



# Javier Jileta



Head of the Investment and Economic Promotion  
Taskforce in the Mexico's Ministry of Foreign Affairs

Javier Jileta holds a BA in Economics from the ITAM and an MA in Planning and Urban Development, and PhD studies on Urban Economics and Country Branding from University College London. He is currently serving as the Director of Outreach at the Office for Multilateral Affairs and Human Rights where he works together with the Secretariat of the Economy and the President's Office to attract foreign investment in Mexico Prior to this he worked on research related to telecommunications, competitiveness, the creation of global knowledge and the usefulness of technologies in the fields of education, health and innovation. He has focused his career on developing and promoting innovation and knowledge projects and in 2008 founded Scientika a non profit organization focused on fostering talent to promote effective change through innovation and creativity.

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# Mexico Drives: new visions for prosperity

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**Getting Ready for the USMCA Trade Agreement**  
**Business Webinar**  
June 30, 2020

# 1. From The North American Free Trade Agreement (NAFTA) to the new United States-Mexico-Canada Agreement (USMCA)

## **NAFTA: a baseline for other trade agreements.**

The NAFTA set a precedent for later Mexico's trade agreements and trade rules. Nowadays, trade rules have evolved, and the new technological developments have transformed the operation of global markets.

**The USMCA** aims to update this agreement to better reflect current conditions in the market of the three countries.

1. Ensures certainty in trade and investment.
2. It strengthens North American competitiveness.
3. It modernizes NAFTA, adapting them to the 21st century economy's needs.
4. It guarantees inclusive and responsible regional trade.



## 2. Mexico in the new era: Global Economic Drive.

Nowadays, the world is constantly evolving, not only trade agreements, but governments and their institutions must also keep up with global trends.

Mexico needs to Implement a comprehensive strategy to boost growth and share the benefits more widely, further enhancing trade and participation in global value chains.

- Technology is fostering regionalization and increasing valued added through services in trade goods.
- Multinationals are searching for domestic supply chains to reduce cost in trade of intermediate goods.
- Global demand is changing towards higher consumption in emerging markets.

# GLOBAL ECONOMIC DRIVE

The new strategy for economic promotion abroad

Vice Ministry for Multilateral Affairs and Human Rights



**RELACIONES EXTERIORES**

SECRETARÍA DE RELACIONES EXTERIORES

# 1

## Introduction



The complex international environment in which we live in obliges us to generate and sent messages to different cultural audiences and geographic interests, in an ever changing economic and technological environment in which multilateralism is a must.

There is a strategic element to these messages, in the context of a multi-polar world, in order to better deliver the messages to achieve the national objectives of economic development with a strong element of well-being.

The need for development, well-being, prosperity and happiness have required a great deal of internal effort in Mexico , but also require a proactive attitude in the international arena, to bring these changes in Mexico.

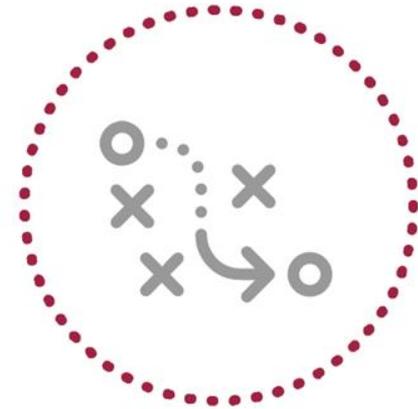
## 2

### **Global Economic Drive: A New Strategy**

The new strategy in Mexico has the unequivocal objective of unifying the messages sent abroad and to provide a coordinated and effective operative platform: at home and abroad.

The promotion activities under consideration here do not imply extra spending, as this strategy requires no additional human resources, as it relies on approved spending for this fiscal year. Additionally, this strategy it taps on existing resources this will allows savings for over 1,200 million pesos every year.

This administration has adjusted its economic promotions in order to attract foreign investment for economic development in areas that receive less attention, and that traditionally have been perceived sectors in which less added value is generated such as, manufacturing and the primary sector of the economy.



# Economic Drive: Three Main Axis

## 01 ECONOMIC DIPLOMACY

### GOAL:

To take advantage of our capable diplomatic capacity to propel our the Mexican nation interests and development goals, leveraging the economic engines with strategic international partners.

## 02

### FOREIGN INVESTMENT

#### GOAL:

To map our network of contacts in order to better develop a unified communication strategy, and to attract foreign direct investment (FDI) in the Mexican strategic sectors.

OUTSTANDING  
RELATIONSHIP AND  
ATTENTION TO  
SPECIALIZED  
INVESTMENT  
FUNDS

GOVERNMENT  
RELATIONS

HIGH LEVEL  
RELATIONSHIPS

TERTIARY  
EDUCATION AND  
RESEARCH

MISSIONS

STRATEGIC PROJECTS  
PROMOTION

STRATEGIC  
FAIRS

## 03

### FOREIGN TRADE

#### GOAL:

Strategic activities designed to increase the visibility of Mexican enterprises in trade forums and fairs to facilitate the internationalization of goods and services.

## 01 Economic Diplomacy

### Government Relations

- Ministries and priority governmental entities in consolidation of high level relationships  
High level relationships.

### High Level Relationships

- Strengthening of ties with chamber of commerce leaders for strategic industries.  
Integration of Tertiary education and research.

### Tertiary Education and Research

- International agreements to spur transfers of technology. Technological professionalization of research centers and universities.

## 02 Foreign Investment

### Outstanding relationship and attention to specialized investment funds

- Identify and consolidate relationships with relevant investment funds to the selected strategic sectors.

### Strategic projects promotion

- Establishing collaboration projects to further advance selected strategic sectors.

## 03 Foreign Trade

### Strategic trade fairs

- Identify and participate in relevant trade fairs for selected strategic sectors.

### Missions

- Development and coordination of missions.

# Functions

1

Continuity to the Mexican economic projection abroad in coordination with the Ministry of Economy and the Office of the President of Mexico



2

Coordinate the participation of the Embassies and Consulates in the task of foreign economic drive in collaboration with the Under secretariats and administrative areas of the Ministry of the Exterior.



3

Generate new synergies, a direct and productive dialogue with other ministries, state governments and the private sector.



4

Generate a geopolitical dashboard for strategic planning.

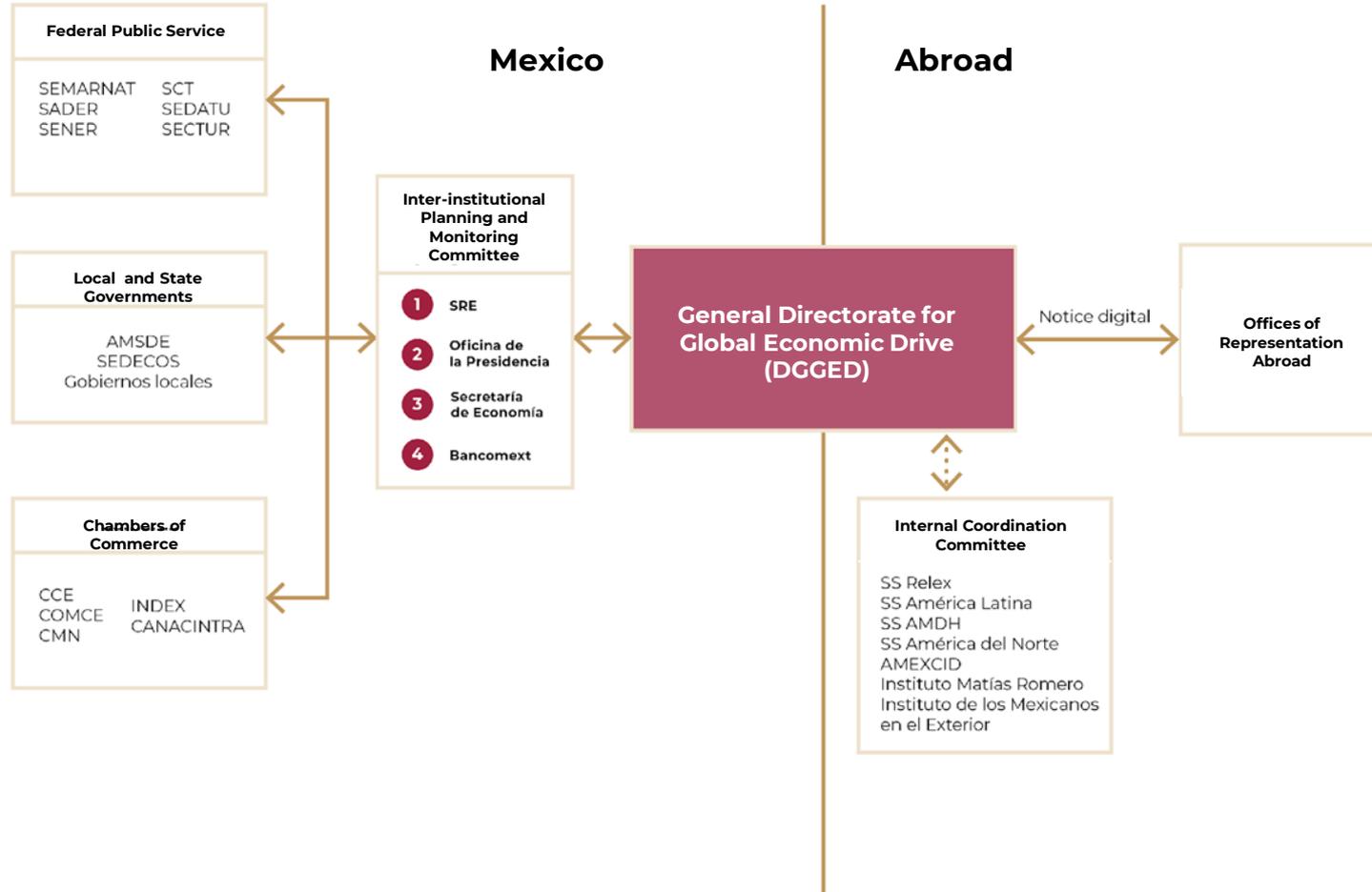


5

The priority is to keep the President directives on budgeting, so the operation center for this strategy will be concentrated in Mexico City and all action and activities abroad will be undertaken by the network of Consulates and Embassies.



# Operational Process



# RELACIONES EXTERIORES

SECRETARÍA DE RELACIONES EXTERIORES



**Vice Ministry  
for Multilateral Affairs  
and Human Rights**



**Oliver Wayman**  
Partner, Aviation,  
Aerospace & Defense

Geoff Murray is a Partner with Oliver Wyman, a leading 2 B global management consulting firm where he leads projects supporting Boards of Directors and senior leaders at OEMs, suppliers, financial sponsors and operators. His principal focus is on aftermarket and services growth including the structure of licensing, distribution and partnership agreements as well as parts and services pricing. In addition to his aerospace role, Dr Murray supports other clients where he focuses on organizational design, operations, training and supply chain management. In his role as an Oliver Wyman Partner, he served as the interim Senior Vice President of Supply Chain Management for a major global airline during a challenging in court restructuring. Dr Murray is widely recognized for his contributions to airline flight operations where he's led projects with major global airlines and is also an author of Oliver Wyman's Flight Operations Brief. Dr Murray holds a Ph D in engineering from Northwestern University and an undergraduate aeronautical engineering degree from Embry Riddle. He is an active pilot and flight instructor and holds Airline Transport Pilot and Certified Flight Instructor certificates issued by the U.S Federal Aviation Administration.

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# FOREIGN DIRECT INVESTMENT IN MEXICO

Effects Of Covid-19, Supply Chain Complications, Propensity to Travel,  
and Demand Recovery

June 30, 2020

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## KEY MESSAGES

01

- After a slowdown between 2015 and 2018 Foreign Direct Investment (FDI) in Mexico and across the globe exhibited a decrease but between 2018 and 2019 showed meaningful increases

02

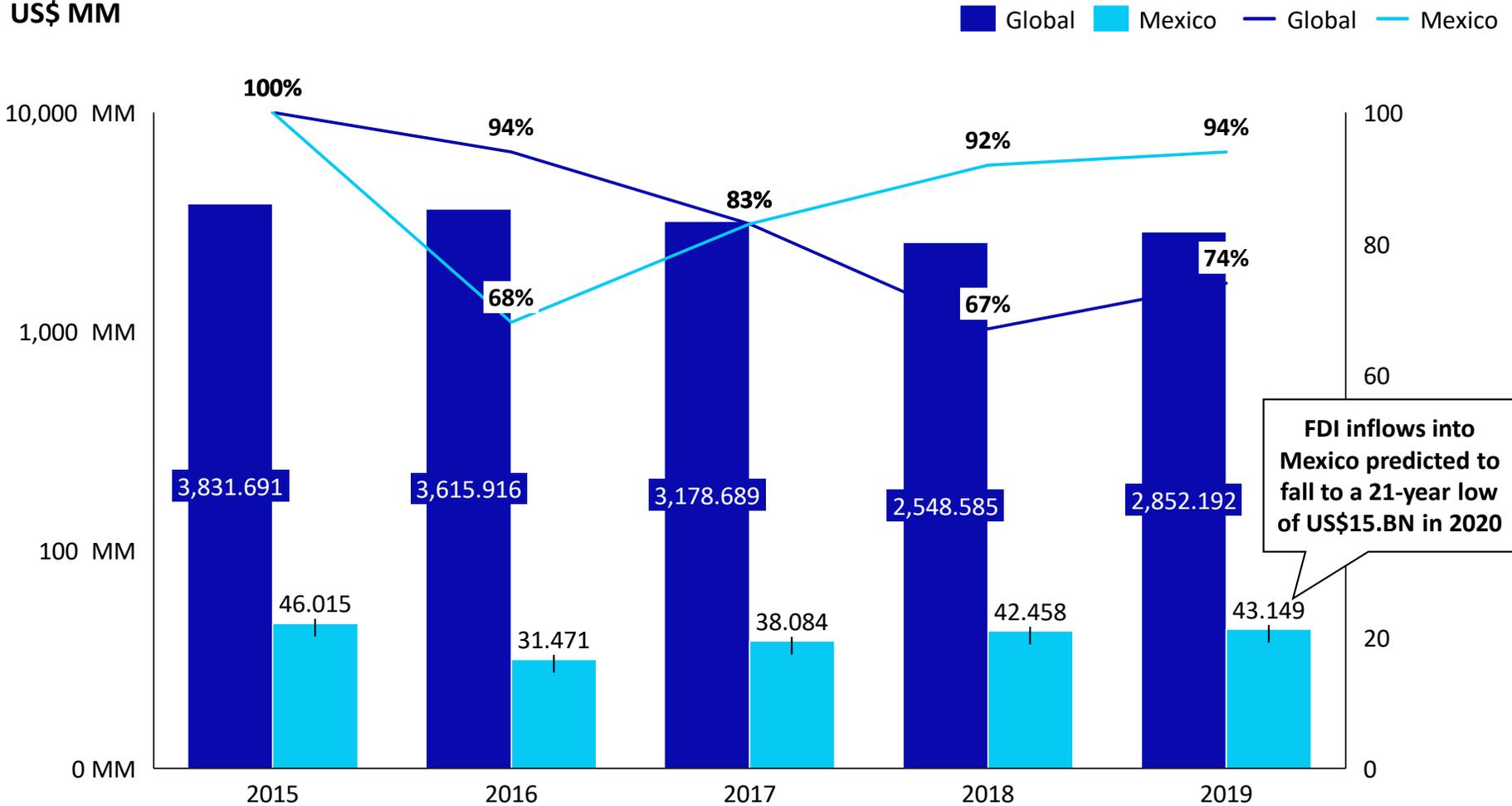
- But FDI *depends on travel* as investors seek to understand local capabilities, infrastructure and customs
  - Recent survey research has shown that nearly 60% of travelers will embark on domestic trips only once the COVID-19 pandemic has subsided
  - Based on that traveler sentiment we may not see pre-COVID travel levels return until early 2023

03

- The current economic environment is putting significant pressure on manufacturers who – along with efforts to reduce costs -- will pay close attention to their supply chains
  - Governments and regulators must ensure efficient cross-border trade

# GLOBAL FDI INCREASED IN 2019 BUT HAS BEEN ON A DOWNWARD TREND SINCE 2015; INFLOW FDI TO MEXICO IN 2020 WILL FALL TO A 21-YEAR LOW

FDI 2015–2019, US\$ MM

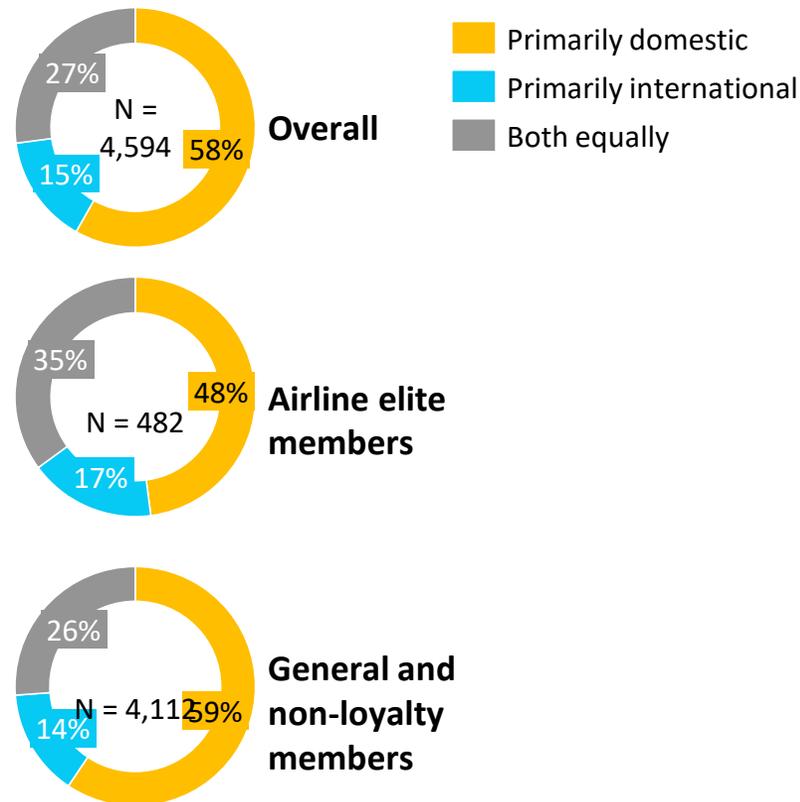


FDI inflows into Mexico predicted to fall to a 21-year low of US\$15.BN in 2020

Global FDI increased in 2019 but HAS BEEN ON A DOWNWARD TREND SINCE 2015; INFLOW FDI TO MEXICO in 2020 WILL FALL TO A 21-YEAR LOW

# TRAVELERS WILL FAVOR DOMESTIC TRIPS OVER INTERNATIONAL; COMPANIES ARE MORE LIKELY TO INVEST IN DOMESTIC TRAVEL THAN INTERNATIONAL

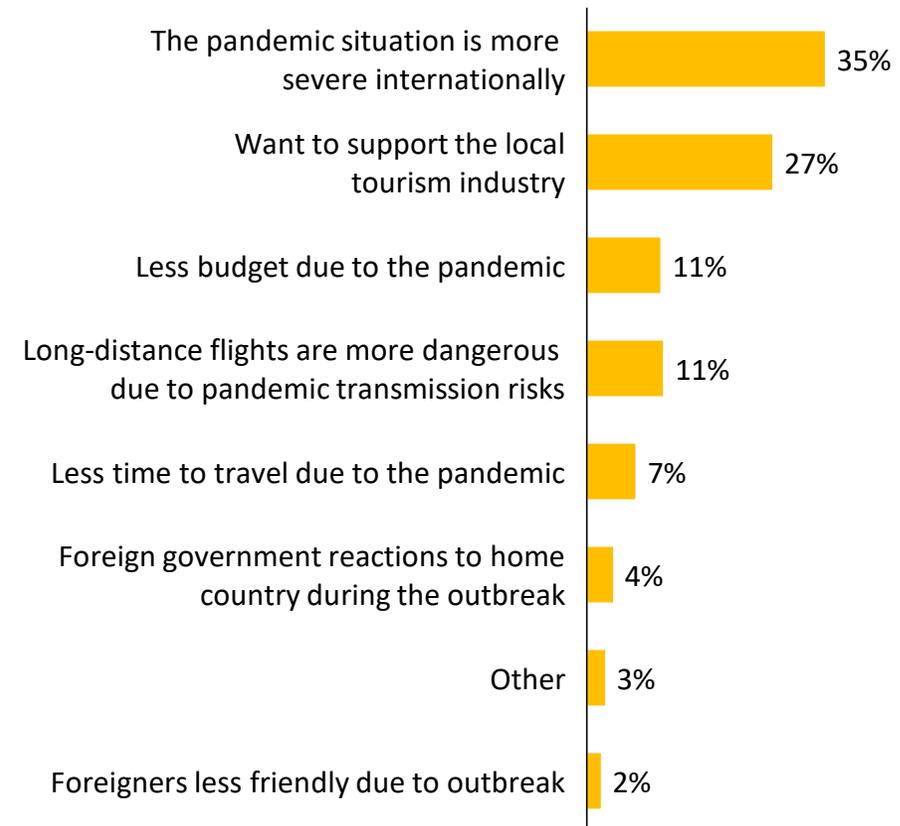
When the COVID-19 outbreak ends and other countries have lifted the travel restrictions, will you travel primarily domestically or internationally for the remainder of the year?



Source: Oliver Wyman Traveler COVID-19 Survey, Oliver Wyman analysis

Why do you choose to travel primarily domestically?

1<sup>st</sup> choice, % of those traveling primarily domestically (n=2,673)

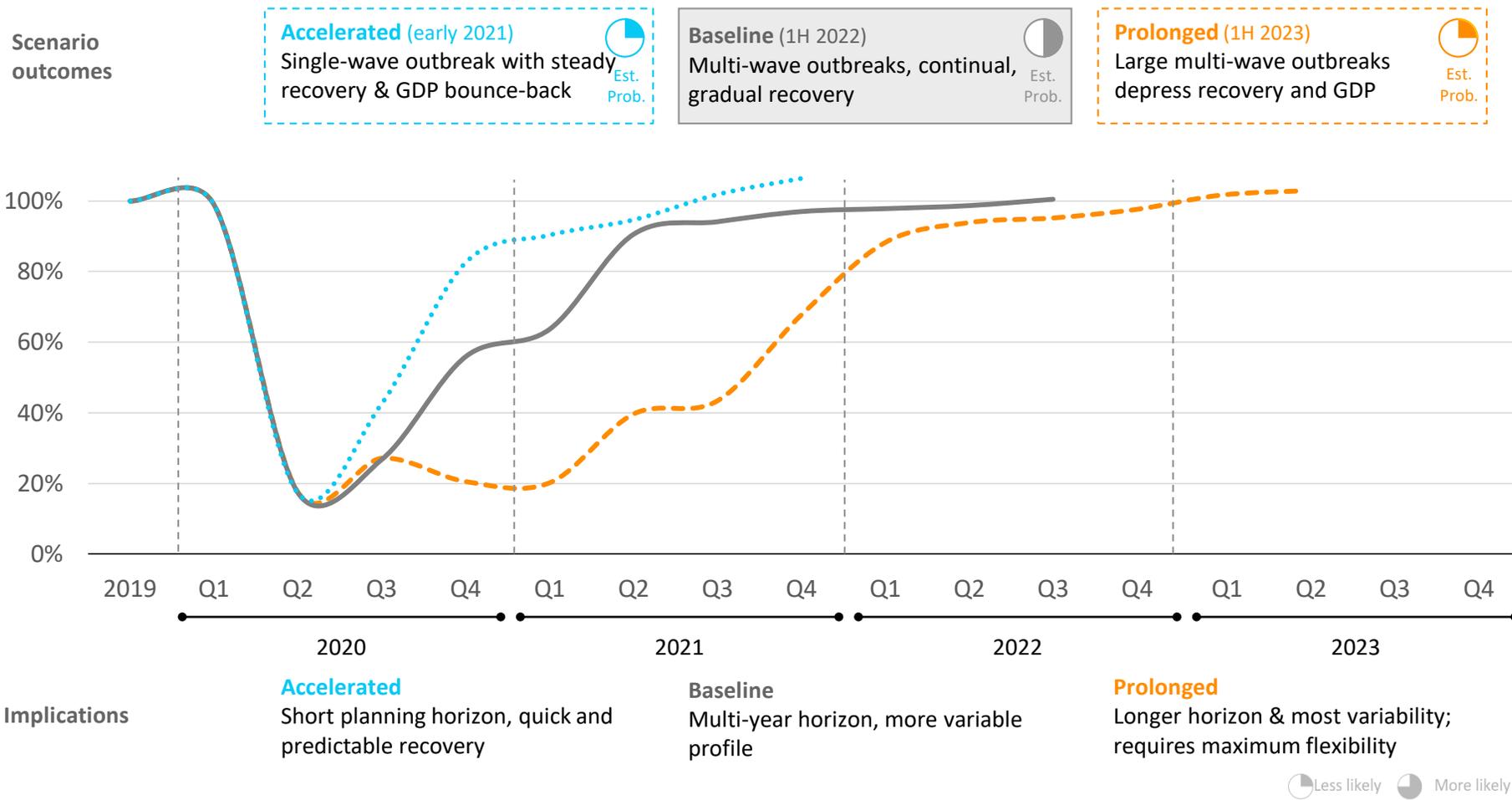


# EMERGING VIEW SUGGESTS US DOMESTIC RECOVERY IN 2022

based on best available inputs for the main factors that will drive recovery, the emerging baseline view is that domestic industry revenue will recover by the middle of 2022

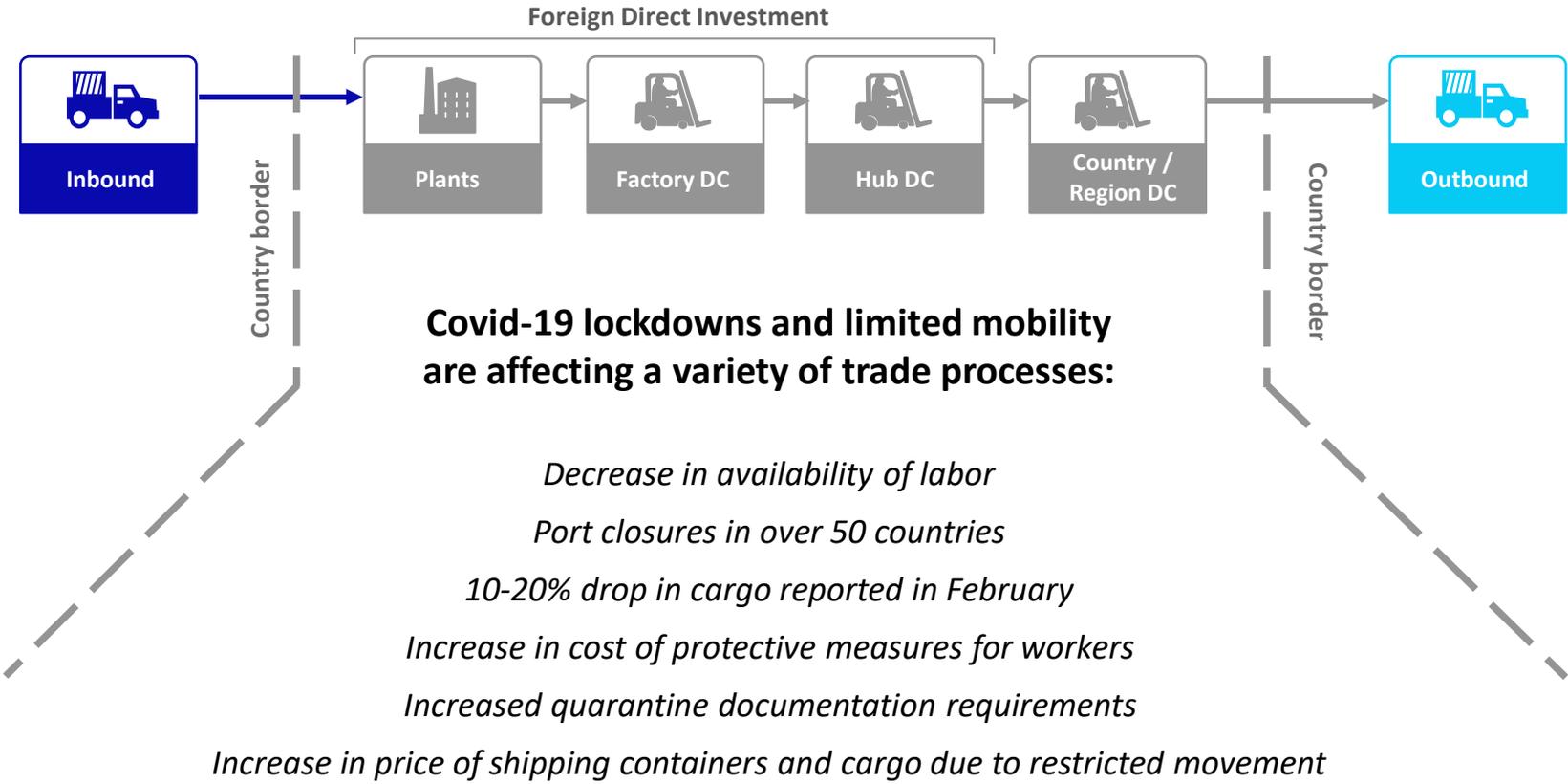
## Revenue recovery index: US domestic

Baseline (100%) represents 2019 industry revenue



# COMPANIES SHOULD PAY CLOSE ATTENTION TO SUPPLY CHAINS; THEY WILL BE AFFECTED BY BORDERS, PROPENSITY TO TRAVEL, AND DEMAND RECOVERY

Covid-19 has led to greater disruption of production than traditional economic crises; supply chains are being affected by the need to ensure additional health and safety measures for all participants in the supply chain



Source: OECD

# SUMMARY MESSAGES

- Foreign Direct Investment has showed a recent uptick but will be materially challenged by COVID-19
- Challenges will be associated with international traveler sentiment which may extend full recovery into 2023
- Broader industrial challenges will put a focus on supply chains, so governments and regulators must ensure cost-efficient and competitive borders

## **QUALIFICATIONS, ASSUMPTIONS, AND LIMITING CONDITIONS**

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Former head of the Technical Negotiation of Mexico for the modernization of the North American Free Trade Agreement (NAFTA)

Ken Smith Ramos has extensive experience in working for the Government of Mexico, specializing in international trade negotiations. He has formed a key part of Mexico's negotiating teams, working with a variety of institutions since he began his career with the team that negotiated the North American Free Trade Agreement (NAFTA). He recently served as Mexico's Chief Technical Negotiator for the modernization of NAFTA, now known as the United States Mexico Canada Agreement (USMCA). As Chief Negotiator, he was in charge of designing and implementing the negotiation strategy, including rules relating to the automotive sector. He also negotiated the parallel accords which exclude Mexico from any national security measure that the USA could impose on the rest of the world.

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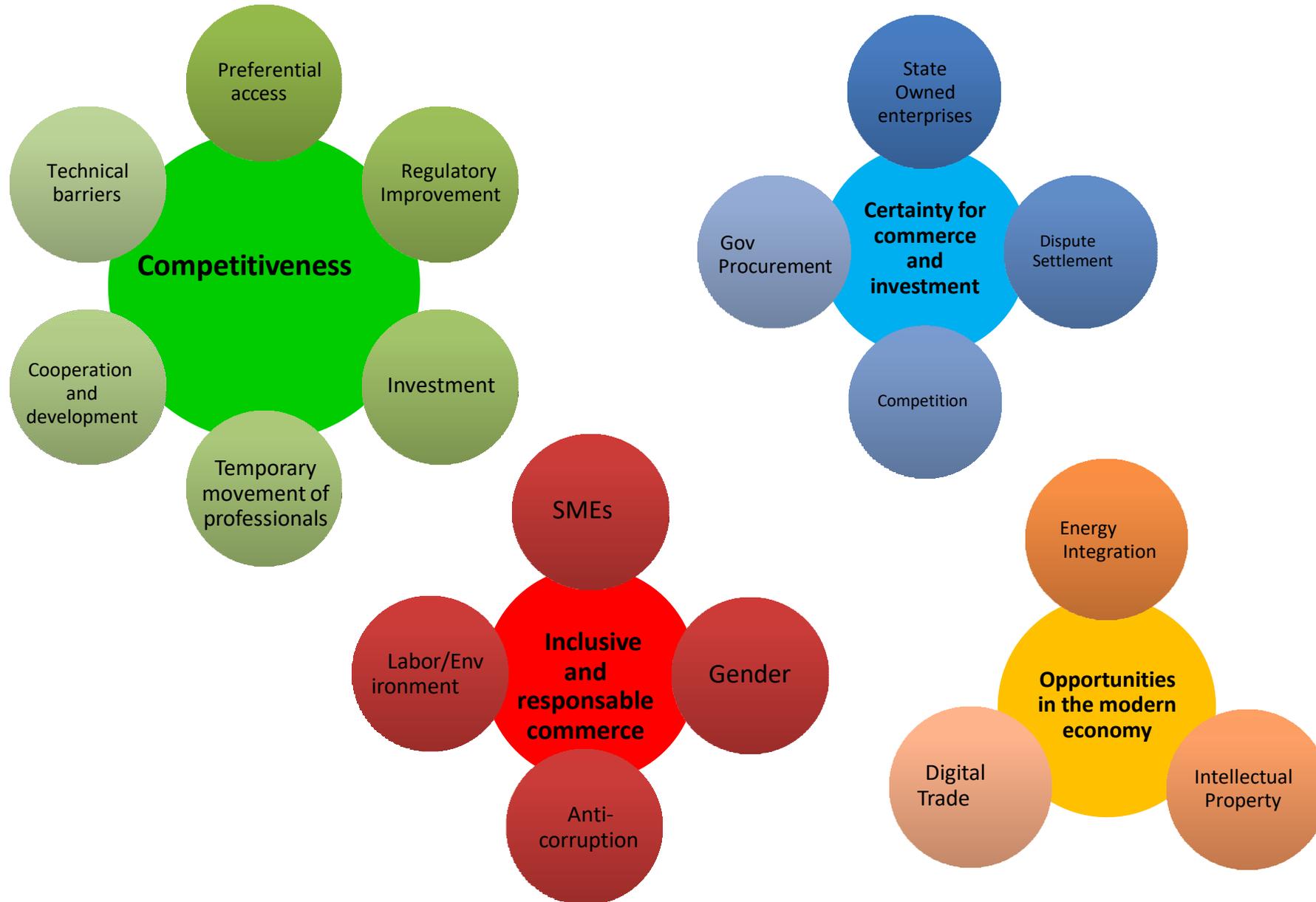
# USMCA Opportunities and Compliance Checklist

**Kenneth Smith Ramos**

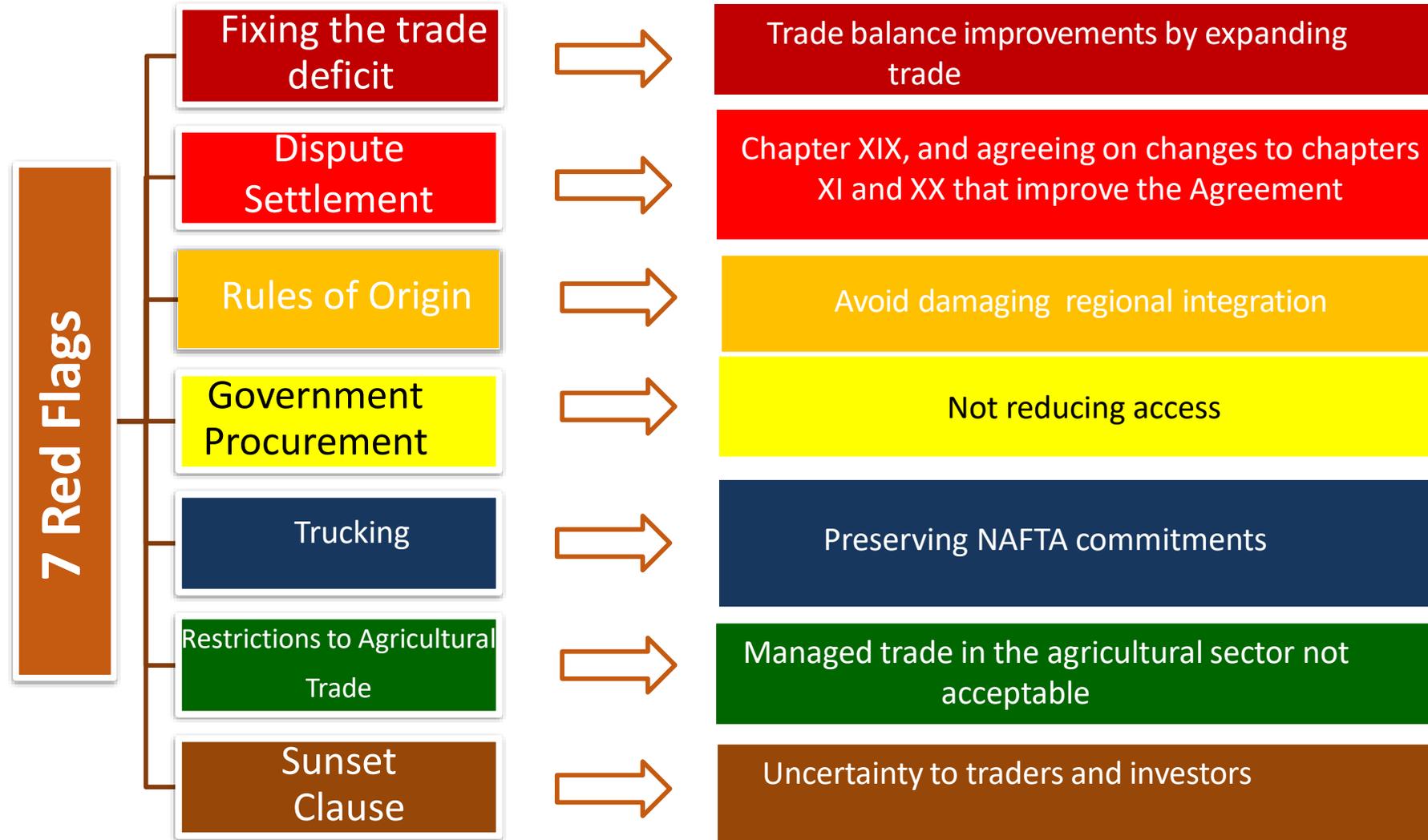
Former USMCA Chief Negotiator for the Government of Mexico and Partner at Agon, Economía, Derecho, Estrategia

June 2020

# Mexican Priorities for USMCA Negotiation



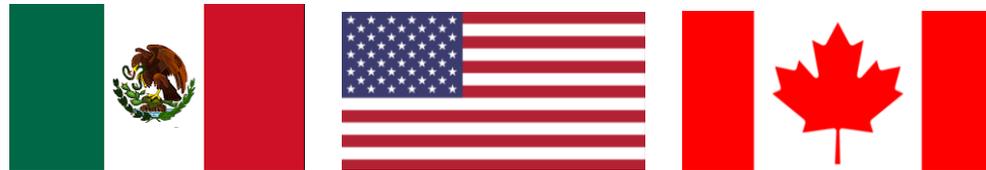
# Red flags during the negotiation



# A Trilateral Agreement

USA-Mexico-Canada

# (USMCA)



# ¿What did we achieve ?

1. Digital Trade

2. Telecommunications

3. Anticorruption

4. Competitiveness

5. SMEs

**New chapters  
modernize  
our  
Agreement**

# ¿What did we achieve?

Agricultural Seasonality

Textiles

Access reduction for Government  
Procurement

Trade deficit reduction goals

**Elimination of  
unacceptable  
US proposals**

# What did we achieve?

## Sunset Clause

Modified and with no sudden death

## Rules of Origin in Automotive Sector

Guaranteeing free trade

Robust rules to promote regional integration

Insurance policy for Mexico in case of extraordinary measures (232)

## Dispute Settlement Mechanism

We preserved:

Chapter XI (Investor-State)

Chapter XIX (AD/Subsidies)

Chapter XX (State-State)

**Agreement  
On  
Controversial  
Issues**

# RULES OF ORIGIN FOR AUTOMOTIVE GOODS

## Light Vehicles and Pick-Up Trucks

**Average salary  $\geq$ \$16/hour**

Materials and manufacturing costs  $\geq$ 25% cars /  $\geq$ 30% pickups  
 Technical content and assembly operations<sup>1/</sup>  $\leq$ 15% cars and pickups

### Labor Value Content (LVC)

**40% cars (4 increases) / 45% pick-ups (immediate<sup>2/</sup>)**

### Steel and Aluminum

$\geq$ 70% based on purchases of OEMs



### Regional Value Content (RVC)

**75% / Net Cost / 4 increments**

### RVC Auto parts / Net Cost / 4 increments

Essential*	Principal	Complementary
75%	70%	65%

\* 7/7 must be originated in North America

## Heavy Vehicles

**Average salary  $\geq$ \$16/hour**

Materials and manufacturing costs  $\geq$ 30%  
 Technical content and assembly operations<sup>1/</sup>  $\leq$ 15%

### Labor Value Content (LVC)

**45% (immediate<sup>2/</sup>)**

### Steel and Aluminum

$\geq$ 70% based on purchases of OEMs



### Regional Value Content (RVC)

**70% / Net Cost / 7 increments**

### RVC Auto parts / Net Cost / 7 increments

Essential	Principal <sup>3/</sup>	Complementary <sup>3/</sup>
70%	70%	65%

1/ Technical criteria includes I&D and TI services. Assembling operations comprise a motor and transmission plant or batteries with a minimum capacity of 20,000 goods.

2/ Entry into force by January 1, 2020.

3/ Goods with an RVC 50% under Net Cost will be 60%. Other parts keep TLCAN 1.0.

1/ Technical criteria includes I&D and TI services. Assembling operations comprise a motor and transmission plant or batteries with a minimum capacity of 100,000 goods for motors and transmissions and 25,000 for batteries.

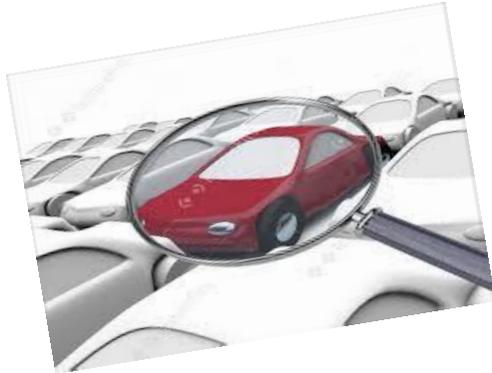
2/ Entry into force by January 1, 2020.

# AUTOMOTIVE TRADE (LIGHT VEHICLES AND AUTO PARTS)

## 1. Free trade and unlimited access

### Originating

- ✓ Comply with ROO
- ✓ 0% tariff



### Non-Originating

- ✗ Don't comply with ROO
- ✓ Pay MFN tariff

## 2. Increase in MFN tariff

### Originating

- ❖ Tariff free



### Non-Originating

### Light vehicles

- ❖ 2.5% tariff, when complying with ROO NAFTA 1994
- ❖ 1.6 million units



If the amount exceeds 1.6 million units, they pay current tariff



- ❖ Tariff free

- ❖ MFN tariff, when complying with ROO NAFTA 1994
- ❖ 108 B USD

### Auto parts

## 3. Extraordinary Measures (Sect. 232)

- ✓ Access for current export capacity is guaranteed for auto parts industry for...

2.6 million vehicles

### Originating

- ✓ 0% tariff

### Non-Originating

- ✓ 2.5% tariff
- ✓ ROO NAFTA 1994

108 billion USD in auto parts

### Originating

- ✓ 0% tariff

### Non-Originating

- ✓ MFN tariff
- ✓ ROO NAFTA 1994

# Automotive Rules of Origin (Transitions)

¿Is there a transition period to comply with the new Rules of Origin?

Yes, there will be 4 increments. Transition: 3 to 7 years, depending on vehicle category

For heavy vehicles, a 7-year transition period

For light vehicles and pickups, a 3-year transition period

Transition Periods Timeline

Element	Entry into force (EIF)	1 year after EIF	2 years after EIF	3 years after EIF
<b>RVC</b>	66%	69%	72%	75%
<b>LVC</b>	30%	33%	36%	40%
<b>Essential auto parts</b>	66% NC*	69% NC	72% NC	75% NC
<b>Principal auto parts</b>	62.5% NC	65% NC	67.5% NC	70% NC
<b>Complementary auto parts</b>	62% NC	63% NC	64% NC	65% NC

\*NC: Net Cost



# Risks for Mexico in US Electoral Year

Agricultural Seasonality—Pressure by US Senate and letter by Amb. Lighthizer

Cascade of labor cases

Tariff increase threats

Paralyzed WTO

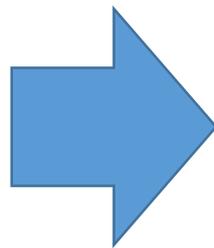
**Protectionist  
tendencies in  
US**

# ¿The end of Global Supply Chains?

*“One of the things that this crisis has taught us ... is that we are dangerously over-dependent on a global supply chain for our medicines like penicillin, our medical supplies like masks, and our medical equipment like ventilators”* – Peter Navarro, White House Advisor for International Trade & manufacturing

**“The Era of Offshoring US Jobs is Over”** —Robert Lighthizer, United States Trade Representative

Key element  
for Mexico



**“Investing in Mexico is  
Nearshoring”**

# Sectors with great potential for attracting investment

- Automotive
- Aerospace
- Machinery & equipment



- Medical equipment
- Pharmaceutical
- Digital economy



- Logistics & Transportation
- Agriculture/
- Agribusiness



## Key Factors

- Stricter Rules of Origin
- Nearshoring & National Security
- “The New Normal”

# Investment Clusters

ELECTRICAL-ELECTRONIC

Northern Border; Guadalajara region

AUTOMOTIVE

Central Mexico; North-Northeast

MEDICAL EQUIPMENT / AEROSPACE

North-Northeast; Querétaro

R&D, BACKOFFICE

CDMX; Guadalajara; MTY; QRO; Mérida



Ready for  
Nearshoring

# USMCA Compliance Checklist



# ¿Next steps for Mexico?

**Correct implementation of  
USMCA**

Firm position vis-a-vis US



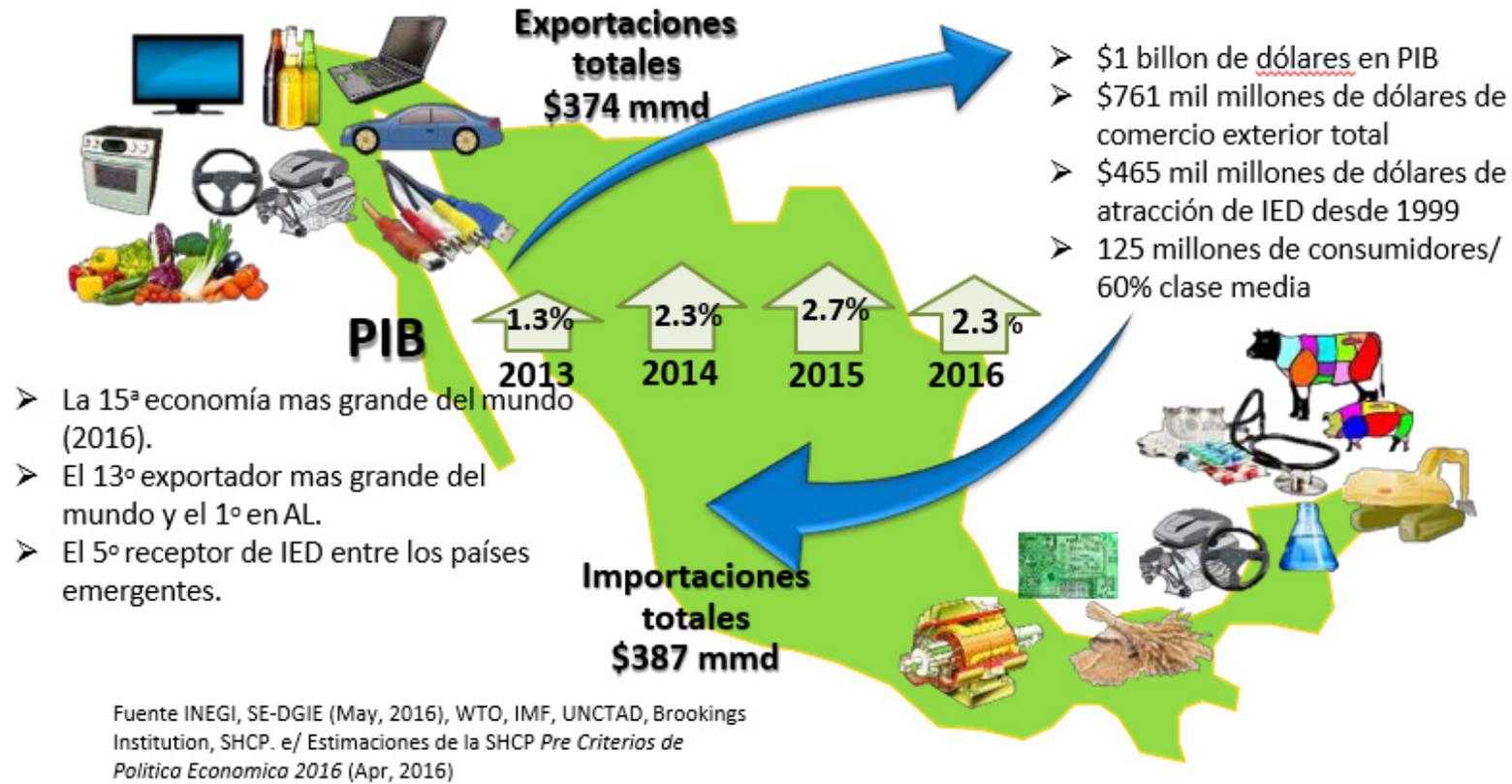
**CPTPP**  
Export  
promotion and  
investment  
attraction

**Conclude  
upgrading FTA  
with EU**

**Pacific Alliance**  
Export promotion and investment  
attraction

**Negotiations with  
Brazil and  
Argentina**

# The future: Mexico as a G7 economy in 2050?



- Mexico is open to the world: FTA Network
- Implementation of structural reforms
- Strengthening the Rule of Law
- Legal Certainty for national and international investors



## Kenneth Smith Ramos

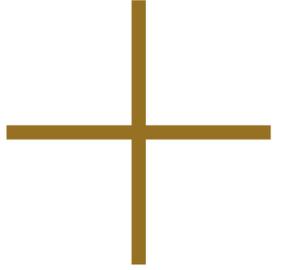
Partner

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 KenSmithramos



# So Why Mexico?



**Mexico**  
**the top destination**  
**for reshoring**  
**operations.**

# Geographic Location



**-80% \***  
shipping time

**-75% \***  
transporting cost

**117 \***  
operating ports  
and terminals

\* Compared to China/Asia

**Mexico the top destination  
for reshoring operations.**

Source: EGADE ITESM

# Competitive Labor Cost

Fully Loaded Cost  
Hourly **Rate**



Mexico the top destination  
for reshoring operations.

*Mexico*

*China*

US\$ **3.95**

US\$ **4.50**

Source: EGADE ITESM



# Talent Availability



Integration into the workforce annually

**1.3 millions**



**30 years**

average

**110,000** average per year  
engineering students

**Top 8**  
worldwide

Source: EGADE ITESM

**Mexico the top destination  
for reshoring operations.**

# The Mexican peso has depreciated against the dollar.

As an exporter, this gives you more purchasing power in manufacturing operations.



## Mexico has become more attractive compared to China for manufacturing.

Mexico the top destination for reshoring operations.

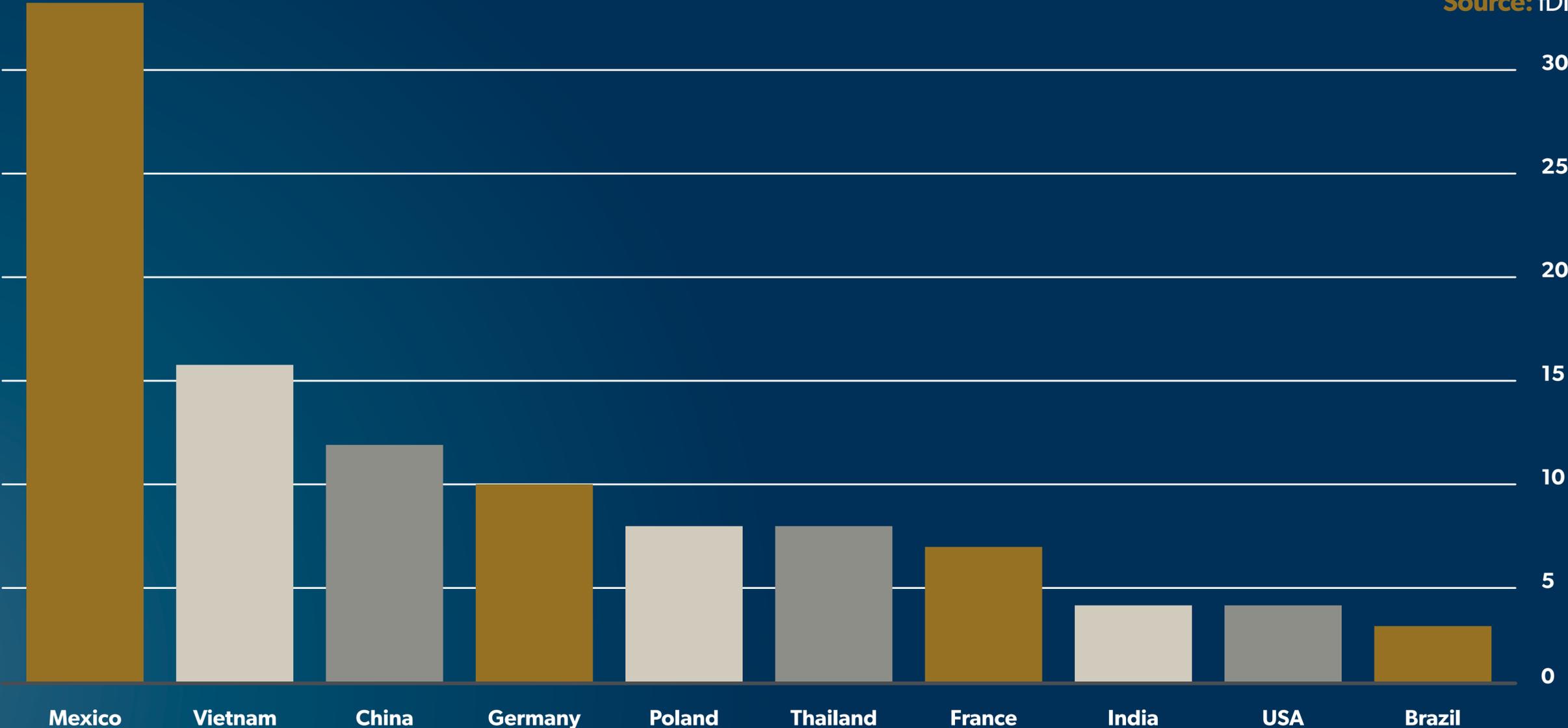


Source: EGADE ITESM

# Mexico the top destination for reshoring operations

Number of  
relocated projects

Source: fDI Markets



# Impact of COVID19 on Industrial Manufacturing

These sectors were adversely affected  
by disrupted global supply chains:

- **Pharmaceutical and Medical Equipment**
- **Telecommunications**
- **Automotive**
- **Aerospace**

The onset of Covid19 is set to further accelerate this trend, as the crisis lays bare weaknesses in the global value chain system with China as its chief manufacturing hub



# USMCA opportunities



# USMCA implications in Mexico



## Supply Chain

- Suppliers with USMCA compliance



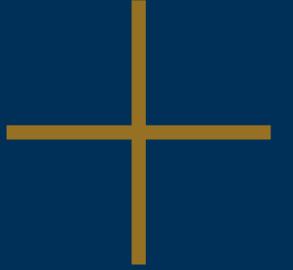
## Human Resources

- Compliance with labor laws



## International Trade Compliance

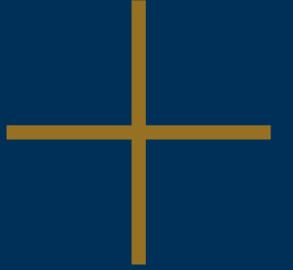
- Rules of origin
- Financial Impact
- Intellectual property



If you are thinking about relocating your manufacturing operations to take advantage of all Mexico has to offer, **it is a good idea to consider using shelter services in Mexico.**

# What are

# Shelter Services?



The Shelter Program is a comprehensive package of administrative services which, along with your manufacturing expertise, will provide your company with **everything needed to establish a successful operation in Mexico.**

# What are NOT Shelter Services?



- **Contract Manufacturing Services**
- **Limited Consulting Services**
- **Recruitment Services (Outsourcing)**

# Mexico is a country with:

- Different laws
- Different culture
- Different language
- Different business environment





**Focus on your core business.**  
**The Shelter will take care of everything else.**

**“You bring your manufacturing expertise; The Shelter will provide you with a comprehensive package of administrative functions required for your business to succeed in Mexico.”**

# **When a Shelter Company is the ideal partner?**

- **You want a quick start-up in Mexico with low risk and liabilities**
- **You want to rely on an experienced partner on local administrative challenges and operation: HR, Logistics, Accounting/tax, etc.**
- **You want a partner that has established robust processes, systems and experienced personnel to streamline your start-up and ramp-up process**
- **You want a comprehensive administrative service provider**
- **You want to leverage from an established local network**

# AI Shelter Company Services.

## **Site Selection:**

**Define the best location for your project**

## **Shelter Program:**

**Administrative support and legal compliance**

## **Business case support:**

**How much would it cost you to operate in Mexico**

## **Industrial Real Estate:**

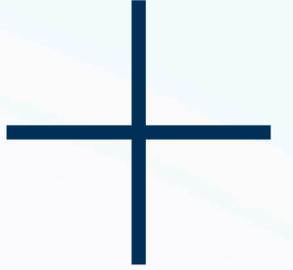
**Ideal space solutions**

# Services covered under a Shelter Program.

The service portfolio includes  
the following administrative strategic functions:

- Human resources
- Accounting services and fiscal compliance
- Customs coordination and duties optimization
- Legal, operational and environmental permits
- Labor management and union relationship
- Full expatriate support for your employees and their families
- Freight forwarding coordination

# Benefits of the Shelter Program



**By operating under a Shelter Program, the client obtains the following benefits:**

- **Quick start-up and lower cost**
- **Trouble-free access to operating in Mexico**
- **Full compliance with Mexican laws**
- **Minimum supervision required from headquarters**
- **Minimal liability in fiscal, customs and human resources matters**
- **No VAT cash flow effect on the imports of raw materials and machinery**

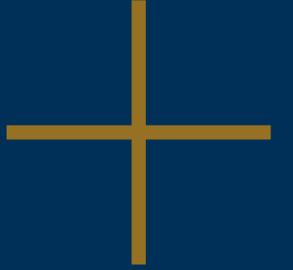


# Why

# American Industries?

- **Indirect Purchasing: Maximize savings by taking advantage of our economy of scale**
- **There will not be a 16% VAT cash flow effect on all indirect purchasing**
- **Incorporated and not-incorporated framework offered**
- **Predictable fees: no mark-ups on purchases/expenses, or fees for recruiting, entrance or exiting the program**
- **Robust IT platforms already set up and updated according to Mexican regulations**
- **ISO 9001-2015 certification on all processes which facilitate clients certifications**
- **On-going consulting services included (human resources, fiscal and customs)**

**If you are interested in  
establishing an operation in Mexico,  
please contact us at:**



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