



GOBIERNO DE COLOMBIA



COLOMBIA

DESTINATION FOR SUSTAINABLE INVESTMENT

EJECUTADO POR:



PROCOLOMBIA
EXPORTACIONES TURISMO INVERSIÓN MARCA PAÍS

COLOMBIA 



PROCOLOMBIA PROMOTES



FOREIGN DIRECT INVESTMENT



INTERNATIONAL TOURISM



NON-MINING EXPORTS





WE ATTRACT INVESTMENT THAT CONTRIBUTES TO



Sustainable development



Reindustrialization



Creation and transference of science, technology, and knowledge



Regional development and strengthening of the Colombian business network



Energy transition



Building lasting peace and reduction of poverty





COLOMBIA

INVESTMENT DESTINATION

1. **Economic leadership**, dynamic and diversified domestic market.
2. Leadership and commitment to **sustainable economic development**.
3. **Competitive export platform** to the region and the world.
4. Prime conditions that **boost business competitiveness**.
5. Attractive **investment opportunities** in multiple sectors.





1

ECONOMIC LEADERSHIP, DYNAMIC AND DIVERSIFIED DOMESTIC MARKET:



One of the largest economies in the region, with a positive growth outlook.



Thriving destination for **dynamic and diversified investments.**



Our domestic market is one of the **most attractive in the region.**



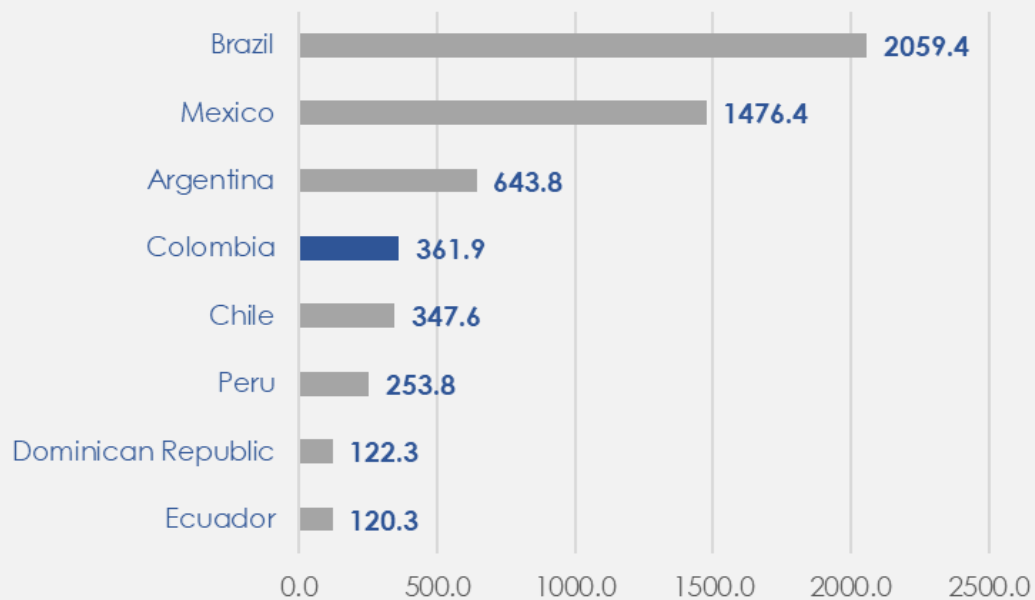
Multiple regions and business centers for different types of investments



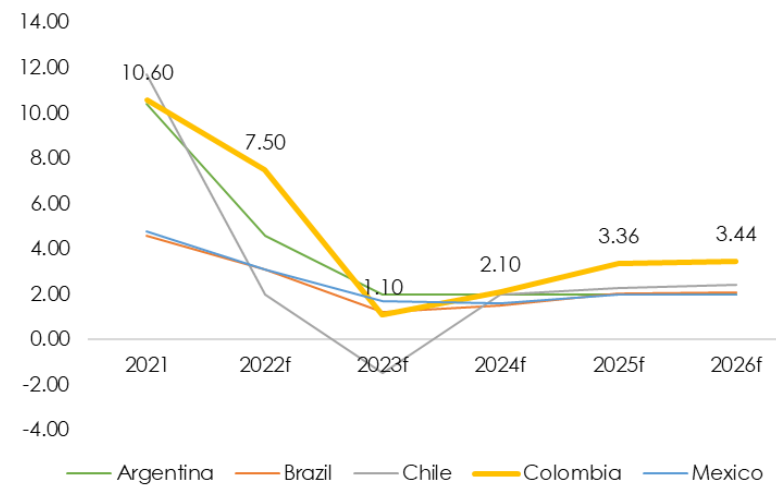


ONE OF THE LARGEST ECONOMIES IN THE REGION, WITH A POSITIVE GROWTH OUTLOOK

Major economies of Latin America GDP (USD billion)



GDP growth projections (%) Major economies of Latin America

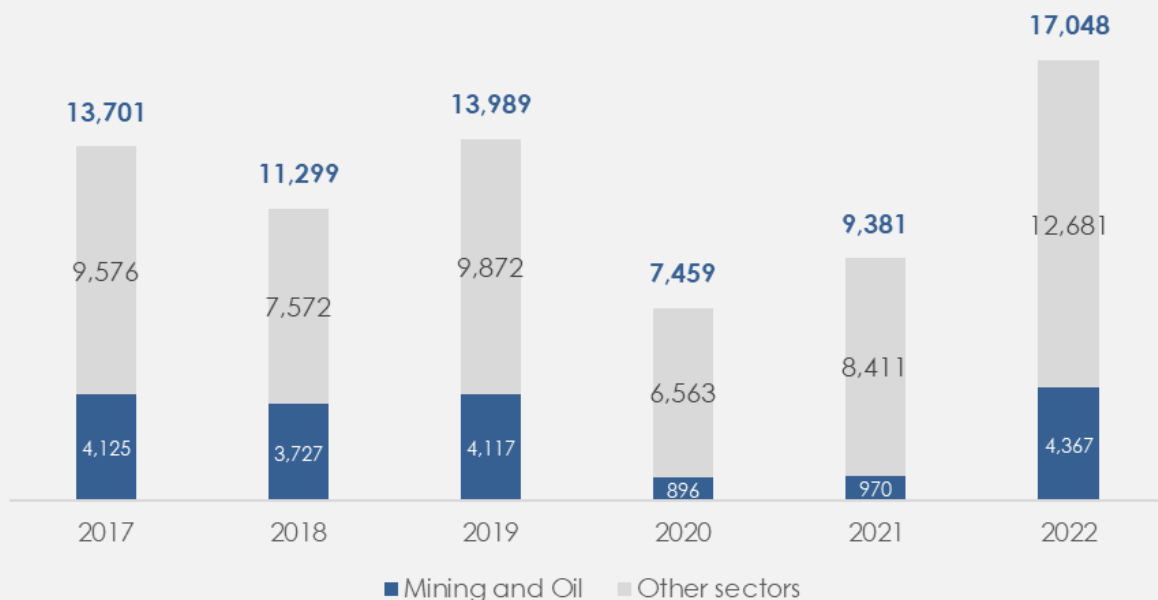


GDP growth
2022 → 7.5%
GDP growth projection
2023 → 1.1%



THRIVING DESTINATION FOR DYNAMIC AND DIVERSIFIED INVESTMENTS

FDI inflows in Colombia by sectors (USD million)



Source: Central Bank

In 2022, Colombia received USD 17,048 million in FDI. FDI in non-mining sectors represented 74,4% (USD 12,681 million).

Top investor countries in Colombia (USD Million) 2017 -2022

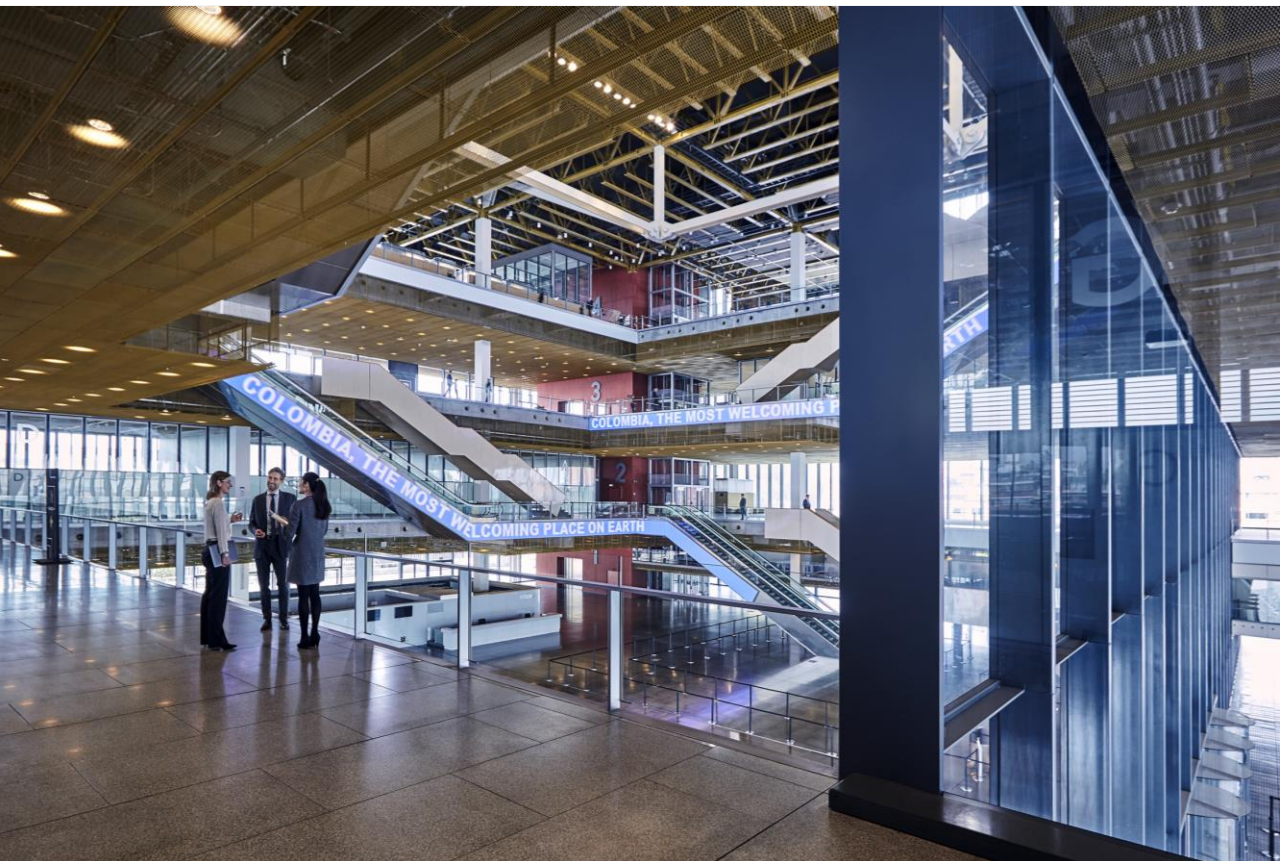
	United States	15,428		Mexico	2,439
	Spain	12,690		Canada	2,360
	Switzerland	5,366		Chile	2,247
	England	5,071		Brazil	1,585
	Netherlands	3,338		Barbados	1,458

Source: Central Bank
Panama, British Virgin Islands and Anguilla are not included

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OUR DOMESTIC MARKET IS ONE OF THE MOST ATTRACTIVE IN THE REGION



**5 BUSINESS CENTERS
+ 1 MILLION INHABITANTS**

Bogotá, Medellín, Cali, Barranquilla y
Cartagena.

15 cities +500.000 inhabitants.
27 cities +250.000 inhabitants.



**3rd most populous country in Latin
America:
+ 52 million inhabitants**



**The young population drives the domestic
market and the labor force**
64% of the population is under 40 years
old.





MULTIPLE REGIONS AND BUSINESS CENTERS FOR DIFFERENT TYPES OF INVESTMENTS (1/2)

CARIBBEAN:

15.2 % of GDP

Population: 11,742,220

Main sectors regional GDP: Public administration, commerce and hotels, manufacturing industries, oil and mining.

59 municipalities ZOMAC and PDET

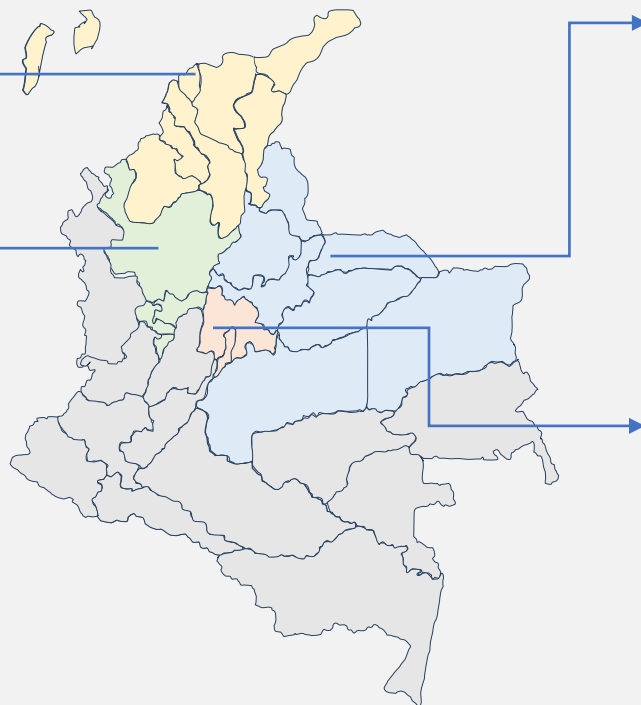
COFFEE REGION:

19.1% of GDP

Population: 9,471,159

Main sectors regional GDP: commerce and hotels, manufacturing industries, public administration

71 municipalities ZOMAC and PDET



CENTER EAST:

15,9% of GDP

Population: 7,178,499

Main sectors regional GDP: oil and mining, commerce and hotels, public administration, agriculture, livestock and fishing.

69 municipalities ZOMAC and PDET

BOGOTÁ AND CUNDINAMARCA:

31,5% of GDP

Population: 11,379,976

Main sectors regional GDP: commerce and hotels, public administration, real estate activities.

12 municipalities ZOMAC and PDET

*ZOMAC: Zones Most Affected by the Armed Conflict. PDET: Territorially Focused Development Programs
Sources: Economic regional profiles MIINCIT, December 2022 and DANE.

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MULTIPLE REGIONS AND BUSINESS CENTERS FOR DIFFERENT TYPES OF INVESTMENTS (2/2)

PACIFIC

13.5% of GDP:

Population: 8,287,996

Main sectors regional GDP : commerce and hotels, public administration and defense, manufacturing industry, real estate activities.

79 municipalities ZOMAC and PDET

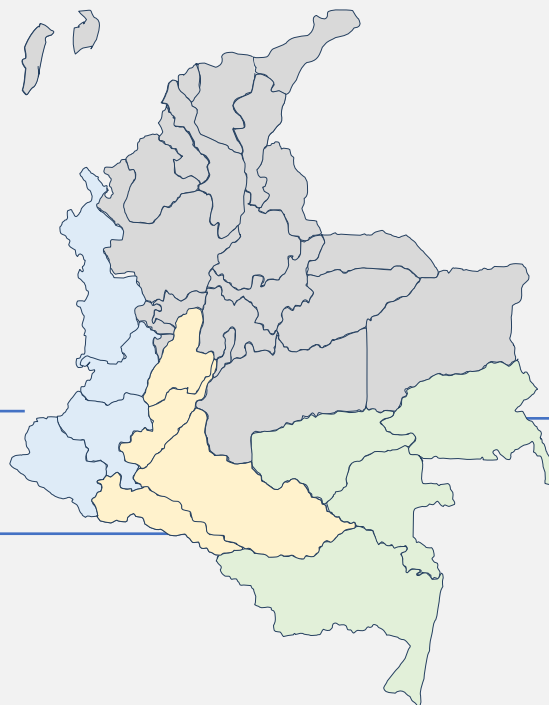
SOUTH CENTRAL:

4.5% of GDP:

Population: 3,276,206

Main sectors regional GDP : public administration, and agriculture, livestock and fishing, commerce and hotels, construction.

53 municipalities ZOMAC and PDET



AMAZON -ORINOCO:

0.2% of GDP:

Population: 273,418

Main sectors regional GDP: public administration, commerce and hotels, agriculture, livestock and fishing.

5 municipalities ZOMAC and PDET

*ZOMAC: Zones Most Affected by the Armed Conflict. PDET: Territorially Focused Development Programs
Sources: Economic regional profiles MIINCIT, December 2022 and DANE.





2

LEADERSHIP AND COMMITMENT TO SUSTAINABLE ECONOMIC DEVELOPMENT



Colombia is committed to becoming a **world power of life.**



Leader in the **energy transition.**



Tourism infrastructure for sustainable and inclusive development.



Biodiversity that drives business.



Success stories: we support the arrival of sustainable investments.

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COLOMBIA



COLOMBIA IS COMMITTED TO BECOMING A WORLD POWER OF LIFE

HIGH COMMITMENT TO ENVIRONMENTAL PROTECTION (NDC)

51% reduction in emissions economy-wide by 2030.

Reach net-zero deforestation by 2030.

Colombia has declared 30% of its territory a **protected area**

Achieve carbon neutrality by 2050.



WE ARE SENDING STRONG SIGNALS

National strategy of finance climate.

1st country to incorporate the SDGs into a National Development Plan.

1st country in the region to publish a green taxonomy

Voluntary carbon market and issuance of sovereign green bonds | Climate Action Law

INCENTIVES FOR SUSTAINABLE DEVELOPMENT

1. Incentives for Commercial Companies of **Collective Benefit and Interest (BIC in Spanish)**.
2. Incentives for Generation with **Renewable Energy Sources, and Efficient Energy Management**.
3. Exempt income from the **sale of electric energy generated with NCSE (or FNCE in Spanish)**.
4. Incentive for not generating National Carbon Tax - **Carbon Neutrality**.
5. Discount on income tax for **investments in environment control, conservation, and improvement and Certificate of Forestry Incentive (CIF in Spanish)**.





COLOMBIA: SUSTAINABLE ENERGY TRANSITION LEADER IN THE REGION



To achieve the decarbonization and reindustrialization objectives we are **boosting the participation of cleaner energies in the matrix.**



3rd economy in Latam with the capacity to supply energy in a **self-sustaining, quality, accessible and environmentally sustainable manner.** (WEF, Energy Transition Index, 2021)



High potential to generate energy with non-conventional energy sources. The availability of resources exceeds the world average, such as sunlight, wind, water, biomass, and geothermal resources, to produce low-emission hydrogen.



Modern regulatory, institutional, market scheme and incentives that promote foreign direct investment to **diversify the energy matrix and democratize access to clean energy.**





TOURISM INFRASTRUCTURE FOR SUSTAINABLE AND INCLUSIVE DEVELOPMENT IN ALL REGIONS



Given the **natural and cultural diversity**, developing tourism in the regions contributes to achieving **lasting peace**.



A **sustainable tourism policy** to strengthen the sector with practices that ensure the **conservation of natural resources**.



An opportunity to create schemes of collaborative work with **local communities** to achieve **inclusive growth**.



An attractive **regional tourism market**, **+106%** in foreign visitor arrivals in 2022.



Hub for **air connectivity** in Latin America. 3rd market with the highest air capacity, after Brazil and Mexico.



To develop the industry with a **sustainable and inclusive approach**, the government provides **incentives to encourage FDI**.





BIODIVERSITY THAT DRIVES BUSINESS



Colombia is the **2nd most biodiverse country** in the world



311 types of continental and marine **ecosystems**



Among the six countries with **more hydric resources** in the world



4,162 Green Businesses verified in **750 municipalities**, from **32 departments** that have generated **48,052 jobs**¹



The government is committed to **boosting business based on biological and genetic resources** and products derived from biodiversity.



Opportunities











- Agriculture using bio-inputs
- Food and beverages, cosmetics and pharmaceuticals using natural ingredients, bioactive ingredients, among others.

1.Source: Ministry of Environment and Sustainable Development





WE SUPPORT THE ARRIVAL OF SUSTAINABLE INVESTMENTS

<p>ACUMEN</p>	 <p>United States</p>	
<p>JOHN LAING</p>	 <p>United Kingdom</p>	
<p>EDF Y EDF-RENOVABLES</p>	 <p>France</p>	
<p>AUVERT</p>	 <p>Canada</p>	
<p>E-KAKASHI</p>	 <p>Japan</p>	



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3

COMPETITIVE EXPORT PLATFORM TO THE REGION AND THE WORLD



Global connectivity and high-level infrastructure to connect businesses to the world



Free Trade Agreements that offer preferential access to 1.5 billion consumers



Network of treaties that promote investment



Free trade zone regime that promotes goods and services exports





GLOBAL CONNECTIVITY AND HIGH-LEVEL INFRASTRUCTURE TO CONNECT BUSINESSES TO THE WORLD

CONNECTION TIMES



Santiago de Chile	5h 55m
Lima	3h 5m
Sao Paulo	6h 10m
México DF	4h 55m
NY	5h 35 m
Toronto	6h 10 m



Callao	2d
Valparaíso	8d
Port Everglades y Miami	5d
Puerto Manzanillo	8d
NY	6d
Vancouver	18d
Shangai	25d



3,500 maritime export routes to 750 ports in 140 countries in the world.



More than **2,400 export routes** through 30 airlines, with access to more than 500 cities.



We share the same **time zone** as the main cities of the continent, making us an ideal destination for **nearshoring services**.



El Dorado Airport in Bogotá is the **1st** Latin American airport in volume of air cargo and the third busiest by passengers.



Port of Cartagena cataloged as the **best connected** in maritime trade in Latin America and the Caribbean (UNCTAD).





FREE TRADE AGREEMENTS

THAT OFFER PREFERENTIAL ACCESS TO 1.5 BILLION CONSUMERS

19 FTA IN FORCE AND 2 SIGNED

SOUTH AMERICA	NORTH AND CENTRAL AMERICA		EUROPE & ASIA
 VENEZUELA*	 UNITED STATES	 CUBA*	 KOREA
 CHILE	 CANADA	 PANAMA	 ISRAEL
CAN*	 MEXICO*	CARICOM*	 UK
Pacific Alliance	 COSTA RICA	Northern Triangle	 SINGAPORE**
MERCOSUR*	 NICARAGUA		EFTA European Union



*Agreements of economic complementation or Partial Scope

** Subscribed

Panama: 1 in force, 1 signed

Nicaragua: Agreement for access of 20 products to Colombia. Colombia has no benefits

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NETWORK OF TREATIES THAT PROMOTE INVESTMENT

14 DOUBLE TAXATION AGREEMENTS IN FORCE

6 DOUBLE TAXATION AGREEMENTS SIGNED

19 INVESTMENT AGREEMENTS IN FORCE AND 5 SIGNED



*Agreement to avoid double taxation and prevent tax evasion in relation to income taxes levied on income obtained by recognized pension funds

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FREE TRADE ZONE REGIME THAT SUPPORTS THE EXPORTS OF GOODS AND SERVICES

BENEFITS

1. **No payment** of tariff and VAT.
2. **Facilitation of exports to third countries**, taking advantage of existing trade agreements.
3. **Income tax rate of 20% until January 1st, 2024.** Subsequently, 20% on export profits and general rate of (35%) for sales to the national customs territory.
4. **Foreign goods introduced into the Free Trade Zones** may remain there indefinitely.
5. **Long-term incentive** with the possibility of extending its period of validity.

TWO TYPES OF FREE TRADE ZONES

80

SINGLE – COMPANY
FREE TRADE ZONES



42

**PERMANENT
(INDUSTRIAL
PARKS)**
FREE TRADE ZONES

TOTAL NUMBER
OF FREE TRADE
ZONES

122





4

PRIME CONDITIONS THAT BOOST **BUSINESS COMPETITIVENESS**



Large business network and an ecosystem that drives entrepreneurship.



The country has a **labor force** that stands out for its commitment and diversity of training



We facilitate and incentivize the arrival of FDI





LARGE BUSINESS NETWORK AND AN ECOSYSTEM THAT DRIVES ENTREPRENEURSHIP

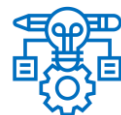


5.704.308¹ companies



Companies of different sizes. This guarantees a reliable supply chain and the opportunity to find allies and clients. 99% SMEs

MICRO	5,597,316
SMALL	81,725
MEDIUM	19,100
LARGE	6,167



1,110 startups operating in 26 sectors are part of the **innovation ecosystem** in Colombia²



Colombia is cataloged as the country with the best conditions for entrepreneurship in Latin America³



Colombia is one of the six countries that have **generated unicorns** in the region (2)



Colombia: **4th** for entrepreneur investment attractiveness in region⁴

1. Business directory I DANE. - 2. Colombia Tech 2021

3. Global Entrepreneurship Monitor - 4. The Venture Capital and Private Equity Country Attractiveness Index 2021 - IESE Business School





THE COUNTRY HAS A LABOR FORCE THAT STANDS OUT FOR ITS COMMITMENT AND DIVERSITY OF TRAINING



COLOMBIA HAS THE SECOND LARGEST LABOR FORCE IN SOUTH AMERICA



Erin Champlin- Vicepresident J&J Global Services:

"We have been able to attract great talent from people who are excited and passionate about working with J&J ... We are incredibly impressed with the talent and linguistic, business and financial capabilities."

Marcelo Altieri – SVP YARA

"People are their greatest wealth, Colombian producers are optimistic, resilient, and better yet, they are great entrepreneurs. Yara bets on this country and has the conviction that the future of agriculture in Colombia is promising."



GRADUATES BY LEVEL OF EDUCATION 2017-2021

UNIVERSITY	1.156.121
TECHNICAL AND TECHNOLOGICAL	734.815
TECHNICAL AND TECHNOLOGICAL SPECIALIZATION	393.391
UNIVERSITY SPECIALIZATION	370.398
MASTER'S DEGREE	128.525
DOCTORATE	4.456

Source: Labor Observatory, Ministry of Education





WE FACILITATE AND ENCOURAGE THE ARRIVAL OF INVESTMENTS

ONE – STOP INVESTMENT INFORMATION WINDOW (VUI in Spanish)

TOOL THAT ESTABLISHES AN INSTITUTIONAL POINT OF CONTACT FOR THE INVESTOR, centralizing the relationship with the different government entities. It allows access to a single site to the pertinent and sufficient information to initiate the installation and operation process in the country. The creation of its regulations is in progress.

TOP INVESTMENT OPPORTUNITIES

A virtual platform that allows, through a search engine, to visualize projects and/or companies looking for foreign capital for their growth.

ATTRACTIVE INVESTMENT INCENTIVES POLICY



Vallejo Plan



Incentives for the acquisition of capital assets



Incentive for companies in “ZOMAC” zones



Incentives for investments in research, technological development or innovation



Income tax deductions to promote employment



Specific sectoral incentives





5

ATTRACTIVE INVESTMENT OPPORTUNITIES IN MULTIPLE SECTORS.



The region's **agri-food power**



Fourth most attractive investment destination in **energy transition**



Opportunities for the development of **tourism activity** in high-potential regions



Regional hub for **knowledge-based industries**



Regional production hub of **high-value-added manufacturing**



Construction of **civil works**, is a driving sector for regional development and competitiveness

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THE REGION'S AGRI-FOOD POWER



SUCCESS STORIES



INVESTMENT OPPORTUNITIES



Transformation of fresh fruits and vegetables into value-added products (IQF, frozen, pulp, oils).



Increase the planted area and/or the productivity of priority crops through sustainable practices.



Develop new cocoa plantations or rejuvenate existing cocoa plantations to increase cocoa production sustainably.



Increase production of healthy and/or sustainable processed foods to meet international market demand while achieving food security.





FOURTH MOST ATTRACTIVE INVESTMENT DESTINATION IN ENERGY TRANSITION, AMONG 107 EMERGING COUNTRIES



SUCCESS STORIES



INVESTMENT OPPORTUNITIES



FDI promotion to diversify the energy matrix with Non-Conventional Energy Sources (NCES), and efficient energy management.



High potential to develop renewable energy generation projects: solar, onshore and offshore wind, Small Hydropower Plants, biomass, green hydrogen and Geothermal.



Development of sustainable energy solutions for Non-Interconnected Areas.



New expansion works of the transmission and distribution infrastructure to ensure reliability. (Trough Public call).



OPPORTUNITIES FOR THE DEVELOPMENT OF TOURISM ACTIVITY IN HIGH-POTENTIAL REGIONS



SUCCESS STORIES



Rural and community-based tourism: hotel projects such as eco-glamping, ecolodges, campsites, sustainable green developments to improve the offer of high-potential tourist destinations.



Sun and beach tourism: Development of hotels, beach and jungle ecosystems, infrastructure for bird watching, construction of tourist docks, marinas, and access to new technologies.



Urban hotels: hotels focused on the youth, senior, corporate or leisure segments in main and intermediate cities.



Entertainment: development of theme parks and venues for events.



In addition, the development of the activity must be supported by local **enabling infrastructure**, which includes the following investment approaches:

- Civil infrastructure (Roads, airports, aqueducts, etc.)
- IT, innovation tools and telecommunications.
- Training for human talent in the regions.





REGIONAL HUB FOR KNOWLEDGE-BASED INDUSTRIES



SUCCESS STORIES

Globant



Optum

INVESTMENT OPPORTUNITIES



BPO y KPO: BackOffice and KPO operations development centers



Software and IT: factories and software development for verticals agritech, fintech, blockchain, health, logistics, energy, e-commerce, APPS, among others.



Fintech: Development of financial services to meet the needs of the rural population and those with the greatest needs.



Technological infrastructure: Deployment of networks in rural and remote areas to provide digital connectivity services.



Audiovisual: recording centers for the generation of audiovisual content, taking advantage of the wide cultural and geographic diversity.

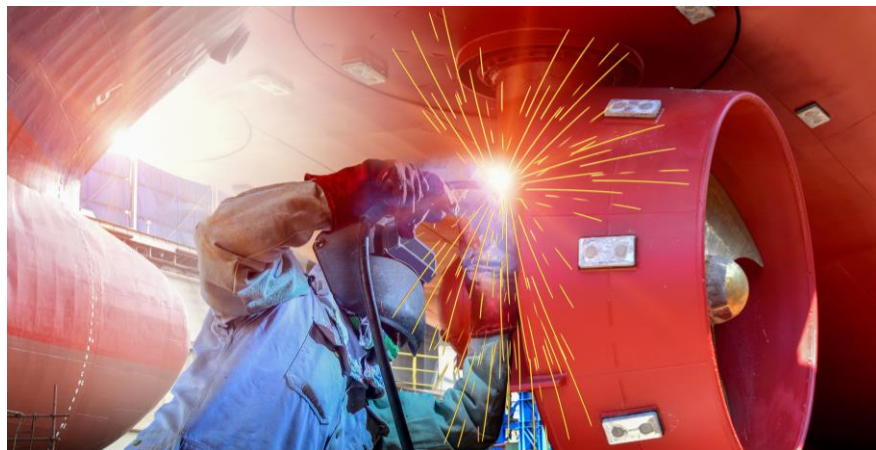


Videogames: own IPS production and development centers and outsourcing services for videogames.





REGIONAL PRODUCTION HUB OF HIGH-VALUE-ADDED MANUFACTURING



SUCCESS STORIES



INVESTMENT OPPORTUNITIES



Manufacture, filling and packaging of vaccines that promote technology transfer and strengthen health sovereignty.



Production of Active Pharmaceutical Ingredients - APIs to meet local and regional demand.



Attract auto parts companies and vehicle assemblers that accelerate and strengthen the adoption of new technologies in the electric vehicle segment.



Attract companies in the resin and oil by-products transformation chains.



Construction of shipyards and attraction of TIER 1 and 2 companies for the local production of pieces and parts for the naval industry.





CONSTRUCTION OF CIVIL WORKS, IS A DRIVING SECTOR FOR REGIONAL DEVELOPMENT AND COMPETITIVENESS



INVESTMENT OPPORTUNITIES



The PMTI* is the roadmap for the country's intermodal connectivity over the next 20 years, with 294 prioritized municipalities, through 86 projects for an estimated amount of USD 48 BN.



The concession projects to be developed will have an investment +USD 10 BN.



The Community Roads for Peace program will have an estimated investment of USD 1.6 billion to rehabilitate 33,000 km of roads

*PMTI: Intermodal Transportation Master Plan (Plan Maestro de Transporte Intermodal)

Source: Ministry of Transportation





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THANK YOU

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