



Talking about Numbers....

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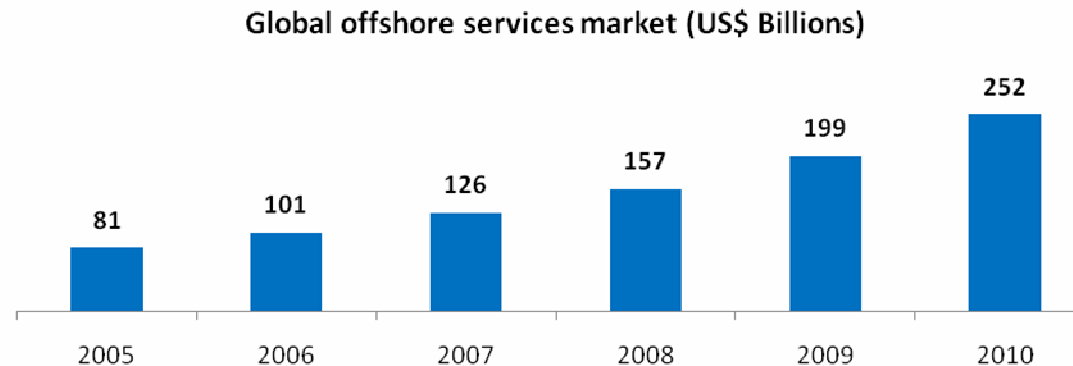
BPO Industry in Numbers

The global offshore ICT market has grown significantly over the past few years and estimated to have reached US\$ 250-280 billion in 2011

Forrester
Research (2010)

"In 2011, global business and government spending for IT outsourcing alone expects to top USD \$254 billion"
Forrester Research (2010)

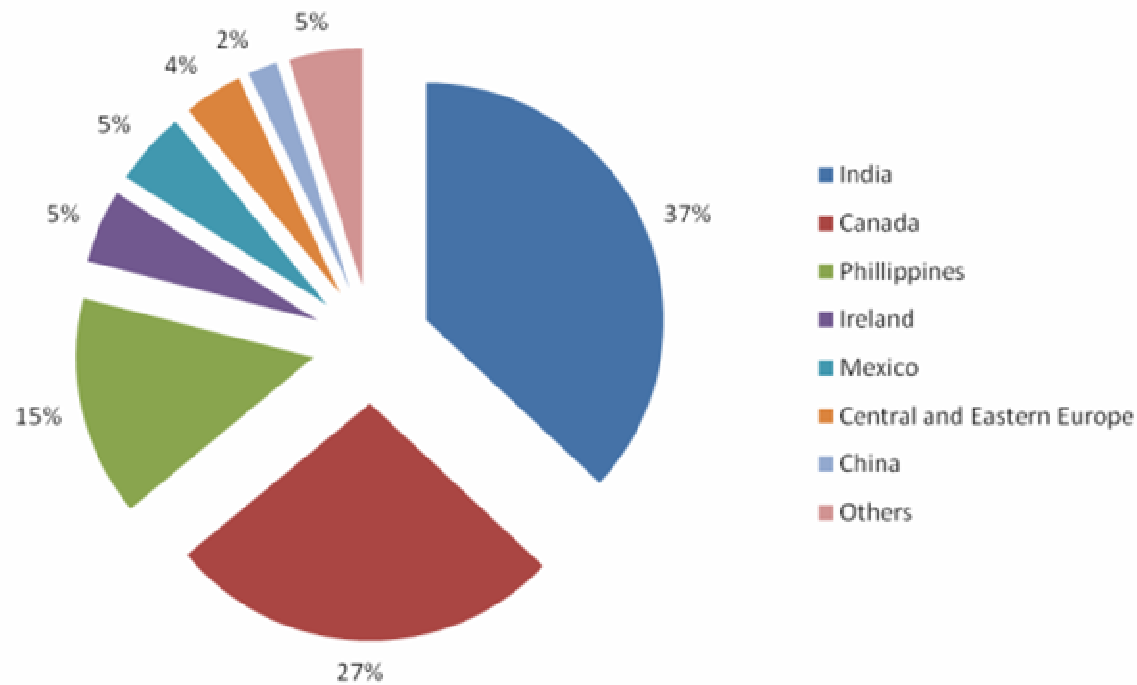
OECD (2008)





Who are the players

Distribution of the global offshore business processing market (2008)



Developing countries control 60% of the global offshore business processing market. Central and Latin America remain, however, relatively small suppliers.



What are the Tendencies

Several factors are driving increased demand for outsourcing services in developed economies

Cost competitiveness

Efficiency

Lack of working age population in the developed economies

Demand from new market segments

Demand for new types of services



At the same time, developing countries are improving their ability to match this demand

Growing populations

Rising rates of education

Technological innovation

Institutional reforms

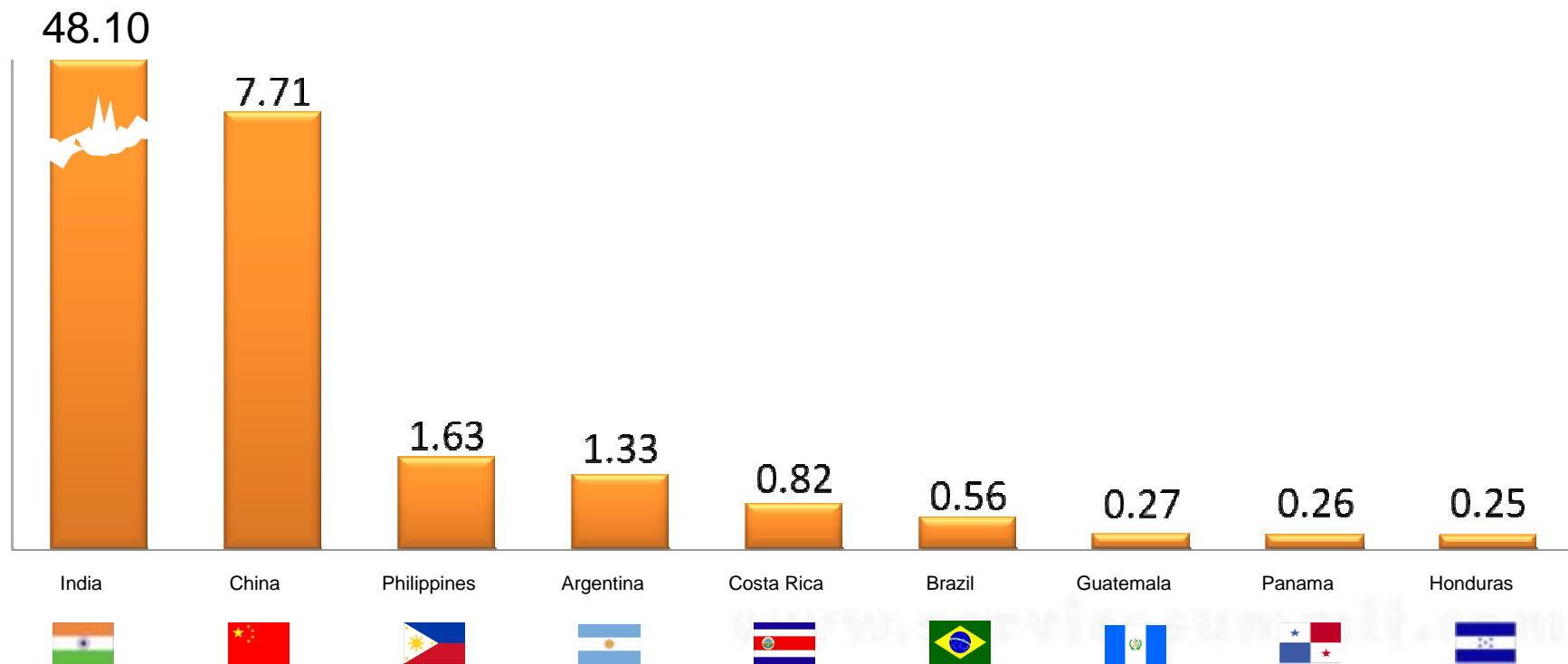
Maturation of industry

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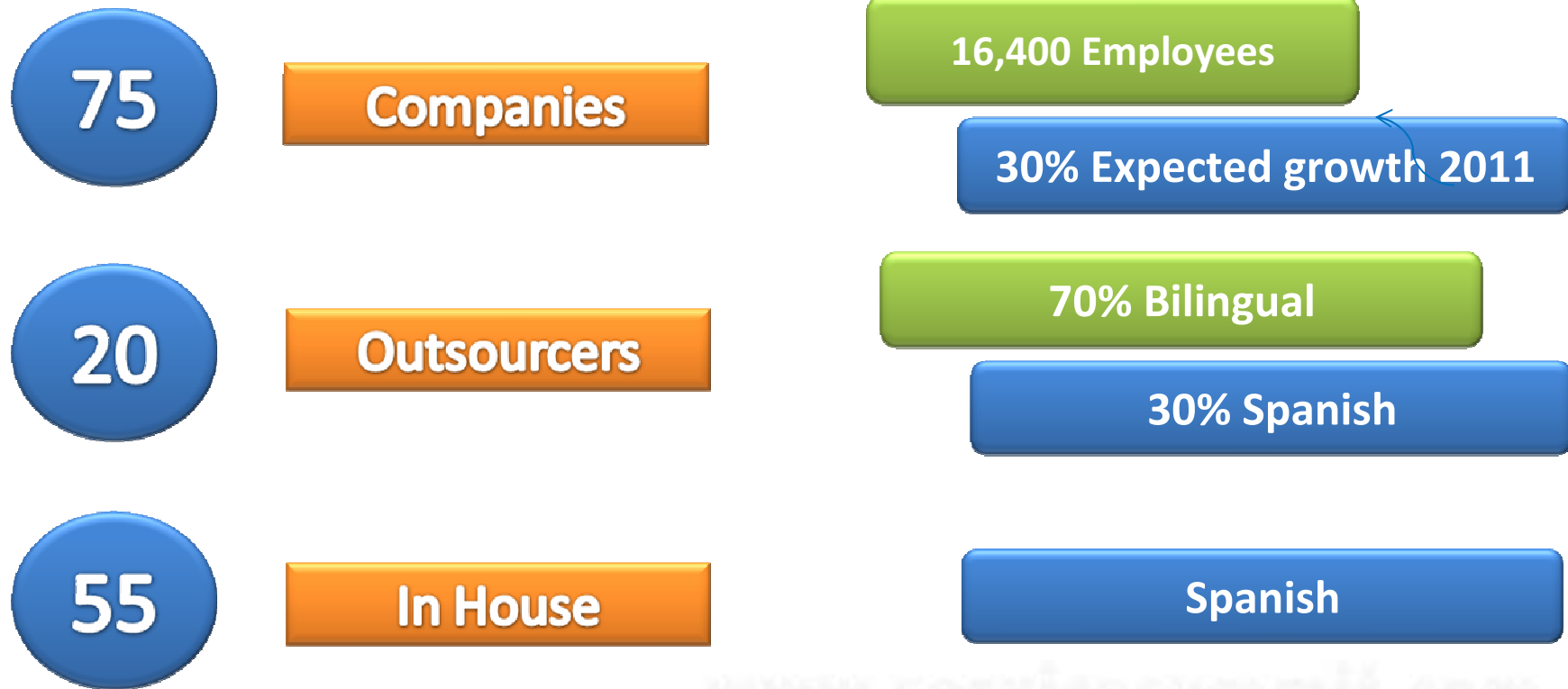
Guatemala's Participation

Total ICT exports (US\$ B) (2009)





Guatemala BPO Industry in Numbers (2010)

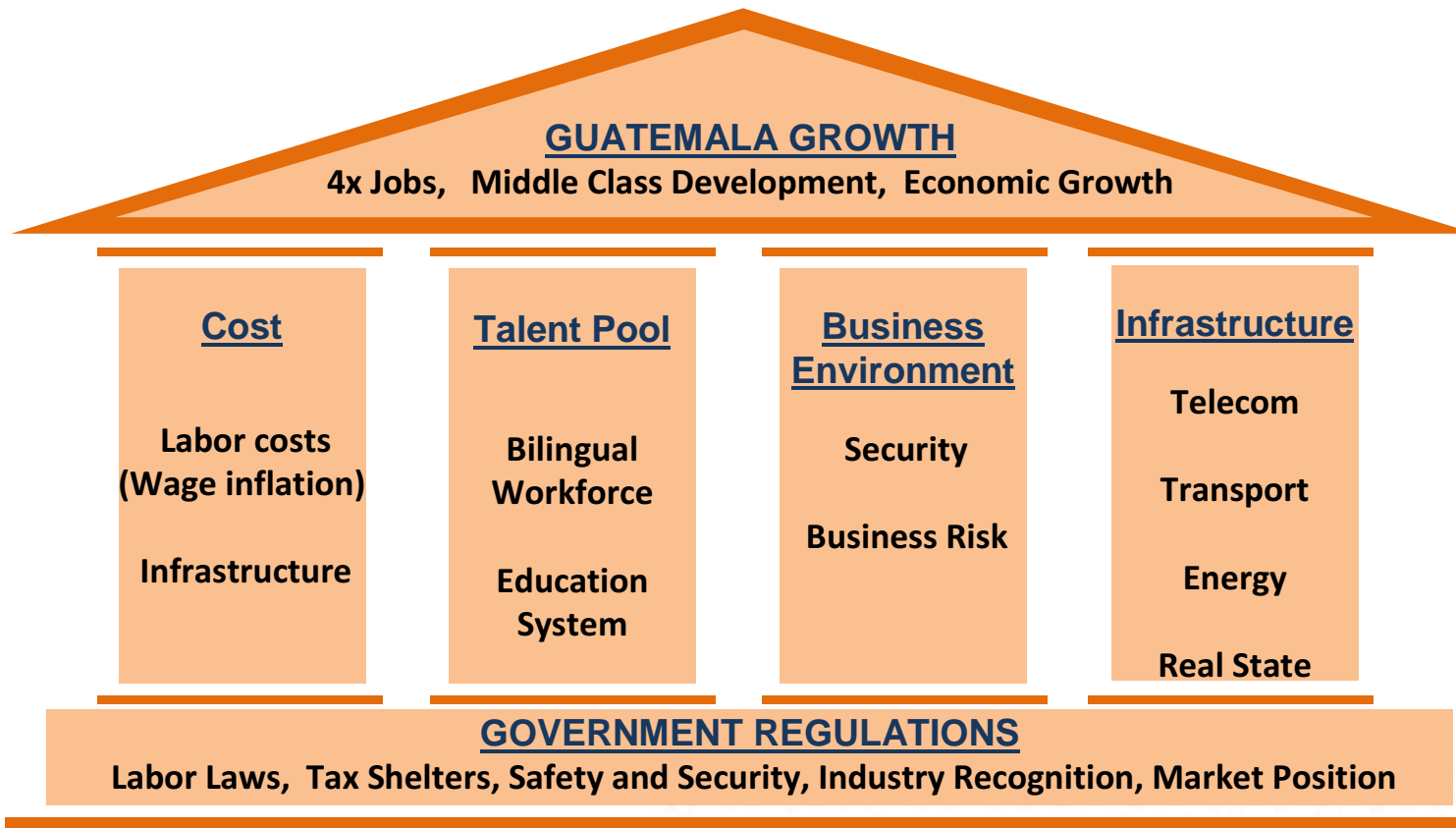


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Source: Invest In Guatemala



Building Blocks – BPO Industry Growth in Guatemala





Questions?

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