

Investing in **CR COSTA RICA**



The place. The people. The opportunities.

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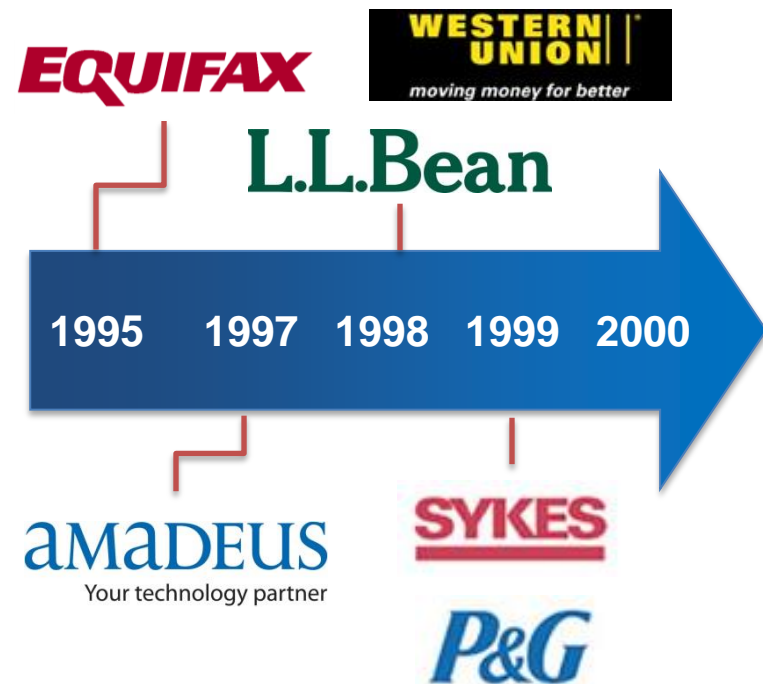
CINDE

Costa Rica Investment Promotion Agency

- **Private, non-profit, non-political organization, founded in 1982**
- **Declared of public interest by the Costa Rican Government in 1984**
- **Active promotion of foreign investment, local support, and post-establishment services**
- **Extensive experience in strategic sectors such as Life Sciences, Advanced Manufacturing, Services, Clean Technologies-Renewable Energy, and Projects**

**Before and After: From a small sector,
to a sophisticated and main revenue-
generating one**

From 6 companies operating by the year 2000...

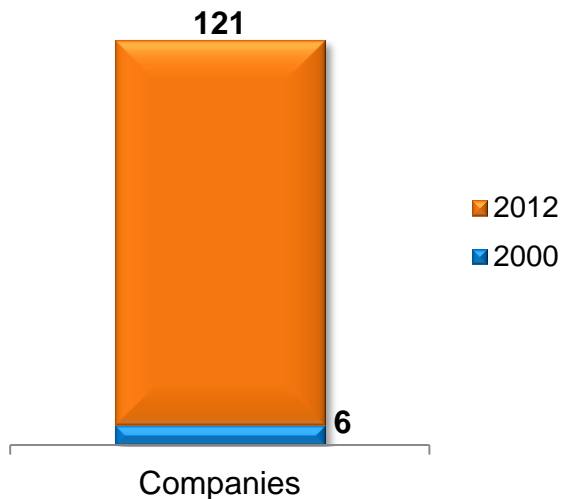


To hosting 25% of FORTUNE 50 Companies, including the number 1



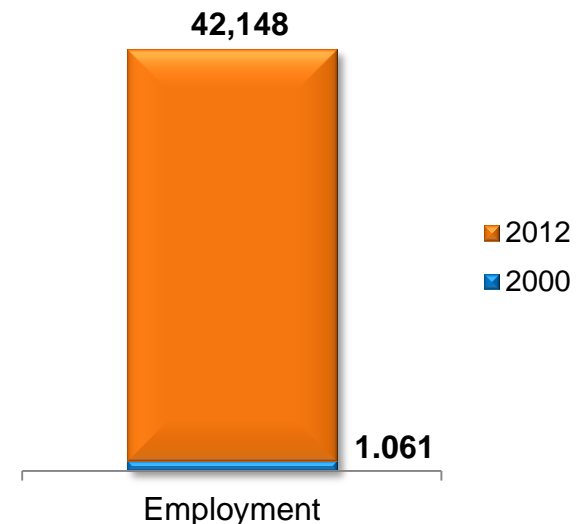
From few employment possibilities...to a Sector offering a wide array of sophisticated employment opportunities

**Service Sector
Companies Growth**



The number of companies in this sector is **1,917%** higher than in 2000

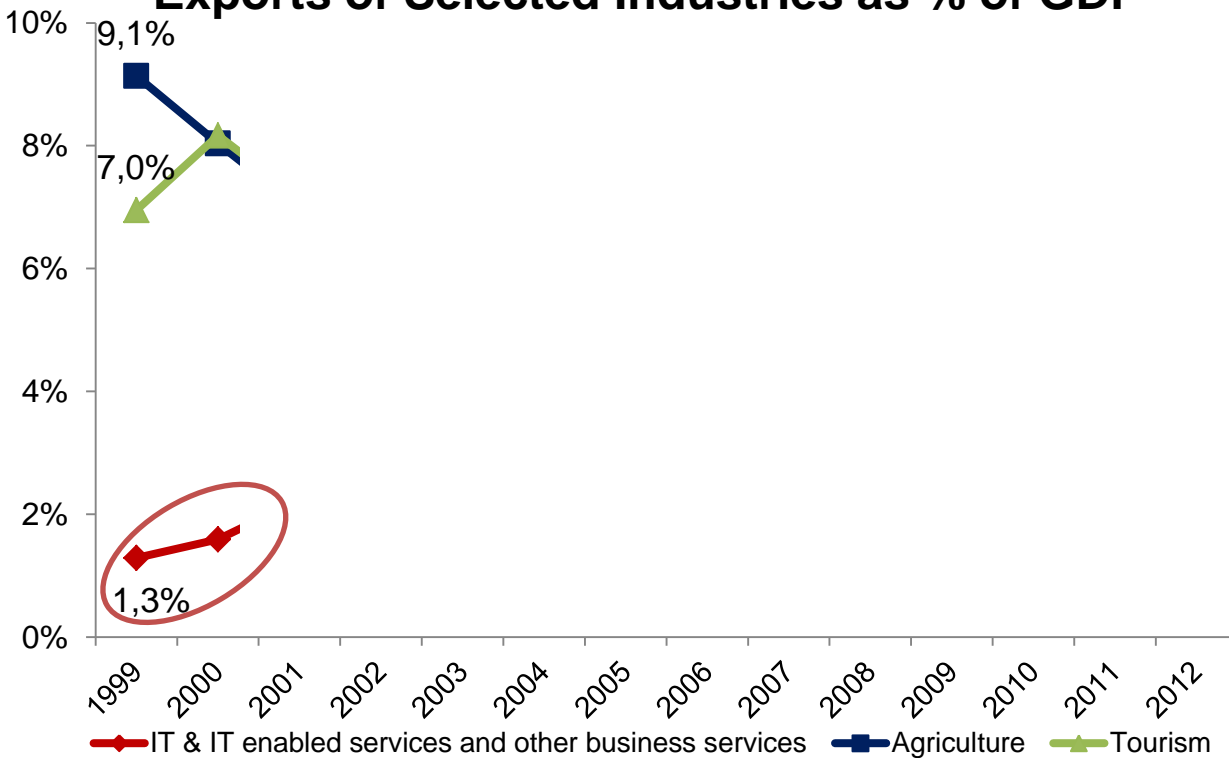
**Service Sector
Employment Growth**



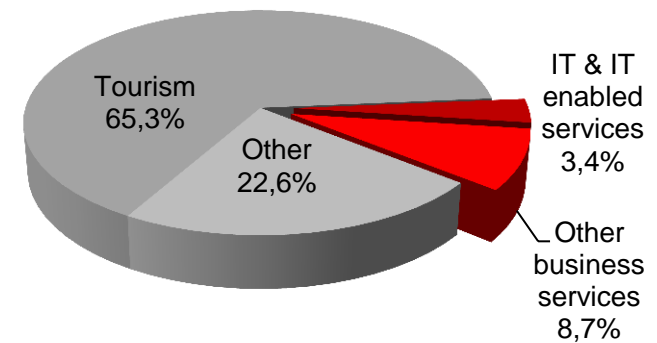
The employment in this sector is **40** times higher than in 2000

From not even representing 2% of GDP...

Exports of Selected Industries as % of GDP



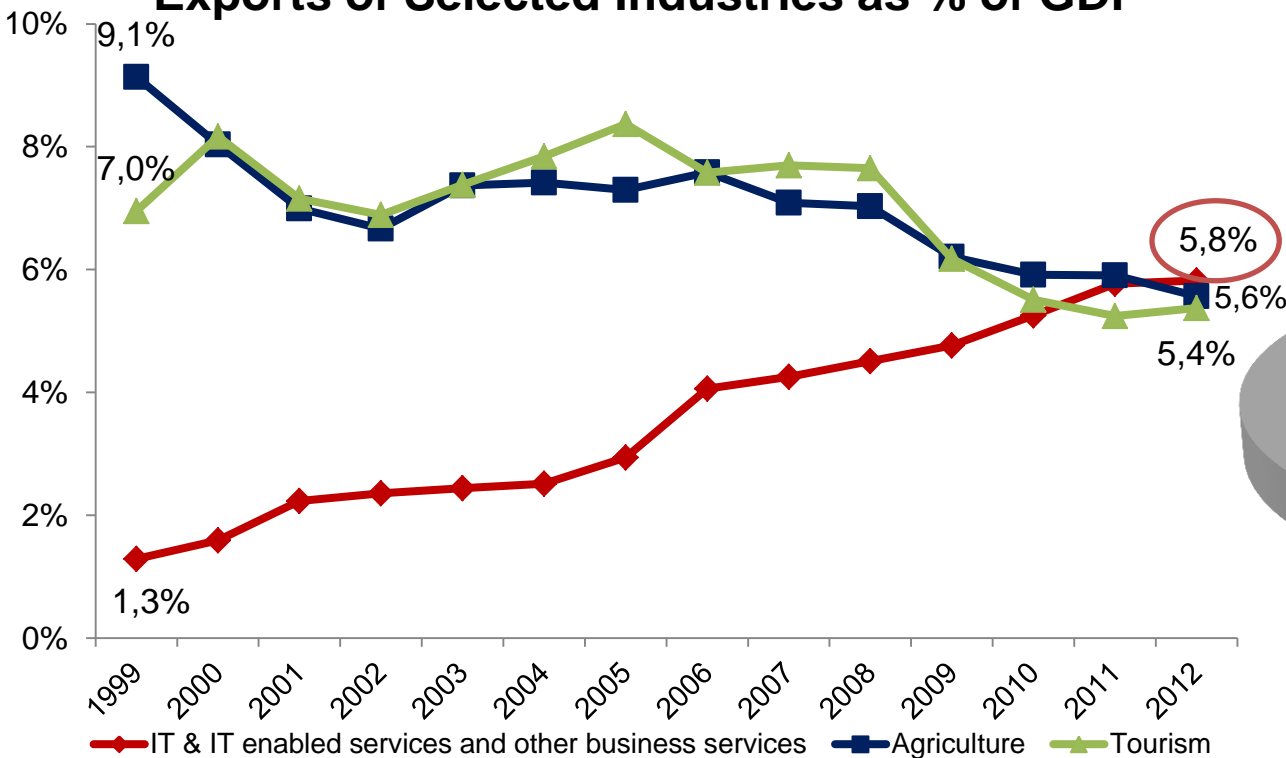
Exports of Services by Sector, 1999



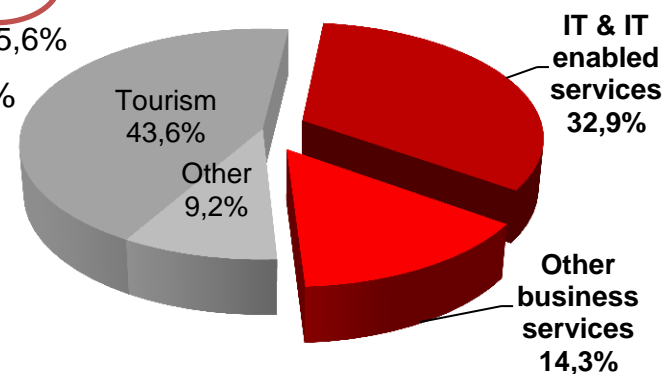
Source: CINDE based on data from BCCR and Procomer, 2013

To one of the most important revenue-generating sectors of the economy

Exports of Selected Industries as % of GDP



Exports of Services by Sector, 2012



Source: CINDE based on data from BCCR and Procomer, 2013

From transactional functions and bilingual services in Spanish and English provided to the Americas...

Finance

- Collections
- Transactional Accounts Payable
- Transactional Accounts Receivable

Back Office

- Credit Application
- Data Entry
- Data Processing
- Data Update
- IT and Help Desk Support

Human Resources

- Payroll
- Travel and Expenses

Contact Center

- Customer Support
- Record-to-Report

To a global sophisticated platform...

Finance &
Accounting

Back Office

Engineering &
Design

Human
Resources

Contact Centers

Entertainment &
Media

Procurement

Regional
Centers

Software
Development

Business
Transformation

...and Global Centers of Excellence servicing the world in more than 15 different languages

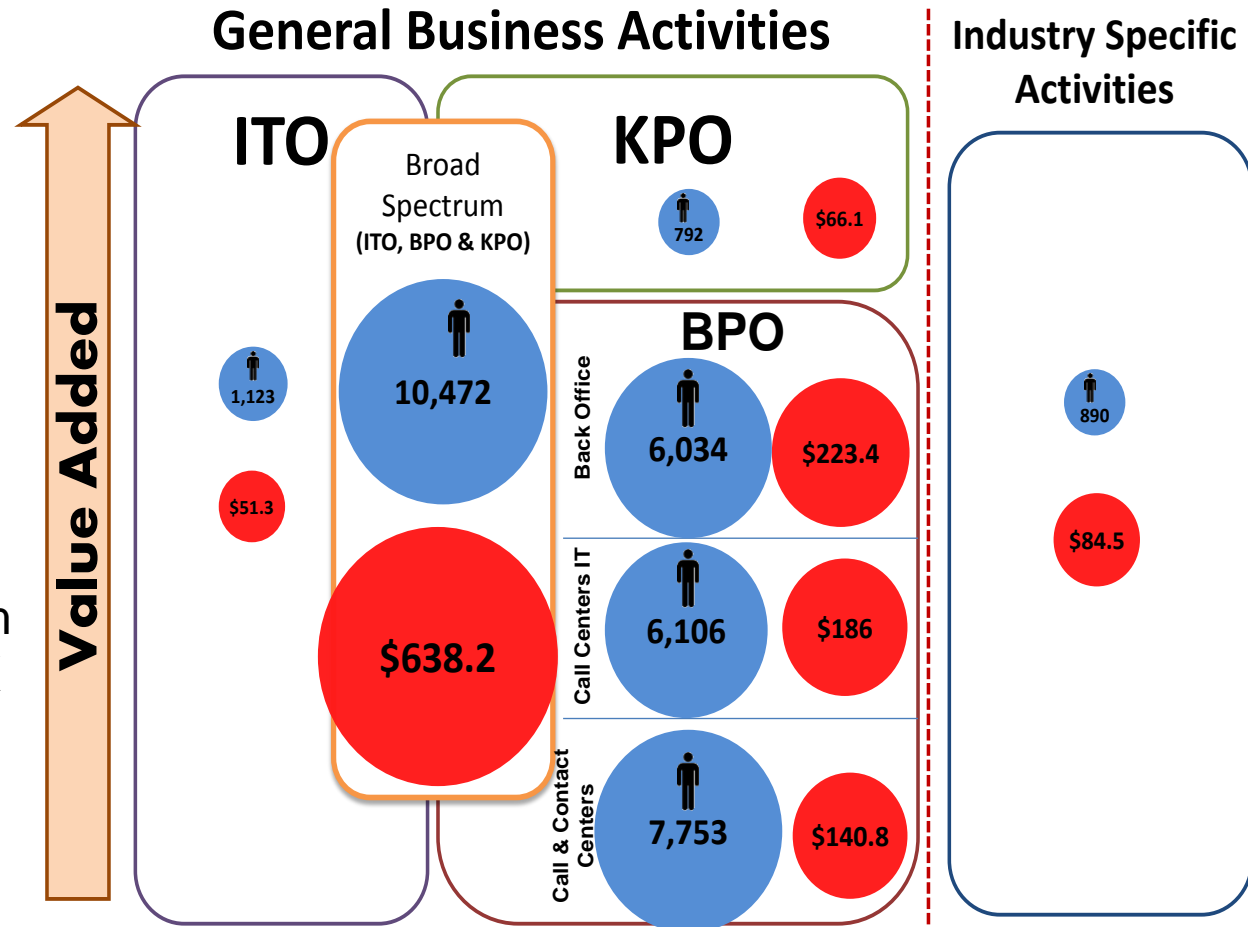
End-to-End Centers offering services 24/7, 365 in English, Spanish, Malay, German, French, Portuguese, Japanese, Dutch, Polish, Czech, Finnish, Italian, Russian, Farsi, Mandarin



**This is Costa Rica's Services Sector
We are designing the future...**

Where companies leverage KNOWLEDGE and EXPERTISE, not just simple cost reductions

- Output per employee depends on activity sophistication level. It ranges from \$18K up to \$95K per employee
- Average output per employee increased from \$35K in 2005 up to \$45K in 2012 (+28%)

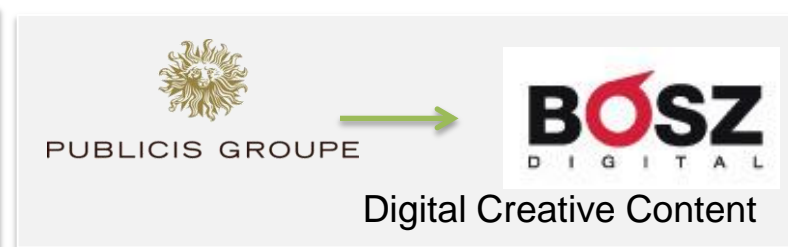
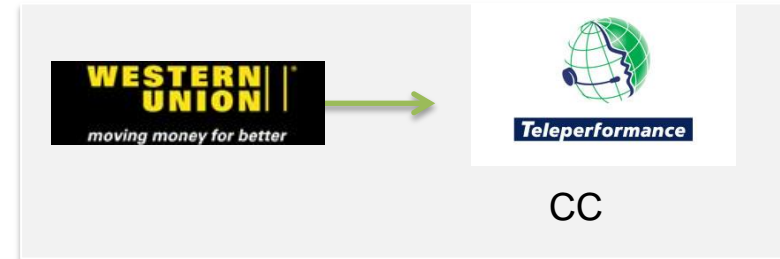
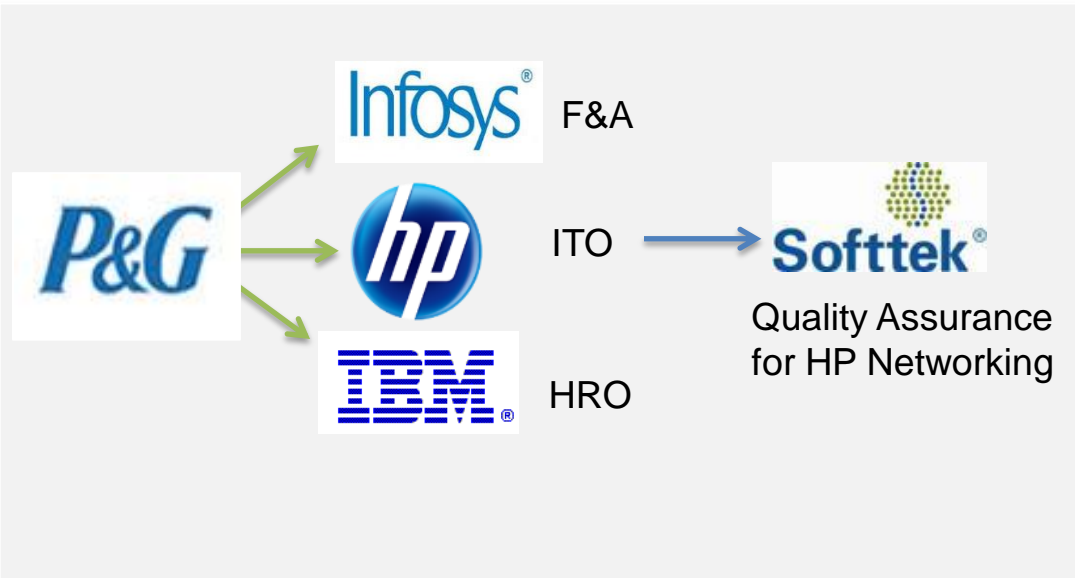


Source: CGGC, Duke University based on data from CINDE, 2012

Red Circles illustrate exports in US\$ million; Blue Circles show number of employees (December 2011).

Outsourcing: strategic alliances aimed at growth, efficiency and excellence

A One-stop location for Global In-house Centers and Outsourcing Business Solutions



- Catering to a wide variety of Business Models: Build Operate Transfer (B.O.T.), Co-Managed operations and Staff Augmentation Services

A Natural Evolution:



Costa Rican companies becoming competitive, expanding to new horizons and providing services in new locations

ITS providing ITO & BPO services:

- United States
- Honduras
- Guatemala
- El Salvador
- Nicaragua
- Colombia
- Dominican Republic

AVANTICA providing software development:

- Peru
- USA West Coast

ARTINSOFT providing software development:

- Washington

Bosz Digital providing creative content services:

- Colombia

What is next? Offering business solutions through Central Gate



Central Gate: helping with promotion, marketing and business development of outsourcing companies in KPO, BPO, and ITO

- The international strategy offers business solutions to companies in Costa Rica and elsewhere and finding the right partner
- The Costa Rican Foreign Trade Corporation, PROCOMER, has become a key supporter of this initiative, contributing expertise in outsourcing, exports, and foreign trade
- There are currently 28 outsourcing vendors, providing Contact Center, Back Office, Software Development, IT Support & Engineering, Digital Production, and Legal Process Services



The Costa Rican Chapter: a strategic alliance

The Chapter will provide:



- A platform to the outsourcing industry in Costa Rica and interaction with a global community, including buyers, vendors, government and academia
- Possibilities of sharing best practices with more than 120,000 experts worldwide
 - Opportunities with potential clients
 - Create close alliance with the most recognized outsourcing association in the world



A global event for a global community

- ➔ **Date and venue:** December 3rd-5th, 2013, San Jose, Costa Rica, Intercontinental Hotel.
- ➔ **Objective:** bring together outsourcing/offshoring global community with the International Association of Outsourcing Professionals (IAOP)'s network of over 120,000 members world-wide.
- ➔ **Audience:** more than 300 high level representatives from the services industry, including vendors, buyers and advisors
- ➔ **Agenda:** includes learning track sessions, conferences and panels. It comprises site Buyer/Vendor match site visits to some of the main services companies based in Costa Rica.

Thank You!