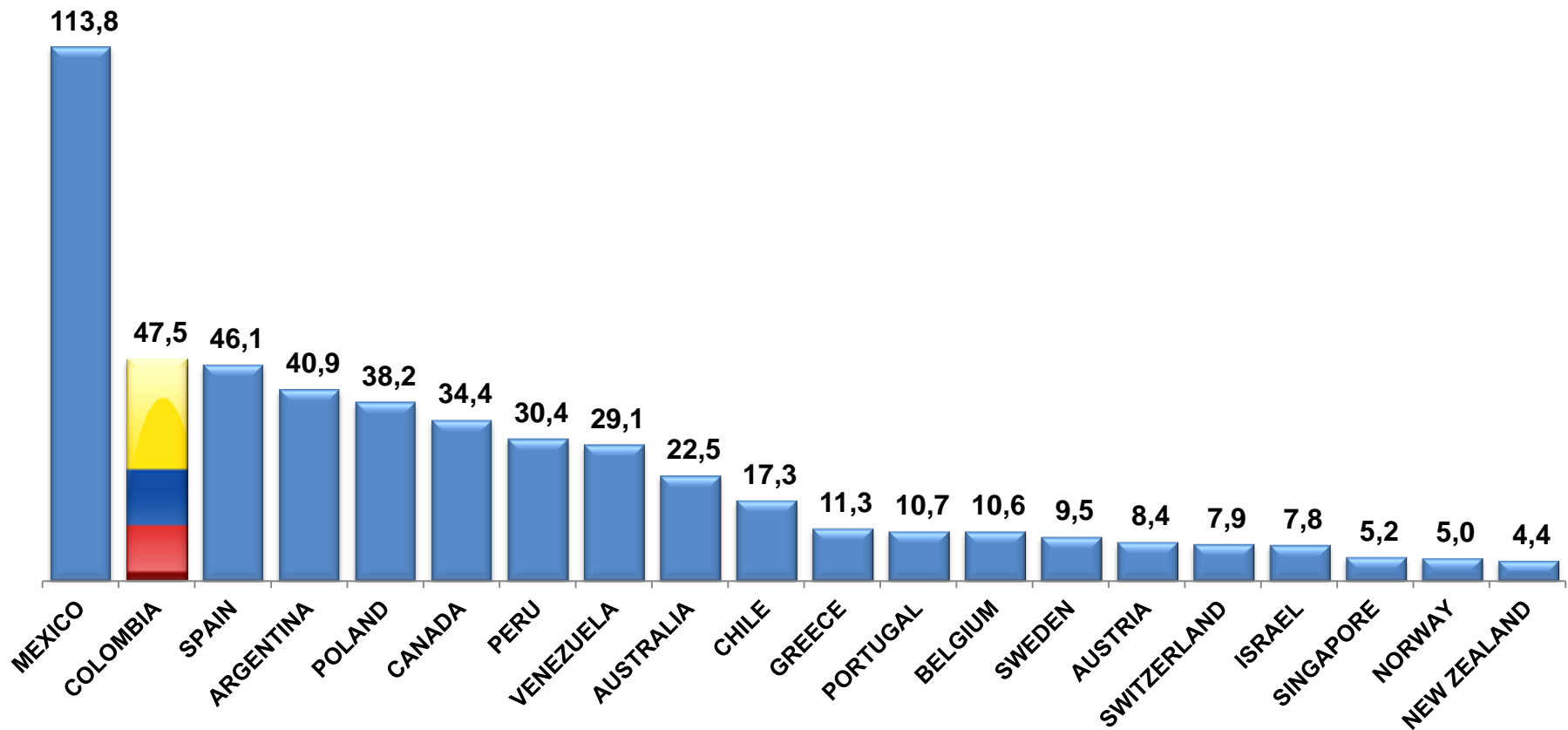
**Colombia is in the middle of 5 time zones, and share time zone with important business centers like New York, Toronto and Miami**

Time Zone	New York	Washington	Ciudad de México	Buenos Aires	Santiago	Sao Paulo	Los Angeles	Montreal
Bogotá	-	-	(-1)	(+2)	(-1)	(+2)	(-3)	0
Buenos Aires	(+2)	(+2)	(+3)	-	(+1)	-	(+5)	(+2)
Sao Paulo	(+2)	(+2)	(+3)	-	(+1)	-	(+5)	(+2)
México C.D.	(-1)	(-1)	-	(-3)	(-2)	(-3)	(+2)	(-1)

# The second largest Spanish speaking country in the world and the 23<sup>rd</sup> most populated

## Population - 2011\*

Millions of People



Source: EIU - Economist Intelligence Unit.

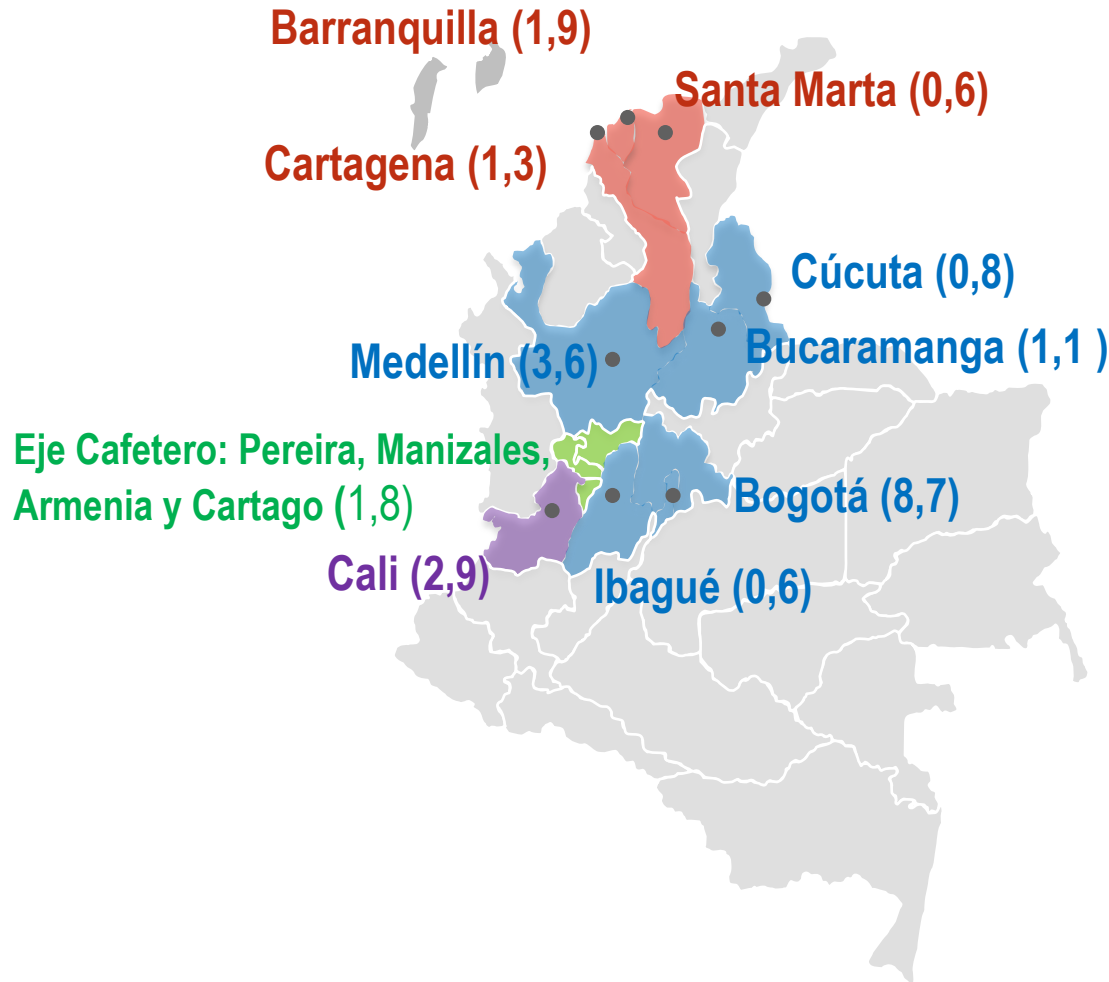
\* Forecast. 2012.





**Colombia's population is 47 million**  
**The percentage of population under 30 years of age is 55%**  
**7 metropolitan areas with over 1 million people**

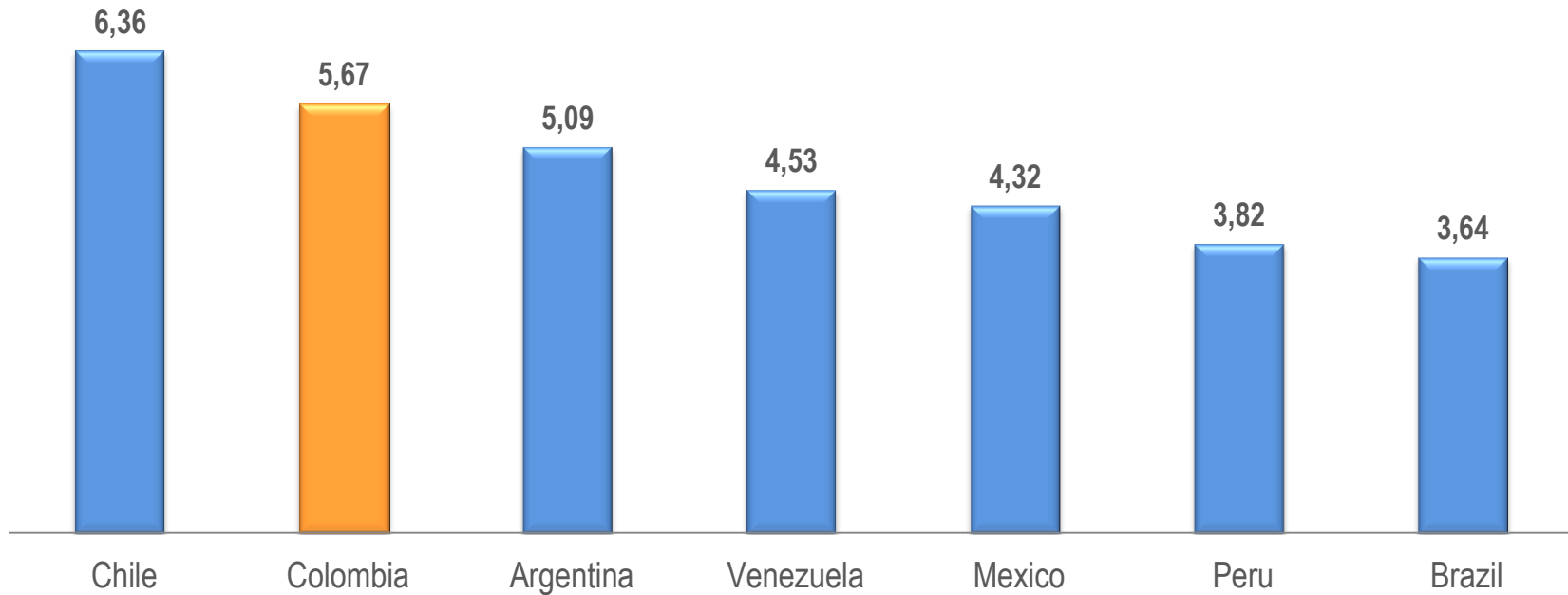
# Múltiples polos de desarrollo: 10 ciudades/áreas metropolitanas con población superior a 500.000 habitantes



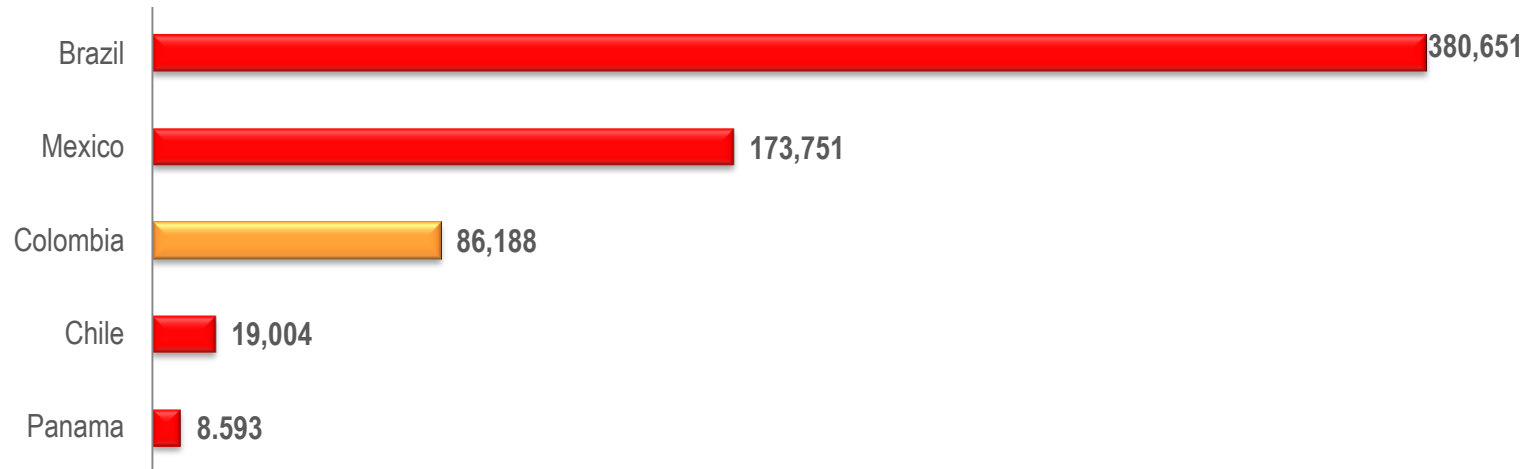
✓ Población total 2011  
47 millones

✓ Población total en  
áreas metropolitanas  
23,3 millones

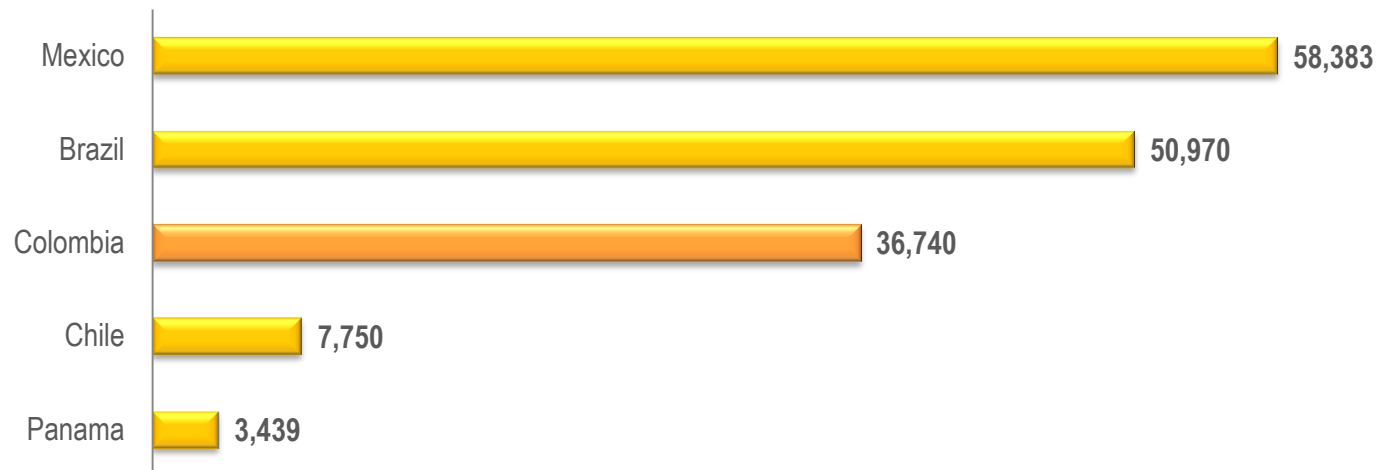
**Second place in Higher Education in Latin America, according to IMD 2011**  
(10 = Feels the needs of the economy)



## Number of Science, Business and Law Graduates (2010)

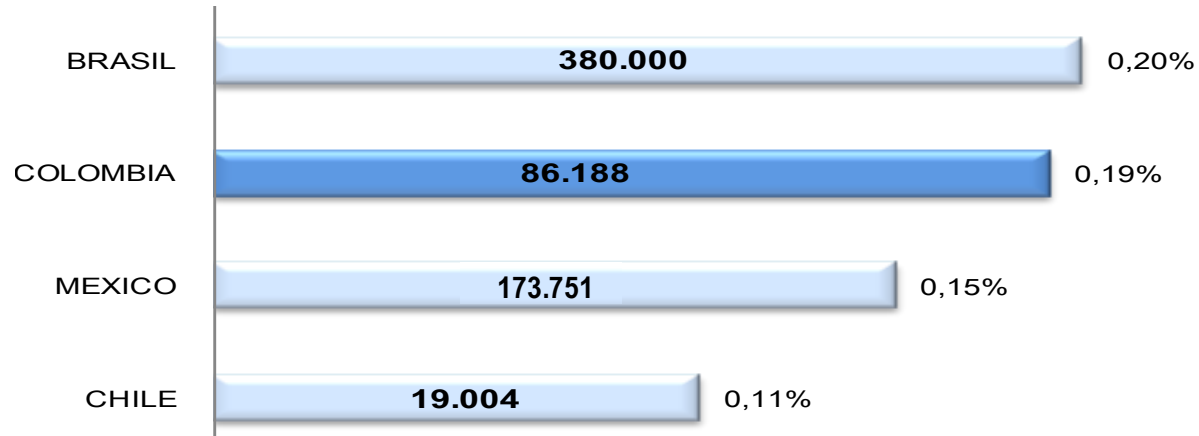


## Number of Engineering, Manufacturing and Construcción Graduates (2010)

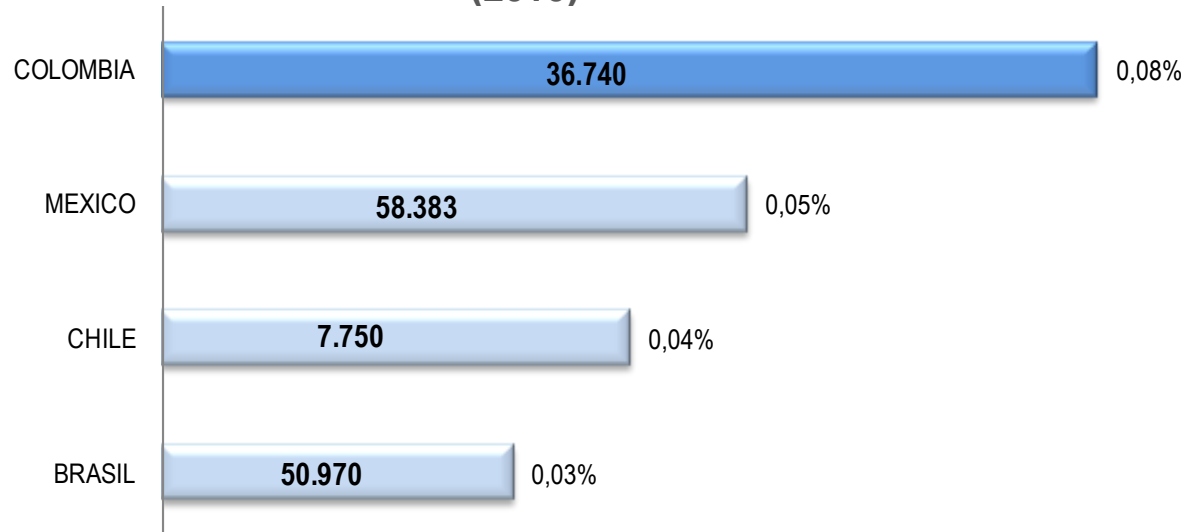


# Colombia, leader in engineering and management graduates

## Percentage of Social Sciences, Business and Law degrees in the total population (2010)



## Percentage of Engineering, Manufactured and Production degrees in the total population (2010)



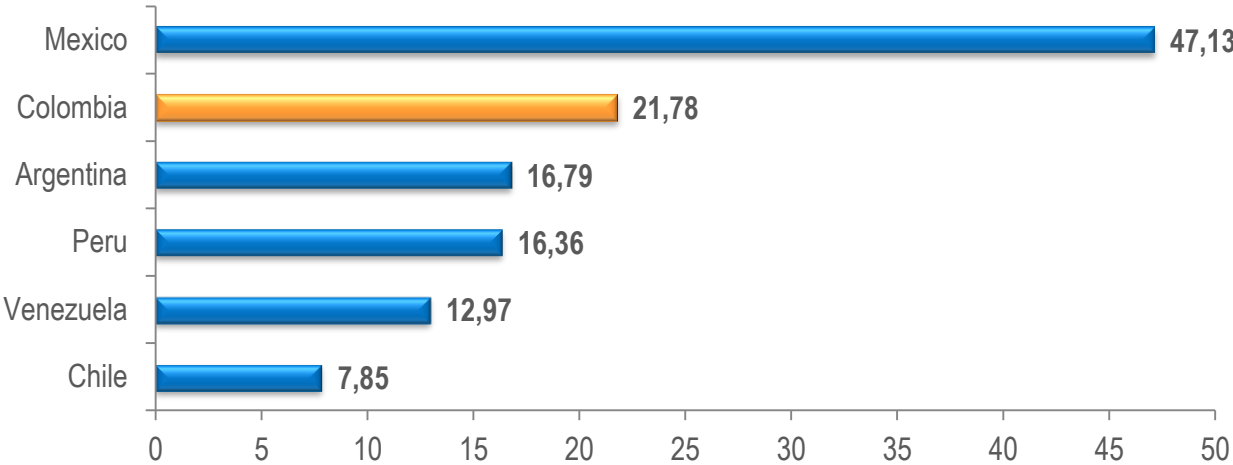
# Colombia has an important availability of human resource for BPO Opportunities

## Number of graduates in business & engineering fields (2010)

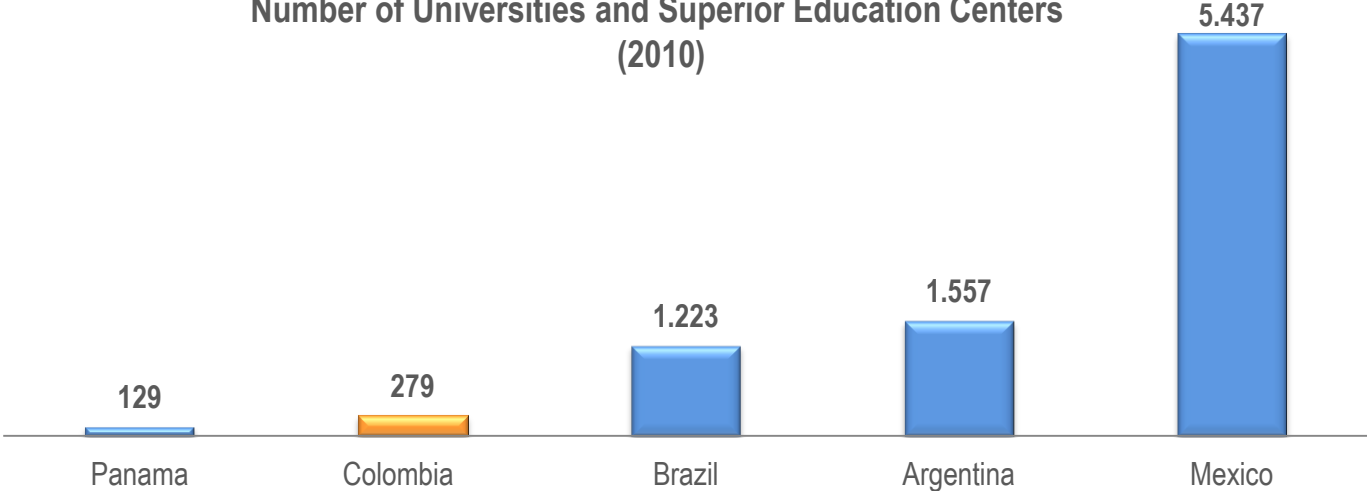
City	# Economics Graduates	# Business Graduates	# Accounting Graduates	# Electrical Engineering Graduates	# Electronics Engineering Graduates	# System Engineering Graduates
Bogota D.C	2.790	16.129	3355	365	2.078	5240
Medellín	629	6.024	1484	238	625	1101
Cali	294	3.298	1176	74	323	778
Bucaramanga	360	2.020	694	100	337	648
Cartagena	203	1295	422	32	67	237
Barranquilla	139	1.498	432	125	299	337

# Human Resources: Highly qualified labor force

The second country in Latin America with the biggest Labor Force, according to the IMD\*



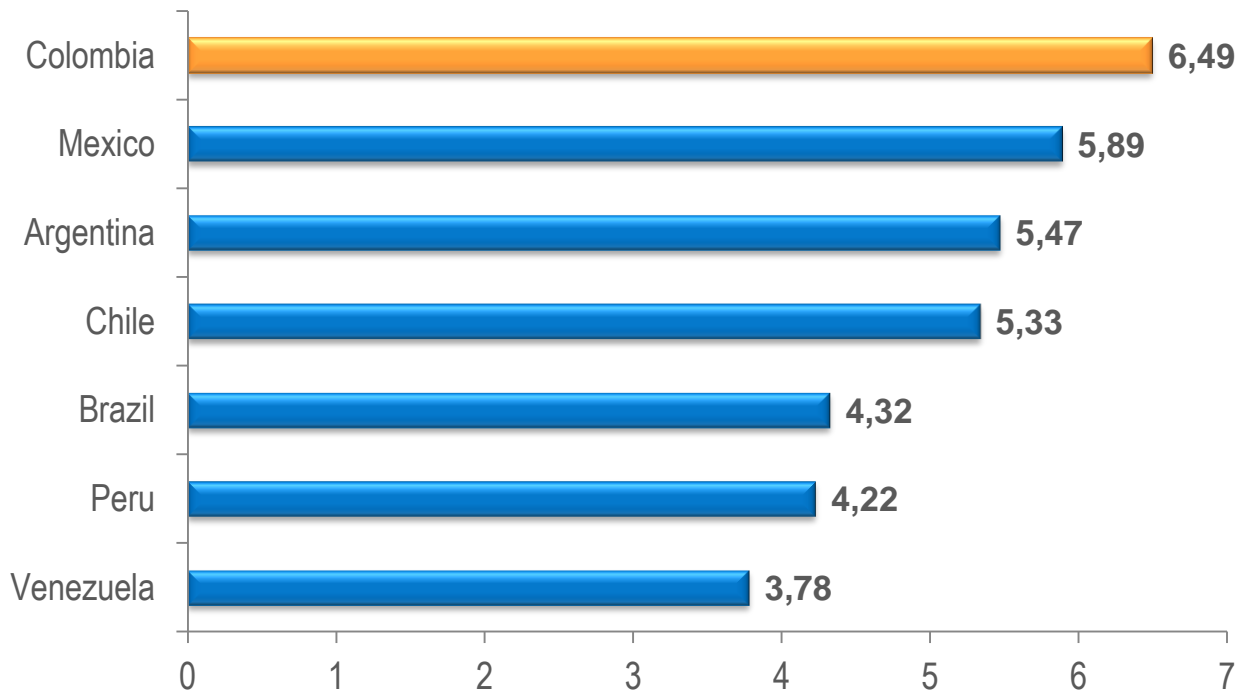
Number of Universities and Superior Education Centers (2010)



\*Employed and registered unemployed (millions)  
Source: The World Competitiveness Yearbook 2010. Euromonitor International

# Quality and Availability of Human Resources for the Sector

## Skilled Labor Availability, 2011 (10= High availability)



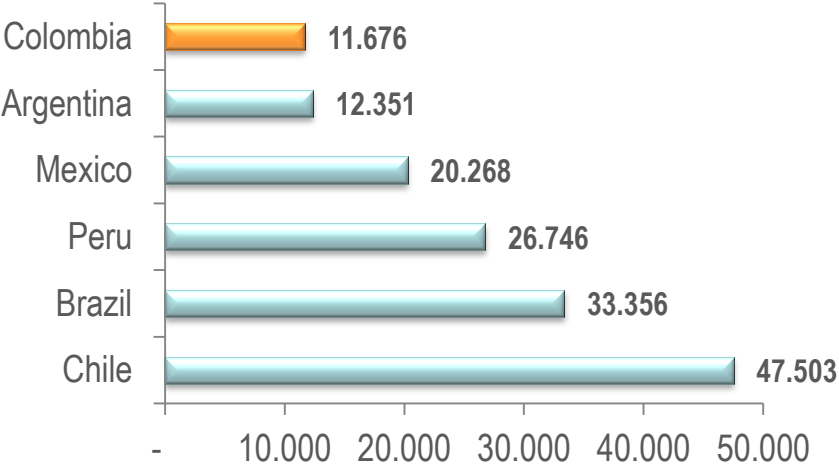
According to IMD, Colombia has a high availability in skilled labor, compared to other countries in Latin America.



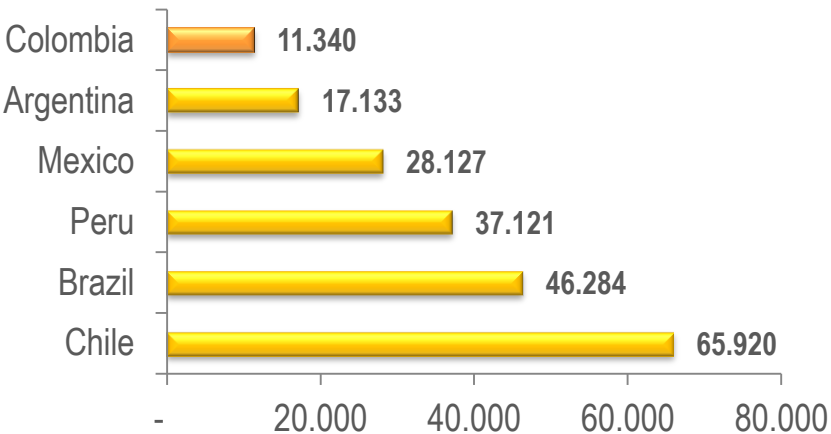
# Human talent at competitive costs

## Wages of Business and Engineering graduates

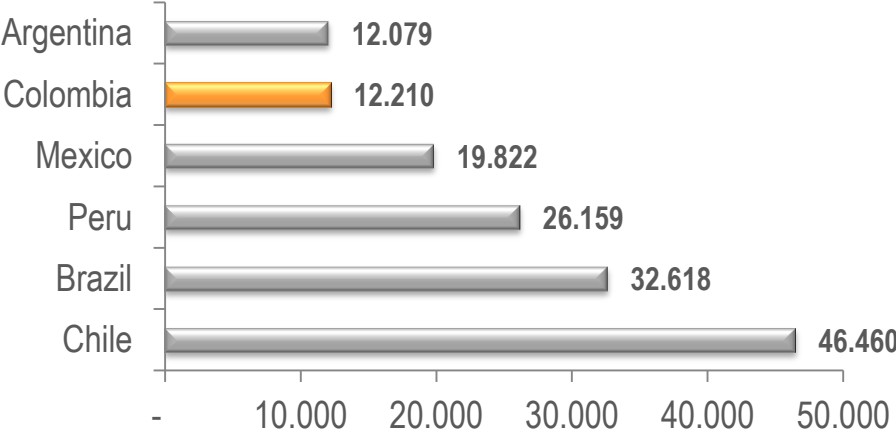
**Financial Analyst (USD)**



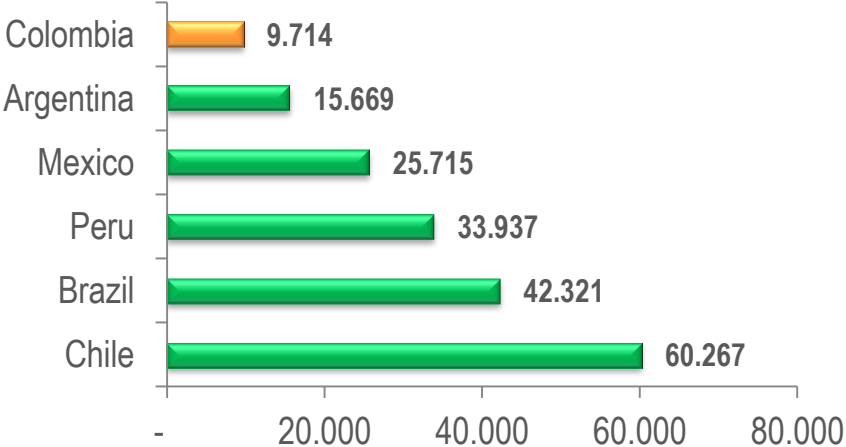
**Economist (USD)**



**Accountant (USD)**



**Electronic Engineer (USD)**



Source: Salary Expert ; Human Capital

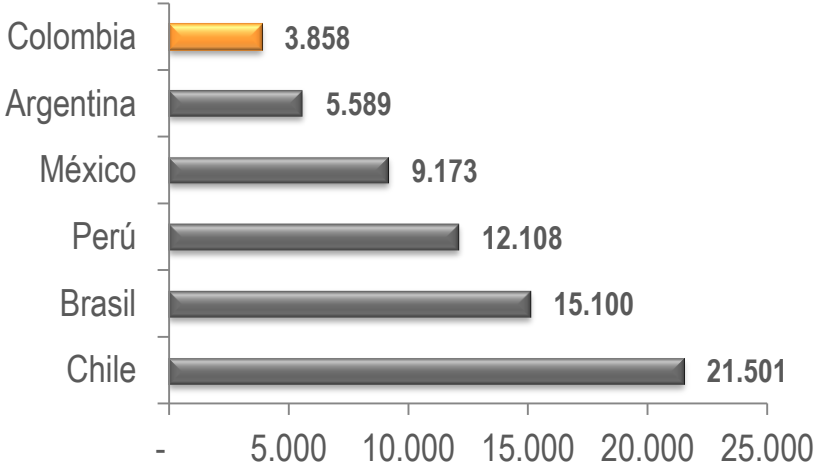
Yearly based Wages: Salary Expert Quartile 16.7; HC Quartile 10.

Exchange Rate : Colombia (US dollar = \$2,000) Chile (US dollar = \$510) Brazil (US dollar = \$1.77), Perú(US dollar = \$2.79) Mexico (US dollar = \$12.7) Argentina (US dollar = \$3.79)

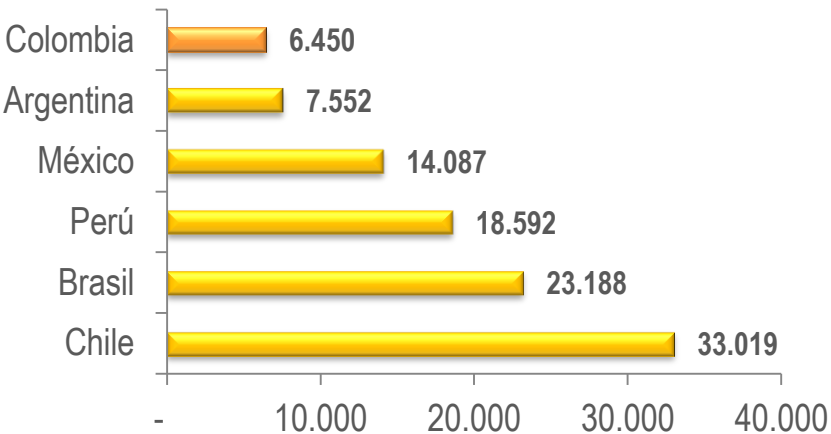
# Human talent at competitive costs

## Competitive wages for the most representative jobs of the industry

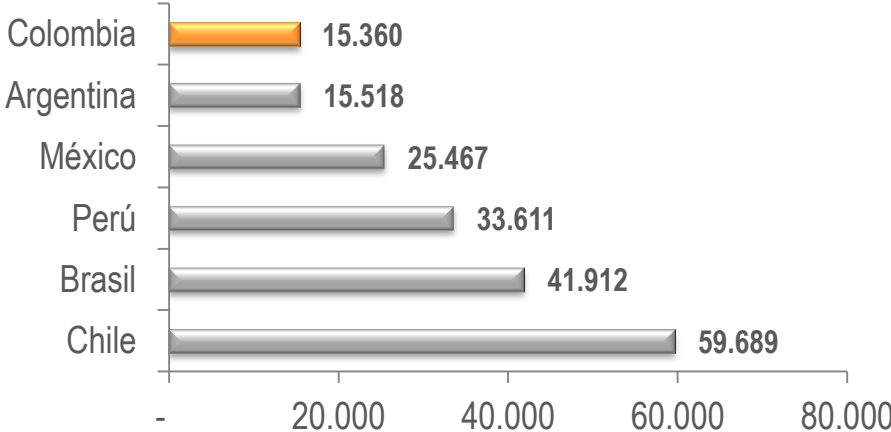
**Data Entry Clerk (USD)**



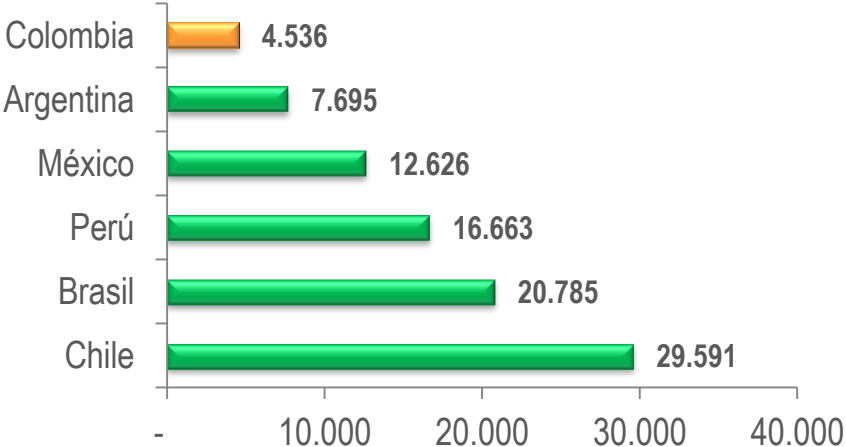
**Personal Assistant (USD)**



**Database Administrator (USD)**



**Computer Operator(USD)**



Source: Salary Expert ; Human Capital

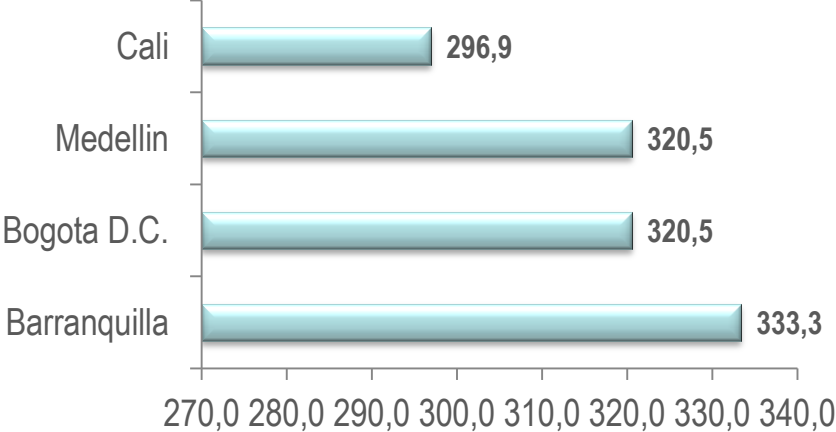
Yearly based Wages: Salary Expert Quartile 16.7; HC Quartile 10.

Exchange Rate : Colombia (US dollar = \$2,000) Chile (US dollar = \$510) Brasil (US dollar = \$1.77), Perú(US dollar = \$2.79) Mexico (US dollar = \$12.7) Argentina (US dollar = \$3.79)

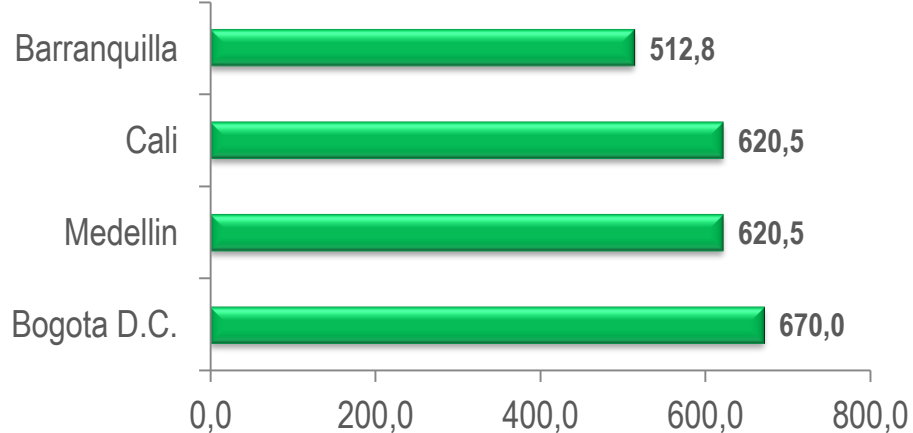
# Human talent at competitive costs

## Monthly Wages for the Call Center and Contact Centers Industries USD (2010)

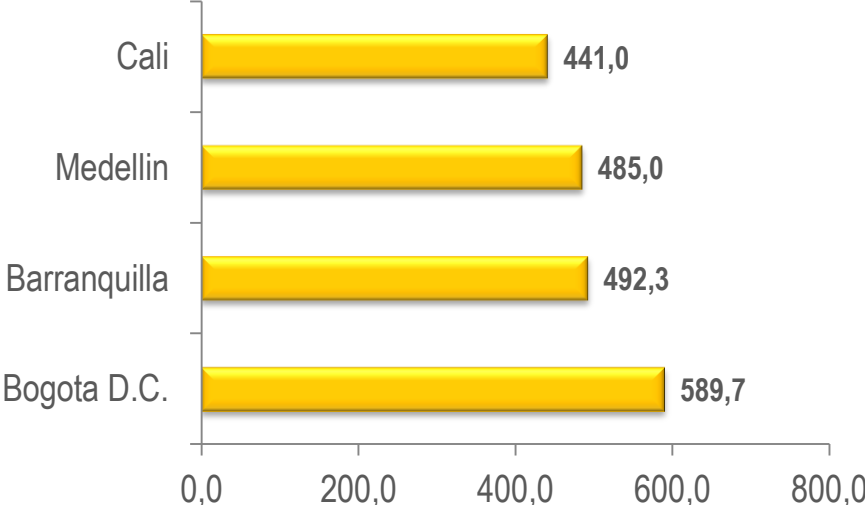
**Agent (Basic Profile)**



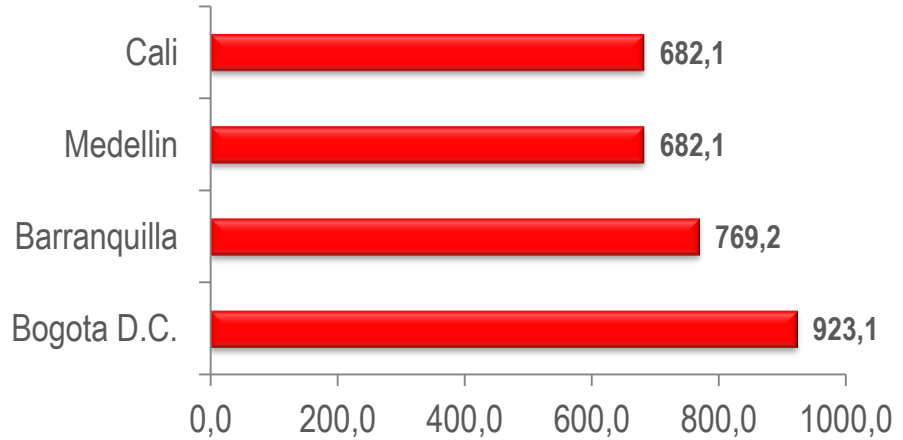
**Help Desk**



**Bilingual Customer Care**

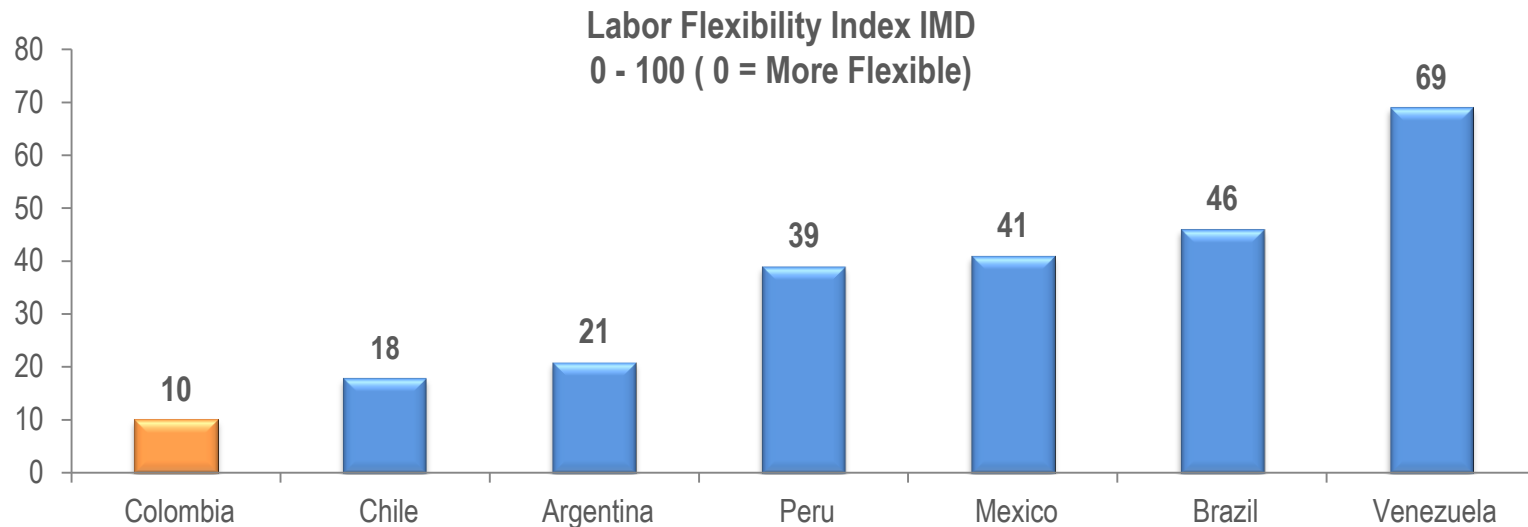


**Coordinator (Spanish)**



Source: Manpower (2010). MMLW = COP \$515,000. Exchange Rate: USD 1 = COP \$1,850. High level wages

# Colombia has the most flexible labor regimen in Latin America



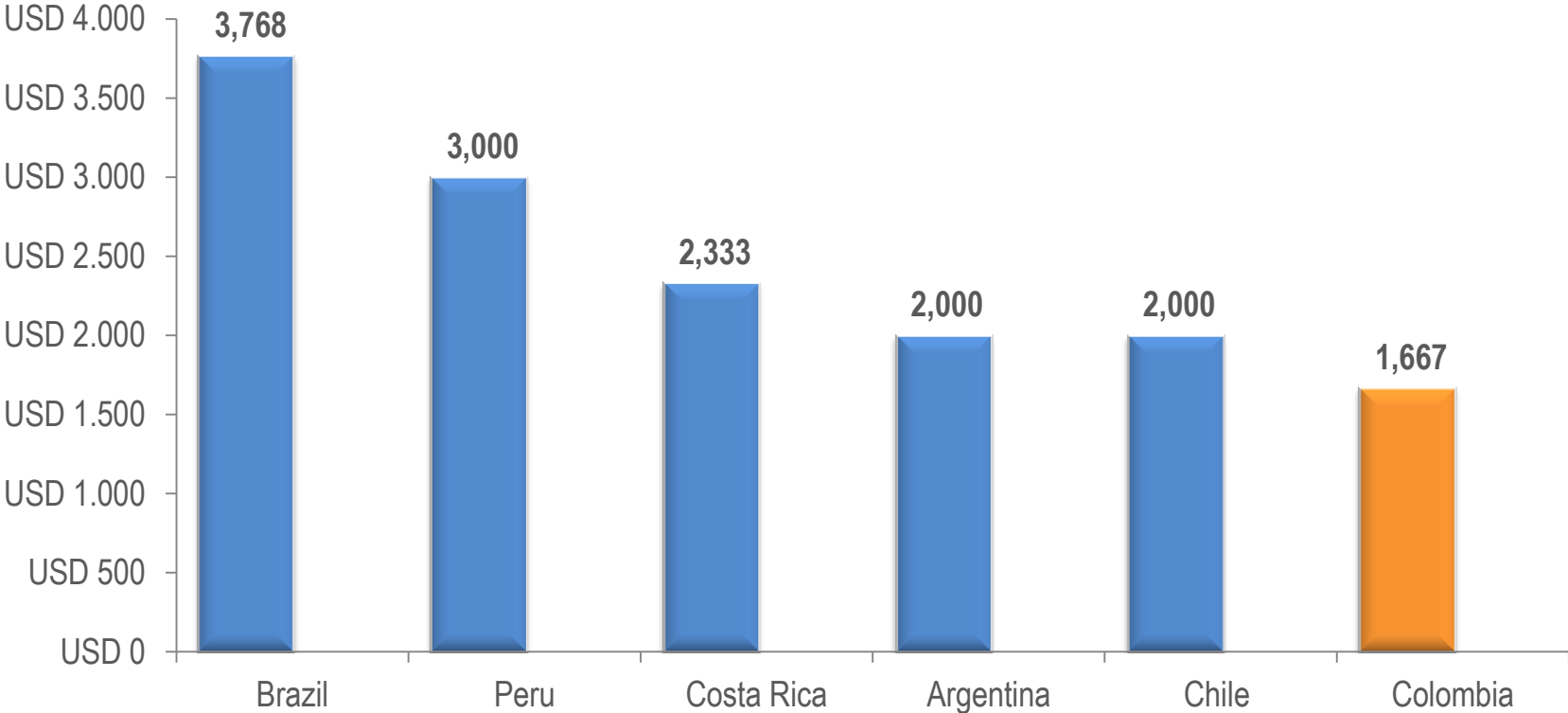
Source: The World Competitiveness Yearbook 2011

País	Day Shift	Night Shift
Argentina	6 a.m. – 9 p.m.	9 p.m. – 6 a.m.
Colombia	6 a.m. - 10 p.m.	10 p.m. - 6 a.m.
Costa Rica	5 a.m. – 7 p.m.	7 p.m. – 5 a.m.
Ecuador	6 a.m. – 7 p.m.	7 p.m. – 6 a.m.
Mexico	6 a.m. - 8 p.m.	8 p.m. – 6 a.m.

Source: Colombia: Law 50 1990 and Law 789 2002. México: Labor Law 1969. Costa Rica: Law 2 1943. Ecuador: Labor Code 2005. Argentina: Law 11,544 1933 and 20,744 1976.

# Lowest Lay off Costs in Latin America

The severance payment for dismissal without just cause is the lowest in Latin America. The chart is based on the case of an employee working with a company during 2 years with a monthly salary of US\$ 1,000



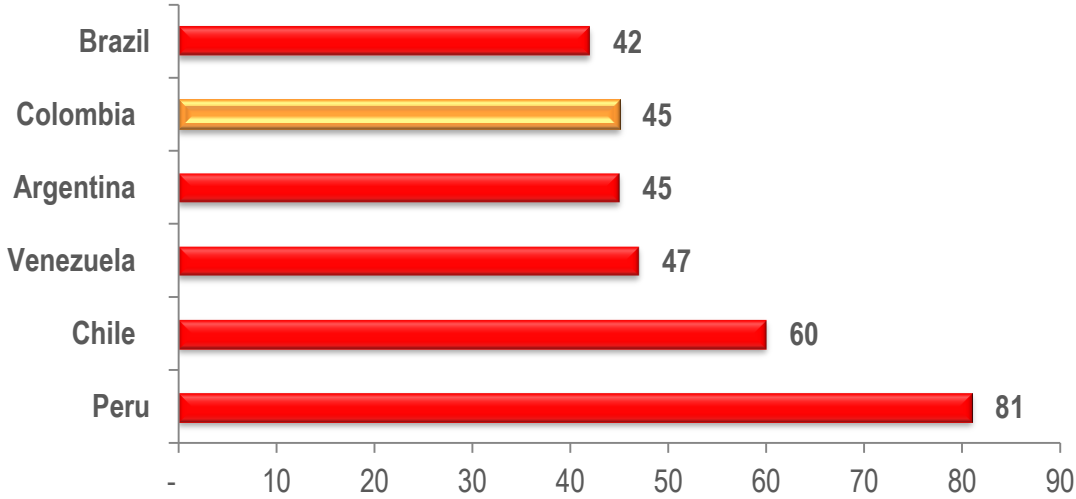
Source: Colombia: Article 64 of the Labor Code. Mexico. Article 50 of the Federal Labor Law; Peru. Article 94 of the Supreme Decree 003-97; Costa Rica. Article 28 and 29 of Labor code. Argentina article 245 of Law 20744 of 1976. Brazil. Article 478 and 487 of Law 5452 of 1943 – (Consolidation of the Labor Laws and FGTS -Unemployment Service Fund in Law 5107 of 1966). Chile article 161 and 167 of Labor Code.



# Highly Competitive Operating Costs

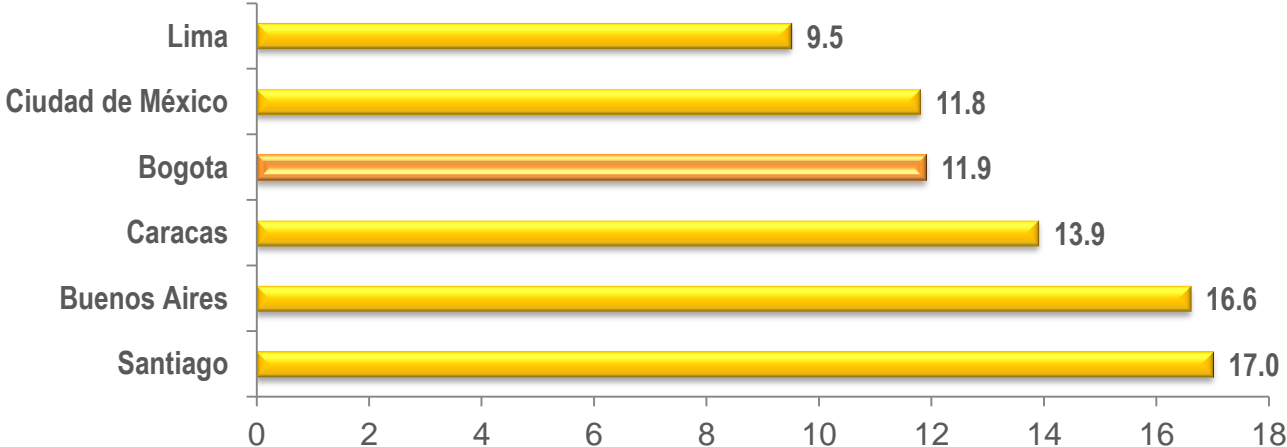
## Competitive Internet Cost

Monthly US\$ for 1Mbps (Megabytes per second)



## Average Rent Costs in Buildings at Competitive Prices

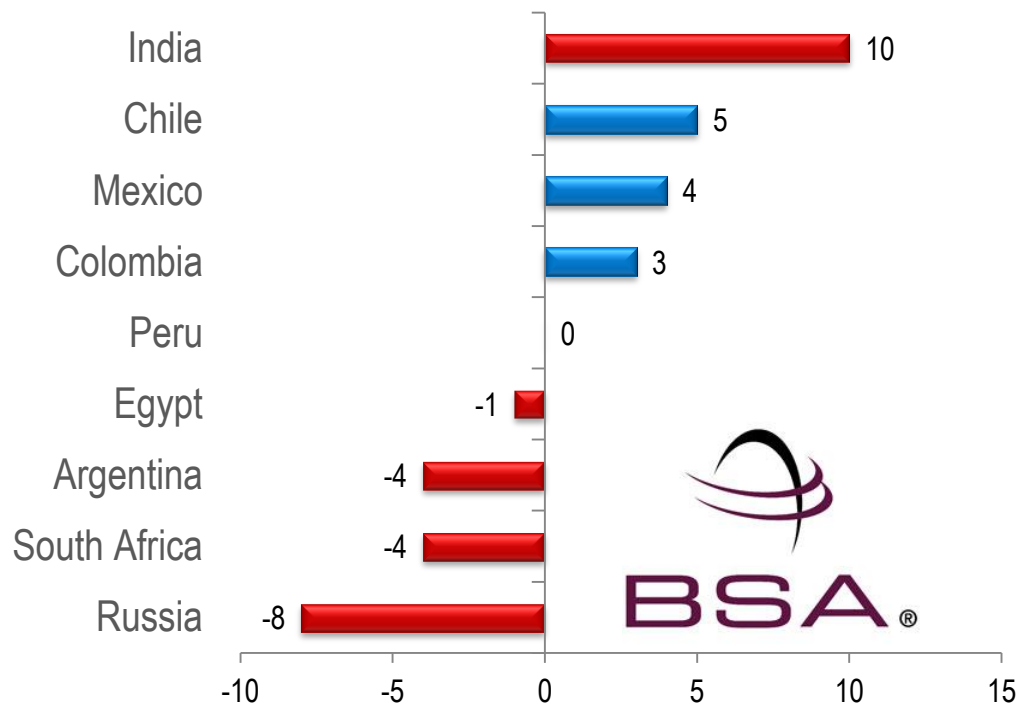
US \$/m<sup>2</sup>



Source: Colliers International  
Category A+ y A Buildings

# Colombia: a competitive country in Information Technology Industry (IT)

## Change in IT Industry Competitiveness Index on Business Software Alliance (BSA) Ranking, 2009-2011 (Position's change)



### Colombia's Indicators

Overall Index Score	↑
Business Environment	↑
IT Infrastructure	↑
Human Capital	↑
R&D Environment	↑
Legal Environment	↑
Support for IT Industry Development	■



# **Companies in Colombia: Success Stories**

**GENPACT**

**IBM**



**unísono**  
soluciones de negocio

**Telemark**  
Profesionales en contacto

**CONVERGYS**  
Outthinking. Outdoing.



**emergia**

**ATENTO**

**avanza**   
INTEGRACIÓN EFICIENTE Y SOSTENIBLE


**SUTHERLAND**  
GLOBAL SERVICES®

  
**TATA**  
**TATA CONSULTANCY SERVICES**


**MDY**   
Contact Center & Business Process Outsourcing

Some companies already present in Colombia


# Colombia's Main Call Centers Companies




Workstations 160  
Jobs 180




Workstations 4,600  
Jobs 6,900




Workstations 2,700  
Jobs 4,200




Workstations 1,290  
Jobs 1,000




Workstations 220  
Jobs 215




Workstations 500  
Jobs 500




Workstations 960  
Jobs 550




Workstations 400  
Jobs 600




Workstations 3,800  
Jobs 5,400



Workstations 1,100  
Jobs 1,200



Workstations 1,900  
Jobs 2,600



Workstations 70  
Jobs 35

Source: Asociación Colombiana de Contact Center y BPO - ACCC

# **Incentives and to promote the Services Industry**

**Discount in the  
income tax and  
supplementary  
contributions, and  
other contributions  
from payroll**

(Do not include  
positions generated  
by mergers or  
replacements)

New employees **under twenty eight** (28) years old. Length of benefit by employee: 2 years.

New employees certified in **displacement situation, reintegration or disability**. Length of benefit by employee: 3 years.

New women employees **above 40 years old with more than 1 year unemployed**. Length of benefit by employee: 2 years.

New employees with incomes **lower than 1.5 SMMLV**. Length of benefit by employee : 2 years.

# Productive Transformation Program: A public - private partnership to strengthen and build *world class sectors*



## 16 Estrategic Sectors

### SERVICES

BPO &O

Software & IT

Health Tourism

Ecotourism

Electric energy and  
services

### MANUFACTURING

Graphic  
Communications

Fashion System

Auto parts and  
Vehicles Industry

Cosmetics

Steel

### AGRICULTURE

Chocolates and  
Candy

Beef

Palm, Vegetable Oils  
and Biofuels

Shrimp

Dairy products

Horticulture

# Key initiatives of the PTP program

## Human Capital Development

- IDB(US\$12Millions) + MINTIC funding to develop training programs in skills for the industry.
- Launch of pilot scheme to strengthen English language skills in SW & IT and BPO&O sectors..

## Legal Affairs and Regulation

- Roadmap for the development of the law on "Data Protection" on Colombia.
- VAT Reductions in the exports of services (BPO & IT Services).

## Industry Development and Promotion

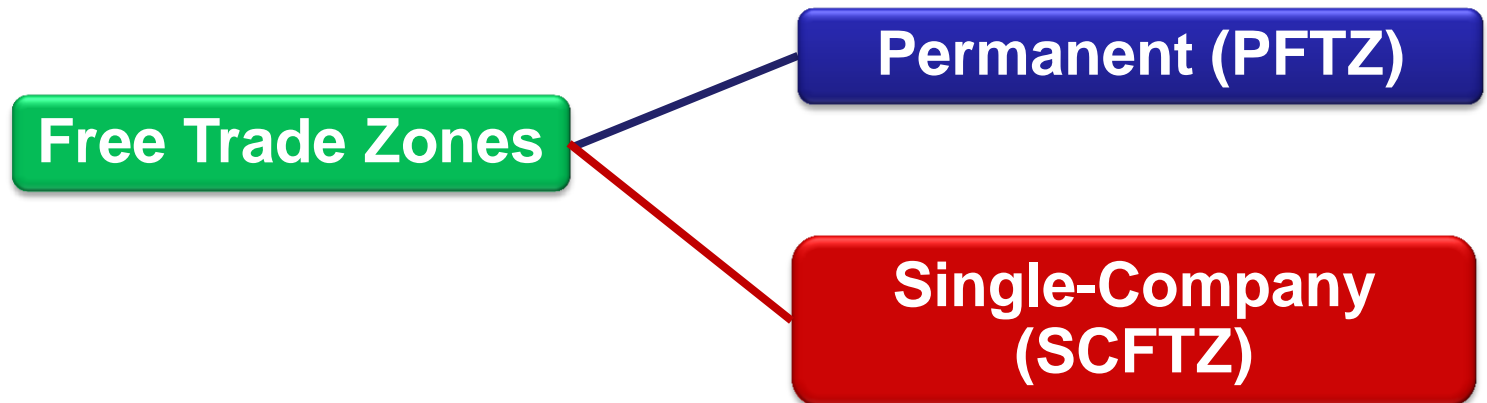
IAOP Chapter Creation of Colombia (International Association of Outsourcing Professionals) and Membership of the South America Regional Advisory Board.

## Infraestructure

- Public – Private alliance to connect 1078 municipalities out of 1100 through fiber optics.
- Expand from 5 submarine cables up to 8 including one coming from the pacific ocean.
- World-class data center

# Free Trade Zone Regime: 15% income tax and sales allowed to the local market

- ✓ 15% income tax rate.
- ✓ No import duties.
- ✓ VAT exemption for goods sold from Colombia to FTZ
- ✓ Benefit from international trade agreements. (Except Peru)
- ✓ Allow sales to the local market.





Gracias Спасибоありがとう Merci Danke 감사합  
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