

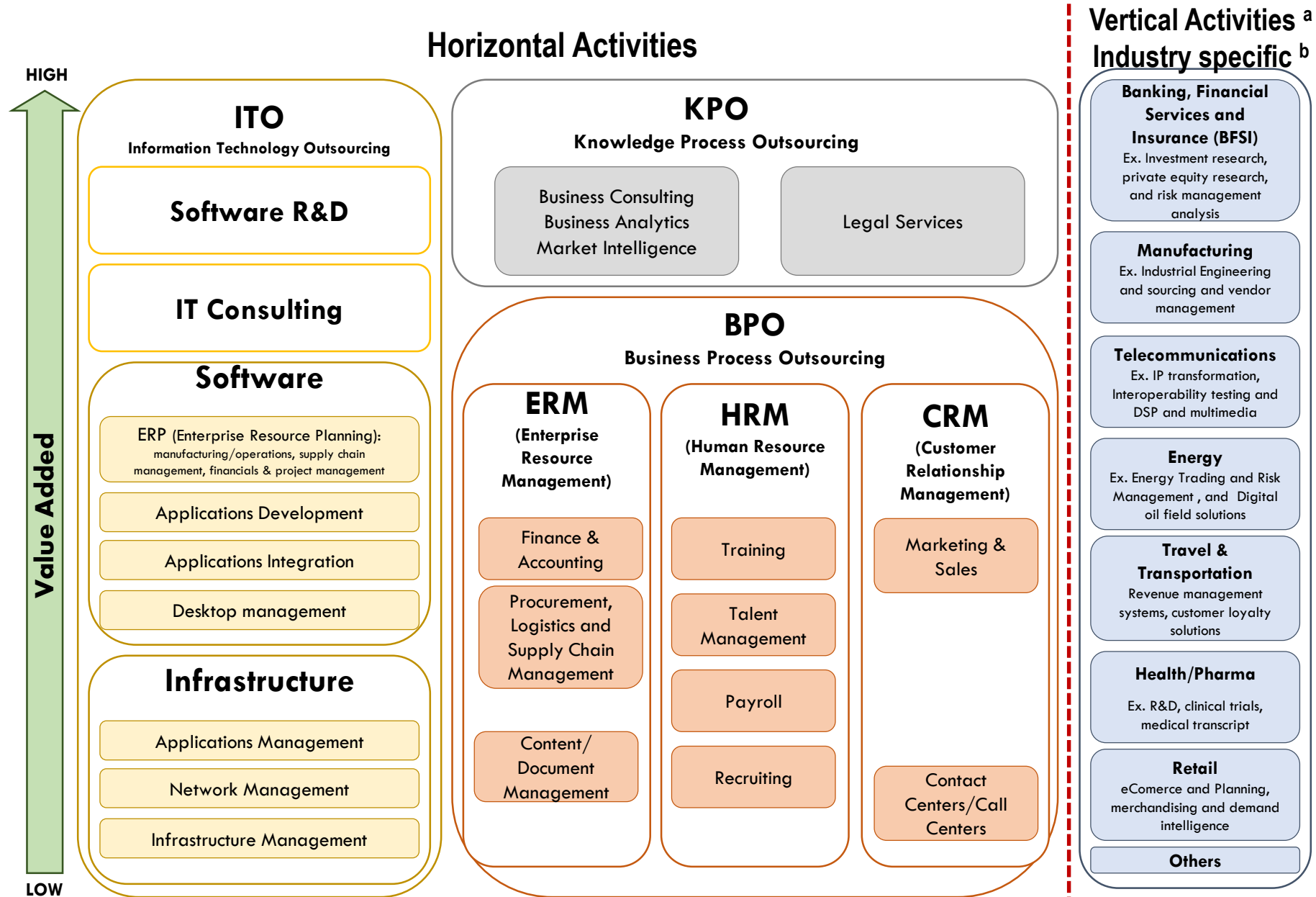
# Offshoring / Outsourcing Posibilidades para América Latina

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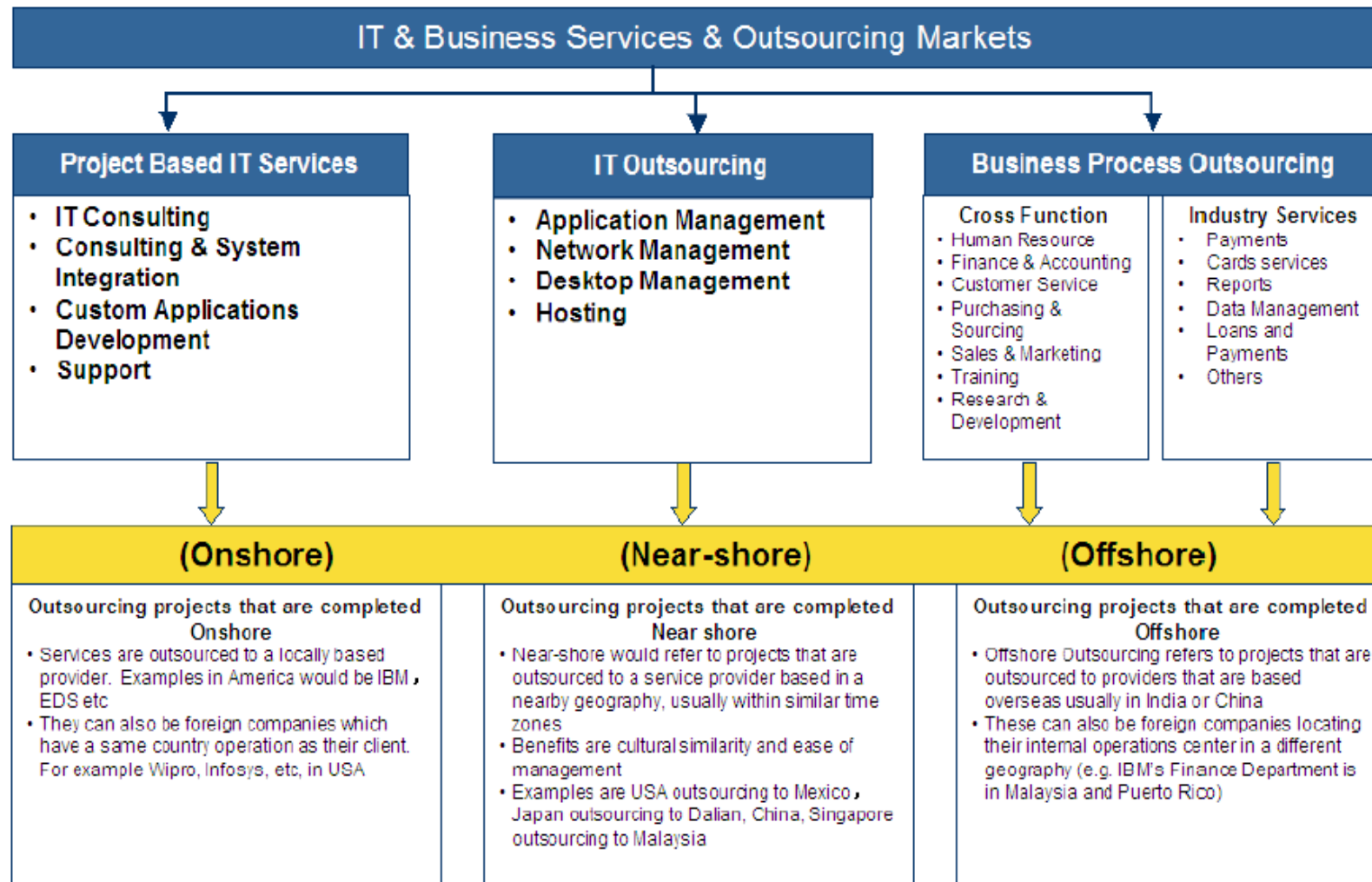
**Tercera Convención Anual de la Asociación Latinoamericana de Exportadores de Servicios**  
**7 y 8 de noviembre, Lima, Perú**

# Definiciones

# Outsourcing: ITO/BPO/KPO



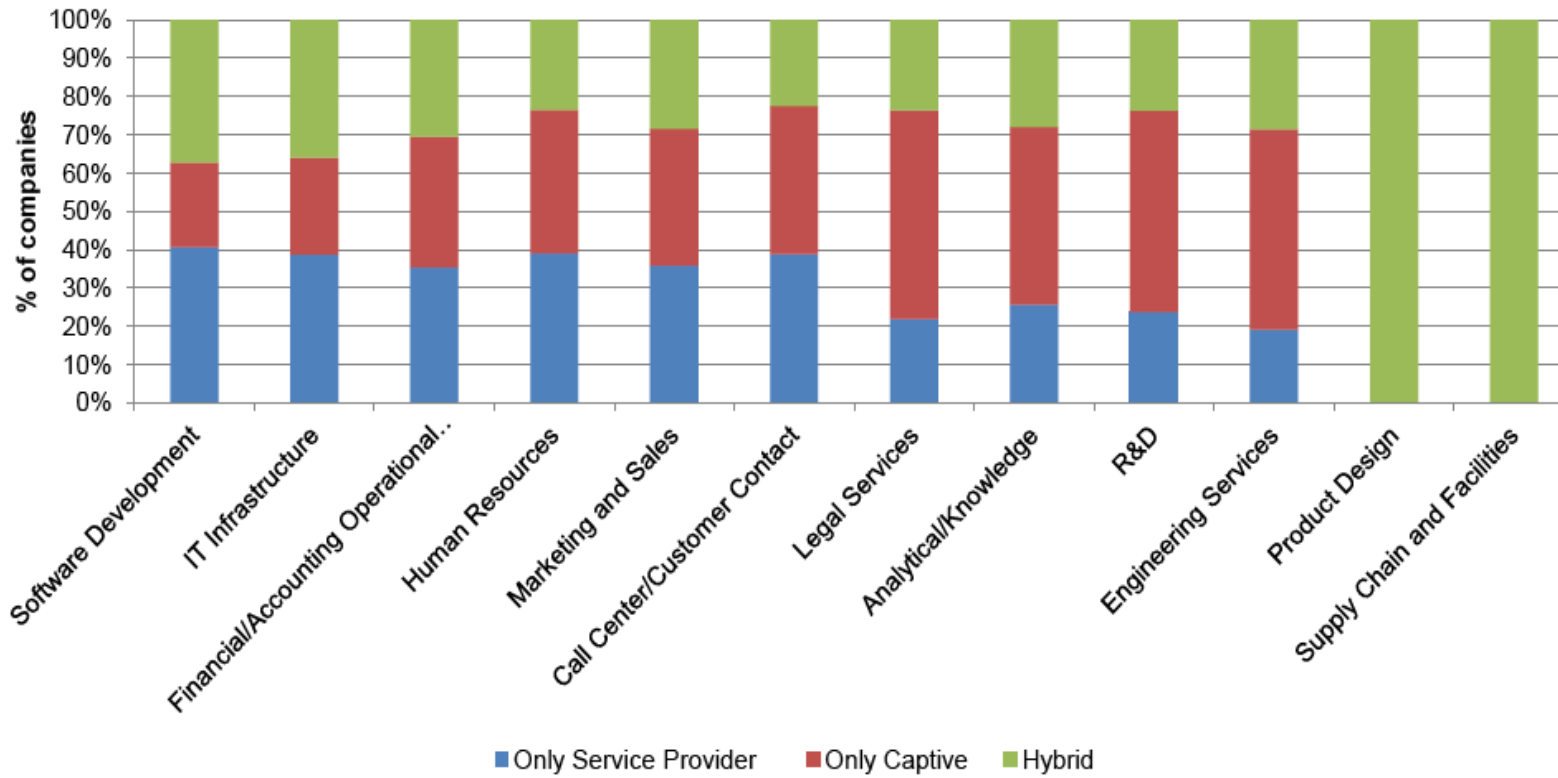
## IDC's Worldwide Services Taxonomy



# Offshoring

	Onshore	Offshore
Captive		
Outsource		

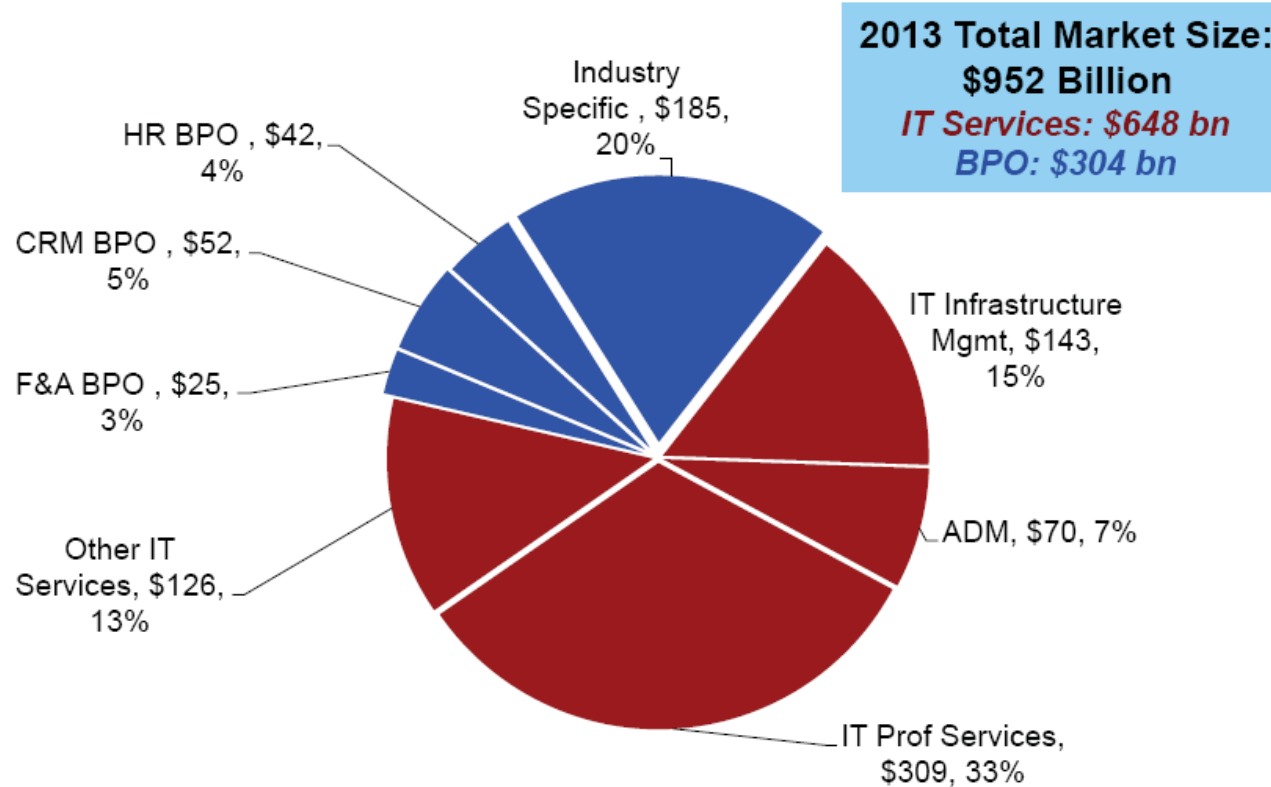
## Functions by offshoring model



Fuente: ORN – Duke Univesrity, 2013

El mercado

## Global BPO and IT Services Market 2013 (\$b)



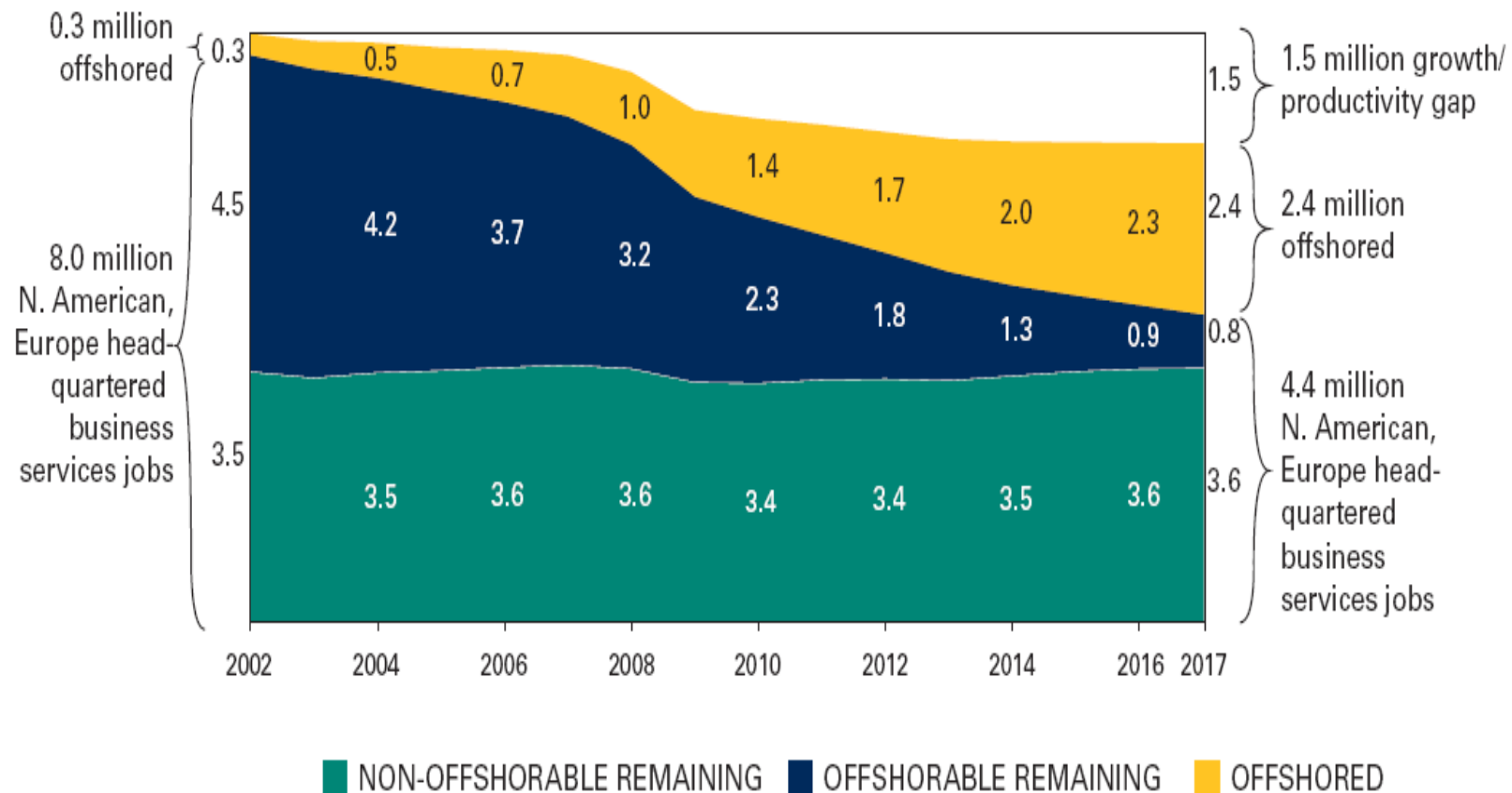
Source: HfS Research, 2013

En general se estima que el 20% del mercado de outsourcing es offshoring



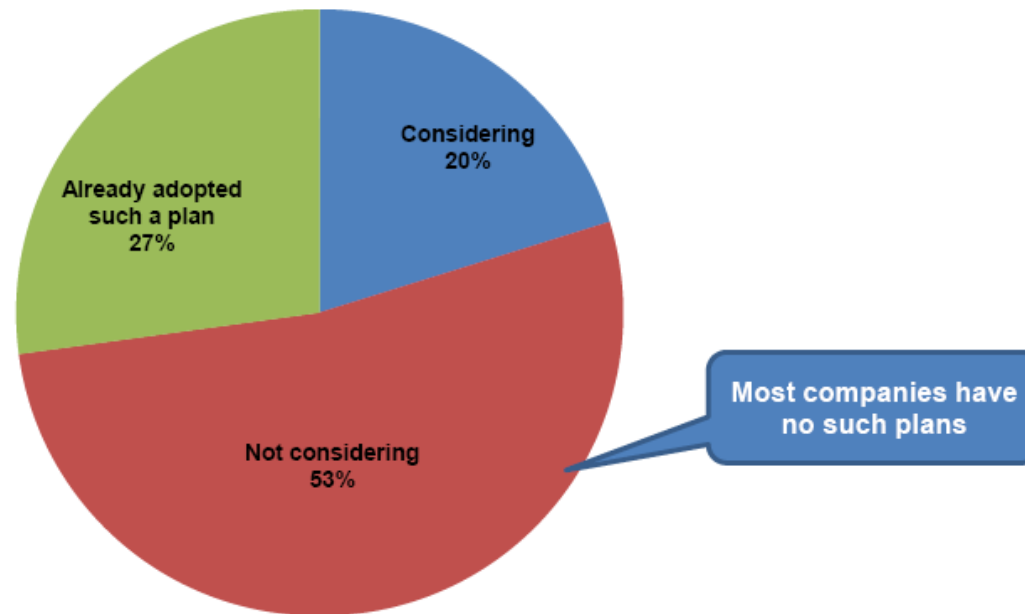
Otra forma de estimar el mercado es en base a la pérdida de empleos en Estados Unidos y Europa  
 ?Fin del offshoring? ... Ventana de oportunidad

FIG. 5 Productivity, growth and offshorable business-services jobs (in millions), 2002-2017



Source: IMF World Economic Outlook, April 2013, and Hackett proprietary benchmark and study data

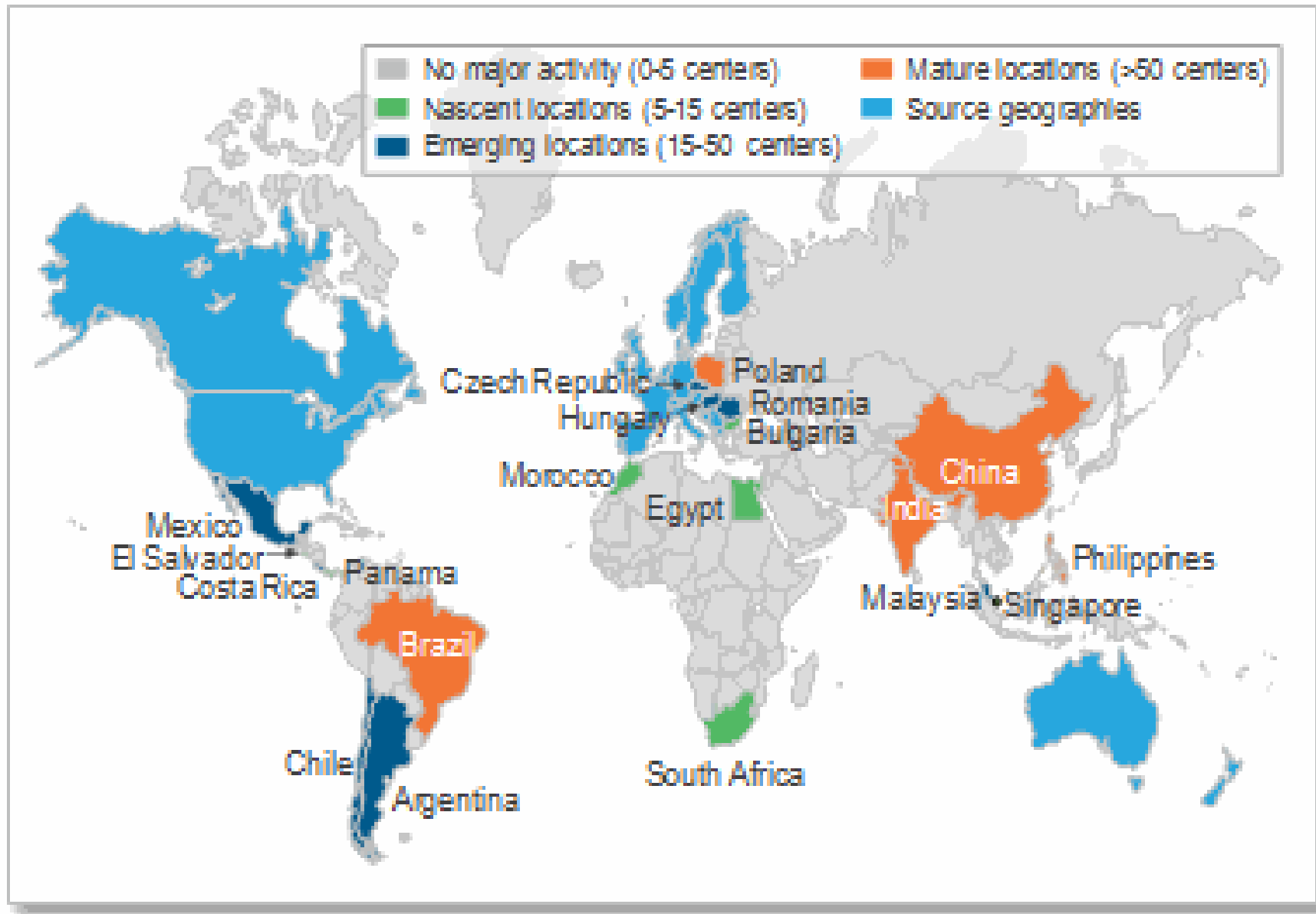
## Future Plans for Implementing a Global Business Services Organization



\* n=114

Fuente: ORN – Duke Univesrity, 2013

América Latina



Oferta y Demanda  
Principales Actores

India:  
Filipinas: Call Center Voz  
(superó a India)  
Malasia: BPO

Fuente: Everest Group, 2011

## Tholons Top 100 Outsourcing Destinations 2012.

Country	City	2012 Rank	Movement from last year
Brazil	São Paulo	13	↑2
Argentina	Buenos Aires	15	↓2
Chile	Santiago	22	↑2
Costa Rica	San José	18	↑7
Brazil	Curitiba	23	↓4
Brazil	Rio de Janeiro	30	-
Mexico	Mexico City	39	↓3
Mexico	Monterrey	41	↑1
Brazil	Brasilia	42	↑2
Uruguay	Montevideo	43	↑7
Mexico	Guadalajara	47	↑1
Colombia	Bogotá	55	↑9
Colombia	Medellin	60	↑8
Peru	Lima	64	↑2
Argentina	Córdoba	72	↓1
Brazil	Recife	75	-
Chile	Valparaiso	82	↑7
Colombia	Bucaramanga	85	↓3
Paraguay	Asunción	88	↓5
Brazil	Campinas	90	↑6
Colombia	Cali	98	-

América Latina  
está en el mapa  
de Servicios Globales

Fuente: Tholons - 2012

Biggest Gainers					Biggest Decline				
2012	2013	Movement	Country	City	2012	2013	Movement	Country	City
18	13	+5	Costa Rica	San Jose	13	18	-5	Brazil	Sao Paulo
28	19	+9	Malaysia	Kuala Lumpur	15	24	-9	Argentina	Buenos Aires
43	37	+6	Uruguay	Montevideo	30	38	-8	Brazil	Rio de Janeiro
55	49	+6	Colombia	Bogota	46	56	-10	Russia	Moscow
60	53	+7	Colombia	Medellin	49	58	-9	Egypt	Cairo
85	80	+5	Colombia	Bucaramanga					

New Entrants			
2012	2013	Country	City
-	94	Philippines	Bacolod City
-	95	Nicaragua	Managua
-	96	Guatemala	Guatemala City
-	99	Philippines	Baguio City

Fuente: Tholons - 2013

## Empresas indias en América Latina

- Diversificación de riesgo geográfico
- Huso horario
- Acompañar a clientes
- Mercado hispano (local y EE.UU.)

Company	Countries	Year	Activities	Segment	Number of employees Region	Number of employees Total	Revenues Total (USD Million)
Tata Consulting Services (TCS)	Argentina	2005	Strategic consulting in IT, services and solutions IT that includes SAP and in-house developed products, and outsourcing end-to-end solutions in IT.	ITO-BPO-KPO	7000	143,761	\$5,492
	Brazil	2003					
	Chile	2003					
	Colombia	2006					
	Ecuador	2007					
	Mexico	2003					
	Uruguay	2002					
Wipro	Brazil	2006	IT Services, finance & accounting services, human resources services, customer services and order management processes.	ITO-BPO-KPO		96,985	\$5,645
Infosys	Mexico	2008	Business consulting, infrastructure management and packaged solutions implementation.	ITO-BPO-KPO	87	103,905	\$4,717
Getronics	Brazil	1989	Customer relationship management, consulting, application integration, infrastructure planning, and systems deployment; outsourced business management and technology services and distributes third-party computer and networking products.	ITO	1500	23,754	\$3,427
	Colombia				366		
	Mexico				1000		
Satyam	Brazil	2007	Application services, content and process management, digital convergence, infrastructure services, product and application testing, supply relationship management, supply chain management.	ITO		51,643	\$2,170
HCL Technologies	Brazil		Engineering and R&D services, hardware engineering, embedded engineering, mechanical engineering, software product engineering, enterprise transformation services, business transformation, technology transformation, business process outsourcing, custom application services, application development, application re-engineering & integration, application support & maintenance, enterprise application services, SAP, Oracle, Microsoft Dynamics, IT infrastructure management.	ITO-BPO-KPO		54,026	\$1,879

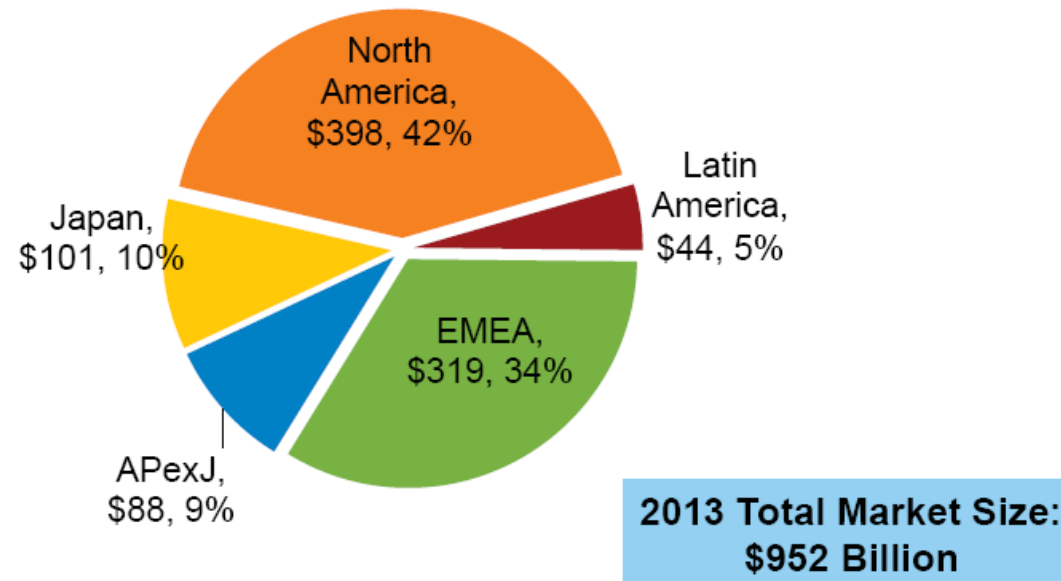
Fuente: BID, 2009

Source: CGGC, based on information from diverse sources: online databases such as OneSource, Hoovers and DataMonitor; company annual reports; telephone interviews; media information; newspapers; and press releases.

Note: Revenues Total includes turnover coming from all companies activities, not only for outsourcing services.

Sin embargo, América Latina tiene una participación menor.

### Global BPO and IT Services Market 2013 (\$b) by Region

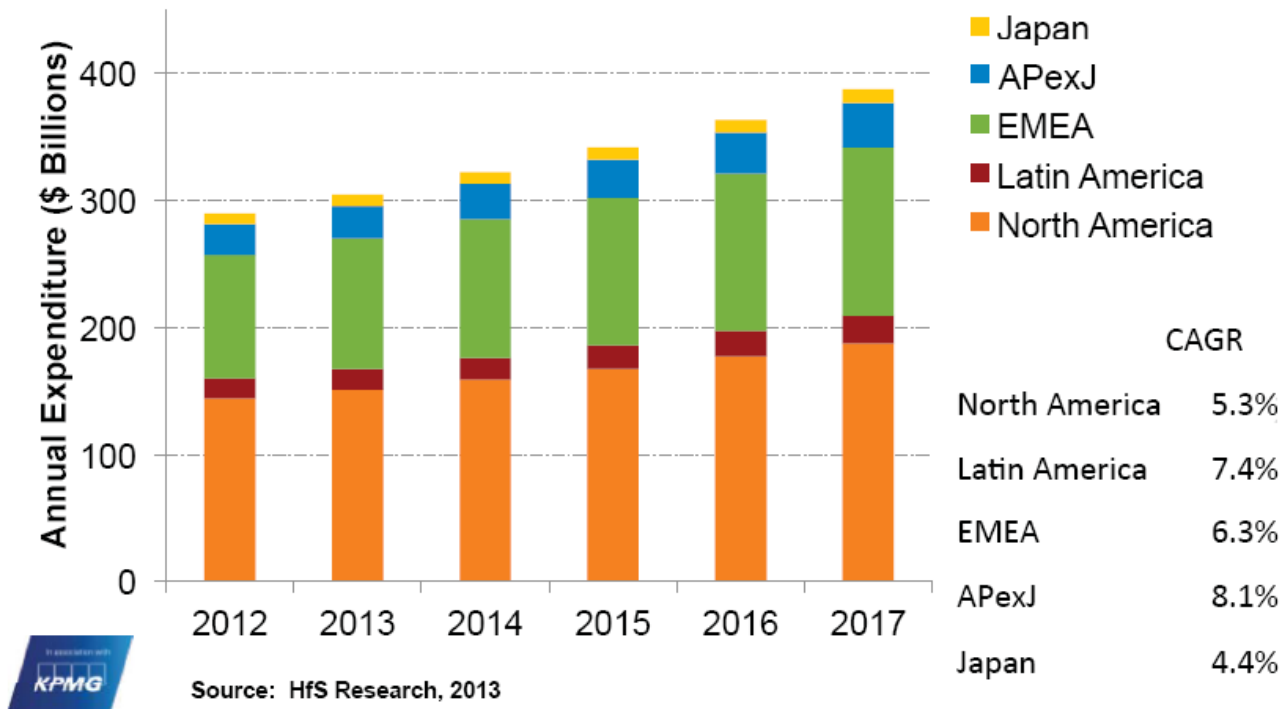


Source: HfS Research, 2013

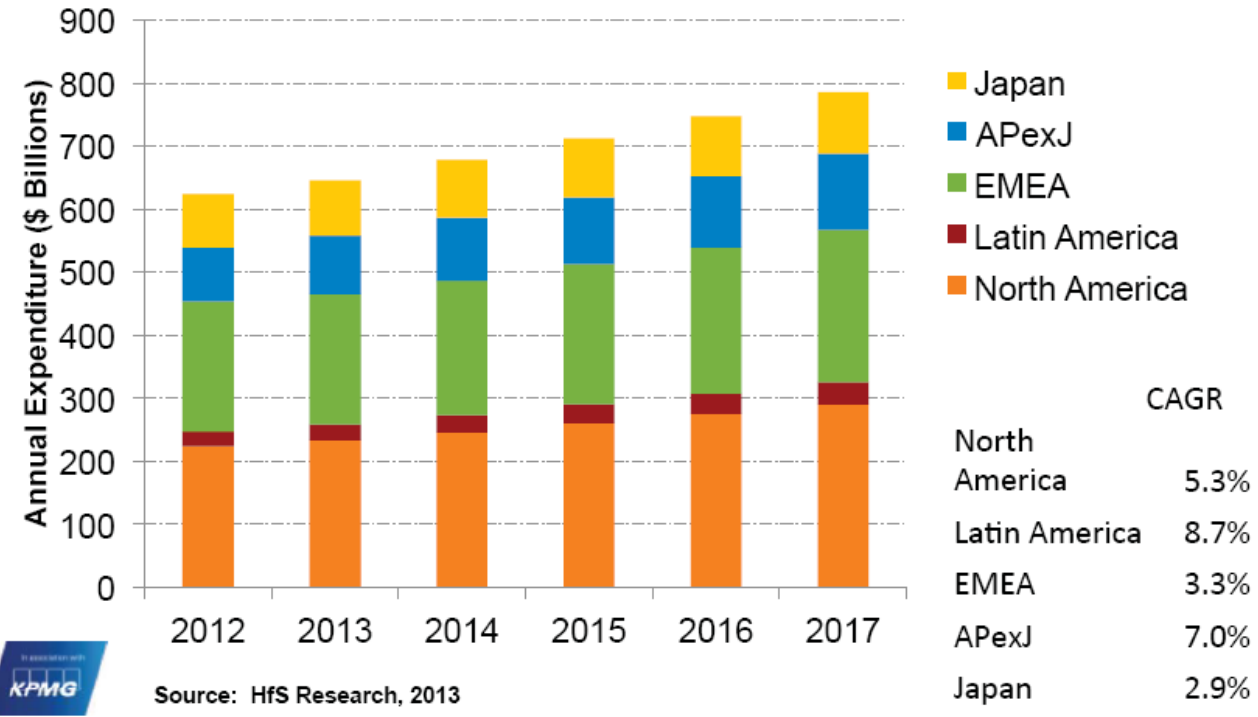


Pero las proyecciones de crecimiento son interesantes.

## Global BPO Services Market 2012 – 2017 (\$b) by Region



# Global IT Services Market 2012 – 2017 (\$b) by Region

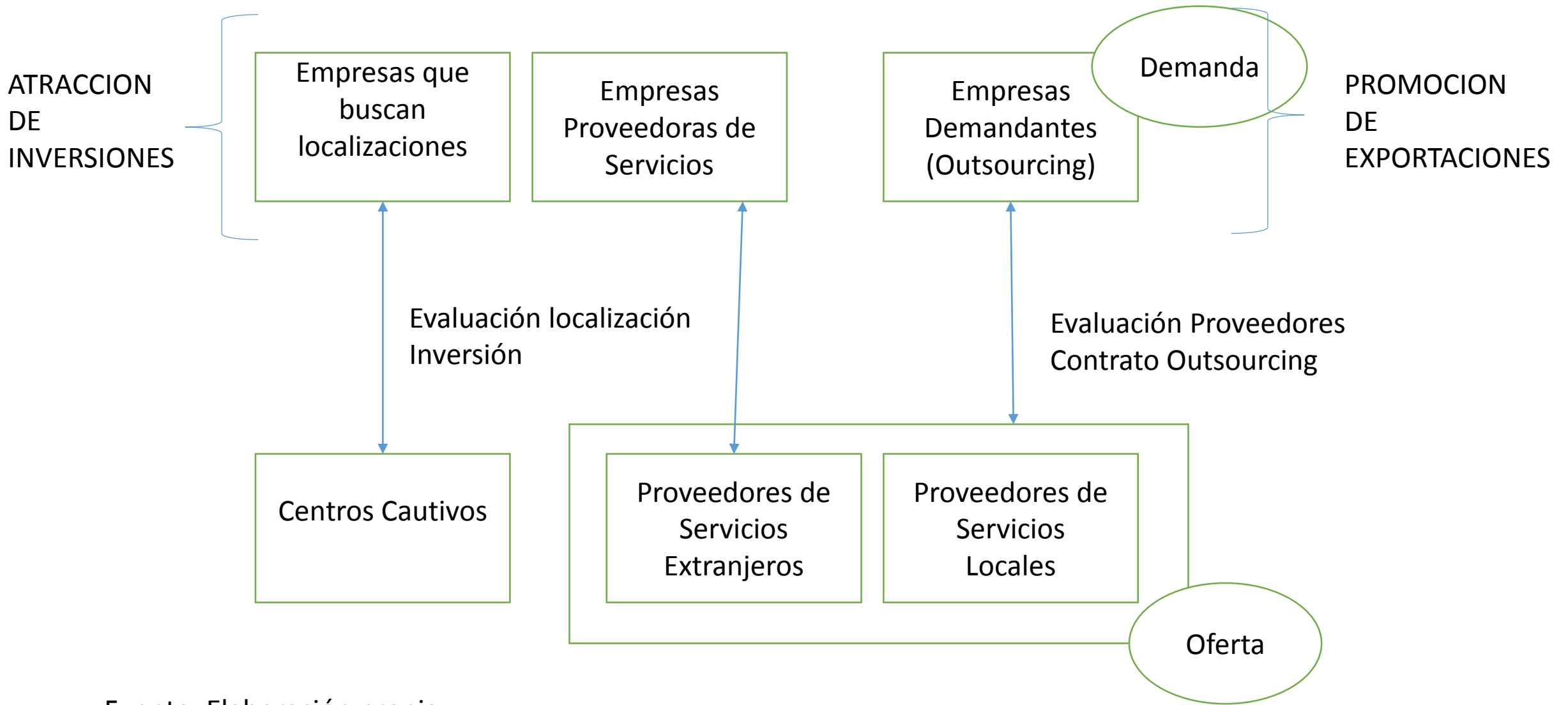


Source: HfS Research, 2013

El negocio de la atracción de inversiones

(y de la promoción de exportaciones)

(y del desarrollo de la industria local)



Fuente: Elaboración propia

No quedarse en los promedios

Entender las diferencias

A.T.Kearney  
Global Services Location Index 2011

1	India	26	Germany
2	China	27	Ghana
3	Malaysia	28	Pakistan
4	Egypt	29	Senegal
5	Indonesia	30	Argentina
6	Mexico	31	Hungary
7	Thailand	32	Singapore
8	Vietnam	33	Jamaica
9	Philippines	34	Panama
10	Chile	35	Czech Rep
11	Estonia	36	Mauritius
12	Brazil	37	Morocco
13	Latvia	38	Ukraine
14	Lithuania	39	Canada
15	United Ara	40	Slovakia
16	United Kin	41	Uruguay
17	Bulgaria	42	Spain
18	United Sta	43	Colombia
19	Costa Rica	44	France
20	Russia	45	South Africa
21	Sri Lanka	46	Australia
22	Jordan	47	Israel
23	Tunisia	48	Turkey
24	Poland	49	Ireland
25	Romania	50	Portugal

## How Peru Won a New Captive IT Operation and Why Other Countries Missed Out

**What made Cignium Technologies – a software-centric marketing information firm based in New Jersey - choose Peru over bigger and better known Latin America nations for its new delivery center?** And why did it go the captive route rather than with traditional third party providers? – including analysis and eventual dismissal of Brazil, Chile, Costa Rica and Argentina.

## Inside Bridgestone’s Decision to Locate New Shared Services Ops in Costa Rica

**Bridgestone announced the opening of its new Financial Shared Services Center for Latin America in San José, Costa Rica, on October 1st.** This \$2.5 million, state-of-the-art center will handle financial and accounting operations for all seven Latin American countries that make up Bridgestone Americas Tire Operations Latin America (BATO LA).

## Xerox the Big Winner in Royal Caribbean’s Move to Guatemala

**Royal Caribbean is moving its British call center to Guatemala as part of a restructuring program.** The multi-lingual call center is expected to generate about hundred jobs in the Central American country.

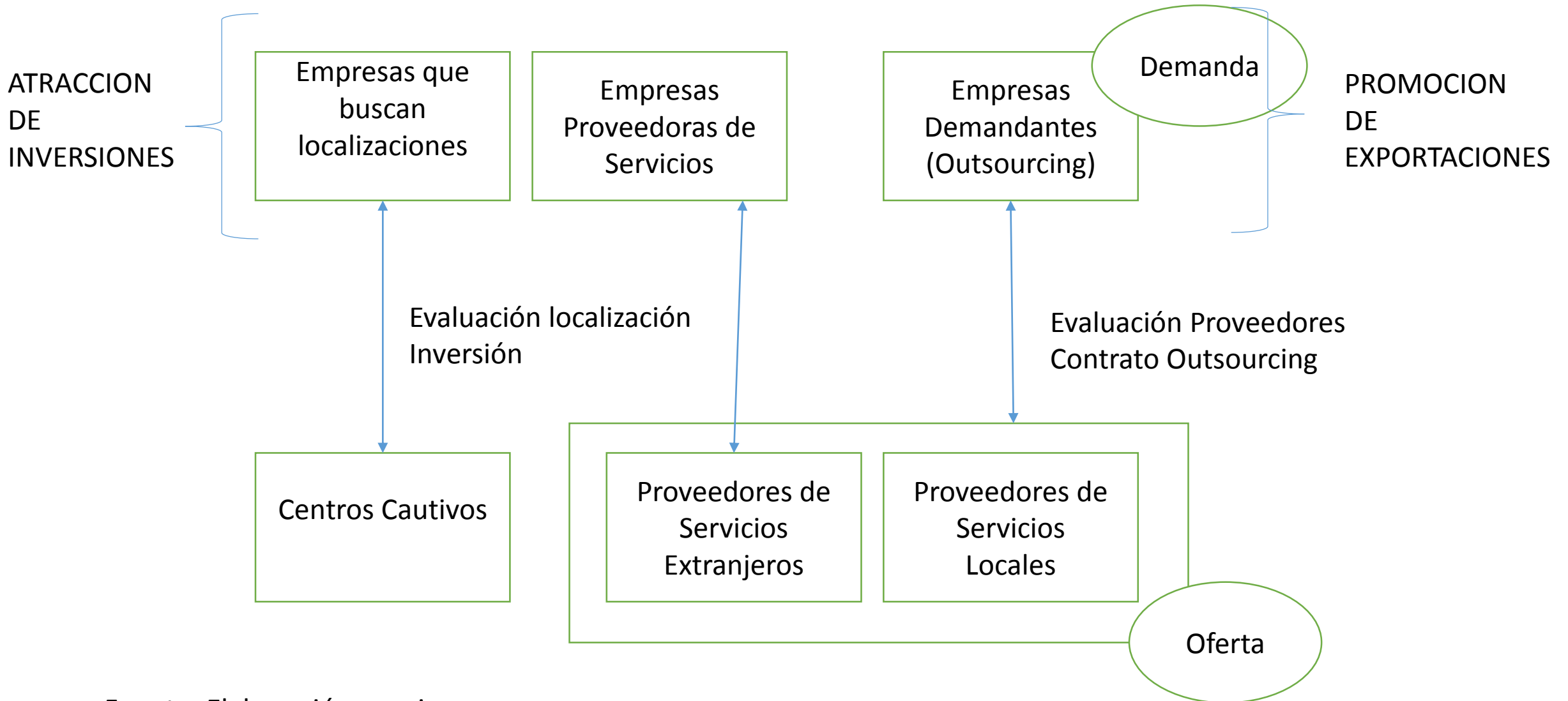
The news follows the British company’s announcement last month its plans to reduce the number of call centers it runs from eleven to three. The other two call centers will be based in Romania and the Netherlands. As part of the restructuring program, Royal Caribbean has wrapped up a partnership deal with **Xerox**, which will run all three call centers.

Financial: 40% People: 30% Business Environment: 30%

Fuente: A.T.Kearney, 2011

Fuente: NearshoreAmericas

Las empresas son distintas.  
Los sectores son distintos.  
Los factores de evaluación son distintos.



Recursos humanos

Recursos humanos

Recursos humanos

calidad – cantidad - precio



**Porcentaje de empresas que presentan dificultad para llenar vacantes por escasez de talento  
(Países seleccionados, 2013)**

Japón (mayor)	85%
Brasil	68%
Argentina	41%
Costa Rica	40%
Estados Unidos	39%
Panamá	38%
México	38%
Promedio Global	35%
Canadá	34%
Guatemala	33%
Colombia	30%
Perú	26%
Irlanda (menor)	3%

**Porcentaje de empresas que presentan dificultad para llenar vacantes por escasez de talento, según zona geográfica (2013)**

Global	35%
Américas	39%
Asia Pacífico	51%
EOMF	26%

**Cinco principales dificultades para llenar vacantes ofrecidas en las Américas, porcentaje de empresas (2013)**

Falta de competencias técnicas	33%
Falta de candidatos disponibles/ No hubo candidatos	31%
Falta de experiencia	24%
Falta de competencias laborales (habilidades blandas)	16%
Busca mayor paga a la ofrecida	11%

Américas: Argentina, Brasil, Canadá, Colombia, Costa Rica, Guatemala, México, Panamá, Perú, Estados Unidos.

Fuente: (ManpowerGroup, 2013)

Fuente: (ManpowerGroup, 2013)

## Average Monthly Gross for F&A positions\*

**Especificidad  
de la información**

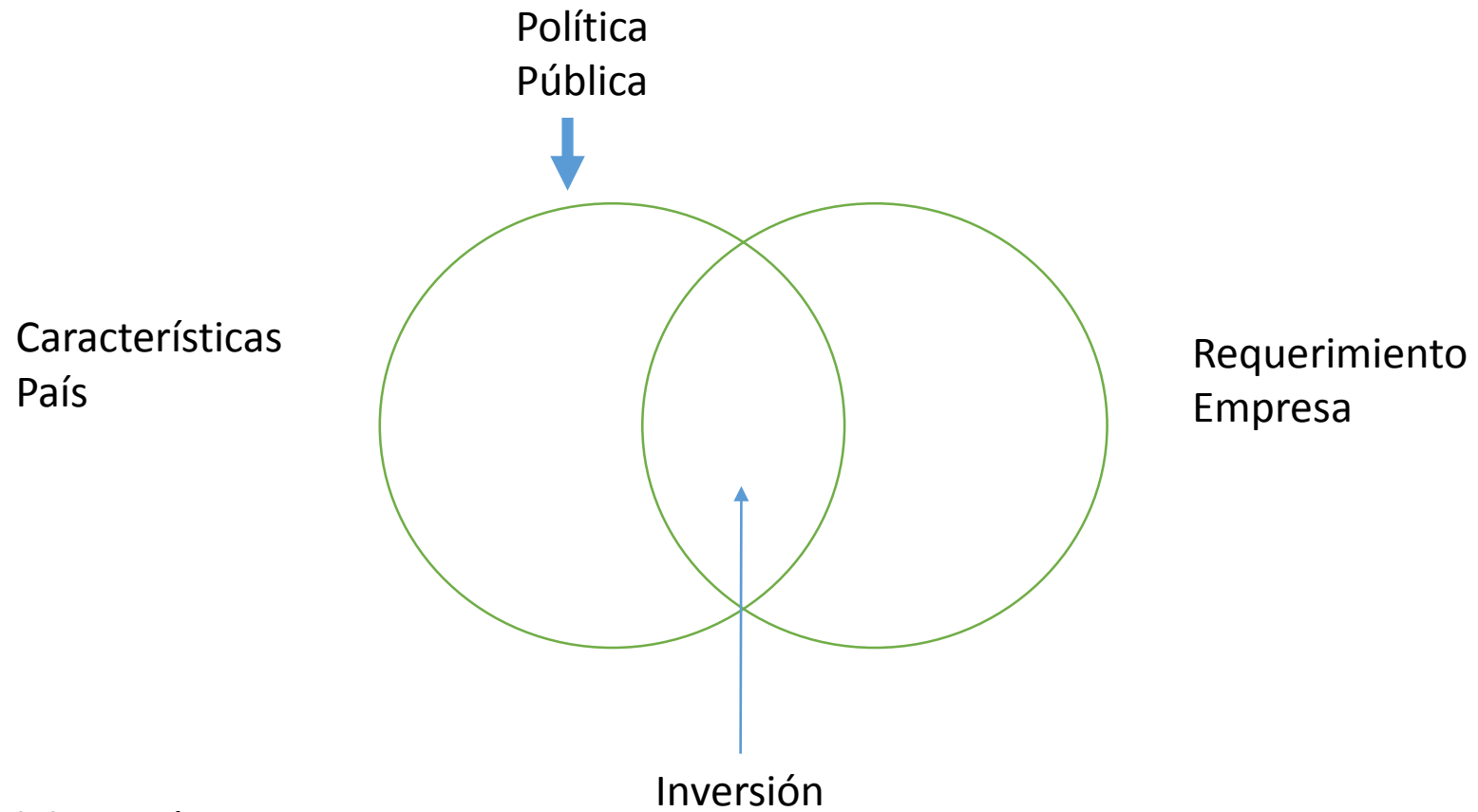
<b>Positions with English skills (intermediate and high level)</b>	<b>Average 0-2 yrs</b>	<b>Average 3-5 yrs</b>	<b>Average 5-8 yrs</b>
Accountant Auditor	1,684	2,105	2,631
Controller	--	4,170	5,546
HR Analyst	1,608	2,011	2,513
Financial Analyst	1,285	1,606	2,007
Accounting Chief	--	2,518	3,270
Finance and Administration Chief	--	2,518	3,270
HR Chief	--	1,799	2,571
Finance and Administration Manager	--	5,128	7,326
HR Manager	--	3,355	5,411

<b>Position with Spanish only skills</b>	<b>Average 0-2 yrs</b>	<b>Average 3-5 yrs</b>	<b>Average 5-8 yrs</b>
Accountant Auditor	1,347	1,684	2,105
Controller	-----	3,336	4,437
HR Analyst	1,287	1,608	2,011
Financial Analyst	1,028	1,285	1,606
Accounting Chief	-----	2,014	2,616
Finance and Administration Chief	-----	2,014	2,616
HR Chief	-----	1,440	2,056
Finance and Administration Manager	-----	4,103	5,861
HR Manager	-----	2,684	4,329

Opciones / Resumen

Conjunción de

- Las características del país
- Requerimiento de las empresas
- Los objetivos y acciones de las políticas publicas



Fuente: Elaboración propia

# Preguntas

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