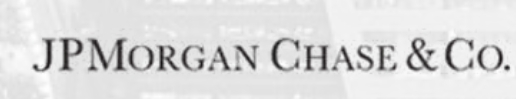


The Philippine IT-BPM

Industry Overview

I.T. & Business Process Association of the Philippines, Inc.

ROADMAP 2028 SPONSORS

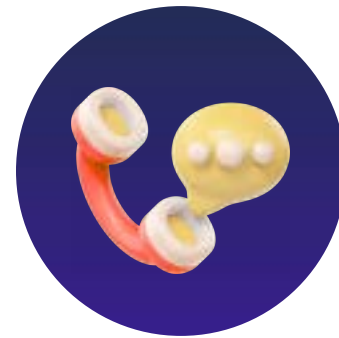


By the Numbers

The **Philippine IT-BPM industry** powers global business success through its world-class services, offering unmatched quality, scalability, and cost-efficiency.

\$40.3 Billion

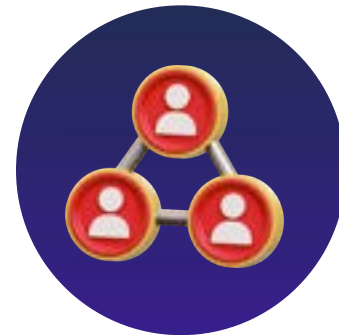
Revenues Generated
(2025)



#1 in Customer Experience and Healthcare services delivery



2nd largest delivery geography for IT-BPM and GCC services (after India)



17% share of global IT-BPM services headcount in 2025, up from 15% in 2022



Fastest growing creatives industry

The Philippines is ready to enter NEXT phase of the global services delivery through:

**N
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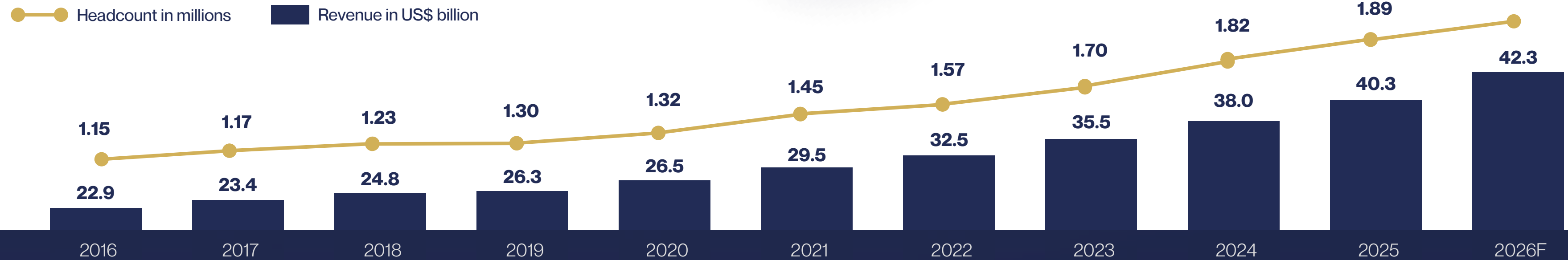
New AI-enabled delivery layer built on existing strengths

Evolution toward higher-value, AI-augmented delivery

eXecution at scale

Tech-ready, adaptable workforce

THE PHILIPPINE IT-BPM INDUSTRY (2016 - 2026F)

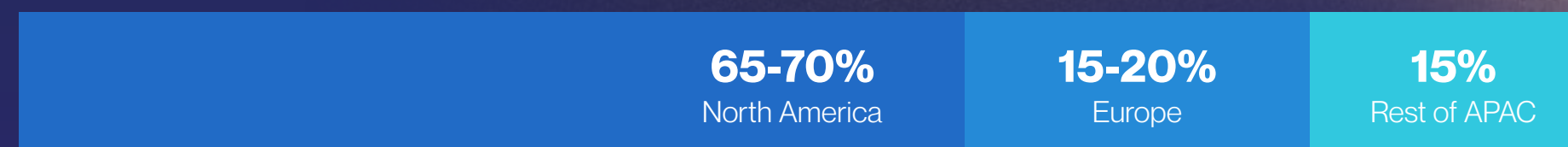


IT-BPM industry of the Philippines continues to outperform global growth while evolving with AI-led transformations, reinforcing its position as one of the global leaders

The Philippines is a **trusted partner for global industries**, offering a **unique mix of service providers and Global Capability Centers (GCCs)** that drive innovation and efficiency.



BUYER SPLIT



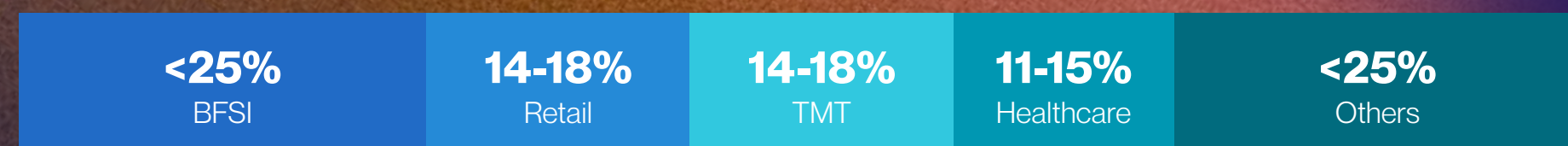
With its cultural affinity to the US and neutral tone, the Philippines has a long legacy of servicing the North America region even today. There are, however, growing instances of service delivery to the APAC region.

SOURCING MIX



While predominantly a service provider driven industry, owing to the large cost arbitrage, the Philippines has also been hosting a growing number of GCCs from across the globe for over 40 years.

INDUSTRY MIX



The Philippines boasts of a healthy mix of industries that it caters to with an in-depth domain knowledge. The core strength of the IT-BPM industry lies in the BFSI and healthcare sector.

The Philippines: A Trusted Global Partner



Leading **global brands** choose the Philippines as their **strategic partner**, leveraging its proven capabilities in IT-BPM services.

GLOBAL CAPABILITY CENTERS



SERVICE PROVIDERS



CREATIVES: ANIMATION & GAME DEVELOPMENT SERVICES



Key sectors in the Philippines

IT-BPM industry



The Philippines has a diversified services ecosystem spanning multiple sectors and industries



CONTACT CENTER AND BUSINESS PROCESS SERVICES

1.68 million
FTEs employed

US\$33.9 billion
Revenue generated

US\$20.1k
Revenue per FTE

Mature and established services:

Contact center, Finance and accounting, Human resources, Industry-specific BPM, Trust and safety

INFORMATION TECHNOLOGY AND DIGITAL SERVICES

190k
FTEs employed

US\$6.1 billion
Revenue generated

US\$33.3k
Revenue per FTE

Mature and established services:

Traditional application development, Application maintenance, QA and testing, Network and security services, Data center and cloud services

HEALTHCARE SERVICES

200k
FTEs employed

US\$4.5 billion
Revenue generated

US\$22.4k
Revenue per FTE

Mature and established services:

Billing and collections, Claims management, Clinical management services, Collections and denial management, Medical coding and billing, Healthcare contact center and back-office operations

GLOBAL CAPABILITY CENTERS (GCCS)

270k
FTEs employed

US\$8.7 billion
Revenue generated

US\$32.3k
Revenue per FTE

Mature and established services:

Customer service, Finance and accounting, Industry-specific BPS, Human resources, Application development and maintenance, IT service desk and infrastructure

ANIMATION

8.4k
FTEs employed

US\$85 million
Revenue generated

US\$10.1k
Revenue per FTE

Mature and established services:

Production services, Post-production services

GAME DEVELOPMENT

7.2k
FTEs employed

US\$107 million
Revenue generated

US\$14.9k
Revenue per FTE

Mature and established services:

Production services, Post-production services, Testing

The Philippine Advantage

With its highly skilled talent, robust infrastructure, cost-effectiveness, and business-friendly environment, the Philippines remains a top global destination for IT-BPM investments.

1

Growing focus on digital
and high complexity work



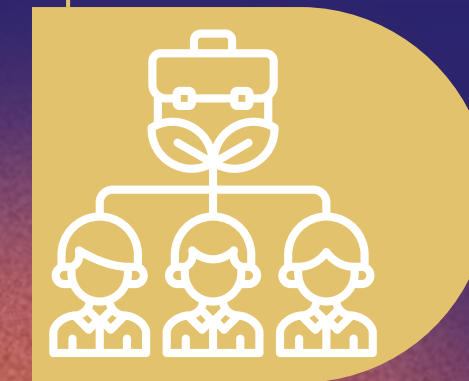
3

World-class infrastructure
and enabling ecosystem



5

Favorable business environment,
policies, regulations and incentives



2

Skilled talent pool with
high emotional quotient



4

One of the lowest costs of
service delivery globally



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THANK YOU

**We are IT-BPM.
We are with the Philippines.**

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