NUESTRO PROVEEDOR DE CONFIANZA EN SEGURIDAD LOGÍSTICA ES PROTECTIO

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October, 2018

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AMERICAN CHAMBER OF COMMERCE OF MEXICO
Foreword

Companies that invest in Mexico acknowledge the great value and economic potential of the country. Macroeconomic and political stability, the demographic bonus and human talent, among others, are strengths that build trust for investment in the country.

The 1,450 companies that make up the American Chamber of Commerce of Mexico (AmCham/Mexico) account for 21% of the national GDP and 20% of both the gross fixed investment of the private sector and foreign direct investment. We also generate 2.5 million direct formal jobs and over 6 million indirect jobs. Over our 100+ years working in Mexico, American Chamber/Mexico has accompanied the country’s development through our investments and encouragement of public policy that benefit the economic climate and the society.

However, security and adhesion to the Rule of Law are great challenges for competitiveness in Mexico today. The operations of our companies and the trust of investors are deeply impacted by high levels of insecurity, corruption and impunity, which disrupt the social fabric and have enormous costs for our businesses.

According to the National Citizen Observatory, 2017 was the year in which more lives were taken, with the occurrence of an intentional homicide each 18 minutes. The situation gets worse over time; between January and August 2018, the rate of victims of intentional homicide and feminicide increased 17.95% as compared with the same period of 2017.1

The National Institute of Statistics and Geography (INEGI), estimates that 74.9% of the population over the age of 18 feel on safe in their city.2

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According to the Mexico Peace Index 2018, the economic impact of violence in 2017 was of 4.72 trillion pesos (21% of National GDP), with an increase of 15% compared to the previous year, equivalent to 634 billion pesos.\textsuperscript{3}

For companies, a particularly worrisome issue is cargo theft. Information gathered by the Transferred Asset Protection Association (TAPA), reveal a total of 4,222 incidents at the second quarter of 2018, which mean an increase of 27% in cargo theft as compared with the same period during the previous year, and an overwhelming 107% as compared with 2016.\textsuperscript{4} Also, between May 2017 and April 2018, 64% of the robbery of insured vehicles, was with violence. This indicator has increased constantly over the last three years.\textsuperscript{5}

These figures show the vulnerability that violence and insecurity create at all levels, and that the strategies adopted so far are insufficient. A better coordination and institutional and police strengthening, the implementation of rules that regulate the action of these entities at all three government levels, and fighting corruption efficiently, among many other challenges, are urgent matters yet to be addressed comprehensively so that the state can thoroughly fulfill the role that legitimizes its existence—preserving public security.

Companies are strategic agents for the creation of formal employment, talent, infrastructure, and innovation. Through our good practices, we generate a positive impact that reaches communities. We affront insecurity by deploying strategies to protect our employees and facilities, and to ensure that our products and services get to consumers.

We trust Mexico, and we have decided to sustain our operations in the country. Nevertheless, as shown by this Business Security Survey, the costs and adjustments this has brought about on the business side are huge.

It is essential to act jointly from all areas of the social fabric to face the insecurity challenges as a complex, multifactorial problem—maybe the most urgent one to maintain Mexico on the economic growth and development track.

The time is now. Inaction is simply not an option.

\textbf{Marcelo Hernández}

President, Security Committee

\textbf{AMERICAN CHAMBER/MEXICO}

\textsuperscript{3} IEP. “Índice de Paz México 2018”.

\textsuperscript{4} TAPA. “Mexico Cargo Theft: Q2-2018 Report”.

\textsuperscript{5} Mexican Association of Insurance Institutions (AMIS), 2018.
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American Chamber of Commerce of Mexico

Founded in 1917, we are an independent, nonpartisan, non-profit organization devoted to promoting sustained commerce and investment between Mexico and the United States, creating better businesses conditions and encouraging social responsibility.

We group over 1,450 companies that make a significant contribution to the country’s social and economic development. They account for 21% of the national GDP and 20% of private investment in Mexico. Together, our partners generate more than 2.5 million direct formal jobs and 6 million indirect formal jobs.

Besides the headquarters in Mexico City, we have Chapters in two of the most important economic hubs of the country: Monterrey, Nuevo León and Guadalajara, Jalisco.

Through our National Committee Network, we encourage actions that have a positive impact on investment and commerce, with a close link and partnership with decision-makers and public officials. We make public policy proposals in each of our areas of work, leveraging our partners’ expertise and talent.

The AmCham Strategic Agenda 2018-2024 focuses on: (i) Security and Rule of Law; (ii) Bilateral relationship Mexico-United States; (iii) Competitiveness; and (iv) New Energy Model.
For companies of any size and sector, the integrity of their employees, facilities, and supply chains is vital. Therefore, through our Security Committee, with more than 150 companies involved, we foster actions that contribute to appropriate risk management and best practice exchange amongst companies.

At the same time, through a close, continuous coordination with law enforcement agencies in the country at the different government levels, we promote public security policies that have a positive impact on the lives of citizens and economic activity.

Table 1. Security Committee priority issues

- Business Security
- Internal Security Law
- Adversarial Criminal System and Penitentiary System
- Violence and organized crime
AmCham’s Security Survey in Mexico has been, for the past 8 years, a reference of the vision of foreign investment in Mexico about the impact of insecurity on their operations.

This survey reflects the perception of companies on the main security challenges, as well as the strategies that they have implemented to address those challenges. With this initiative, we want to share with authorities and social actors the vision of those who make significant investments in the country, in order to contribute to a comprehensive understanding of the situation, which could in turn help to implement effective public policy so that companies can keep on operating, investing, and competing in Mexico.

For this eighth edition, the Survey was carried out jointly with Berumen y Asociados, a specialized firm with over 26 years’ experience in statistical research.

Methodology

Data collection

The questionnaire was applied online nationwide between April 17th and June 1st, 2018. In order to collect specialized information, the questionnaire was sent to executives and directors in departments related to business security.

Participating companies

A total of 415 responses were collected from employees of partner companies to: American Chamber/Mexico; the Australia, New Zealand & Mexico Business Council; the Canadian Chamber of Commerce in Mexico; the German-Mexican Chamber of Commerce and Industry; the Japan Chamber of Commerce and Industry of Mexico; and the Overseas Security Advisory Council (OSAC).

Due to the nature of the participating chambers, in this AmCham-led Survey, more than 60% of the responses come from executives from foreign companies (Figure 1). This makes the Survey a reflection of the biggest concerns for foreign direct investment in Mexico.

Participating companies are mainly located in Mexico City, Nuevo León, Jalisco and Estado de México (Map):
• **Corporate offices**: 60.2% are in Mexico City, followed by Nuevo León (12.1%), and Jalisco (10.7%).

• **Sites**: 37.7% of the companies have sites in Mexico City, 34.1% in Nuevo León, 33.1% in Jalisco, and 29.5% in Estado de México.

• **Distribution Centers (DCs)**: The State of Mexico is the one with the largest number (19.6%), followed by Nuevo León (13.3%), Mexico City (13%), and Jalisco (12.8%).

Companies from 24 sectors in total participated in the exercise. The most common ones include: automotive (13%), technology (8.9%), agribusiness (8.6%), and machinery (8.1%) sectors (Figure 4).

This year, almost 50% of respondents are classified as large companies, considering as a reference that they generate more than 500 formal jobs in the country (Figure 5).
Figure 1. Participating companies: origin

<table>
<thead>
<tr>
<th>Origin</th>
<th>2016</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreign Company operating in Mexico</td>
<td>56.0%</td>
<td>61.2%</td>
</tr>
<tr>
<td>Domestic Company operating in Mexico only</td>
<td>28.0%</td>
<td>18.5%</td>
</tr>
<tr>
<td>Domestic Company with Operations Overseas</td>
<td>13.0%</td>
<td>13.5%</td>
</tr>
<tr>
<td>International Organization/Business Chamber</td>
<td>3.0%</td>
<td>6.8%</td>
</tr>
</tbody>
</table>

Figure 2. Participating companies: location

States where the responding companies have: (i) Corporate Offices (O); (ii) Sites/factories/operations (P); (iii) Distribution centers - DCs (C)

<table>
<thead>
<tr>
<th>States</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aguascalientes</td>
<td>O P C</td>
</tr>
<tr>
<td>Baja California</td>
<td>O P C</td>
</tr>
<tr>
<td>Baja California Sur</td>
<td>P C</td>
</tr>
<tr>
<td>Campeche</td>
<td>P C</td>
</tr>
<tr>
<td>Coahuila</td>
<td>O P C</td>
</tr>
<tr>
<td>Colima</td>
<td>O P C</td>
</tr>
<tr>
<td>Chiapas</td>
<td>O P C</td>
</tr>
<tr>
<td>Chihuahua</td>
<td>O P C</td>
</tr>
<tr>
<td>Mexico City</td>
<td>O P C</td>
</tr>
<tr>
<td>Durango</td>
<td>P C</td>
</tr>
<tr>
<td>State of Mexico</td>
<td>O P C</td>
</tr>
<tr>
<td>Guanajuato</td>
<td>O P C</td>
</tr>
<tr>
<td>Guerrero</td>
<td>P C</td>
</tr>
<tr>
<td>Hidalgo</td>
<td>P C</td>
</tr>
<tr>
<td>Jalisco</td>
<td>O P C</td>
</tr>
<tr>
<td>Michoacán</td>
<td>P C</td>
</tr>
<tr>
<td>Morelos</td>
<td>O P C</td>
</tr>
<tr>
<td>Nayarit</td>
<td>P C</td>
</tr>
<tr>
<td>Nuevo León</td>
<td>O P C</td>
</tr>
<tr>
<td>Oaxaca</td>
<td>P C</td>
</tr>
<tr>
<td>Puebla</td>
<td>O P C</td>
</tr>
<tr>
<td>Querétaro</td>
<td>O P C</td>
</tr>
<tr>
<td>Quintana Roo</td>
<td>P C</td>
</tr>
<tr>
<td>San Luis Potosí</td>
<td>O P C</td>
</tr>
<tr>
<td>Sinaloa</td>
<td>P C</td>
</tr>
<tr>
<td>Sonora</td>
<td>P C</td>
</tr>
<tr>
<td>Tabasco</td>
<td>P C</td>
</tr>
<tr>
<td>Tamaulipas</td>
<td>P C</td>
</tr>
<tr>
<td>Tlaxcala</td>
<td>P C</td>
</tr>
<tr>
<td>Veracruz</td>
<td>P C</td>
</tr>
<tr>
<td>Yucatán</td>
<td>O P C</td>
</tr>
<tr>
<td>Zacatecas</td>
<td>O P C</td>
</tr>
</tbody>
</table>
Figure 3. Participating companies: National presence

- South: 1.7%
- North: 15.0%
- Centre: 83.3%

Figure 4. Participating companies: sectors

- Automotive: 11.0%
- Technology: 8.9%
- Food and Drinks/Agriculture: 8.6%
- Industrial Machinery: 8.1%
- Chemicals: 6.3%
- Transportation and storage: 6.0%
- Logistics and Custom Services: 5.7%
- Pharmaceuticals: 5.5%
- Construction: 4.9%
- Security Services: 4.9%
- Consulting Services: 4.7%
- Energy: 4.4%
- Financial Services: 4.4%
- Professional Services: 3.4%
- Product Manufacturing: 3.1%
- Electronics: 3.1%
- Retail: 2.6%
- Telecommunications: 2.3%
- Marketer: 2.3%
- Manufacturing Industry: 2.1%
- Human Resources: 1.8%
- Real Estate Services: 1.6%
- Insurance: 1.6%
- Textile and Clothing: 1.6%
Respondents profile

41.6% of the executives that responded hold a senior position (CEO, Head of Department), while 58.4% are middle-management (Figure 6). 75.7% of respondents were women, while 24.3% were men (Figure 7) from different company areas (Figure 8): General Management, Security, Human Resources, Legal, Logistics, etc.
Security management within the company

So far, a little more than half of the companies (53.9%) have an Assets Security Department, which reports mainly to General Management (38.2%) or to the Human Resources Department (29.5%).

However, almost half of the people responsible for the security department of the companies perform additional duties, mainly other security duties (27%) and human resources management (26.3%), environmental security, logistics, and others.
Figure 9. Does your company have an Assets Security Department?

<table>
<thead>
<tr>
<th>Year</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>51.0%</td>
<td>49.0%</td>
</tr>
<tr>
<td>2018</td>
<td>53.9%</td>
<td>46.1%</td>
</tr>
</tbody>
</table>

Figure 10. What company department does the Security Department report directly to?

- General Management/Presidency CEO (Chief Executive Officer): 38.2%
- Human Resources: 29.5%
- Manufacturing/Operations: 7.2%
- EHS (Environment, Health and Safety): 7.2%
- Legal: 3.9%
- Supply Chain (Supply Chain Manager): 3.9%
- Facilities/Real Estate: 3.4%
- Finance: 2.4%
- Corporate Security: 1.9%
- Global Security: 1.4%
- Don’t know: 1.0%
Figure 11. Does the head of the security department in your company perform other additional duties?

- Yes: 45.7%
- No: 54.3%

Figure 12. What are the additional duties they perform?

- Security: 27.5%
- Management/Human Resources: 26.3%
- EHS (Environment, Health and Safety): 6.9%
- General Services: 4.4%
- Facilities/Real Estate: 3.1%
- Logistics: 3.1%
- Accounting/Finances: 3.1%
- Environment: 3.1%
- General Management: 2.5%
- Strategic Planning: 2.5%
- Inter-institutional Labor Relations: 1.9%
- Regulatory Compliance: 1.9%
- Operations: 1.9%
- Others less than 1.5%: 8.1%
- Don’t know: 3.7%
Results

1. Geographical areas and matters of greater concern

This year Tamaulipas and the State of Mexico remain as the states that represent the greatest challenges for companies in terms of security, followed by Mexico City, Michoacán and Guerrero. Mexico City, as well as Guerrero and Veracruz, reflects an increase compared to previous years. Jalisco and Sinaloa remain at the same level of concern; and Guanajuato and Puebla appear on this map (Figure 1.1).

On the other hand, Yucatán, Querétaro, Aguascalientes, Campeche, and Quintana Roo are the states that raise less concerns (Figure 1.2).

This perception reflects the incidents that companies have faced in the geographical areas where they operate.

Figure 1.1. Perception: 10 states with greater challenges and/or concerns regarding business security

<table>
<thead>
<tr>
<th>Lugar</th>
<th>2013-2014</th>
<th>2015-2016</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Nuevo León</td>
<td>Tamaulipas</td>
<td>Tamaulipas</td>
</tr>
<tr>
<td>2</td>
<td>Michoacán</td>
<td>State of Mexico</td>
<td>State of Mexico</td>
</tr>
<tr>
<td>3</td>
<td>Tamaulipas</td>
<td>Michoacán</td>
<td>Mexico City</td>
</tr>
<tr>
<td>4</td>
<td>State of Mexico</td>
<td>Mexico City</td>
<td>Michoacán</td>
</tr>
<tr>
<td>5</td>
<td>Mexico City</td>
<td>Nuevo León</td>
<td>Guerrero</td>
</tr>
<tr>
<td>6</td>
<td>Chihuahua</td>
<td>Guerrero</td>
<td>Veracruz</td>
</tr>
<tr>
<td>7</td>
<td>Jalisco</td>
<td>Jalisco</td>
<td>Jalisco</td>
</tr>
<tr>
<td>8</td>
<td>Guerrero</td>
<td>Veracruz</td>
<td>Guanajuato</td>
</tr>
<tr>
<td>9</td>
<td>Coahuila</td>
<td>Sinaloa</td>
<td>Sinaloa</td>
</tr>
<tr>
<td>10</td>
<td>Veracruz</td>
<td>Coahuila</td>
<td>Puebla</td>
</tr>
</tbody>
</table>

In the 2018 period, the states with the highest to lowest percentages were sorted by the challenges and/or concerns rated as extreme and high in terms of business security.

Figure 1.2. Perception: 10 states with fewer challenges and/or concerns regarding business security

<table>
<thead>
<tr>
<th>Lugar</th>
<th>2013-2014</th>
<th>2015-2016</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yucatán</td>
<td>Yucatán</td>
<td>Yucatán</td>
</tr>
<tr>
<td>2</td>
<td>Tlaxcala</td>
<td>Tlaxcala</td>
<td>Querétaro</td>
</tr>
<tr>
<td>3</td>
<td>Quintana Roo</td>
<td>Chiapas</td>
<td>Aguascalientes</td>
</tr>
<tr>
<td>4</td>
<td>Nayarit</td>
<td>Campeche</td>
<td>Campeche</td>
</tr>
<tr>
<td>5</td>
<td>Baja California Sur</td>
<td>Baja California Sur</td>
<td>Quintana Roo</td>
</tr>
<tr>
<td>6</td>
<td>Campeche</td>
<td>Colima</td>
<td>Baja California</td>
</tr>
<tr>
<td>7</td>
<td>Tabasco</td>
<td>Quintana Roo</td>
<td>Sonora</td>
</tr>
<tr>
<td>8</td>
<td>Oaxaca</td>
<td>Durango</td>
<td>San Luis Potosí</td>
</tr>
<tr>
<td>9</td>
<td>Hidalgo</td>
<td>Nayarit</td>
<td>Chiapas</td>
</tr>
<tr>
<td>10</td>
<td>Chiapas</td>
<td>Tabasco</td>
<td>Tlaxcala</td>
</tr>
</tbody>
</table>

In the 2018 period, the states with the highest to lowest percentages were sorted by challenges and/or concerns described as unsubstantial in terms of business security.
What is the main cause for concern for companies?

The areas of greatest concern are the integrity of employees (51.6%), the security of their information (36%) and cargo transport (35.7%), crime (35.3%) and the security of their facilities (34.1%) - Figure 1.3.

Figure 1.3. Which of the following areas is of particular concern in terms of security for your company?

2. Perception in security

For slightly more than half of the respondents in this survey (56.5%), the level of security in their companies remained steady -as compared to the year 2016- while 25% (a quarter) expressed a decline in the security conditions, and 19% indicated an improvement. (Figure 2.1)

It is worth mentioning that in the last survey (2016), the trend was the opposite: 37% of respondents considered that the level of security of their company remained steady compared to the previous year; 31% mentioned that their company was safer during 2015 and 17% considered that their organization was less safe compared to the previous year. This reflects less optimism from the respondents, matching with heightened insecurity in the country since then.
Figure 2.1. Which of the following statements best describes your opinion about the security situation in your company?

- 18.6%: Our Company was safer in 2017 compared to safety in 2016
- 24.9%: Our Company was less safe in 2017 compared to safety in 2016
- 56.5%: The level of safety of our Company remained unchanged

For those respondents who considered their company to be less safe in 2017 compared to 2016, the main factors having an impact are (i) the strengthening of organized crime, (ii) the increase in crimes of opportunity, (iii) the absence of the Rule of Law and (iv) the corruption of authorities in general (Figure 2.2).

Figure 2.2. Considering that your company was less safe in 2017 compared to 2016, which of the following aspects has had the greatest impact on the deterioration of security conditions?

- Strengthening of Organized Crime: 71.2%
- Increase of Crime of Opportunity: 69.5%
- Absence of the Rule of Law (ex. impunity): 49.2%
- Rise in Violence near Employment Area: 49.2%
- General Corruption of Authorities: 37.3%
- Adverse Economic Conditions (Unemployment, low salaries, etc.): 16.9%
- Company’s Internal Factors: 6.8%

Just like in the 2016 edition of this survey, 83% of the respondents that perceived an improvement attribute it to enhancements to internal security measures. The perception of authorities’ involvement continues to be negative, as it does not seem to make a significant impression of the security conditions perceived by the companies (Figure 2.3).
3. Damages suffered by companies

Incidents of violence in companies

42.1% of respondents declared that their companies suffered attacks to the supply chain transport over the last 12 months, which has become one of the biggest concerns of the productive sector in Mexico. Likewise, virtual extortion, robbery and threats to employees, facilities trespassing, protests and blockades stand as recurrent security problems (Figure 3.1).
ADT has been providing protection with the latest generation technology for more than 140 years in 38 countries.

From homes and small businesses to a corporate, ADT protects more than 137,000 buildings and millions of people throughout Mexico 24/7 all year in case of:

- Medical Emergency
- Theft
- Panic
- Fire

More people trusts ADT because we have innovated in the way we protect people and buildings making places where they live and work, safer.
Identity

Security Advisors is a Private Security Company, provides a full range of corporate security services to a local and international corporate client base, specializing in integrated security solutions for the protection of company assets including people, facilities, information, and reputation.

Mission

Security Advisors contributes and supports the strategic objectives of our clients, in providing full support for the protection of their assets and resources.

Values

Honesty, Loyalty, Responsibility, Respect, Commitment.

Vision

To be one of the leading Private Security Service Companies in Mexico and Latin America, in collaboration with our employees, clients, providers, commercial partners, through sustained commitment to quality, honesty, and adapting products and services, to fulfill synergies and long term development and business continuity.

Experience areas:

- Corporate Security
- Private Security
- Military Security
- Port Security
- Oil & Gas
- Mining

Our Strengths

- Broad experience on field in Corporate Security
- Full understanding of business and security

Tactical Services

- Professional guarding services (corporate, industrial and commercial)
- Security Supply Chain.
- Risk Management
- Risk Assessment

Strategic Services

- Corporate Security Consultancy
- Executive Protection
- Crisis Management

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info@securityadvisors.com.mx
Figure 3.1. Has your company been a victim of any of the following crimes/incidents during the last 12 months?

<table>
<thead>
<tr>
<th>Crime/Incident</th>
<th>First Mention</th>
<th>Total Mentions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raids on the Supply Chain Transport</td>
<td>25.4%</td>
<td>42.1%</td>
</tr>
<tr>
<td>Virtual Extortion</td>
<td>13.6%</td>
<td>39.9%</td>
</tr>
<tr>
<td>Theft</td>
<td>12.3%</td>
<td>39.9%</td>
</tr>
<tr>
<td>Aggression or Threat by External Individuals to Employees</td>
<td>11.8%</td>
<td>30.3%</td>
</tr>
<tr>
<td>Inclusivity of the Facilities</td>
<td>4.4%</td>
<td>23.7%</td>
</tr>
<tr>
<td>Protests, Blockades, Social Unrest</td>
<td>16%</td>
<td>23.2%</td>
</tr>
<tr>
<td>Information Leaks</td>
<td>4.8%</td>
<td>18.0%</td>
</tr>
<tr>
<td>Vandalism</td>
<td>13.6%</td>
<td>13.2%</td>
</tr>
<tr>
<td>Cyber attacks</td>
<td>4.4%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Direct Extortion</td>
<td>2.6%</td>
<td>9.6%</td>
</tr>
<tr>
<td>Aggression or Threat by External Individuals done to Senior Executives</td>
<td>2.2%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Virtual Kidnapping</td>
<td>2.2%</td>
<td>7.5%</td>
</tr>
<tr>
<td>Aggression against Distributors</td>
<td>2.6%</td>
<td>8.3%</td>
</tr>
<tr>
<td>Kidnapping</td>
<td>2.6%</td>
<td>8.3%</td>
</tr>
<tr>
<td>Express Kidnapping</td>
<td>2.6%</td>
<td>8.3%</td>
</tr>
</tbody>
</table>

4. Performance of the authorities

According to the companies that participated in this survey, the involvement of the authorities in response to the incidents reported is deficient in most cases, particularly at a state and municipal level (Figure 4.1). Moreover, the percentage of unhappy respondents has increased compared to the previous survey (Figure 4.2).

Almost all of the respondents state that their companies report to the authorities the crimes and security problems they face (Figure 5.6), but these complaints have not had the desired impact.

It is worth mentioning that the Army and the Navy are not authorities with which companies have the first contact after a security incident. This explains the neutrality in the responses regarding these institutions.

For 54.5% of the respondents, the greatest trust in reporting security incidents resides in the federal authorities. Nevertheless, it is worrisome that for 29% none of the levels of government is trustworthy for this matter (Figure 4.3).
Figure 4.1. How do you rate the involvement of the authorities in response to the incidents reported by your company?

<table>
<thead>
<tr>
<th>Authority</th>
<th>Efficient</th>
<th>Deficient</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Municipal</td>
<td>12.5%</td>
<td>58.9%</td>
<td>28.6%</td>
</tr>
<tr>
<td>State</td>
<td>12.5%</td>
<td>55.8%</td>
<td>31.7%</td>
</tr>
<tr>
<td>Federal</td>
<td>26.3%</td>
<td>35.7%</td>
<td>37.9%</td>
</tr>
<tr>
<td>Army</td>
<td>20.1%</td>
<td>9.4%</td>
<td>70.5%</td>
</tr>
<tr>
<td>Navy</td>
<td>18.8%</td>
<td>8.0%</td>
<td>73.2%</td>
</tr>
</tbody>
</table>

Figure 4.2. How do you rate the involvement of the authorities in response to the incidents reported by your company? Comparison between the results of the surveys of 2016 and 2018.
5. Corporate security: Measures and actions implemented by companies

Preventive strategies for their protection

Since it is a fundamental issue to guarantee their operations, companies have reinforced their strategies and allocated resources for risk prevention. For this, they report having systems of security management in the facilities, risk assessments, crisis management plans, as well as information and sensitization campaigns for employees and contractors, among other things. (Figure 5.1).

Figure 5.1. Which of the following security measures has your company implemented to mitigate risks/impacts?

<table>
<thead>
<tr>
<th>Measure</th>
<th>Total Mentions</th>
<th>First Mention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety Management System for each facility (policies, procedures and manuals)</td>
<td>66.4%</td>
<td>15.8%</td>
</tr>
<tr>
<td>Risk Assessment and Prevention Plan</td>
<td>63.9%</td>
<td>27.8%</td>
</tr>
<tr>
<td>Crisis Management Plan and Business Continuity</td>
<td>58.1%</td>
<td>29.0%</td>
</tr>
<tr>
<td>Employee Security Awareness</td>
<td>54.4%</td>
<td>14.5%</td>
</tr>
<tr>
<td>Recruitment Process of Trusted Personnel</td>
<td>28.6%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Protection Programs for Executives</td>
<td>10.4%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Data Collection and Analysis</td>
<td>9.1%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Anti-doping checks</td>
<td>6.6%</td>
<td>1.7%</td>
</tr>
</tbody>
</table>
More than half of the respondents (62.9%) reported their companies have specific security measures to operate in the states that they consider high risk (Figure 5.3). Faced with this environment, security policies and protocols are based primarily on risk analysis (35.7%), special travel protocols (13.7%) and actions to ensure the employees’ physical safety (13.7%) - Figure 5.4.

In this regard, it is worth noting that since the last survey (2016), there has been a significant increase in mentions of travel protocols, security training and awareness, executive protection, transport/goods satellite tracking and crisis management plans (Figure 5.5).
Response to security incidents

Among the main strategies to face security incidents, most of the respondents report having increased measures and protocols with their own investment (99.2%), having notified the authorities at the three levels of government (95%), and hiring external consultants (90%) - Figure 5.6.

65.6% of the respondents report their companies have a business travel management program and more than 50% was forced to implement travel restrictions in the last year. Tamaulipas, Michoacán, Guerrero, Mexico City and Jalisco feature in the list of the states with the highest risk.
Figure 5.6. What strategy does your company use to face the main security incidents?

- **Increase of Safety Measures with own resources**: 99.2% (96.0%)
- **Inform Authorities (Municipal/State/Federal)**: 95.0% (32.8%)
- **Contact External Consultants**: 90.0% (9.1%)
- **Comprehensive Security Plan**: 2.5% (1.7%)
- **Inform Corporate Security**: 1.7% (1.2%)
- **Train and Raise Awareness Among Staff**: 7.5% (0.8%)
- **Others less than 1%**: 1.7% (0.4%)
- **Nothing**: 0.8% (0.4%)

Figure 5.7. Does your company have a business travel management program?

- **YES**: 65.6%
- **NO**: 34.4%

Figure 5.8. In what way have business trips been managed in your company?

- **Implementation of Trip Protocols**: 59.9%
- **Use of Safe Transport Services (service assessment, competent driver, low profile vehicle)**: 10.8%
- **Emergency Telephone Line 24/7**: 8.9%
- **Tracking and Monitoring of Employees**: 7.6%
- **Limitations to move within Mexico**: 7.0%
- **Limitations to travel from other countries to Mexico (when operating in another country)**: 4.5%
- **Hotel Assessment**: 1.3%
Figure 5.9. Due to the rise in violence in the country in 2017, did your company find it necessary to implement/modify travel restrictions?

- Yes, monthly: 5.0%
- Yes, sometimes: 48.7%
- Yes, just once: 3.4%
- No: 42.9%

Figure 5.10. In what state of the country does your company implement special regulations for business trips?

Executive Protection

With regard to corporate security strategies, 30.8% of the respondents stated that they have increased the level of protection for their executives, both in managerial positions and in other levels of the organization (5.11 and 5.12), by outsourcing relocation services (63.4%), acquiring special transportation fleets (57%), with new training strategies to escorts (55.4%), strengthening control and confidence tests (53.8%), armoring cars (47.3%) and with armed elements (23.1%), among other strategies (Figure 5.13).
Figure 5.11. Has your company increased the level of protection for its executives during last year?

![Pie chart showing 30.8% YES and 69.2% NO]

Figure 5.12. Does the scope of executive protection cover only the Board/Executive Committee or other levels as well (Directors, Managers)?

![Bar chart showing 48.3%, 46.7%, and 5.0%]

Figure 5.13. What actions has your company implemented to improve the level of protection for its executives?

![Bar chart showing various actions with percentages]

Figure 5.14. Is there an increase in the executive protection budget compared to last year?

![Pie chart showing 16.1% YES and 83.9% NO]
Operations in Mexico

When asking about the specific decisions that companies have made regarding their operations -as a result of the security situation in the country- the following findings are observed (Figures 5.15 - 5.24):

- 6.1% suspended investment projects entirely and 4% reduced them.
- 14.2% suspended operations in the last two years, highlighting the cases of: Tamaulipas, Guerrero and Michoacán.
- 3.5% moved their operations from one state to another and 1.5% moved certain processes to another country.
- 9.6% outsourced or transferred operations to another state in the country, notably those cases of Tamaulipas, Guerrero, Nuevo León and Sinaloa.

Figure 5.15. Did your company suspend any type of investment/industrial development in the country for security reasons?

- YES 6.1%
- NO 93.9%

Figure 5.16. Has your company reduced investments in Mexico for security reasons?

- YES
- NO
- NR

<table>
<thead>
<tr>
<th>Year</th>
<th>YES</th>
<th>NO</th>
<th>NR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>27.0</td>
<td>52.0</td>
<td>21.0</td>
</tr>
<tr>
<td>2010</td>
<td>27.0</td>
<td>48.0</td>
<td>25.0</td>
</tr>
<tr>
<td>2011</td>
<td>27.0</td>
<td>27.0</td>
<td>20.0</td>
</tr>
<tr>
<td>2012</td>
<td>7.0</td>
<td>56.0</td>
<td>36.0</td>
</tr>
<tr>
<td>2013</td>
<td>10.0</td>
<td>69.0</td>
<td>6.0</td>
</tr>
<tr>
<td>2015</td>
<td>21.0</td>
<td>9.0</td>
<td>62.0</td>
</tr>
<tr>
<td>2018</td>
<td>29.0</td>
<td>4.0</td>
<td>96.0</td>
</tr>
</tbody>
</table>
Figure 5.17 and 5.18. Has your company suspended operations in any state of the country for security reasons? If yes, in which ones?

- **NO** 85.8%
- **YES** 14.2%

NO (85.8%): Tamaulipas, Guerrero, Michoacán, Chihuahua, Jalisco, Baja California, Coahuila, Mexico City, Nuevo León, Puebla, Querétaro, Sinaloa, Tabasco, Mexico City, Nuevo León, Puebla, Querétaro, Sinaloa, Tabasco.

YES (14.2%): Tamaulipas, Guerrero, Michoacán, Chihuahua, Jalisco, Baja California, Coahuila, Mexico City, Nuevo León, Puebla, Querétaro, Sinaloa, Tabasco, Mexico City, Nuevo León, Puebla, Querétaro, Sinaloa, Tabasco.

Figure 5.19. Has your company moved its operations to another place within the Mexican Republic for security reasons?

- **NO** 96.5%
- **YES** 3.5%

Figure 5.20. If yes, in which state of the country were they located and to which one did they move?

<table>
<thead>
<tr>
<th>Previous Location</th>
<th>New Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tamaulipas</td>
<td>Nuevo León</td>
</tr>
<tr>
<td>Mexico City</td>
<td>State of Mexico</td>
</tr>
<tr>
<td>State of Mexico</td>
<td>Michoacán</td>
</tr>
<tr>
<td>Guerrero</td>
<td>Puebla</td>
</tr>
<tr>
<td>San Luis Potosí</td>
<td>Yucatán</td>
</tr>
</tbody>
</table>
Figure 5.21. Has your company moved its operations to another country (outside of Mexico) for security reasons?

- **NO**: 98.5%
- **YES**: 1.5%

Figure 5.22. If yes, what was the previous location of your company and what is the new location?

<table>
<thead>
<tr>
<th>Previous Location</th>
<th>New Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manzanillo, México</td>
<td>Estados Unidos</td>
</tr>
<tr>
<td>Silao, Guanajuato</td>
<td>Wakayama, Japón</td>
</tr>
<tr>
<td>The company didn’t move its operations, only certain processes</td>
<td>The company didn’t move its operations, only certain processes</td>
</tr>
</tbody>
</table>

Figure 5.23. Has your company outsourced or transferred operations to any State of Mexico for security reasons?

- **NO**: 90.4%
- **YES**: 9.6%

Figure 5.24. If yes, in which state are your facilities currently located?

States of Mexico with the highest percentage of facilities are:

- **Nayarit**: 52.6%
- **Sonora**: 36.8%
- **Nuevo León**: 21.1%
Although the vast majority of companies have not resorted to this type of measures, we should not minimize the fact that the unsafe environment is a key factor in the decision of companies to maintain or increase their investment, reinforce, move or outsource their operations as well as suspending them to the detriment of the jobs they generate, the supply chain and the competitiveness of the industry. This feeds the vicious cycle of violence and insecurity.

6. Investment in security

An environment of security and Rule of Law is fundamental not only to guarantee investment in the country, but also to generate conditions that allow companies to increase their productivity, strengthen the internal market and expand formal employment opportunities for the population.

The dimension of the public security challenges that the country is facing requires urgent and effective attention.

In 2016, 16% of respondents reported their companies invest more than 5% of their annual operating budget in security. In the current survey, that percentage went up to 38% (Figure 6.1). These figures reflect an opposite situation to a competitive business environment.

**Figure 6.1. What percentage of your company’s annual operating budget is currently invested in security?**

![Bar chart showing the percentage of annual operating budget invested in security from 2016 to 2018.](image)
Figure 6.2. In which of the following areas of security does your company currently invest?

<table>
<thead>
<tr>
<th>Area</th>
<th>First Mention</th>
<th>Total Mentions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Controls</td>
<td>57.3%</td>
<td>24.8%</td>
</tr>
<tr>
<td>CCTV (Closed-Circuit Television)</td>
<td>56.4%</td>
<td>20.6%</td>
</tr>
<tr>
<td>Security Guards</td>
<td>35.3%</td>
<td>15.3%</td>
</tr>
<tr>
<td>Alarms</td>
<td>22.5%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Perimeter Security</td>
<td>22.5%</td>
<td>4.6%</td>
</tr>
<tr>
<td>GPS for Company Vehicles</td>
<td>21%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Employees Training</td>
<td>19.3%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Filter Selection</td>
<td>15.1%</td>
<td>15.1%</td>
</tr>
<tr>
<td>Cyber Security</td>
<td>15.1%</td>
<td>11.0%</td>
</tr>
<tr>
<td>Consultancy (Audits)</td>
<td>4.1%</td>
<td>7.3%</td>
</tr>
<tr>
<td>Breath Alcohol Testing and Drug Testing</td>
<td>4.1%</td>
<td>3.9%</td>
</tr>
<tr>
<td>Security Guards for Transportation</td>
<td>3.7%</td>
<td>6.4%</td>
</tr>
<tr>
<td>Internal Audits</td>
<td>1.4%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Protection for Executives</td>
<td>1.4%</td>
<td>4.6%</td>
</tr>
</tbody>
</table>

7. Security of the information

Information is one of the most valuable assets for companies. Therefore, this year we include a section to know the level of risk in this subject.

In this survey, 80.9% of respondents expressed that information security is a high priority (Figure 7.1). For that reason, most of them have staff trained in cybersecurity and dedicated budget to prevent and mitigate the risk of information theft and cyber attacks.

It is of concern that the coordination with authorities is very limited and that the National Cybersecurity Strategy is little known and rather assessed as insufficient and limited (Figures 7.8 and 7.9).

Figure 7.1. How important do you consider information security?

HIGH 80.9%
MEDIUM 14.9%
LOW 3.7%
NIL 0.5%

Figure 7.2. Does your company have a Manager focused on issues of cybersecurity or information security?

NO 34.4%
YES 65.6%
Figure 7.3. How many years of experience does the person in charge of information security have in your company?

- 1-3 years: 29.3%
- 4-6 years: 19.1%
- 7-9 years: 9.3%
- 10 or more years: 42.3%

Figure 7.4. Does your company have a cybersecurity strategy?

- NO: 25.2%
- YES: 74.8%

Figure 7.5. How do you perceive the support of the Senior Management in cybersecurity issues?

- High. There are regular meetings and continuous follow-up of the strategy: 41.7%
- Medium. There is awareness of the objectives, receives quarterly, semi-annual and annual reports: 30.1%
- Low. Only seeks answers/reactives in case of an incident: 22.3%
- Nil. There is no direct relationship nor reports with Senior Management: 5.8%

Figure 7.6. What risks or threats does your company face in cybersecurity issues?

- Data Theft/Hacking: 47.1%
- Cyber attacks: 12.0%
- Virus: 9.6%
- Phishing/Identity Theft: 8.7%
- E-mail Scams: 3.4%
- All cybersecurity risks: 2.4%
- Extortion: 1.4%
- Risks are low: 1.4%
- N/A: 2.4%
- None: 8.7%
- Don’t know: 2.9%

Figure 7.7. Does your company have a budget focused on cybersecurity issues?

- Yes: 63.1%
- No: 22.8%
- There is a global area focused on the matter: 0.5%
- Corporate takes on responsibilities: 3.4%
- Monthly Payments for “Firewall” Protection: 2.4%
- N/A: 1.9%
- None: 1.5%
- Don’t know: 4.4%
Figure 7.8. What support do companies receive from the Government in an attack or incident related to cybersecurity?

<table>
<thead>
<tr>
<th>Support</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>47.6%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>27.2%</td>
</tr>
<tr>
<td>NR</td>
<td>15%</td>
</tr>
<tr>
<td>NA</td>
<td>3.9%</td>
</tr>
<tr>
<td>Retrieval of certain information</td>
<td>3.9%</td>
</tr>
<tr>
<td>Only police investigation done</td>
<td>15%</td>
</tr>
<tr>
<td>Employee Training</td>
<td>15%</td>
</tr>
<tr>
<td>We only report to the Cybernetic Police</td>
<td>15%</td>
</tr>
<tr>
<td>We haven’t requested it</td>
<td>3.9%</td>
</tr>
<tr>
<td>Support is little/minimal</td>
<td>7.8%</td>
</tr>
</tbody>
</table>

Figure 7.9. Do you think that the National Cybersecurity Strategy covers the current needs of companies in Mexico?

**Why-Yes? 12.1%**
- It covers main aspects regarding information protection: 29.2%
- It includes standards that must be followed: 25.0%
- They have been studied in order to be effective: 12.5%
- The Company hasn’t received any cyber attack: 12.5%
- Due to information provided: 12.5%
- Don’t know: 4.2%
- NR: 4.2%

**Why-No? 54.9%**
- Strategy is insufficient/limited: 12.4%
- It lacks competency and development: 11.5%
- They need to approach the Companies: 10.6%
- Dissemination of strategy is necessary: 10.6%
- Due to recent attacks to SPEI system: 9.7%
- It is necessary to upgrade and use state-of-the-art technology: 8.0%
- Inefficiency and corruption of authorities: 5.3%
- The topic is new to the authorities, there are no laws yet...: 4.4%
- Investment and resources for the strategy are necessary: 3.5%
- No data to demonstrate effectiveness: 3.5%
- No follow-up and formality: 2.7%
- More campaigns about security are needed: 1.8%
- Cyber security culture needs to improve: 1.8%
- Company’s security is handled on the outside: 1.8%
- NA: 0.9%
- None: 0.9%
- Don’t know: 6.2%
- NR: 0.9%

33.0% Are not aware of the National Cybersecurity Strategy
8. Future expectations

Even though most respondents disbelieve conditions will improve in the short term with the change of government (54.9%), companies do not plan to suspend investments or operations (except for 2.6%). As seen in this Survey, companies have allocated additional resources to deal with organized crime, outsource their operations or move them to safer areas and impose travel restrictions. The additional high costs in terms of security incurred by companies (economic, human capital, etc.) affect their level of competitiveness and, consequently, the development of the domestic market.

The continuity of the vast majority of investments in the country reflects the great commitment of the private sector with Mexico. However, this does not imply that its ability to invest and operate is not affected, especially in those areas of the country that have been identified as unsafe.

Productive investment is necessary to promote economic growth and social development, particularly in the most marginalized areas.

If we fail to improve the security environment, companies will be increasingly limited to expand their operations and investments, which has an impact on millions of jobs and opportunities for economic development and well-being for the population.

On the other hand, Mexico is a market that competes with many other countries to attract foreign direct investment. For the country to remain an attractive destination for global investments, the Rule of Law, security and legal certainty are essential conditions that must be guaranteed.

Considering that the Rule of Law is one of the pillars for sustained economic growth, it is a concern that companies perceive that they are not supported enough by the authorities to address threats and violations to their security.

Figure 8.1. When do you expect the security situation in Mexico to improve?

![Figure 8.1](image-url)
Figure 8.2. Why do you think the security situation will improve in that period of time?

- Change of Administration: 42.0%
- Actions Implemented by the Government: 30.0%
- Joint Actions Citizens – Company – Government: 15.0%
- Public Awareness: 13.0%

2016

2018

Figure 8.3. Does your company plan to suspend operations in any State of Mexico for security reasons?

- NO: 97.4%
- YES: 2.6%

Figure 8.4. If so, in which one?

<table>
<thead>
<tr>
<th>States</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coahuila</td>
</tr>
<tr>
<td>Guerrero</td>
</tr>
<tr>
<td>Michoacán</td>
</tr>
<tr>
<td>Tamaulipas</td>
</tr>
</tbody>
</table>
Recommendations and priorities

In American Chamber/Mexico, we believe that in order to bolster Mexico in terms of security and Rule of Law, it is necessary that the authorities advance in:

1. Strengthening, training and professionalization of police forces in the three levels of government;
   a. Close monitoring of the Homeland Security Act and a subsequent strategy for the withdrawal of the armed forces from civil security tasks;
   b. Zero tolerance to all types of crimes;
      i. Guarantee of supply chain security;
      ii. Advancement of strategies of protection to industrial property and patents, and the fight against piracy;
      iii. Inter-institutional collaboration for border security. Mitigation of arms trafficking, human trafficking, illegal migration associated with crime, etc;

2. Total implementation of the National Anti-corruption System and the new Adversarial Criminal Justice System;
   a. Metrics of performance and accountability to the police, city prosecutor’s offices and courts with the aim of enhancing the management quality of the complete process (filing, consolidation of the investigation and sentencing) in order to reduce impunity.

3. Transformation and strengthening of the penitentiary system and development of specific programs of social reintegration;

4. Full implementation of the National Cybersecurity Strategy;

5. Armoring the financial system with resources, talent and the use of technology, against money laundering.

For all this, pairing up with the private sector is essential. There must be:

• An establishment of mechanisms that build trust within companies through communication channels and continuous monitoring with the authorities.
• Advocacy to promote greater coordination and participation of the sector in the design, execution and evaluation of the homeland security strategies.
QUALITY STANDARDS

This project was carried out in compliance with the quality standards: ISO 20252: 2012 and ESIMM 3.0

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