

LATIN AMERICA: ATTRACTIVE DESTINATION



**BRAZIL, MEXICO,
COSTA RICA,
COLOMBIA,
ARGENTINA
AND URUGUAY
ACCOUNT FOR
AROUND 94%
OF SSC LOCATED
IN THE REGION**

BENEFITS OF BPO & SSC

- Customized solutions for business demands
- Higher quality of business services
- Cost flexibility
- Efficiency
- Cost reduction / economies of scale

TRENDS

- The savings opportunities can vary between 20-40% depending on the business model adopted.
- Implementing a SSC could result into an 8% annual increase in the productivity levels of the companies. Due to economies of scale this % should be higher for BPO.
- The number of SSCs and BPO with more than three business processes continues to rise dramatically, from 20% in 2013, to 31% in 2015, and now 53% in 2017.

PRO MÉXICO



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SHARED SERVICES CENTERS & BPO INDUSTRIES IN MEXICO



DID YOU KNOW THAT...

- Mexico is the **11th** largest country in the world in terms of the size of its population: 122.7 million inhabitants.
- Mexico is a young country: youth population (15 - 24 years) represent 18% of total population. Median age of Mexico's population is 27 years old.
- Mexico will become the **8th largest economy by 2050**: The GDP is expected to reach 5,563 billion dollars.
- Mexico is the **8th most attractive destination for FDI** according to the PwC's CEO Survey 2017.
- Mexico has signed 32 Reciprocal Promotion and Protection of Investments Agreements with 33 countries, and 12 free trade agreements spanning 46 countries.
- Mexico is the **13th most attractive destination for locating services operations**.
- Countries that have a tax treaty in force with Mexico: Australia, Austria, Belgium, Brazil, Canada, Chile, Czech Republic, Denmark, Ecuador, Finland, France, Germany, Greece, Iceland, Indonesia, Ireland, Israel, Italy, Japan, Korea, Luxembourg, Netherlands, New Zealand, Norway, Poland, Portugal, Rumania, Russia, Singapore, Slovakia, Spain, Sweden, Switzerland, United Kingdom and United States.

ADVANTAGES OF ESTABLISHING IN MEXICO

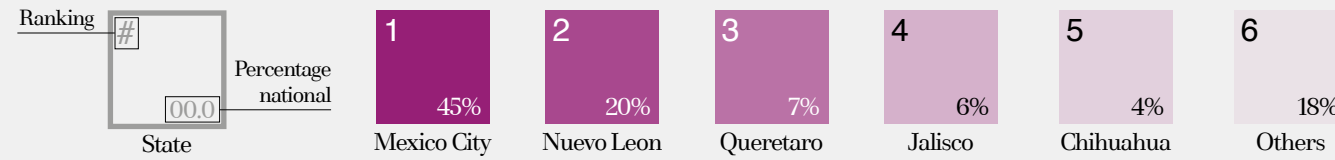
- Close proximity to current operations
- Labor cost
- Labor availability
- Close proximity to HQ
- Cultural synergies
- Regulatory/legal certainty
- Strategic location and time zone

MAIN SSC AND BPO'S IN MEXICO

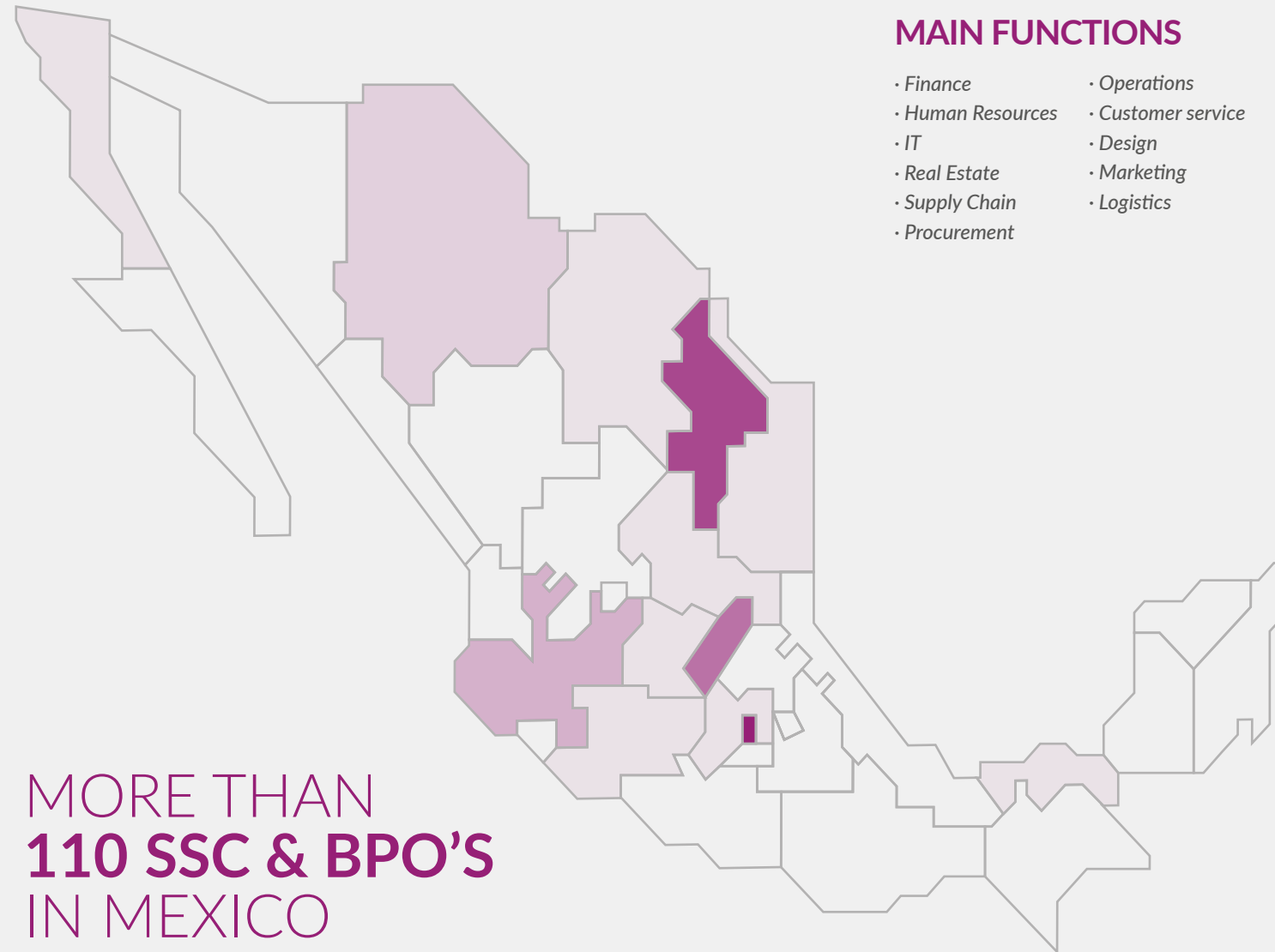
- ABB
- Accenture
- AON
- Capgemini
- CBRE
- Cushman & Wakefield
- Ericsson
- Flex
- Gerdau
- HCL
- Henkel
- John Deere
- Kellogg's
- Lufthansa
- MetLife
- Novartis
- PepsiCo
- Santander
- Scotiabank
- Tata Consultancy Services
- Teleperformance

Source: SSON Analytics, 2017

SHARED SERVICES CENTERS AND BPO'S INDUSTRIES IN MEXICO. MARKET SHARE BY STATE



Source: SSON Analytics, 2017



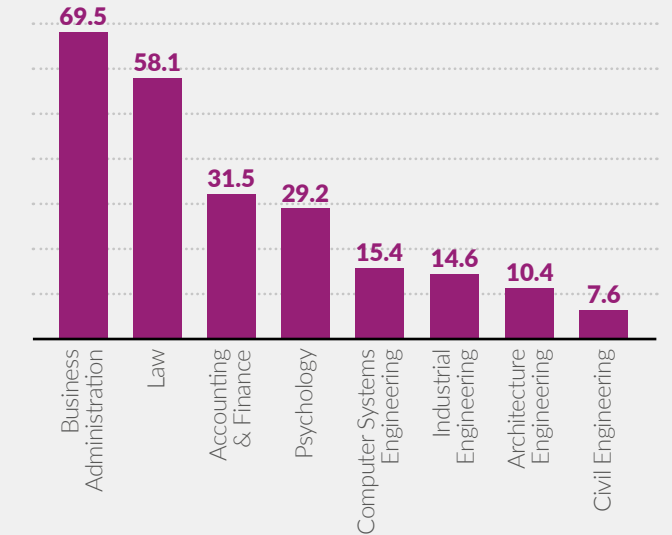
MAIN FUNCTIONS

- Finance
- Human Resources
- IT
- Real Estate
- Supply Chain
- Procurement
- Operations
- Customer service
- Design
- Marketing
- Logistics

MORE THAN
110 SSC & BPO'S
IN MEXICO

MOST POPULAR STUDY FIELDS IN MEXICO

Students who finished an undergraduate program, 2016-2017 (thousands)



Source: Asociación Nacional de Universidades e Instituciones de Educación Superior (ANUIES).

MAIN MEXICAN UNIVERSITIES FOR SSC AND BPO'S

University	City	University	City
★ 1 Universidad Nacional Autónoma de México	Mexico City	6 Universidad Autónoma de Nuevo León	San Nicolas de los Garza
★ 2 Instituto Tecnológico de Estudios Superiores de Monterrey	Monterrey	7 Universidad de las Américas Puebla	Puebla
3 Instituto Politécnico Nacional	Mexico City	8 El Colegio de México	Mexico City
4 Universidad Autónoma Metropolitana	Mexico City	9 Benemérita Universidad Autónoma de Puebla	Puebla
5 Universidad de Guadalajara	Guadalajara	10 Universidad Autónoma de Chapingo	Texcoco

★ They are among the best 200 universities worldwide according with the QS World University Rankings 2018.
Source: AméricaEconomía, Ranking de las Mejores Universidades de México 2017.