

Bogota, a city with opportunities for contact centers

COLOMBIA

4th largest BPO market in LATAM

According AT Kearney's Global Services Location Index 2017:

10th

most competitive country in the world

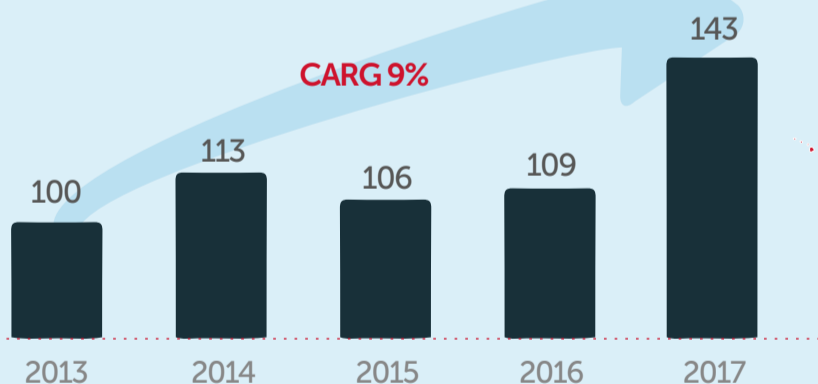
3rd

in Latin America, after Brazil and Chile to develop a global services operation

Industry with a high international component

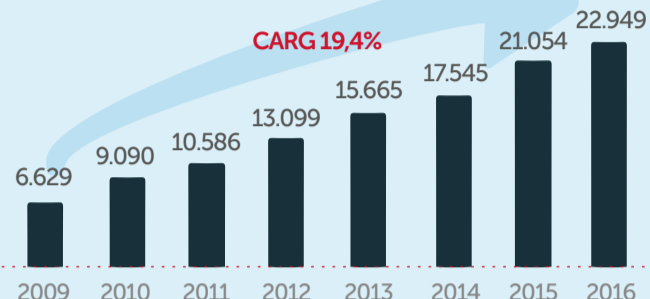
63% of contact centers in Colombia export services.

Call center exports in Colombia 2013-2017 (US\$ million)

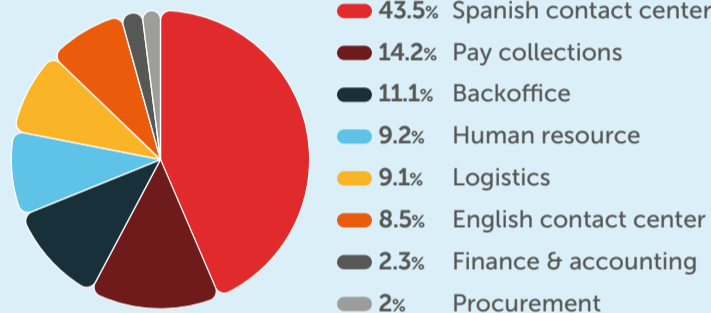


One of the most dynamic sectors of the Colombian economy, with an average annual growth of 19.4% in the last seven years.

Size of the outsourcing market in Colombia (2009-2016) * US\$ Million



BPO by service type (2016)

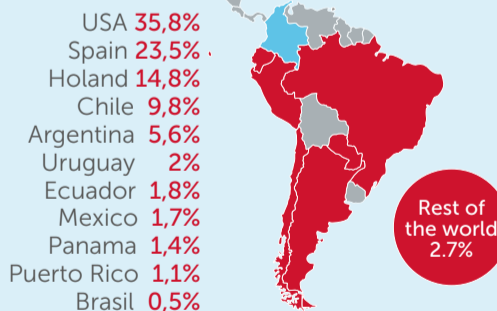


58% of the contact centers offer services in one language (spanish), 29% in two languages (+english), 10% in three languages (+portuguese/french) and 3% in more than four languages.

Destinations of Call Center exports 2017

40% of the contact centers have foreign capital

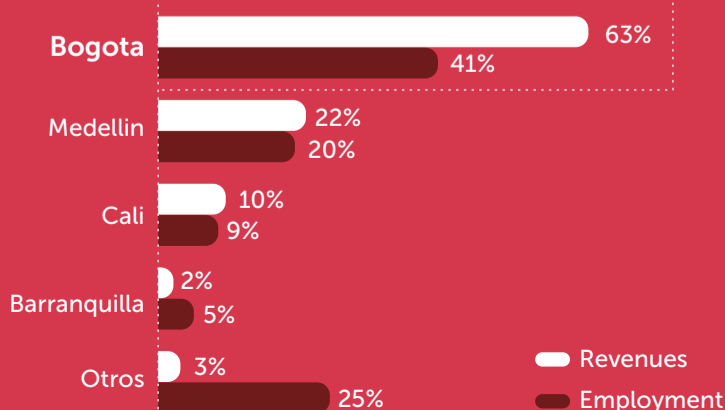
Spain, the United States, Chile, and Argentina are the main investors, concentrating 44%, 26%, 9% and 4% of the "sites" established in the Colombia respectively.



BOGOTÁ

Colombia's main contact center cluster

Revenue and employment generated by contact centers in Colombia, 2016



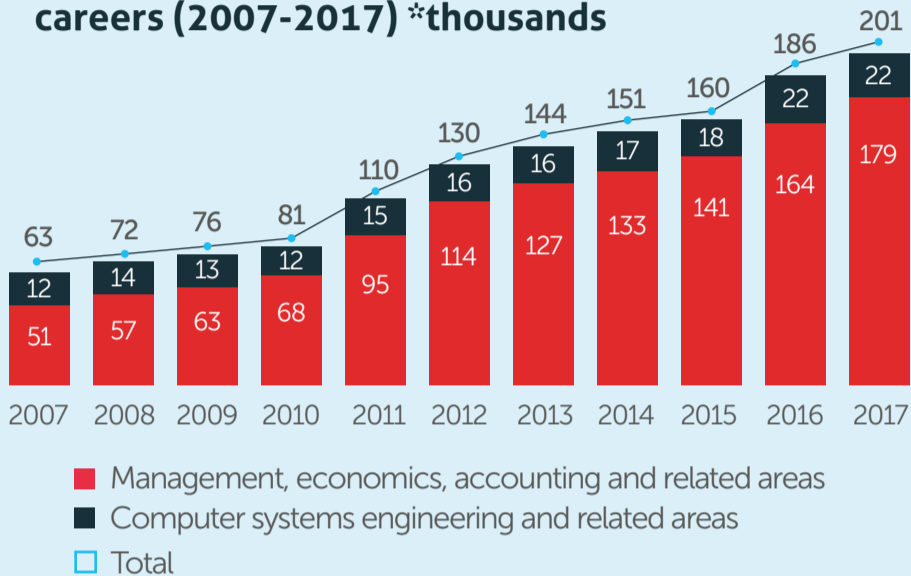
Some international contact centers established in Bogota

CONVERGYS/CONCENTRIX
SUTHERLAND + ACS
TELEPERFORMANCE
SITEL + AVANZA + ALLUS
GRUPO KONECTA + ATENTO

Human Talent

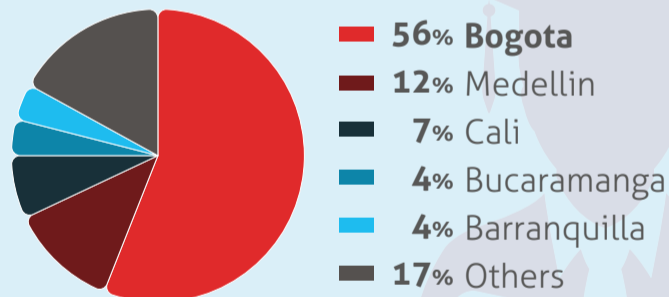
In the last 10 years, the number of annual graduates in Colombia of careers of interest has tripled, from 63,800 in 2007 to 201,600 in 2017. Management, economics, accounting and related areas register an average annual growth of 13%, while computer systems engineering and related exhibit an average annual growth of 6%.

Number of graduates in Colombia in selected careers (2007-2017) *thousands



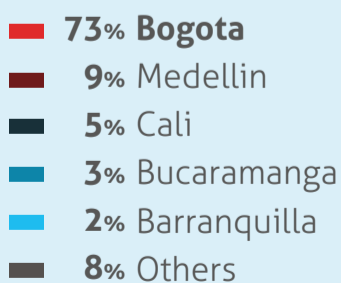
Bogota stands out as the country's main education cluster, with 56% of graduates in careers of interest.

Graduates in selected careers by city (2007-2017)



It is estimated that between 8% and 17% of the Colombian labor force is bilingual (2 - 4.5 million).

Bilingual Population in Colombia



An industry with competitive salaries

Average salary by position 2017 (US\$/Month)



Exchange rate: US\$ 1 = COP\$ 2.800

The wages do not include the social benefits assumed by the employer. These are between 34% - 50%

Bogota's strategic position



47 daily international flights.



Eastern time zone USA.



Neutral accent with willingness to support.



Low risk of natural disasters (earthquakes).

Institutional support



Tax incentives

- Free Trade Zone Regime
- Labor incentives
- VAT exemptions and export/import benefits
- R&D incentives

Invest in Bogota is the investment promotion agency for Bogota and Cundinamarca. The Agency offers, free of charge, and in absolute confidentiality, services for investors during each stage of their investment process: Exploratory phase, start-up phase, operational phase and re-investment.

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