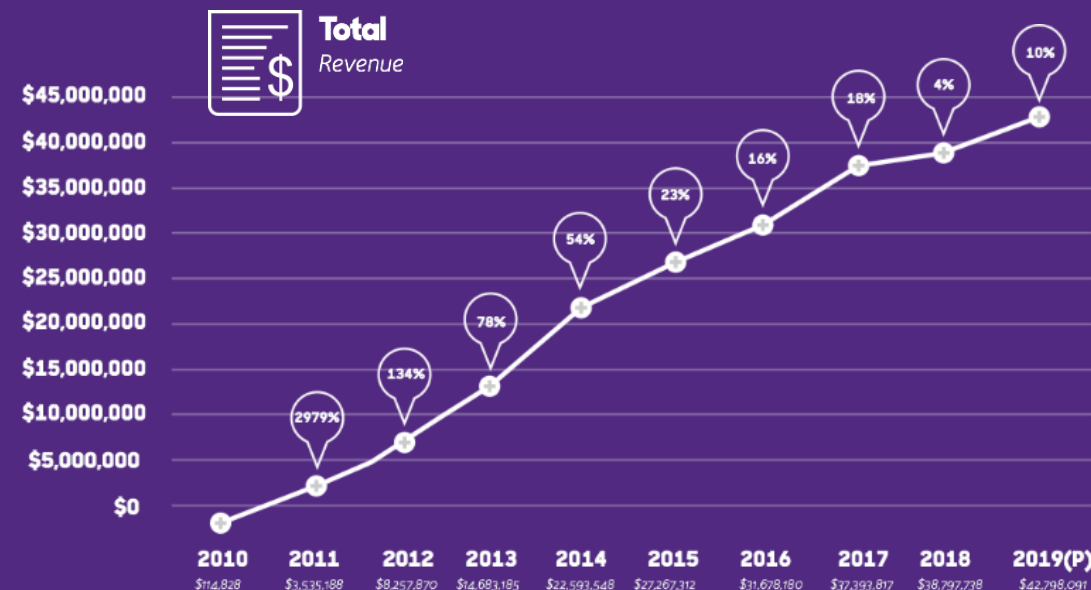
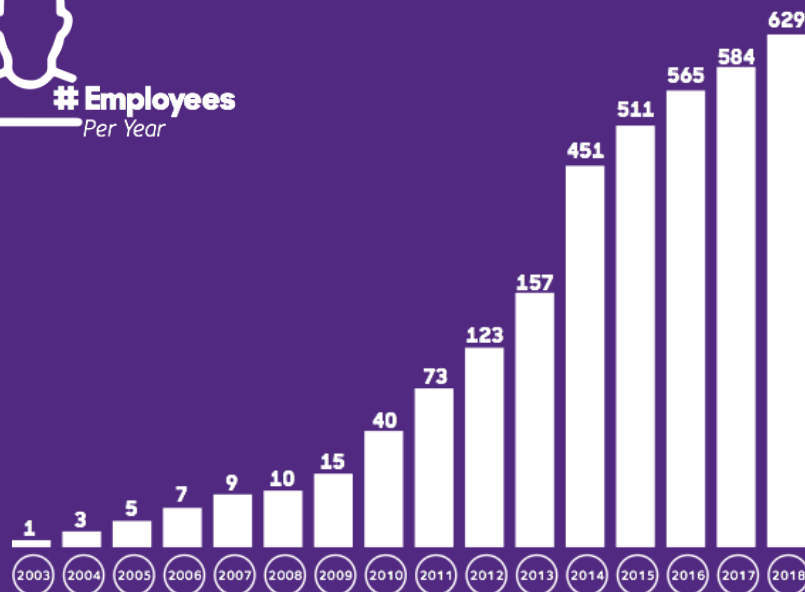
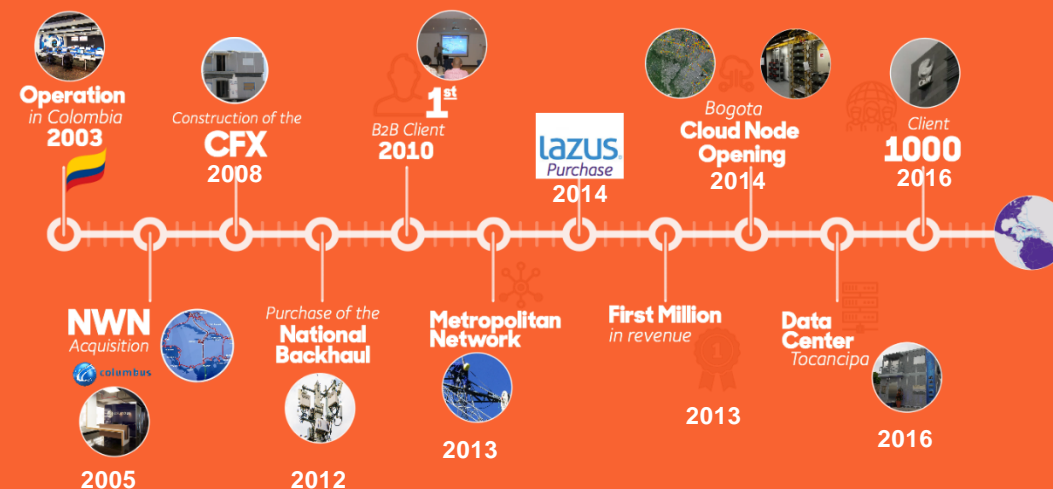




2020 ENTERPRISE

C&W Business Colombia

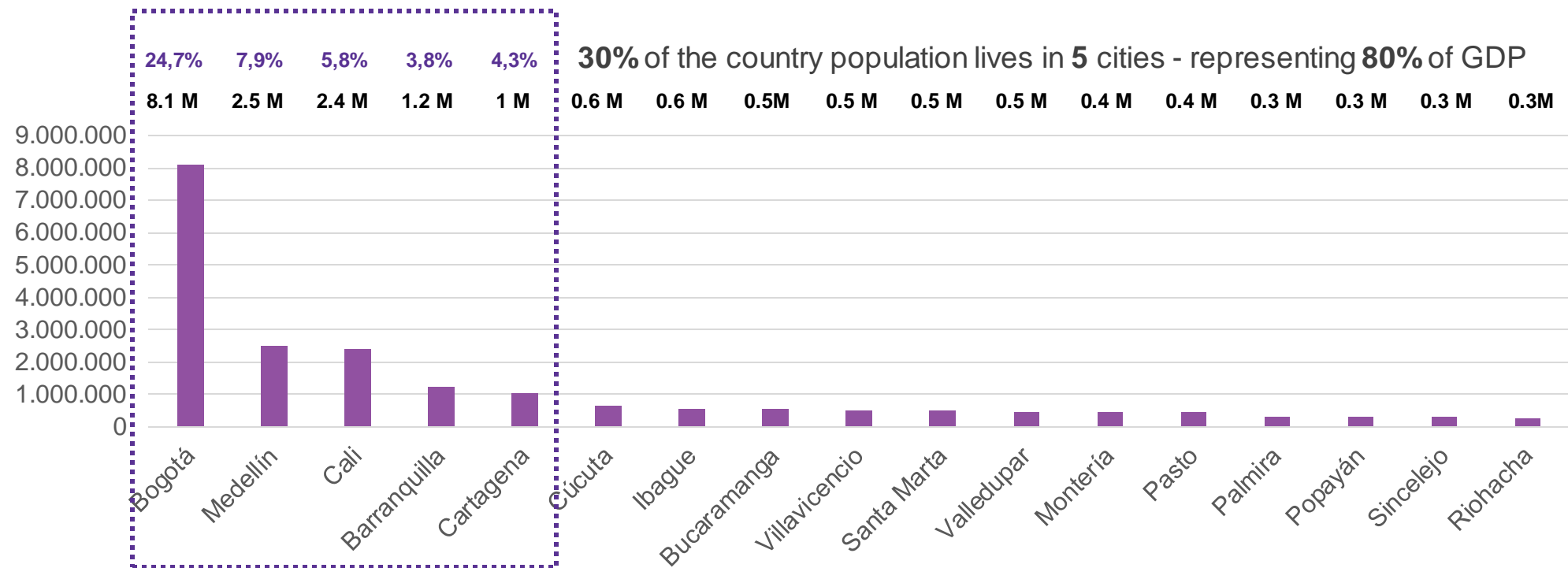
C&W COLOMBIA



COLOMBIA: COUNTRY PROFILE

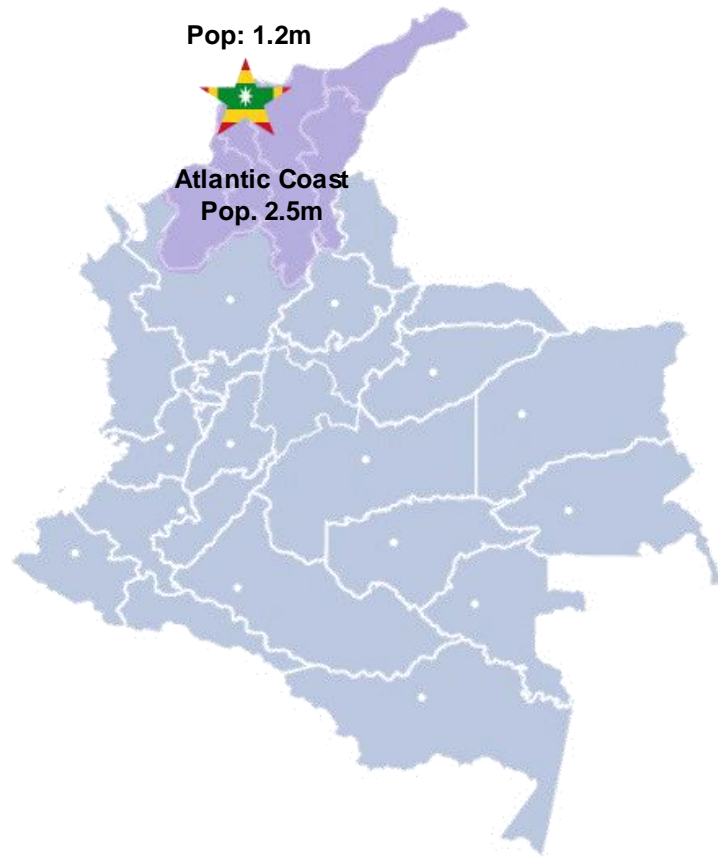
| KPI | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|-----------------------------------|-------|-------|-------|-------|-------|-------|
| GDP (% YoY) | 4.7 | 3.0 | 2.0 | 1.8 | 2.6 | 3.3 |
| Private Consumption (% YoY) | 4.6 | 3.1 | 1.4 | 1.8 | 2.8 | 3.6 |
| Public Consumption (% YoY) | 4.7 | 4.9 | 1.8 | 4.0 | 4.4 | 2.4 |
| Investment (% YoY) | 11.8 | -1.2 | 0.3 | 0.6 | 0.3 | 5.6 |
| Inflation (% YoY, eop) | 3.7 | 6.8 | 5.7 | 4.1 | 3.3 | 3.0 |
| Inflation (% YoY, average) | 2.9 | 5.0 | 7.5 | 4.3 | 3.3 | 2.8 |
| Exchange rate (eop) | 2,392 | 3,149 | 3,001 | 2,984 | 2,880 | 2,900 |
| Devaluation (% , eop) | 24.2 | 31.6 | -4.7 | -0.6 | -3.5 | 0.7 |
| Exchange rate (average) | 2,001 | 2,742 | 3,055 | 2,951 | 2,834 | 2,918 |
| Devaluation (% , eop) | 7.1 | 37.0 | 11.4 | -3.4 | -4.0 | 3.0 |
| BanRep Rate (% , eop) | 4.50 | 5.75 | 7.50 | 4.75 | 4.25 | 4.50 |
| DTF rate (% , eop) | 4.3 | 5.2 | 6.9 | 5.3 | 4.6 | 4.8 |
| CNG Fiscal Balance (% GDP) | -2.4 | -3.0 | -4.0 | -3.6 | -3.1 | -2.4 |
| Current Account (% GDP) | -5.2 | -6.5 | -4.4 | -3.6 | -2.8 | -3.3 |
| Urban unemployment rate (% , eop) | 9.3 | 9,8 | 9.8 | 9.8 | 10.0 | 9.5 |

COLOMBIA: COUNTRY PROFILE



BARRANQUILLA

OVERVIEW



- Strategic location: river and seaports
- Hurricane-free and earthquake-free zone.



- 7 submarine cables land in the region.



- GDP growth of 4,4%, about USD 12,423MM (2017).
- International hotels have entered market in the past 5 yrs (Sheraton, Hilton, Holiday Inn, Crown, GHL, Radisson, Movich, and Marriott-under construction).
- USD 2.400 m of supported investment in last 5 years (2014-2018)
- 4th future state in Latino America and 1st in Colombia with best strategy of Direct Foreign Investment (Financial Times, 2018).



- Population with high “English proficiency index” (Education First – Switzerland).
- Uninorte is one of the top ten universities in Colombia (2019).



- Stable local government- current mayor w/high approval ratings (over 96%)
- 2nd city with more total income per capita compared to the 6 main cities
- 3rd city with less corruption risk and best management practices, according to *Transparencia por Colombia* (Branch of NGO International Transparency)



- One of the lowest unemployment rate of the country in January 2019 (**8.1%**).

BARRANQUILLA

SHARED SERVICES

Regional Centers

Regional Team: 6
Shared Service Time: 70%

01 **Billing, Collections & Treasury**

- Management of banks accounts banking portals, cash flow and payments for each of Networks Entities (Guatemala, México, Honduras, Puerto Rico, República Dominicana, USA, Curacao, etc).

Regional Team: 6
Shared Service Time: 90%

02 **Planning and Control**

- Closing review, Forecast, Budget F/S (53 Entities).
- Support to Budget/LRP/E2E/Funtional Opex review Networks&Latam
- Market Calls, CAR meeting/ Leadership meetings support Capex Roll consolidation.

Regional Team: 4
Shared Service Time: 10%

03 **Accounting**

- Responsible for CN Colombia, Lazus Colombia, CN Ecuador and Lazus Perú accounting and reporting
- Fixed assets report and control for Networks & Latam.

Regional Team: 3
Shared Service Time: 100%

04 **Central Finance**

- Lead payroll, contingent labor and headcount planning in consultation with the HR partners and the CO Team.
- Oversee the closing forecast and budget process with the goal to achieve optimal output and timely reporting.



BARRANQUILLA

SHARED SERVICES

Regional Centers

Regional Team: 4
Shared Service Time: 60%

05 **New Business Development**

- Produce the business cases and modeling, as well as all the documentation, for approvals for Commercial WS Proposals and New Business Special WS Projects. It also identify potential migrations & potential market, belong others.

Regional Team: 3
Shared Service Time: 40%

06 **Commercial Support**

- Support for processes of fulfillment, billing and assurance for CNL.
- Support management of services order on Salesforce platform for CNL

Regional Team: 1
Shared Service Time: 100%

07 **Category Manager Networks & Subsea**

- Manage supplier selection process and negotiable commercial terms with suppliers.
- Define the correct buying channels for procurement managed spend.

Regional Team: 1
Shared Service Time: 100%

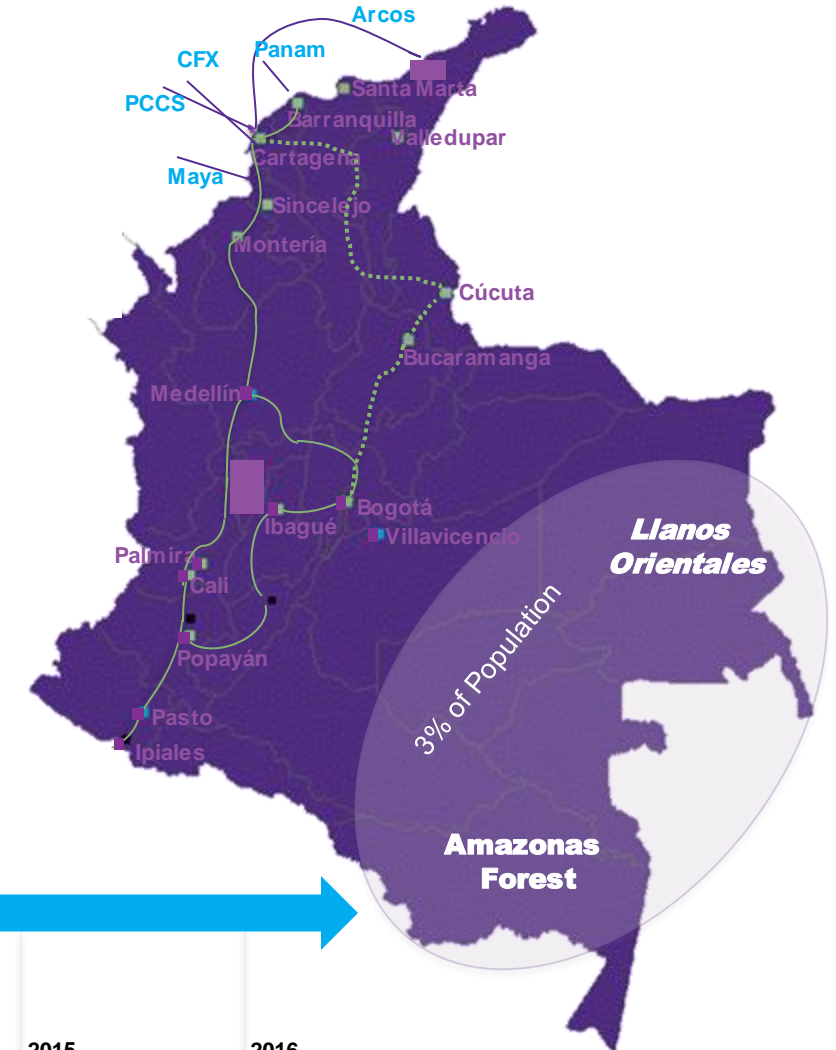
08 **Integration Manager Corporate Strategy**

- Support the LLA Integration projects and initiatives across the region and develop all the integration activities needed along pre and post acquisitions.
- Develop and achieve synergies defined at integration initiatives across the region.



COLOMBIA: NETWORK PROFILE

- Over 7.000 Km of metropolitan and intercity networks
- C&W networks covers the main cities of Colombia, which represent 63% of the corporate customers



2001
Barranquilla-1.601 Km
Cartagena-898 Km

2003
LH Barranquilla-
Cartagena-337 Km

2006
Bucaramanga-560Km

2007
Cali-905Km

2009
Santa Marta-255K
Montería-134K
Sincelejo-109K

2011
Popayán-74Km

2013
Valledupar-73Km
Bogotá-1.342Km

2014
Palmira-24Km

2015
LH Ctg-Mde 817Km
LH Sbn-Ipi 266Km
LH Ctg-Rio (w et)
Cúcuta-87Km
Ibagué-30Km
Villavicencio-11Km

2016
Medellín-74Km
Pasto – 11 Km

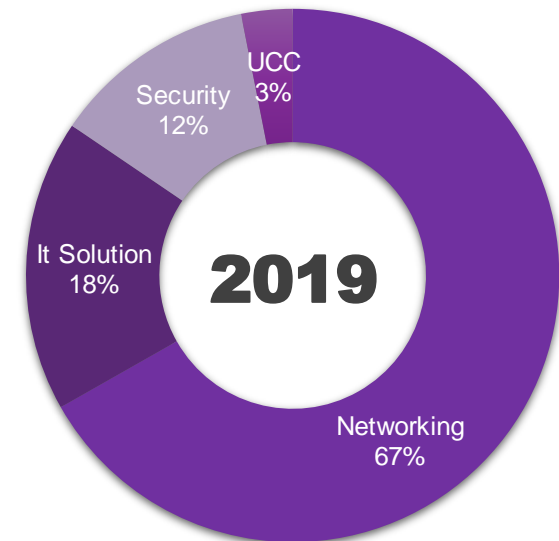
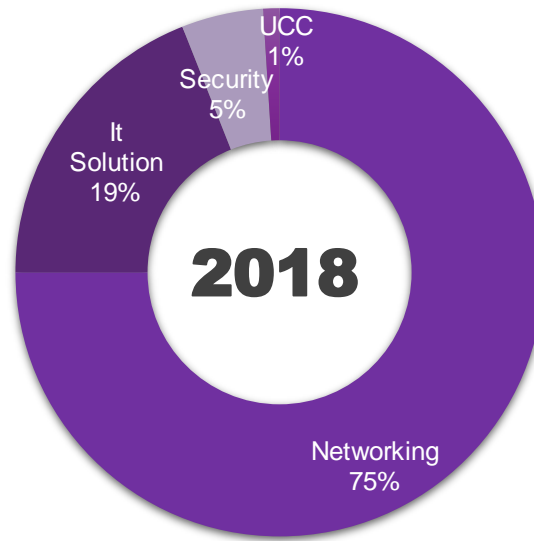
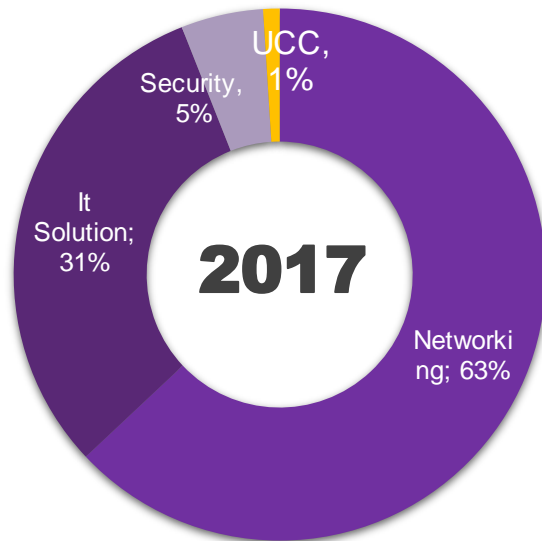


2019 YoY Sales

C&W Business Colombia

2020 OUTLOOK – CHALLENGES AND PRIORITIES

COLOMBIA: EXECUTION



Benefits of Portfolio diversification

- Longer contract terms
- Higher MRR (ARPU)
- Stickiness
- Reputation (no longer an ISP)
- Discussions are no longer only about Price!

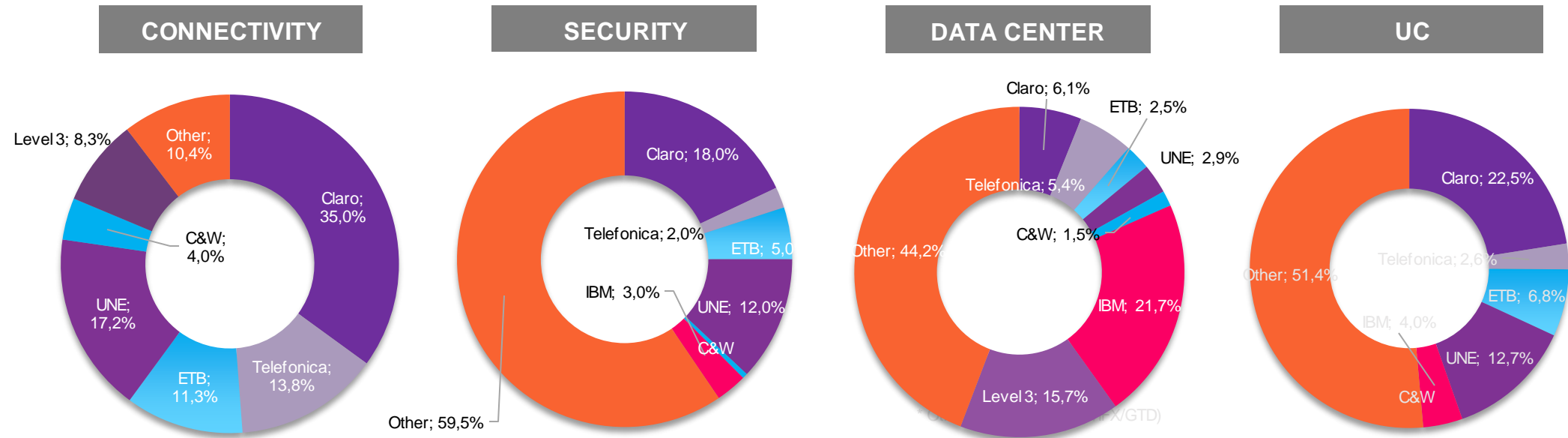


MARKET DYNAMICS

C&W Business Colombia

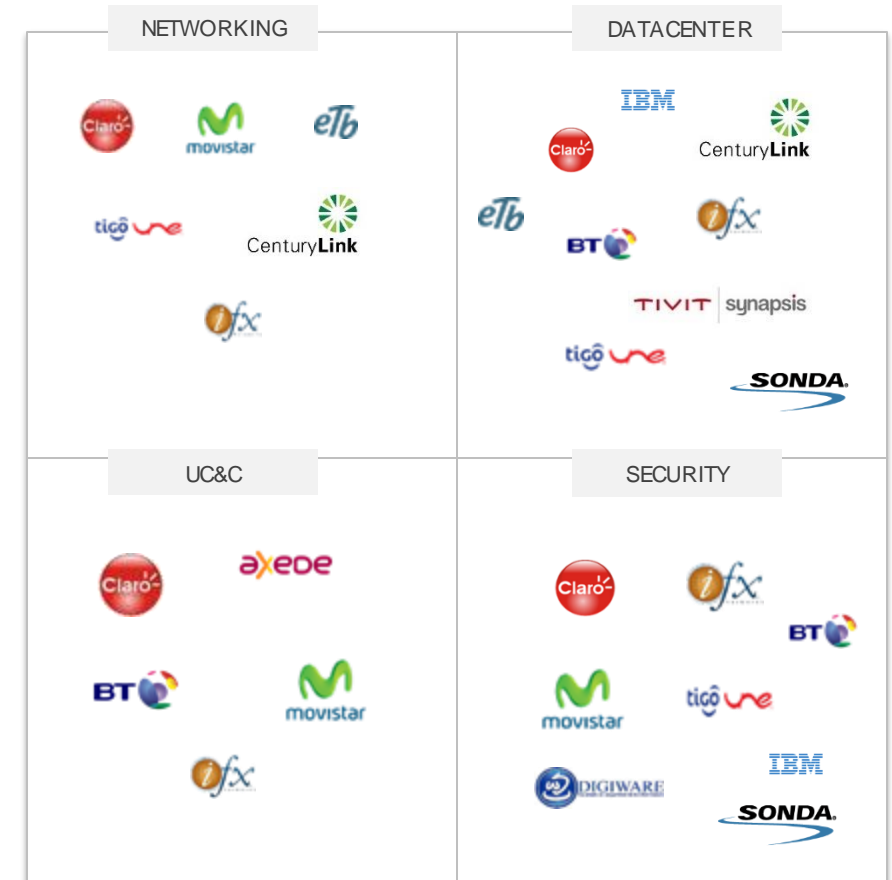
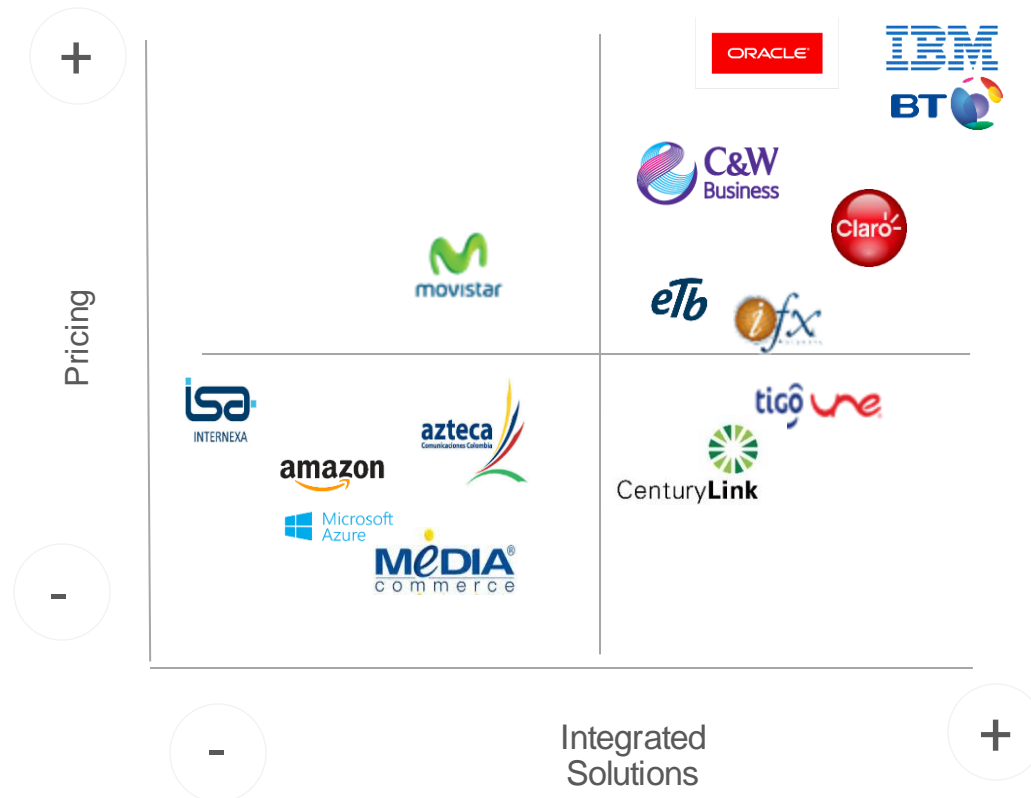
COLOMBIA: MARKET SHARE

B2B Competitors and Positioning



| Product Family | Claro | movistar | etb | tigo une | C&W Business | IBM | Level(3) | Other | Total |
|----------------|-------|----------|-------|----------|--------------|-------|----------|-------|--------|
| Connectivity | 35.0% | 13.8% | 11.3% | 17.2% | 4.0% | | 8.3% | 10.4% | 100.0% |
| Security | 18.0% | 2.0% | 5.0% | 12.0% | 0.5% | 3.0% | | 59.5% | 100.0% |
| Data Center | 6.1% | 5.4% | 2.5% | 2.9% | 1.5% | 21.7% | 15.7% | 44.2% | 100.0% |
| UC | 22.5% | 2.6% | 6.8% | 12.7% | 0.0% | 4.0% | | 51.4% | 100.0% |

B2B COMPETITORS AND POSITIONING



COLOMBIA: B2B STRATEGY

Growth Drivers



Identify the most attractive Customer Targets



Build a GTM Model Focus on Large and Medium Customers



Strengthen Value Proposition



Maintain our Consultative Sales Approach



Sales Productivity improvement Plans

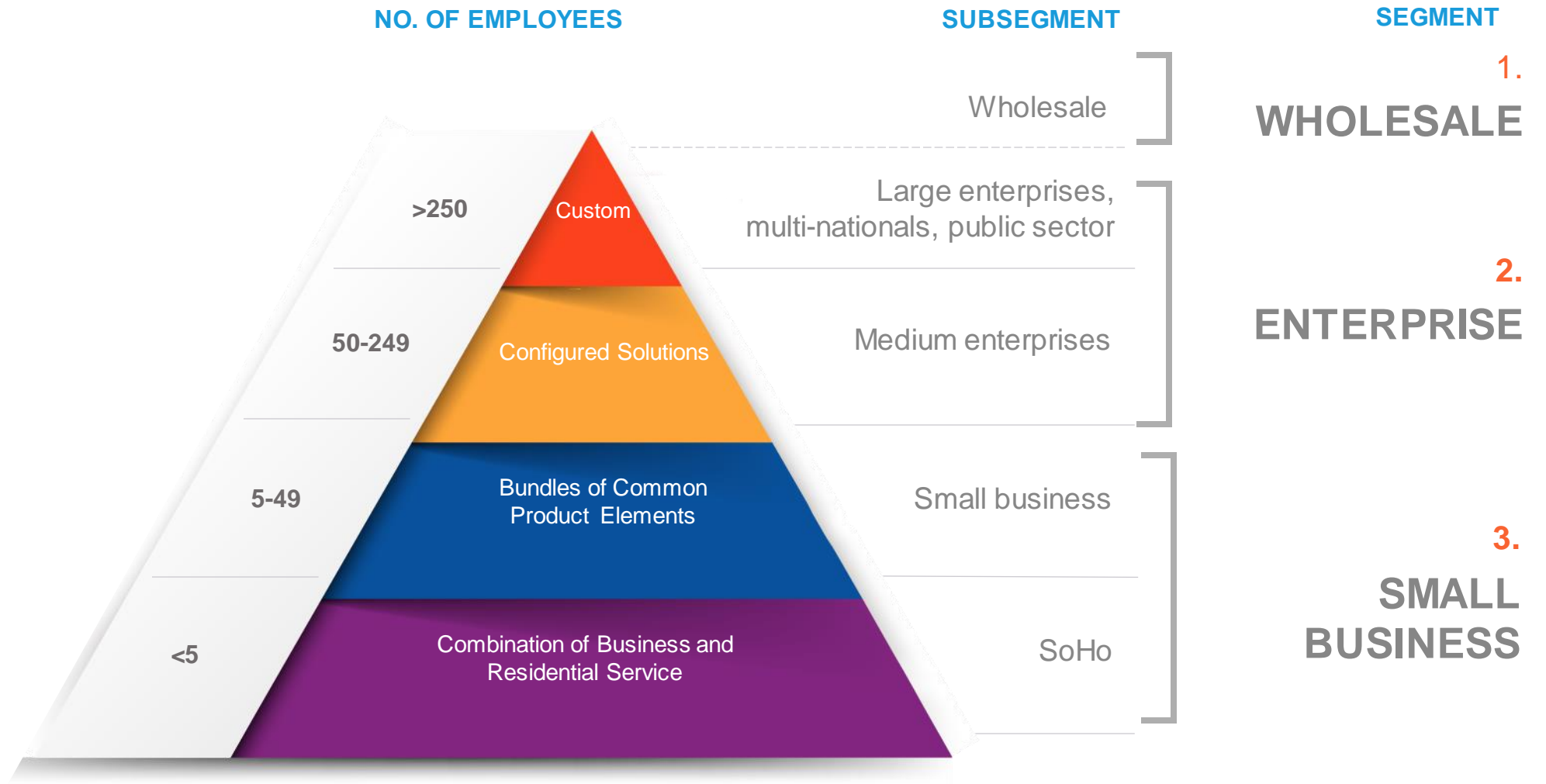
Incremental Revenue (Upsell)

Increase New Logos

Increase Product Penetration (Cross-Selling)

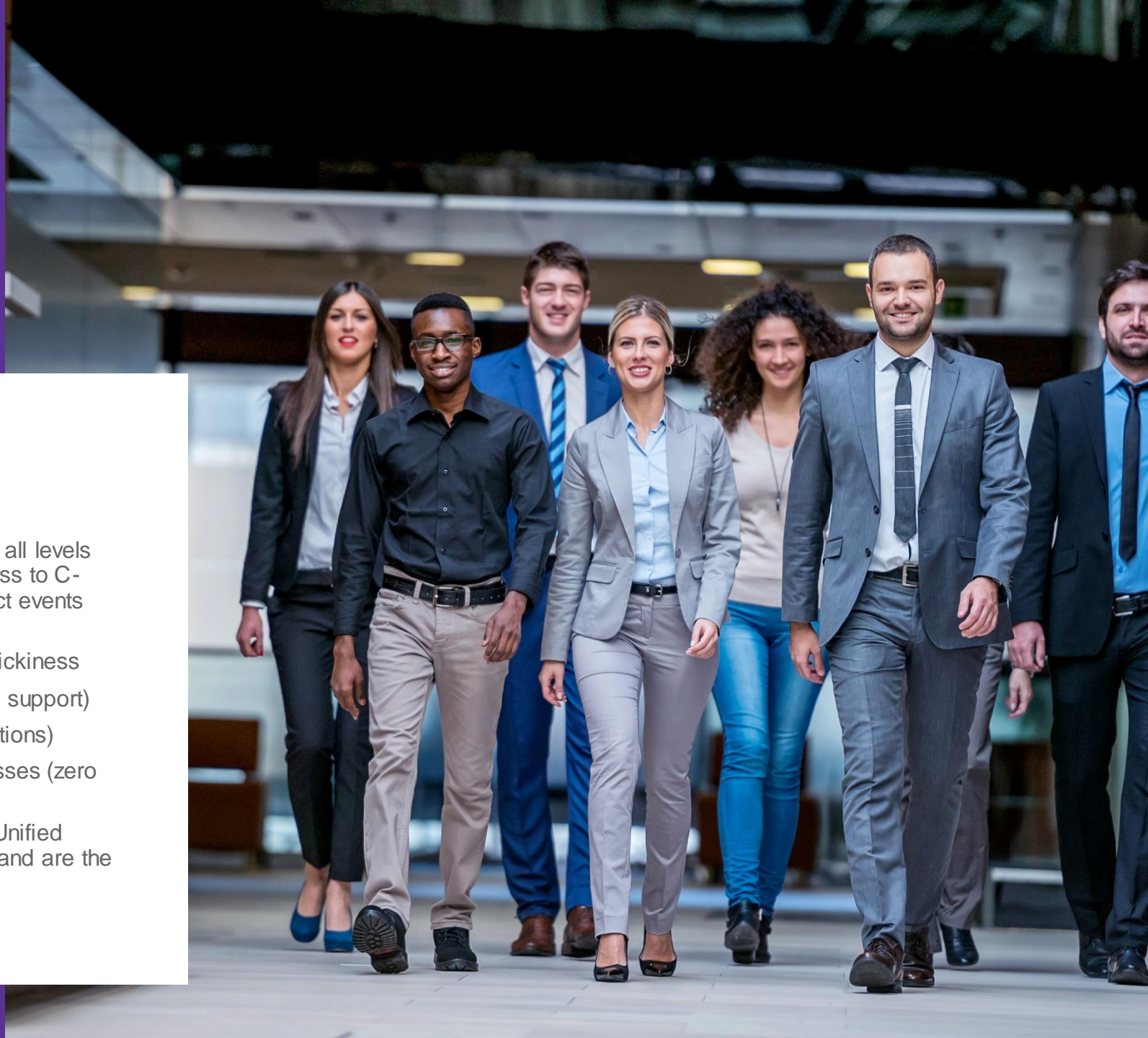
Expected Results

MAIN SEGMENTS



ENTERPRISE SEGMENT OVERVIEW

- Longer Business Life cycle (6-12 Months)
- Consultative approach
- Constant follow up / high level Relationship building at all levels (beyond technical and procurement departments access to C-Levels and decision makers) – Networking and Product events (Innovation Tech summit, Data Center Summit etc)
- Retention and loyalty strategies in order to increase stickiness
- Enterprise expects VIP service (CSC, implementation, support)
- Customized solutions are required (specially in IT solutions)
- Support Service 24x7 high availability business processes (zero tolerance to failure and interruptions)
- Next Generation products such as security, Cloud IT, Unified communications represents 30-35% of our new sales and are the foundation of our sales strategy.



ENTERPRISE SEGMENTS

ARPC

\$9.9K

19% of the customers
69% of the revenue

ARPC

\$1.1K

71% of the customers
31% of the revenue

>250

**LARGE
ENTERPRISE**

50-249

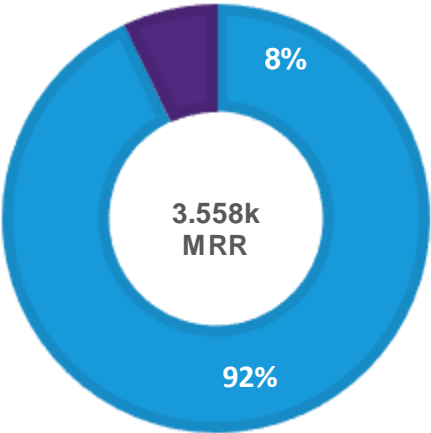
**MEDIUM
ENTERPRISE**

Main Verticals: Financial,
Hospitality, BPO, Education

INSTALLED BASE VS ADDRESSABLE

Total Customers 1,209

Total Addressable ** 14,559



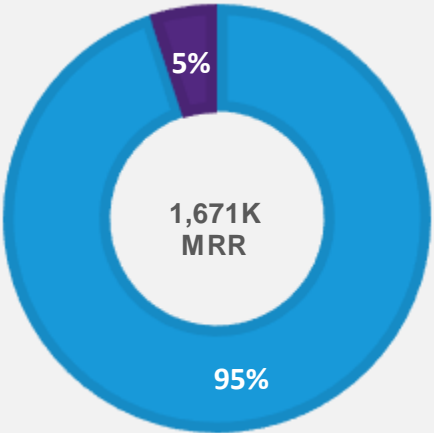
ARPC: 3,354k

**8,3%
Penetration**

Large

219 (18%)

3,238

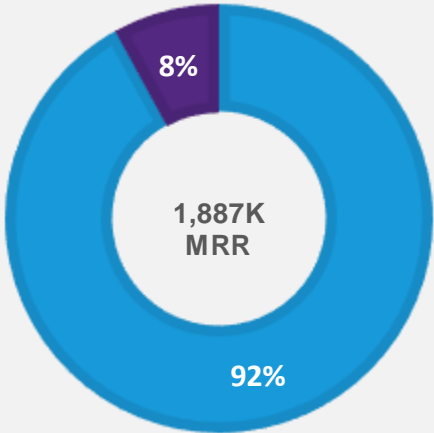


ARPC: 8,052

ME

909 (82%)

11,321



ARPC: 1,706

Our Sweetspot



2,8B Total Addressable Market

Connectivity: 40%

MAIN VERTICALS:

Financial, Retail, Healthcare, Hospitality, BPO, Education

PRODUCT MIX

Networking & Security: 68%

IaaS, DRaaS, Cloud, UC&C:

32%

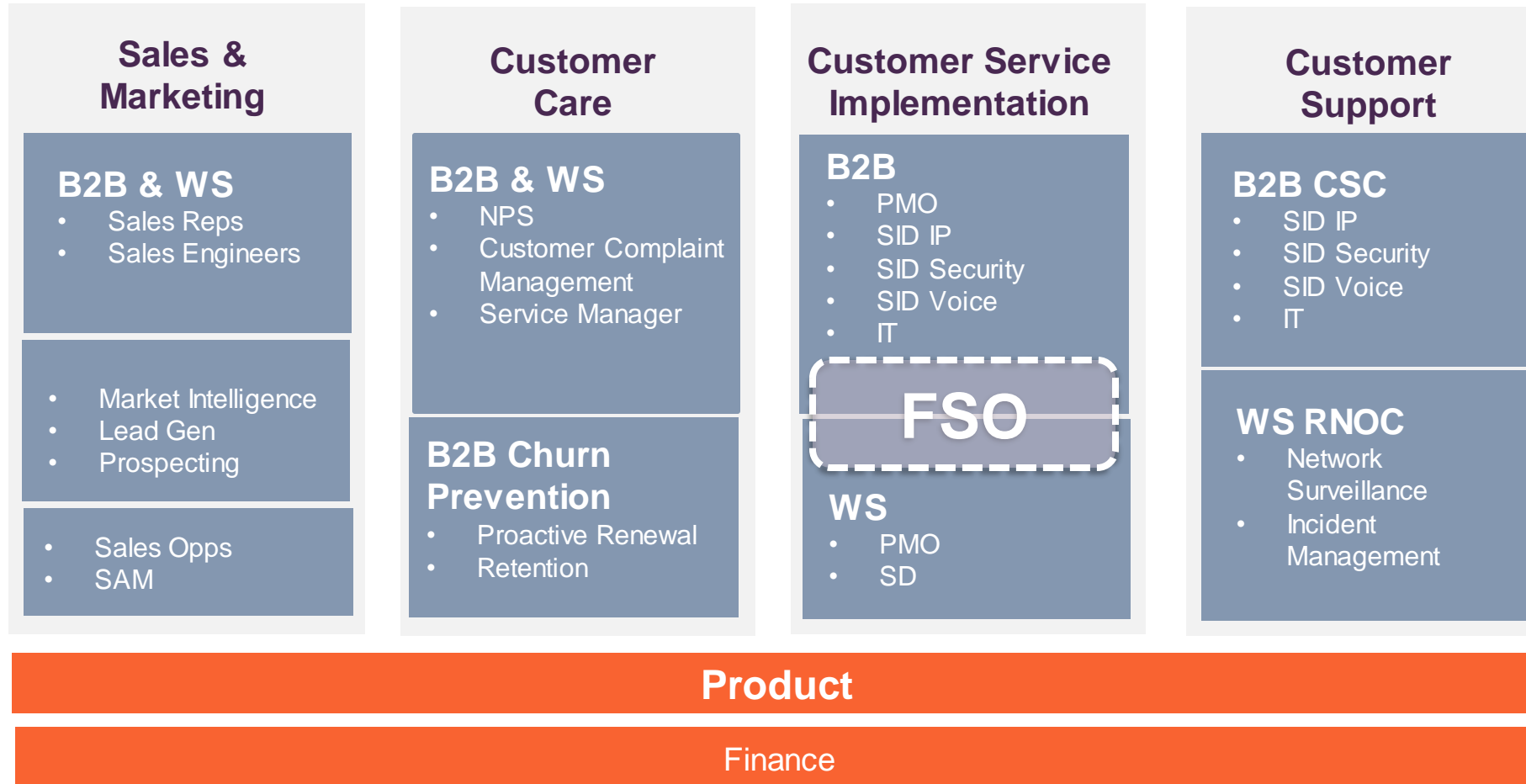
**Number of potential businesses in C&W footprint ⁽¹⁾



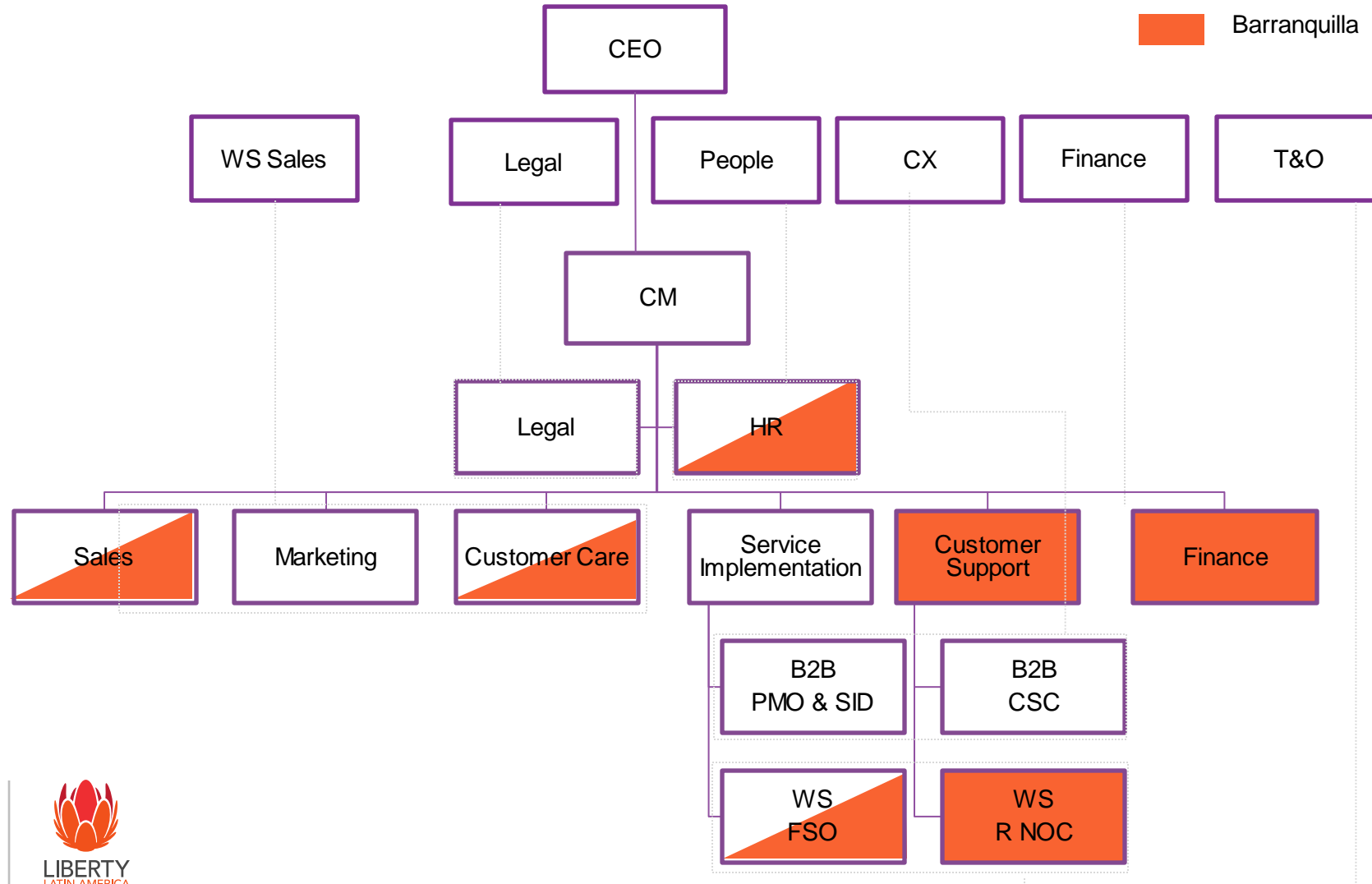
CENTER OVERVIEW

C&W Business Colombia

COLOMBIA: TEAM STRUCTURE

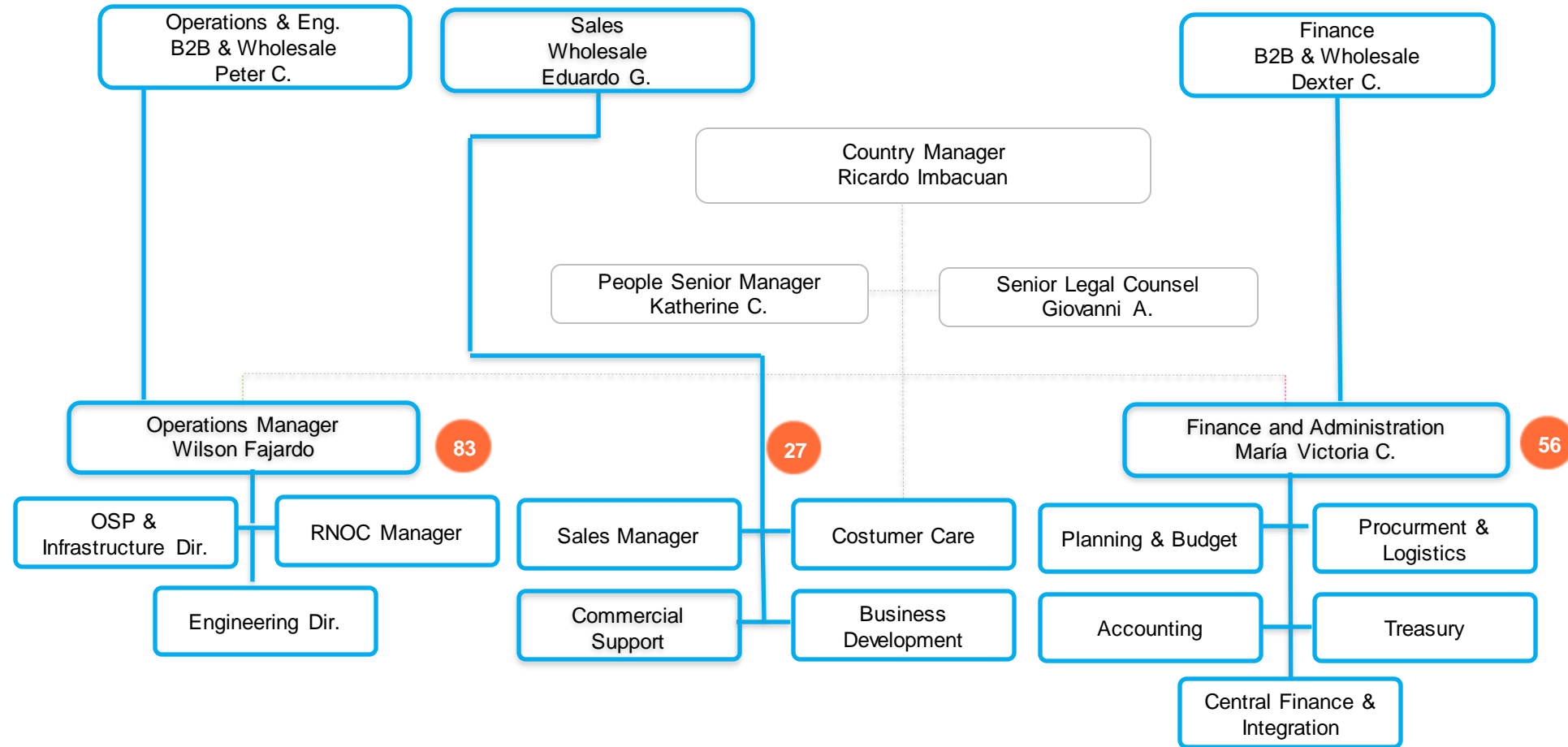


COLOMBIA: TEAM STRUCTURE



COLOMBIA: TEAM STRUCTURE

Barranquilla Org Chart



COLOMBIA: TEAM STRUCTURE

Headcount by Department, Operation and BU (2018)

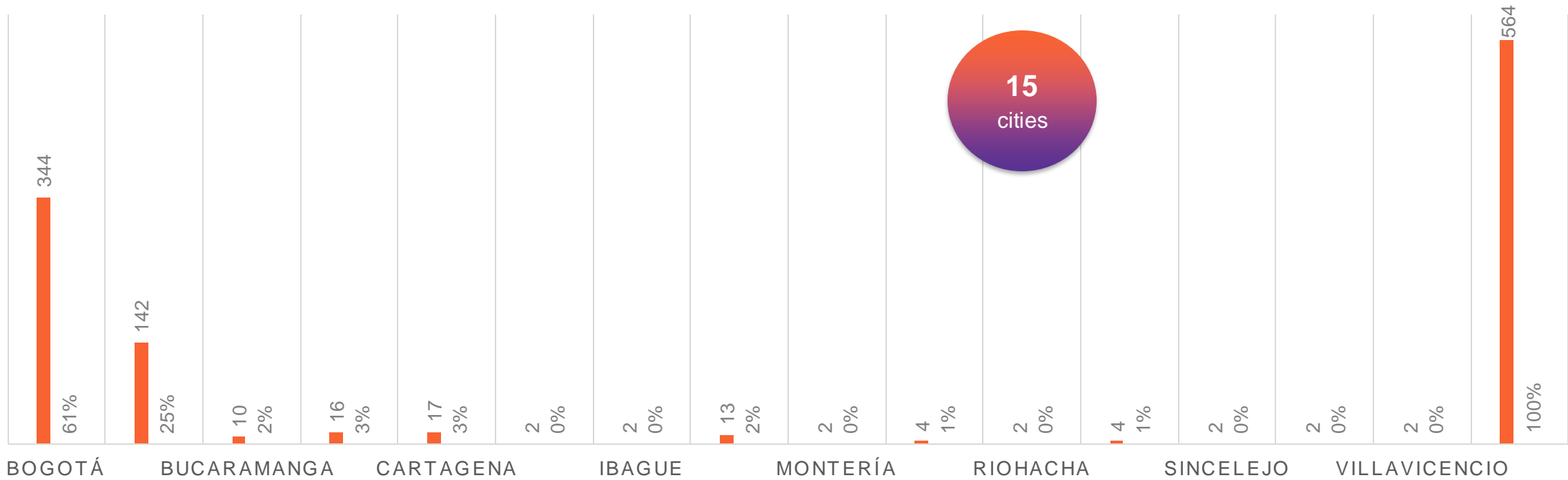
| Operation | B2B | Wholesale | Share Services | Total | % |
|-----------------|-----|-----------|----------------|-------|------|
| Local | 121 | 130 | | 251 | 45% |
| Regional | | 83 | 230 | 313 | 55% |
| Total Employees | 121 | 213 | 230 | 564 | 100% |

| Unit Business | No. Employees | % |
|---------------|---------------|------|
| B2B | 351 | 62% |
| Wholesale | 213 | 38% |
| Total | 564 | 100% |

| Overall Engagement Score | 2016 | 2017 | 2018 |
|--------------------------|--------|--------|--------|
| Engagement score | 94,00% | 88,00% | 78,82% |
| Average CWC | 72,00% | 59,00% | 59,68% |
| Headcount | 544 | 563 | 564 |



COLOMBIA: TEAM STRUCTURE



| Average | Bogotá | Barranquilla |
|---------|------------|--------------|
| Age | 34,9 years | 36,4 years |
| Ternure | 3,1 years | 7,2 years |

| Gender | Bogotá | Barranquilla |
|--------|--------|--------------|
| Female | 31% | 47% |
| Male | 69% | 53% |