

Invest in  Bogota!

Bogota: City of Business Opportunities and a Great Place to Live

Bogota, October 2015

BOGOTA 



1. Who are we

2. Why Bogota

3. Investment opportunities in Bogota

Invest in Bogota: investment promotion and international marketing agency of the city of Bogota



- Created in 2006
- Mixed, public-private
- Managed under private law
- Non-profit
- Bogota Secretary of Econ Dev
- Bogota Chamber of Commerce



Invest in Bogota works in three main fronts to promote investment and city image internationally

Target clients



- Investor in strategic sectors: generating high quality employment and contributing to with tecnology transfer.
- *Influencers* and opinion generators

**FDI Promotion and
facilitation**



**Investment
Climate**



City Marketing Strategy



Invest in Bogota



We provide services to foreign investors willing to start operations in Bogota

Services provided by the agency



Custom made information and opportunity analysis

General, sector and company specific information according to investor needs, understanding of business opportunities, business agendas for site visits, meeting arrangements with key players.

Advice during start-up

Guidance on permits, regulations and business set-up activities, identification of possible locations or offices, contacts with potential suppliers, clients or partners.

Aftercare services

Follow-up on company's development, support in expansion projects, networking with other companies, continuous monitoring and improvement of business climate.

Invest in Bogota has facilitated more than 190 investment projects in high added-value sectors



Invest in Bogota

Recognized by Site Selection Magazine in May 2015 as best regional investment promotion agency for LATAM and Caribbean



Site Selection Announces
The First Annual Best to Invest

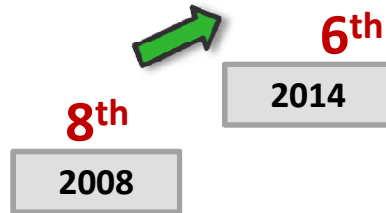


Invest in Bogota

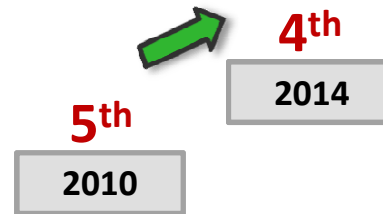
And Bogota as having one of the best business environments in Latin America...



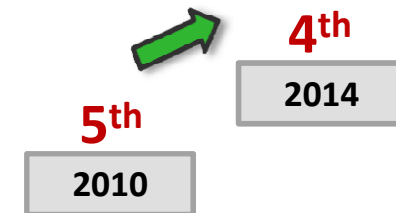
Best city for business
in Latin America
(América Economía)



Latin America
Global City
(A.T. Kearney)



City for investment
attraction
(IdN and CEPEC)



... recently named the (8th) city in the world with the best investment attraction strategy

Ranking FDI Strategy 2014/15*

8th worldwide



1st in Latin America



Only Colombian city amongst the 25 largest centers



*Ranking "Global Cities of the Future 2014/15"
Source: Financial Times, fDi Intelligence, 2014





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Bogota is...

... a creative city in constant transformation and progress

Invest in Bogota

It's young, diverse and modern

- ✓ Bogota has a workforce of over 4.5 million people of which 69% are between 16 and 44 years old.
- ✓ 100,400 students graduate every year from 115 post-secondary education institutions.

Bogota is a growing business hub in Latin America focused on developing high value added services.

- ✓ Financial hub for Colombia and the Andean region.
- ✓ 6th best city in Latin America for doing business (2014).

A city that respects the environment and has been built around water. An ideal place to grow, live and enjoy.

- ✓ 5,016 parks.
- ✓ 14 wetlands.

Invest in Bogota

Bogota is a cultural reference in Latin

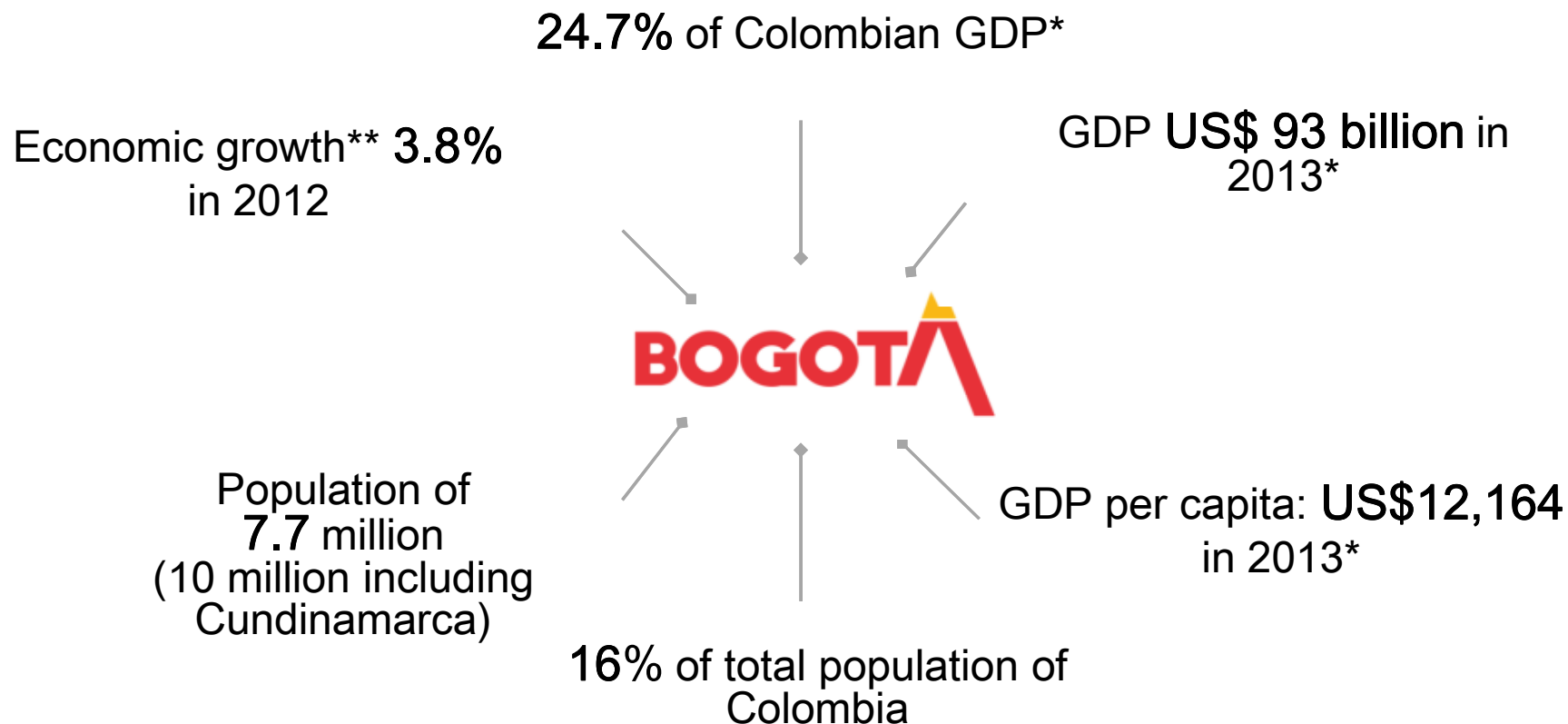
- ✓ 6 Free musical festivals at park.
- ✓ One of the best theater festivals in the world.
- ✓ Network of mega and public libraries

A new tourist destination for business, culture, health, events and conventions.

- ✓ Ranked 52nd worldwide and 7th in Latin America according to ICCA.
- ✓ Approximately 13,204 hotel rooms and a sustainable destination for events and conventions.

Invest in Bogota

Bogota is the economic engine of the country and a crucial player in Latin America's economy...



Bogota is the most important consumer market in Colombia

* Calculations by Invest in Bogota based on DANE ** DANE, Regional accounts
Source: DANE, Regional accounts, Forecast Census 2005.

Bogota's central location and direct air connections to major metropolises make it an ideal location to serve the local and regional markets

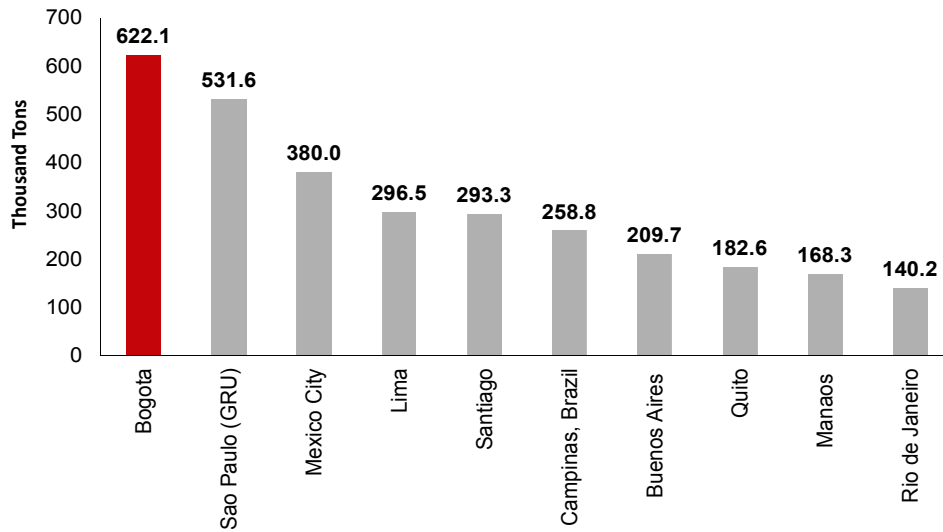


Bogota is **5 hours** from New York, Mexico City and Sao Paulo

Direct flights depart from El Dorado International Airport to **37 destinations** around the world

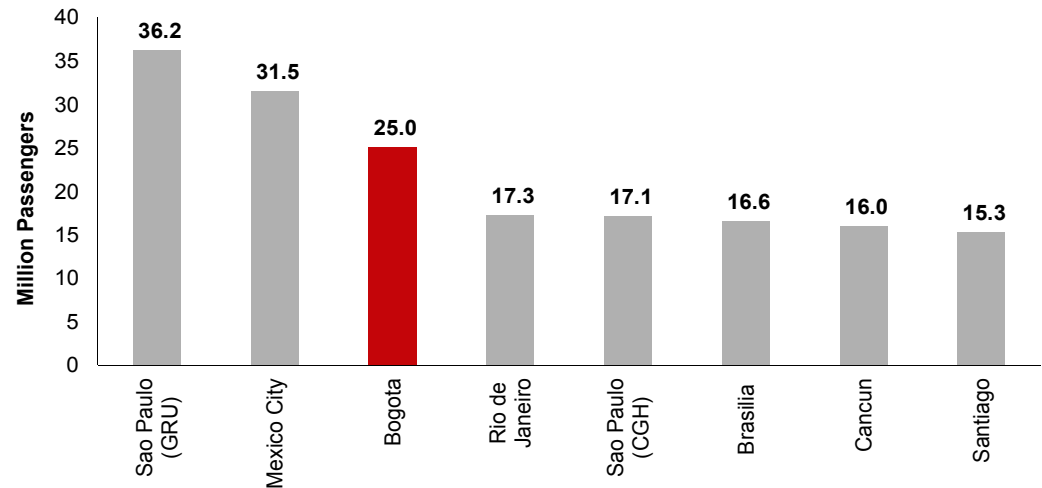
Companies in Bogota have access to an extended market of **US\$44 trillion and 1,450 million** people.

The city is the major cargo air hub and the third passenger transport hub in Latin America



Main Latin American Airports according to Cargo Movement (2013)*

Main Airports in Latin America according to Passenger Movement (2013)*



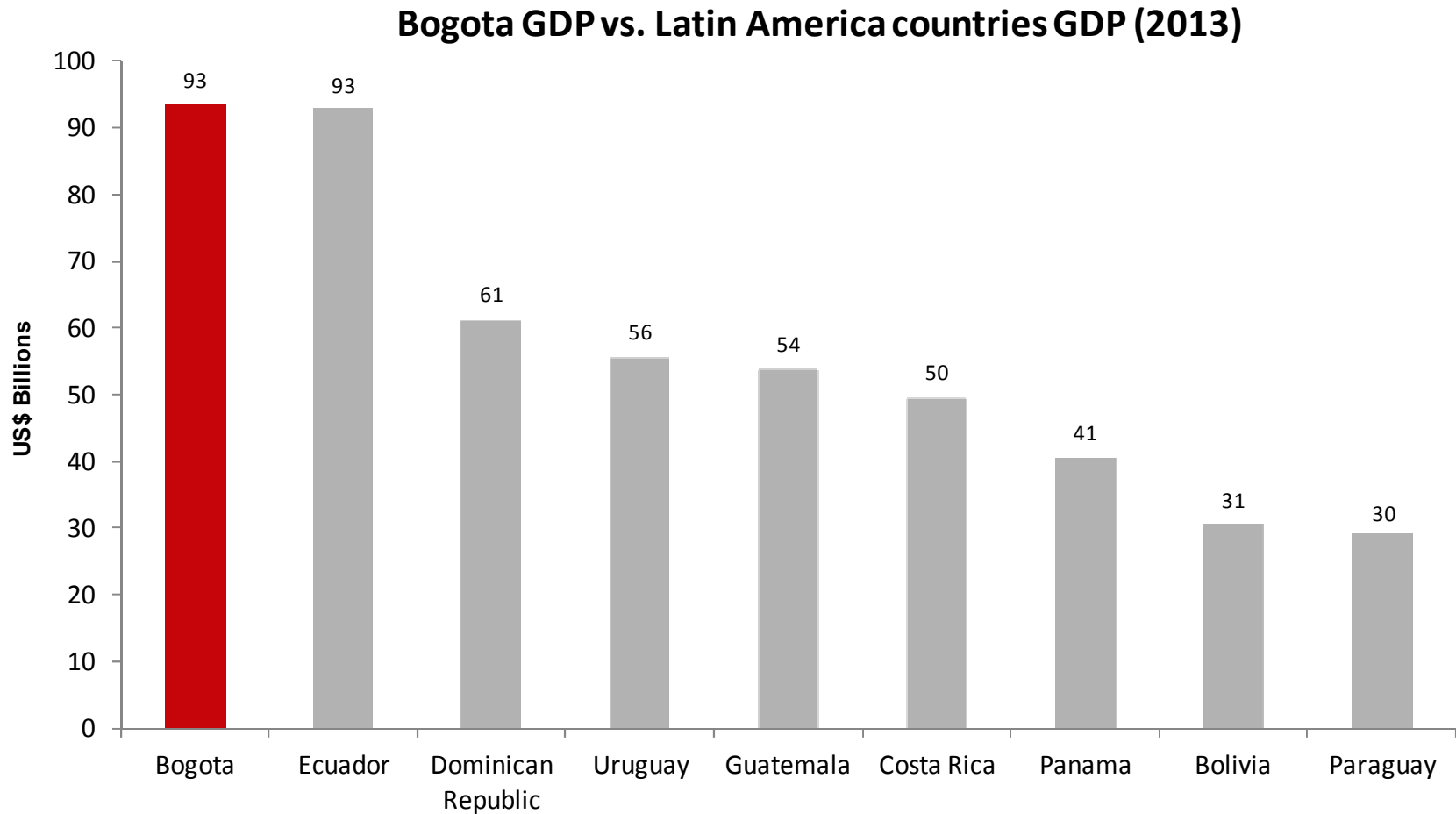
With 4 stars, El Dorado airport is ranked as one of the best 23 airports in the world.**

*Airports Council International (ACI World Airport Traffic Report, 2013)

** Skytrax, 2014.



...in fact, Bogota's economy is larger than that of many countries in Latin America

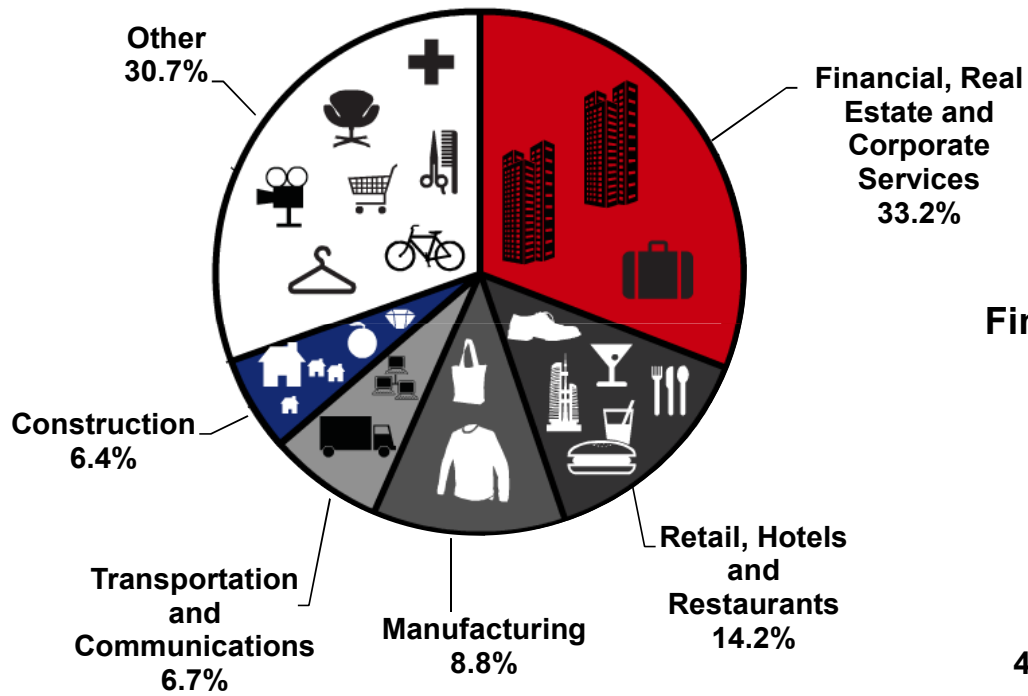


Source: International Monetary Fund, World Economic Outlook Database October 2014; DANE, Regional accounts



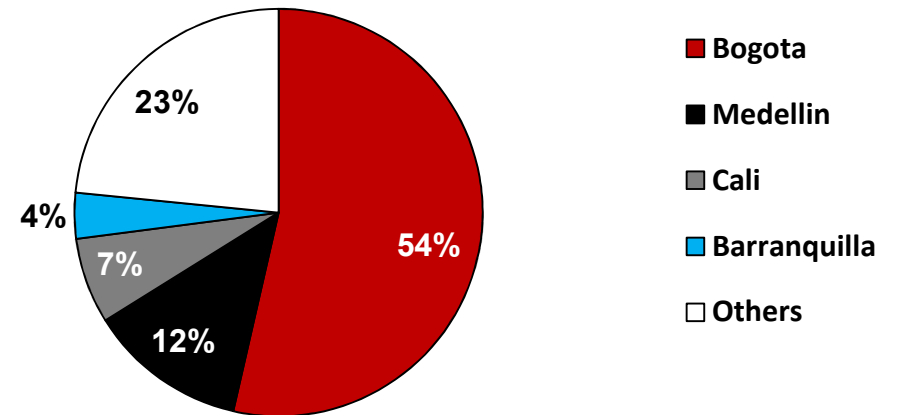
Bogota has a diversified economy, with a strong emphasis on services...

Bogota's GDP by Economic Sector (2013)



... and is Colombia's financial center

Financial Transactions* by Cities, 2014

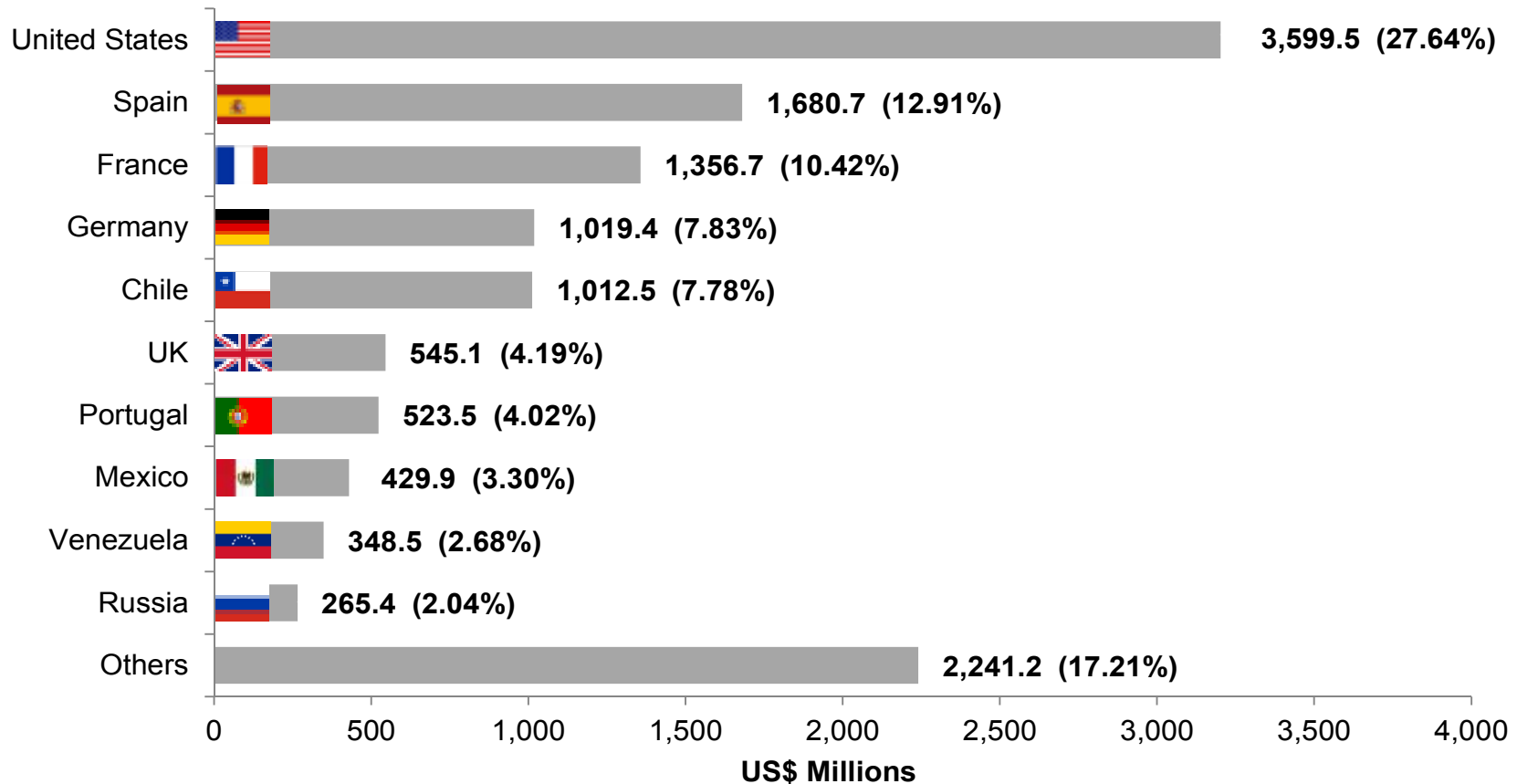


Source: DANE, Regional accounts; Superintendencia Financiera de Colombia. Calculations Invest in Bogota
 *Sum of financial raising and loans in the financial system



Between 2003 and 2014 United States, Spain, France, Germany and Chile were the principal source markets of the greenfield investment in Bogota.

Greenfield investment* in Bogota by country of origin (2003-2014)



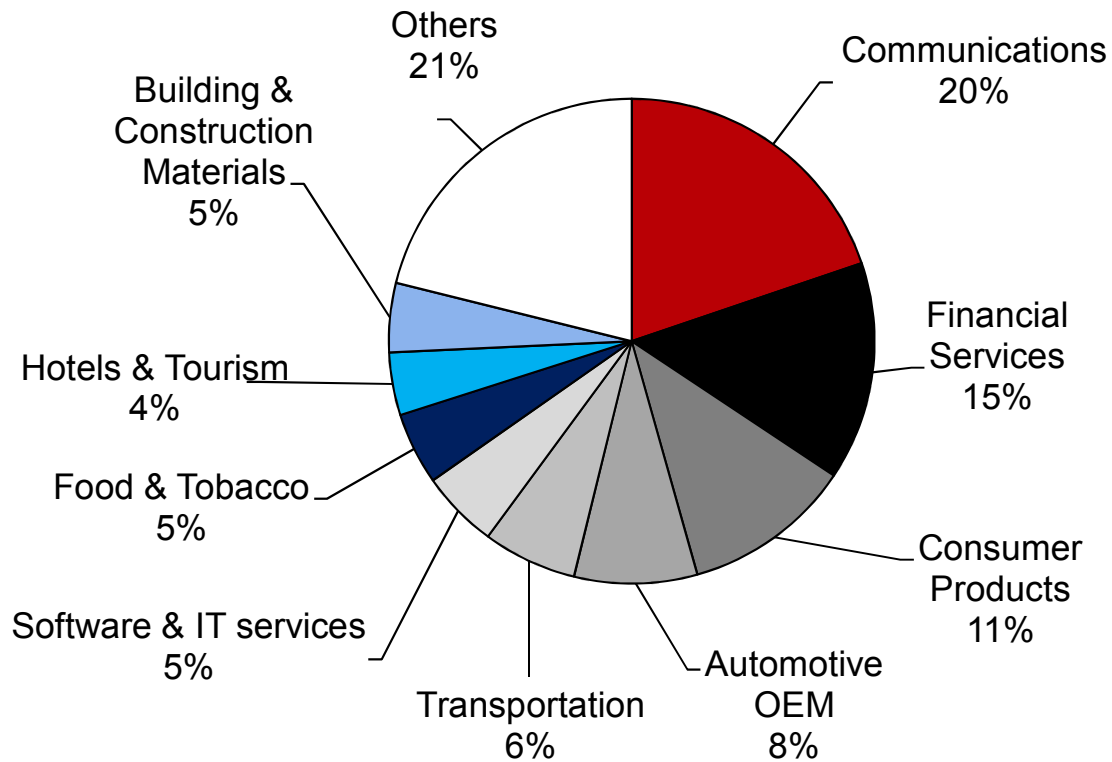
Others includes the following countries order from the highest to the lowest investment: Brazil, Bermuda, Canada, Finland, Argentina, Peru, Switzerland, Denmark, Japan, El Salvador, Austria, Belgium, Australia, Netherlands, United Arab Emirates, Panama, China, India, South Korea, Nicaragua, Italy, Poland, Ecuador, Hong Kong, Norway, Uruguay, Luxembourg, Ireland, Costa Rica, Czech Republic, Sweden.

*Excluding extraction activities. Estimations Invest in Bogota based on fDi Markets.



In the last years Bogota has received US\$13.02 billion in greenfield investment, concentrated mainly in communications and services (56%).

Greenfield investment* in Bogota by economic sector (2003- 2014)

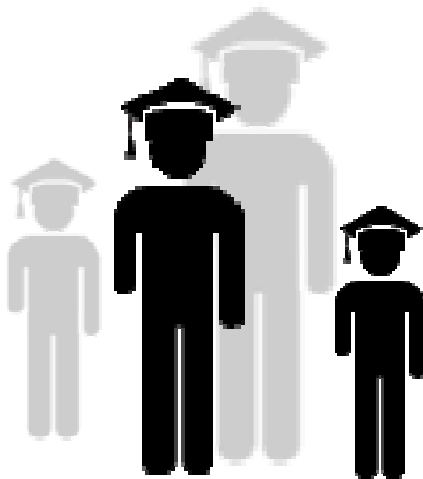
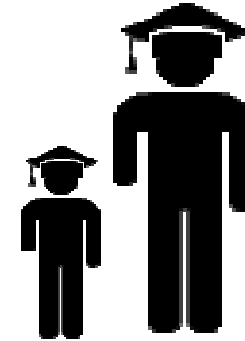


...between 2003 and 2014 greenfield investment projects in Bogota have had an annual average growth of 30%.

*Excluding extraction activities
Estimations Invest in Bogota based on fDi Markets

Bogota has a young workforce of 4,5 million and highly qualified human resources. The main fields of study are economics, administration, social sciences and engineering

- Bogota is the largest provider of human resources in Colombia: approximately **29,430** of its yearly **112,714** tertiary graduates, carry postgraduate degrees



- Bogota concentrates **43%** of total PhDs in the country
- It concentrates **32%** of professional technicians and technologists from Colombia.
- Bogota has **5** of the 100 best universities in Latin America*

Bogota Offers national and local incentives for investment



Free Trade Zones



The Free Trade Zone legislation offers benefits such as:

- A preferential income tax of 15%
- Duty free importation of machinery and raw materials
- Purchase of raw materials, capital goods and services with no VAT
- Possibility of selling to the Colombian market
- Possibility of creating a Single-Company Free Trade Zone subject to certain requirements

Bogotá offers an attractive FTZ environment



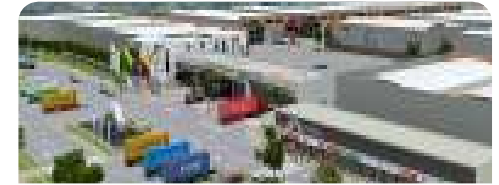
Intexzona

- **Location:** Cota (Cundinamarca) 26 Km from Bogotá
- **Area:** 82 hectares
- **Potential segments:** diagnostic and medica devices, contact centers, data centers, logistics



Zona Franca de Bogotá

- **Area:** 96 hectares
- **Potential segments:** SCM and logistics, cosmetico and pharmaceutical, Biotech, (BPO, ITO, KPO)



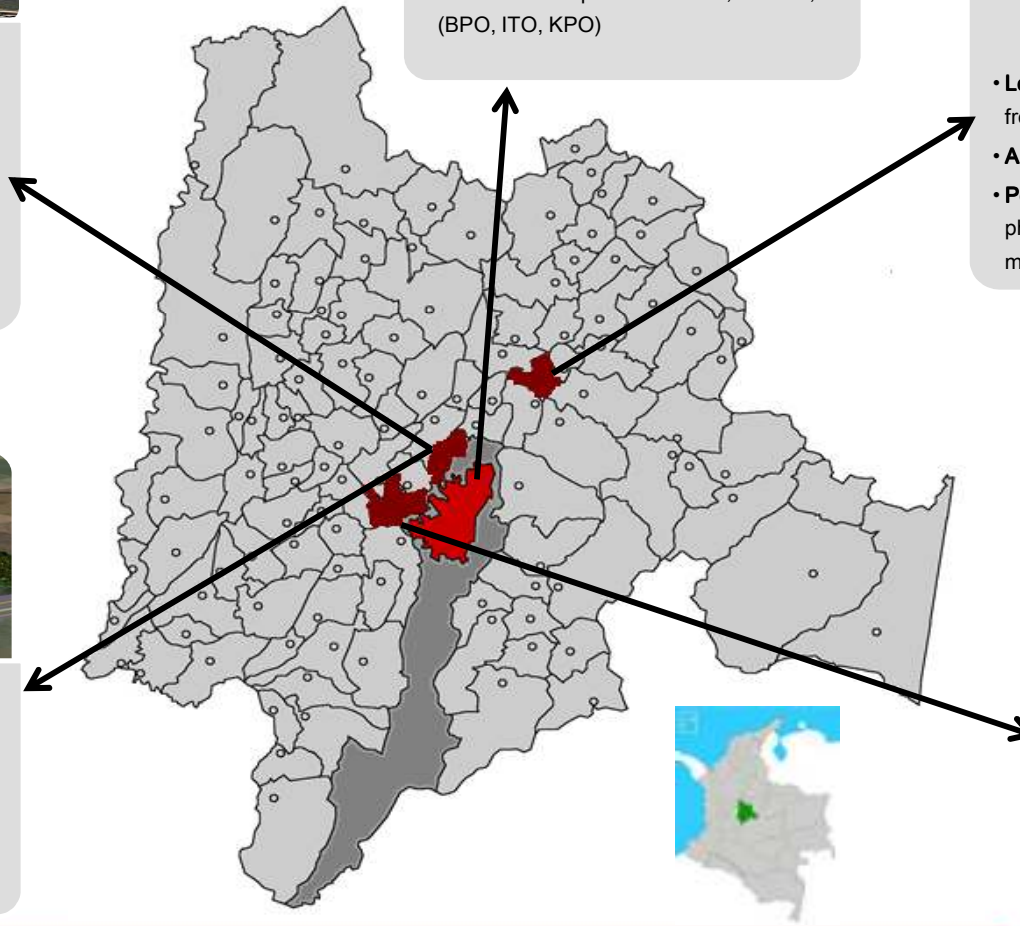
Zona Franca de Tocancipá

- **Location:** Tocancipá (Cundinamarca) 44 Km from Bogota
- **Area:** 387.000 m²
- **Potential segments:** autoparts, cosmetics, pharma, biotech, construction materials, manufacturing, logistics



Zona Franca Metropolitana

- **Location:** Cota (Cundinamarca) 23 Km from Bogota
- **Area:** 235.320 m²
- **Potential segments:** ITC, BPO, pharmaceutical, logistics, call centers



Zona Franca de Occidente

- **Location:** Mosquera (Cundinamarca) 21 Km from Bogotá
- **Area:** 328.000 mts²
- **Potential segments:** autoparts, logistics, O&G services, coatings, packaging, SW development.



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Main business sectors for foreign investment opportunities



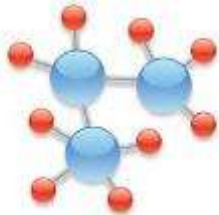
Services

- IT Services
- BPO and Shared services
- Creative industries
- Business and consulting
- Extractive Services
- Clean Technologies and environmental services



Light Manufacturing

- Automotive and transportation
- Construction materials
- Processed foods



Life Sciences and Biotech

- Biotechnology
- Medical devices
- Pharma
- Cosmetics



Infrastructure & City projects

- Transportation and logistics
- City projects
- Tourism and hospitality

BPO and Shared Service Centers



BPO and Shared Service Centers

Investment opportunities

Shared
Service
Centers

F&A
HR
Back office
Doc Mgmt.

BPO / KPO,
Business
Analytics,
R&D

Special industrial
services: Design,
architecture and
engineering

Value proposition

- ✓ Abundant human talent providing scalability for business
- ✓ Strategic location
- ✓ Flexible labor regime and competitive costs
- ✓ Opportunity to provide bilingual services at a regional and global level

BPO and Shared Service Centers



GENPACT



DELTA PARTNERS



SUTHERLAND
GLOBAL SERVICES®
Measurable Performance Delivered Globally



CONVERGY'S



BBVA



unisono
business solutions



Ibermática
Tecnología y Conocimiento



AIG



ALTO



TRANSEARCH
YOUR WORLD'S PARTNER IN EXECUTIVE SEARCH
30 YEARS



Invest in Bogotá

IT Services & Creative Industries



IT Services

Investment opportunities

Remote
Infrastructure
mgmt., cloud
services and e-
commerce

ERP / CRM,
design,
programming
, integration,
security and
testing

Mobile apps
development

Animation
and
videogames

Value-add proposition

- ✓ Abundant human talent providing scalability for business
- ✓ Connectivity and infrastructure
- ✓ Flexible labor regime and competitive costs
- ✓ Relevant players and R&D Centers

IT Services



alTran



Invest in Bogota

Oil & Gas Services



Oil & Gas Services

Investment opportunities

Technologies to increase proven oil & gas reserves

Technologies for improved recovery factor

Infrastructure transportation, refining and environmental performance

Technology and methodology development for offshore platforms

Value-add proposition

- ✓ Close to operators, regulatory entities, government and market
- ✓ Human talent across the entire service value chain
- ✓ Regional hub for entire Northern Cone of Southamerica

Oil & Gas Services



An Enhanced Oil Recovery Company



Invest in Bogota

Light Manufacturing (Bogota and Region)



Automotive and transportation

Investment opportunities

Light vehicle
assembly

Public
transportation
vehicle
assembly

Trucks/Cargo
vehicle
assembly

OEM and
aftermarket

Value-add proposition

- ✓ A growing Automotive market
- ✓ Established OEM and autopart p
- ✓ Qualified human talent
- ✓ FTA that enable Bogota as an exporting platform

Light Manufacturing (Bogota and Region)



Construction materials

Investment opportunities

Improved packaging for optimized logistics

Environmentally friendly packaging

Packaging for the agribusiness and food sectors

High performance construction materials

Value-add proposition

- ✓ Most important market in the region
- ✓ Increased demand for complex/sophisticated products
- ✓ Close to institutional and industrial buyers

Light Manufacturing (Bogota and Region)



Biotechnology and Life Sciences (Bogota and Region)



Processed foods - natural ingredients, functional foods and nutraceuticals

Investment opportunities

Fruit and vegetables

functional foods and nutraceuticals

Food production from local suppliers

Natural ingredients R &D

Greenhouse and refrigeration logistics and infrastructure

Value-add proposition

- ✓ A growing internal consumer market
- ✓ Increased demand for complex/sophisticated products
- ✓ Close to institutional and industrial buyers
- ✓ Variety of climate levels

Biotechnology and Life Sciences (Bogota and Region)



Pharmaceuticals; Biomedicine, Cosmetics and personal care, Medical Devices

Investment opportunities

R&D centers for Pharmaceutical companies

Production and R&D centers for ingredients

Biotech product development

Health services

R&D Centers for cosmetics

Low cost medical devices for emerging countries

Value-add proposition

- ✓ World-class universities and R&D centers
- ✓ Strong industrial ecosystem
- ✓ Qualified human talent
- ✓ A growing internal consumer market

Bogotá faces major challenges in terms of future competitiveness:

- ✓ Logistics infrastructure
- ✓ Entrepreneurship
- ✓ Innovation

- ✓ Reduction in inequality
- ✓ Post-conflict or integration



- ✓ Air quality
- ✓ Water sources
- ✓ Solid waste management

- ✓ Urban renewal
- ✓ Social housing
- ✓ Mobility

Transmilenio BRT System Construction, Trunk Av. Boyacá.



- Overall length: 38.84 Kms.
- Connect south (Usme) to north (Usaquén)
- Number of stations: 43
- Approx. investment.: USD 1.1 billion
- Passengers Time / Direction: 44,000 maximum load.

Safe pedestrian Environmental Path Network (RAPS)

Set of public spaces and dedicated networks to pedestrian use.

- Approx Investment: USD 85.66 million
- RAPS Rincón
- RAPS Nieves
- RAPS Teusaquillo
- RAPS Kennedy Central
- RAPS Restrepo
- RAPS Carvajal



Bogota Cable Cars



Cable Car - San Cristóbal



Path: Moralba – Portal 20 de Julio, San Cristóbal
Length: 2830 meters
3 stations
Approx. investment: USD92m
Maximum capacity: 3,500 passengers / hr

Cable Car - Ciudad Bolívar



Path: Paraíso - Tunal, Ciudad Bolivar
Length: 3340 meters,
4 stations
Approx Investment:
USD108m
Maximum capacity: 3,500 passengers / hr

Mass Public Transportation Projects



Metro de Bogotá

Conceptual Engineering looking forward

	Axle 1: Urban and territorial impact
	Axle 2: Impact over the demand
	Axle 3: Impact over the transport offer
	Axle 4: Environmental impact
	Axle 5: Socio-economic and cultural impact
	Axle 6: Financial Impact

Multicriteria Matrix



Design: 4 lines, 99,98km

Triangulo de Fenicia – private urban renewal project



Render Vista Aérea del Triángulo de Fenicia, David Delgado Arquitectos

Urban proposal in numbers:

8.8 Ha total area 6.2 Ha public area 2.6 Ha of private area	25,000 m ² Commerce 40,000 sqm Office and / or Hotel 25,500 m ² Dotacional 3,500 m ² Public Facilities
900 Houses in total 108 VIP Housing 400 Restorations	50% Green Terraces 6 m ² / inhabitant

Approximate cost:
\$ USD 400 million.



Location	Between Avenue Circunvalar, Calle 20 and Avenida Jimenez and 3rd Avenue.
Project developer	Universidad de Los Andes.
Area	8.8 Ha total intervention.

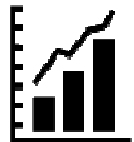
Agora International Convention Center of Bogotá.



Attracting more than 1,000,000 business tourists to Bogota in 5 years.



Generating 4,000 new jobs in 10 years.



8.4% impact on city's GDP



Will raise more than COP 347 billion in annual taxes.

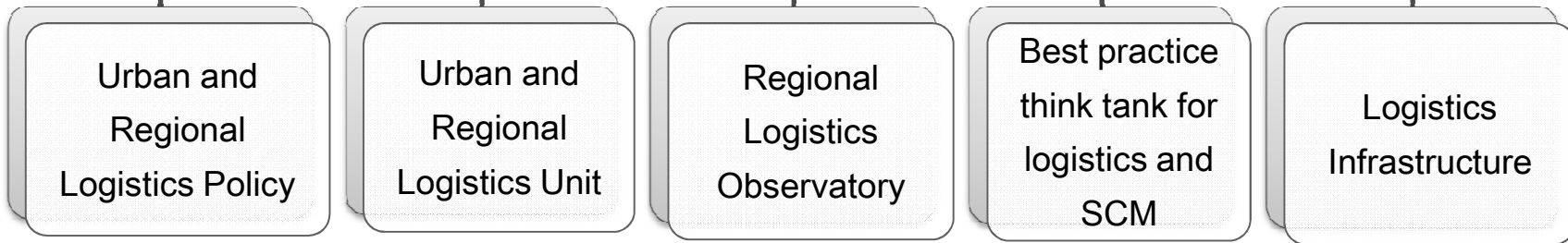


Bogotá's International Convention Center - Agora aims to transform the surrounding area with a public/private investment of approx. USD \$125M (300 billion COP).

Regional Logistics Plan



Logistics Plan Implementation



1

Formalizing regional logistics policy and stakeholders at local, department and national levels

2

Unit sustainability

3

Updated supply/demand inventory (public institutions, freight carriers, operators, etc.,) together with services provided

4

Supply Chain Management Best Practice Adoption Plan

5

Technical, financial and legal feasibility for West and South logistics platform projects



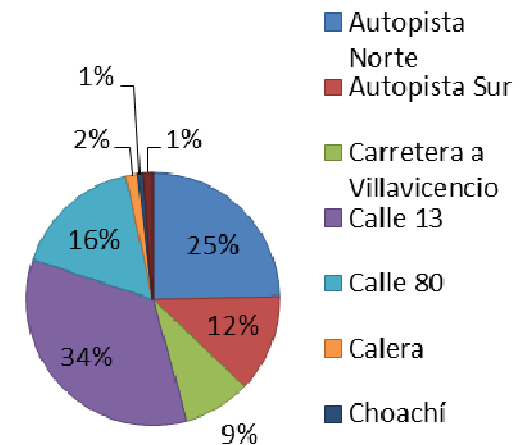
Regional Logistics Plan

Regional Logistics Platforms

Specialized infrastructure with value-add services for multi-modal transportation and logistics operations.



- ❑ 18 million tons of cargo per year enter the city through the western area (75% of total heavy cargo).
- ❑ Average speeds of 5 to 13 Km/h, generating 45 to 90 minute journeys



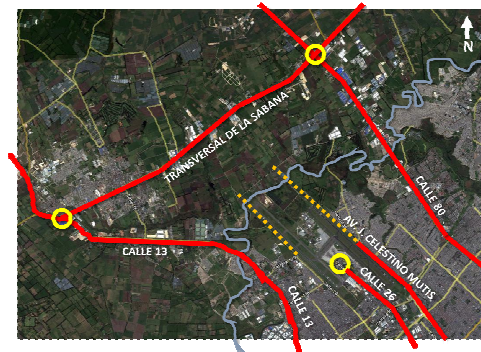
Regional Logistics Plan

Siberia Logistics Platform

30.8 Has total

65,500 m² transportation center
115,000 m² logistics center
55,000 m² roads
23,447 m² public service areas

Approximate investment
\$ USD 81 million



Location

Western outskirts of the city, between Calle 13 and Calle 80.



Regional Logistics Plan

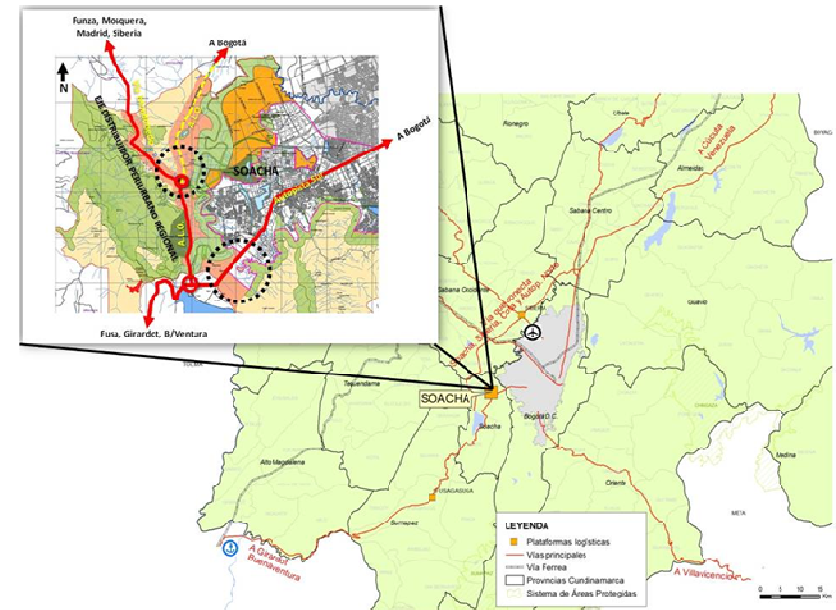
Soacha Logistics Platform

Transportation Center

55.000 m² total area
 22.500 m² parking
 18.500 m² container terminal
 7.000 m² general services
 7.000 m² vehicle service center

Transportation Center

85.000 m² logistics center
 40.000 m² warehousing
 40.000 m² Cross Docking
 5.000 m² cargo consolidation space



Approximate investment:
 \$ USD 62 million.

Location

North: Bojacá and Mosquera.
 South: Sibaté and Pasca.
 East: Bogotá.
 West: Granada and San Antonio del Tequendama.

29.8 Has total

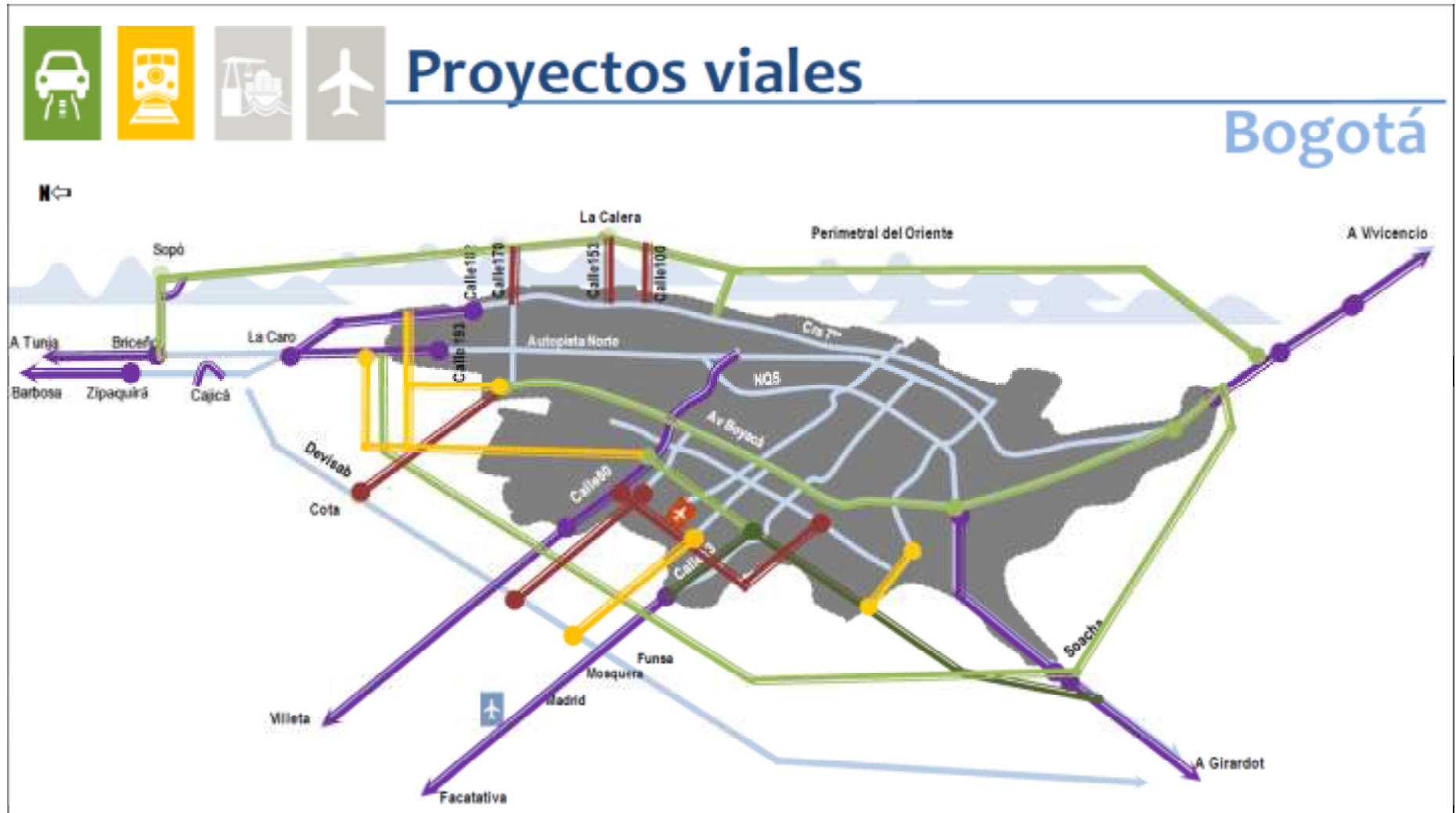
BOGOTÁ
 REGIÓN LOGÍSTICA

Invest in Bogotá

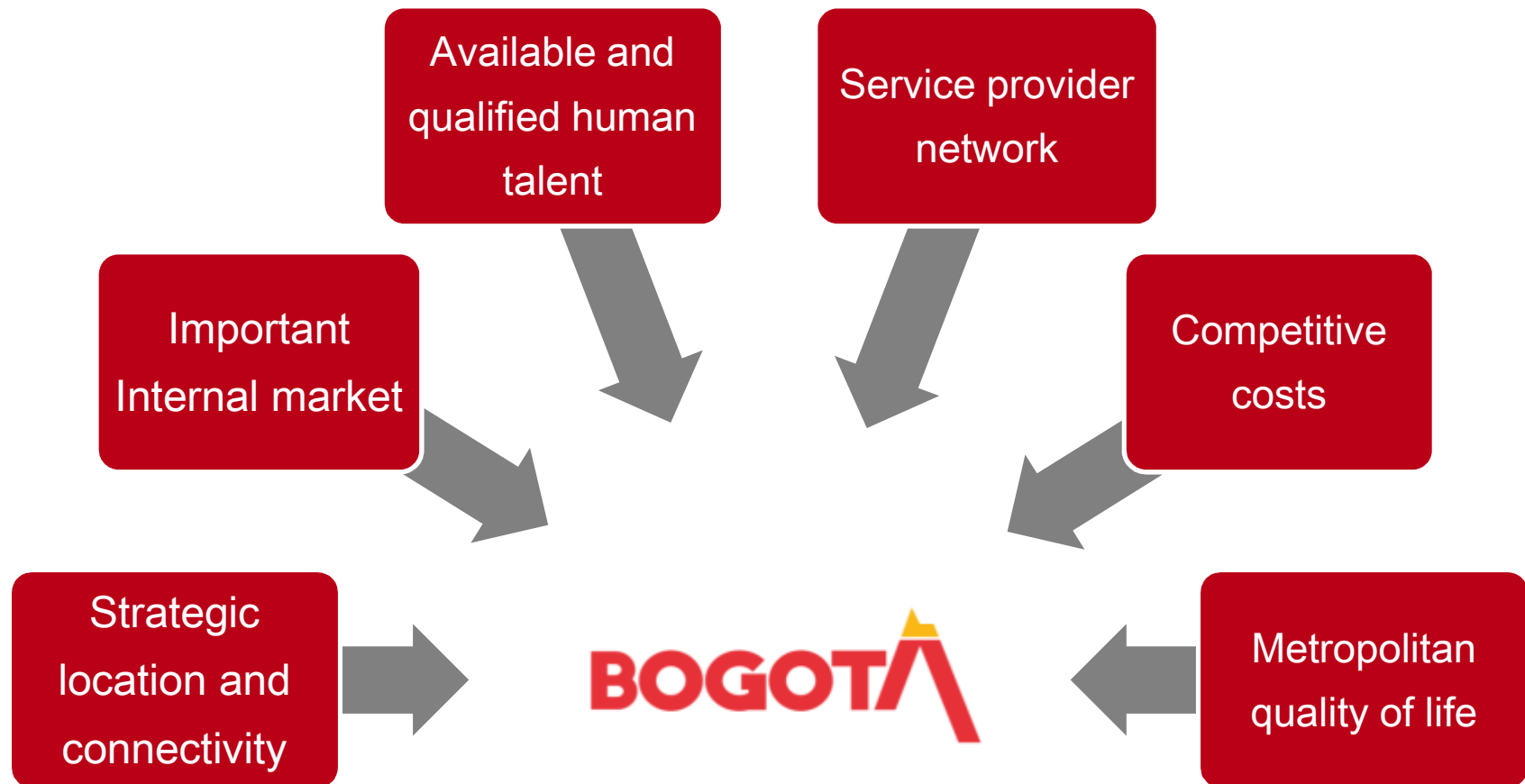
ALCALDÍA MAYOR
 DE BOGOTÁ D.C.

Cámara
 de Comercio
 de Bogotá

Various other projects at the national level, either concessions or PPPs are being considered for Bogotá's connectivity with the world



Invest in Bogota and its network of allies create a difference when it comes to promoting Bogota as an attractive investment destination





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