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RESEARCH SUMMARY:
Outsourcing to The Philippines: Metro Manila and Beyond

By neoIT

Which cities in the Philippines are most ideal for executing ITO/BPO work?

Which cities are emerging as strong contenders?

Globalization has enabled the seamless delivery of information technology (IT) and business process (BP) services across borders, through time zones, and over oceans. It has transformed our world into more of a global village than it has ever been. This increasing demand for ITO and BPO services has opened opportunities for emerging ITO and BPO destinations such as India, the Philippines, China, and Russia to improve and expand their services offerings.

To accommodate these expansions, countries are working to create centers of excellence – concentrated locations where ITO and BPO service centers are located – in multiple locations within their borders. These centers of excellence are designed specifically to optimize the four key parameters important to outsourcing firms: cost, control, quality, and risk.

Outsourcing to The Philippines: Metro Manila and Beyond is a result of neoIT's continuous research dedicated to providing our clients with valuable insights on various offshore outsourcing destinations. In this research summary, we provide critical information about the emerging cities in the Philippines that hold promise for IT and BP outsourcing.

Key issue:

- Which Filipino cities are currently the most attractive destinations for ITO and BPO services?
- Which Filipino cities are likely to emerge as centers of excellence in the future?
- How critical is city classification as part of a global sourcing strategy?

Introduction

In last month's white paper we highlighted the world's most prominent nearshore and offshore destinations for information technology (IT) and business process (BP) outsourcing. In that report the Philippines ranks second to India as a BPO destination. The country's capital city, Metro Manila, has long dominated the country's other cities as an outsourcing destination. But eight other cities have emerged to contend with Metro Manila as viable outsourcing destinations. The ability of these cities to continue to improve their services competency will greatly affect the Philippines' overall performance and viability as a key outsourcing destination in the global ITO and BPO markets.

Metro Manila is still the most popular outsourcing destination in the Philippines. Driven by a need for broad-based growth, however, the government has assumed the task of developing alternative, smaller cities in the Philippines – making them "outsource-ready".

neoIT has identified eight cities in the Philippines that are likely to develop into attractive outsourcing destinations: Cebu, Davao, Clark, Cagayan de Oro, Iloilo, Bacalod, Baguio, and Dumaguete. For each of these eight cities, we constructed a city competitiveness rating designed to offer our clients an idea of each location's current ability to provide ITO and BPO services.

We generated these competitiveness ratings based on a set of four factors and fifteen sub-factors that are important components for developing centers of excellence in a city and creating an ecosystem for mature ITO and BPO suppliers to emerge. For details on the methodology behind the offshore city competitiveness rating, please refer to Appendix 3.

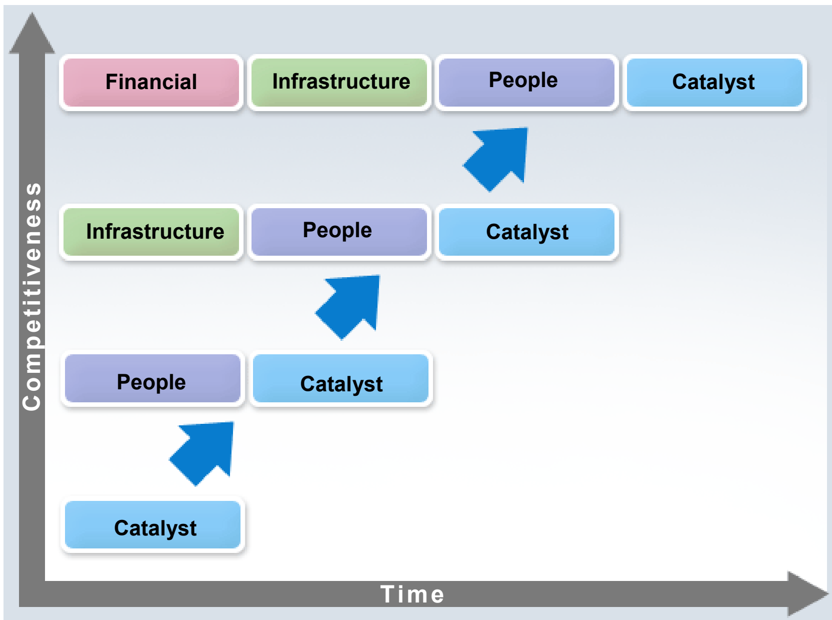
Table 1 provides details on each of the factors and sub-factors we used to generate the offshore city competitiveness ratings as well as the impact of each of those factors on the competitiveness of a city's suppliers.

Table 1: Key Factors and Their Impact on City Competitiveness

Factors	Sub-Factors	Impact on City Competitiveness
People	• Size of labor pool • Number of tertiary schools • English language proficiency • Labor quality	• Easier scalability • High capability to handle voice based interactions with US clients
Infrastructure	• Telecommunications (availability and reliability of a digital network connection) • Power • Airports • Transportation (physical roads)	• Provision for uninterrupted work environment • Remote management capability • Lower cost of communication • Easy physical accessibility for client personnel
Financial	• Cost of living • Availability and cost of real estate	• Lower employee cost– salaries, benefits – higher savings from offshore outsourcing initiative • Lower cost of operations • Investment savings while scaling up operations
Catalyst	• Catalyst • Government support and initiatives • Presence of similar companies • Social and political stability • Climate (weather) • Key developments catering to the ICT industry	• Aggressive business solicitation by the government • Openness to invest in developing required business environment • Stabilized work environment • Comfort factor for companies planning to leverage the city

As a city develops its resources according to the factors detailed in Table 1, it will develop – and attract – a base of suppliers with increasingly mature, competent service capabilities. Figure 1 shows the development steps necessary for a city to create a solid ITO and BPO services foundation; the first step is the development of the catalyst factors and the final step is the development of financial factors. While development will build its own momentum over time as one development factor naturally leads into the next, it is nonetheless important for governments and suppliers to work together to ensure the continued development of the city's market.

Figure 1: Steps toward Competitiveness



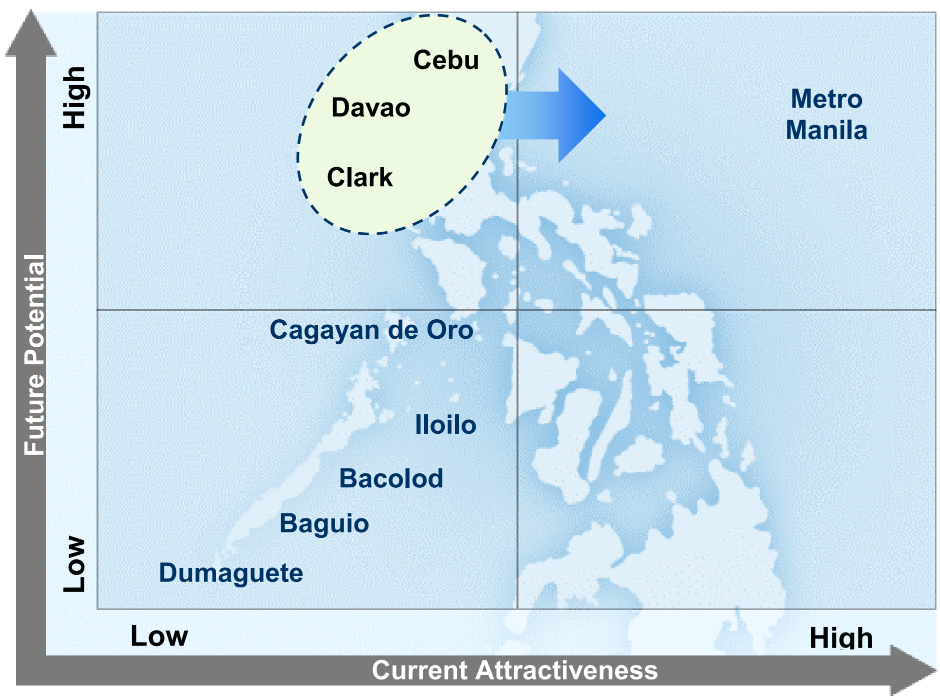
Source: neoIT

Key Findings

- Metro Manila is the most suitable ITO and BPO destination city in the Philippines. But increasing costs of operation and competitive pressures on the labor supply there will continue to progressively detract from the city's attractiveness.
- Cebu, Davao, and Clark are emerging as attractive outsourcing locations in the Philippines – with competent labor pools, lower costs, strong government support, and fast-improving technical infrastructures.
- Future growth in the Philippines' outsourcing industry will be concentrated in four clusters of cities, including:
  - Metro Manila, on the main island of Luzon.
  - Clark, also on the main island of Luzon.
  - Cebu, Leyte, Bacolod, Iloilo, and Dumaguete, in the Visayas region.
  - Davao, Cagayan de Oro, and General Santos, in the Mindanao region.

Figure 2 highlights the current and future attractiveness of Metro Manila, Cebu, Davao, and Clark, as well as the four other cities evaluated in this study.

Figure 2: Cities' Current and Future Potential Attractiveness



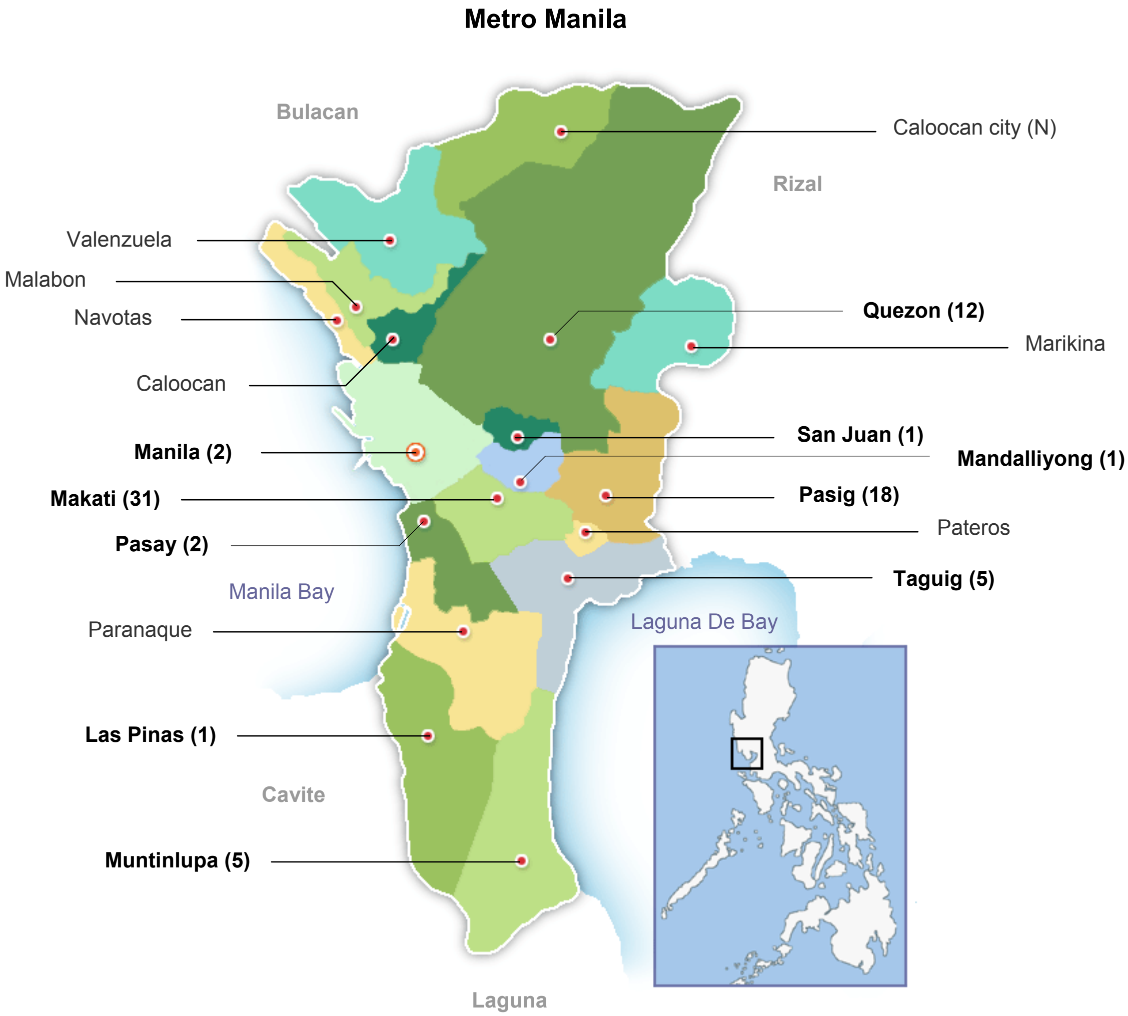
Source: neoIT

The Philippines' Key Outsourcing Destinations

METRO MANILA: OUTSOURCING HUB

Metro Manila, also know as the National Capital Region (NCR), is considered the nation's gateway to the world. It is the base of the Philippine national government and the center of the country's major commercial, financial, and educational activities. More than 80 voice-based call centers are located throughout the Metro Manila region. The region – which accounts for nearly 20 percent of the country's population – is part of the main island of Luzon.

Figure 3: Major BPO Supplier Locations in the Metro Manila Region



*Figures in brackets indicate the number of BPO companies in each location.
**Data is current as of March 2005.
Source: neoIT

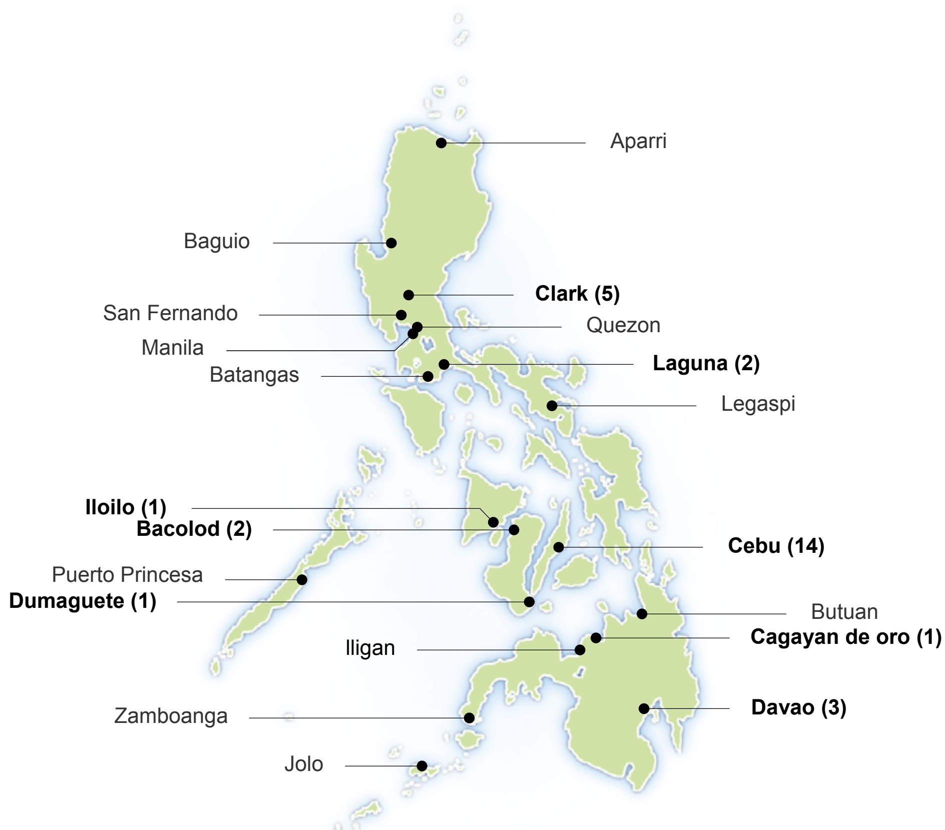
The Metro Manila region includes several important satellite cities (shown in the figure above) that were developed in part through the government's long-term support. The key to Metro Manila's future growth is the continued enhancement of these satellite cities – enhancement driven by governmental (policy-based), corporate, and individual initiatives.

SECOND-TIER FILIPINO CITIES: EMERGING COMPETITORS

The increasingly competitive environment in Metro Manila has led some outsourcing organizations to consider alternative locations that still have room to grow. Having caught wind of that trend, other local governments in the Philippines have begun promoting their cities as attractive outsourcing destinations. The national government, too, is working to establish new economic and technology centers in multiple cities throughout the country as an additional incentive for ITO and BPO suppliers.

The eight cities in the Philippines identified by neoIT that hold significant future potential for business process outsourcing and information technology outsourcing include: Cebu, Baguio, Clark, Davao, Bacolod, lloilo, Dumaguete, and Cagayan de Oro. Figure 4 illustrates the location of these cities and the current outsourcing activity occurring there. Additional information on these cities can be found in Appendix 1.

Figure 4: Major BPO Supplier Locations Outside of Metro Manila



*Figures in brackets indicate the number of BPO companies in each location.
**Data is current as of March 2005.
Source: neoIT

City Competitiveness Assessments

Metro Manila's current advantages include a talented workforce with strong English-language proficiency, a selection of suppliers with significant process maturity, a cultural affinity with the US, good physical and telecommunications infrastructure, and – most importantly – an attractive cost structure that promises tremendous savings for outsourcing organizations. These advantages are the result of the government's concentrated efforts and long-term commitment, the development of infrastructure, the existence of supporting industries, competitiveness among suppliers, resource management, and the region's clear positioning in the global market.

But the capital region can no longer so easily sit back and claim its position as the country's sole destination for outsourcing activities. With industry growth has come an increasing demand for resources. Commercial occupancy rates rose substantially, resulting in a limited availability of Class A prime properties. The demand for skilled BPO providers with English language proficiency also rose, hindering call centers' ability to hire more personnel to keep up with rising demand.

The increasing cost of doing business in Metro Manila has opened up opportunities for less costly regions to attract business. For Metro Manila, sustaining a competitive advantage among other cities of excellence around the world – and among those emerging destinations in the Philippines – requires a shift in focus and policy making based on long-term vision.

The current outsourcing activity in these cities is small compared to that of Metro Manila. Stand-alone suppliers in these cities are low on service maturity, having to make do with employees who have no significant experience and insufficient infrastructure. However, neoIT believes that there are several important reasons why smaller cities in the Philippines (especially Cebu, Davao, and Clark) will emerge as centers of excellence in the future, including:

- The need for organizations to tap a less competitive, distributed labor pool to aid their ability to scale up quickly.
- A desire to establish disaster recovery centers with competent suppliers and recognized resources.
- Smaller cities have actively pursued the growth and development of their outsourcing industries.
- Smaller cities, still relatively untapped outsourcing markets, offer lower operational costs in many areas than Metro Manila.

Figure 5 details each city's overall Offshore City Competitiveness (OCC) score as well as the cities' scores on each of the four factors we described in the Introduction.

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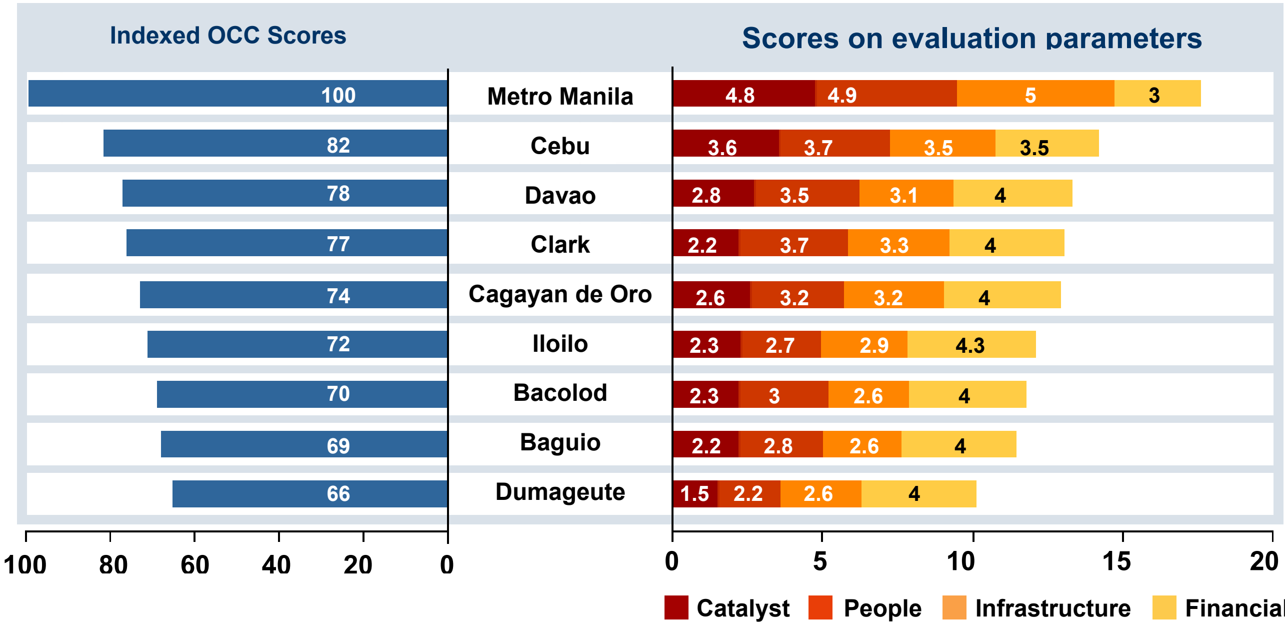
Figure 5: Offshore City Competitiveness Scores



* Ratings are based on data that is current as of March 2005.
Source: neoIT

As Figure 5 demonstrates, Cebu is the most promising of the Philippines' smaller cities – with a skilled labor pool, lower cost structure, strong education system, and solid infrastructure already in place. Indeed, Cebu has already attracted firms looking to diversify operations within the Philippines - one of the oldest cities in the country, Cebu is now one of its fastest growing economies.

Davao's ranking shows that it also has the potential to become a center of excellence. This city is the capital of the Davao region, strategically located in the Southeastern part of Mindanao. The city's strategic location makes it the center of trade not only in the southern Mindanao region but also in the East ASEAN growth area (EAGA). In the past, the city's attractiveness hinged in part on its reputation for maintaining a safe and stable environment. Although the bombing in February 2005 caused some firms to reconsider the city's attractiveness as a destination for outsourced operations, diligent government efforts have since largely reversed those reconsiderations. The city offers a high-quality labor pool (call center applicants in Davao had the highest pass rates of any in the country) and has the benefit of being the largest university area in the south.

Clark, a former US military base, will likely be another of the key outsourcing destinations in Philippines in the future. The city's attractiveness stems from its proximity to Metro Manila; its excellent technology parks; a strong Western heritage; excellent infrastructure; and a committed, supportive local government. The city offers generous monetary and non-monetary incentives to business locating there, professional support services, and other amenities. To further enhance its competitive position, the city is developing a master economic development plan that will include the construction of several special economic zones, airports, commercial complexes, and roads.

Given that these cities have intrinsic advantages, the crucial factor that will drive future competitiveness is the effort and commitment of local governments. The role of these governments will be in creating an ecosystem that will foster city competitiveness. The ecosystem must contain ingredients that will encourage country-level policy making, firm-level competitiveness, industry-level associations and individual-level entrepreneurship.

THE CATALYST FACTOR

Metro Manila was the first Filipino city promoted by the government for information and communication technology (ICT) investments. The government developed areas like Quezon City, Muntinlupa and Taguig to supplement Makati – an area squeezed by real estate demand.

The government's help led to the development of more than 80 call centers in the area, which have helped to sustain on-going growth initiatives. And the company-level competitiveness these centers create has been critical in attracting human capital as well as outsourcing clients. These factors have gone a long way to enable suppliers' service maturity and global-level competitiveness.

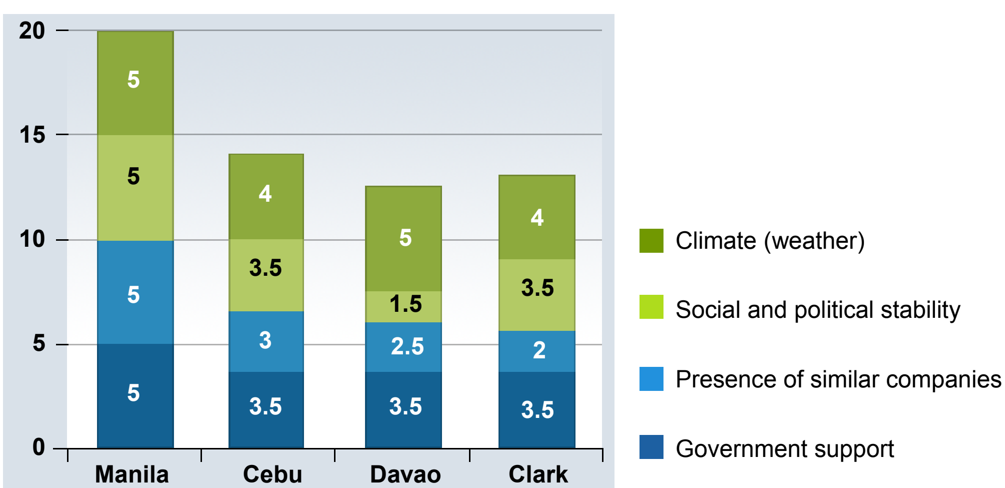
Local governments in each of the other cities have exhibited the desire to catalyze and have taken significant steps towards creating ecosystems within which the outsourcing industry can flourish. Some of these steps include the creation of special economic zones (there are five in Cebu and one each in Davao and Clark), the investment in the city's tertiary education systems, the creation of industry associations, and the maintenance of clean and green surroundings to ensure good quality of life for the city's residents.

Nonetheless, these cities face several challenges arising from their lack of developed information and communications technology infrastructures. The lack of similar firms and supporting industries poses an especially difficult challenge to the development of centers of excellence within these cities.

The maintenance of safety and stability has recently proven to be critical to the ICT industry. After the February 2005 bombing in Davao, four companies that had planned to invest there postponed their decision, taking on a "wait and see" approach.

Figure 6 details each of the four major cities' scores on the catalyst sub-factors and Appendix 2 outlines the role of government in developing competitiveness.

Figure 6: OCC Catalyst Factor Index



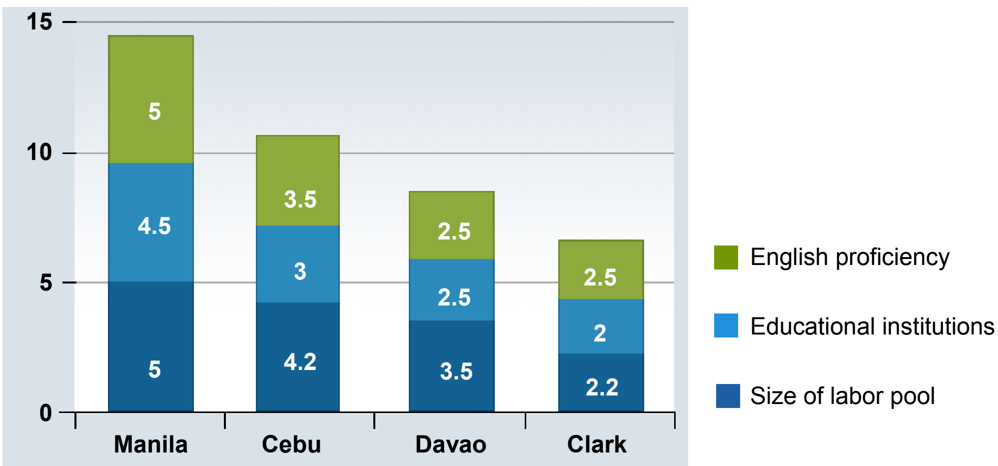
* Ratings are based on data that is current as of March 2005.
Source: neoIT

THE PEOPLE FACTOR

One important factor that makes Metro Manila the most popular outsourcing destination in the Philippines is its strong supply of human capital. The city has a large skilled resource base that assures smooth operation scale-ups. The city houses 81 institutions of higher education and 1,600 other schools, boasts a literacy rate of 92.4 percent, and is home to institutions such as the Asian Institute of Management (AIM), Ateneo de Manila, De La Salle University, the University of the Philippines, and the University of Santo Tomas.

While Davao and Cebu are comparable in population size, Cebu ranks higher on the size of labor pool sub-factor because the city has a larger number of institutions of education than Davao – and therefore a larger number of graduates entering the labor pool. Cebu has six universities, about thirty colleges, and several private training centers. The quality of Cebu's human capital is supported by Cebuanos' higher passing rate on the PhilNits examination (for IT certification) compared to students in other cities. Clark's low score on the people factor is also directly related to its labor force – it received a low score due to its small supply.

Figure 7: OCC People Factor Index



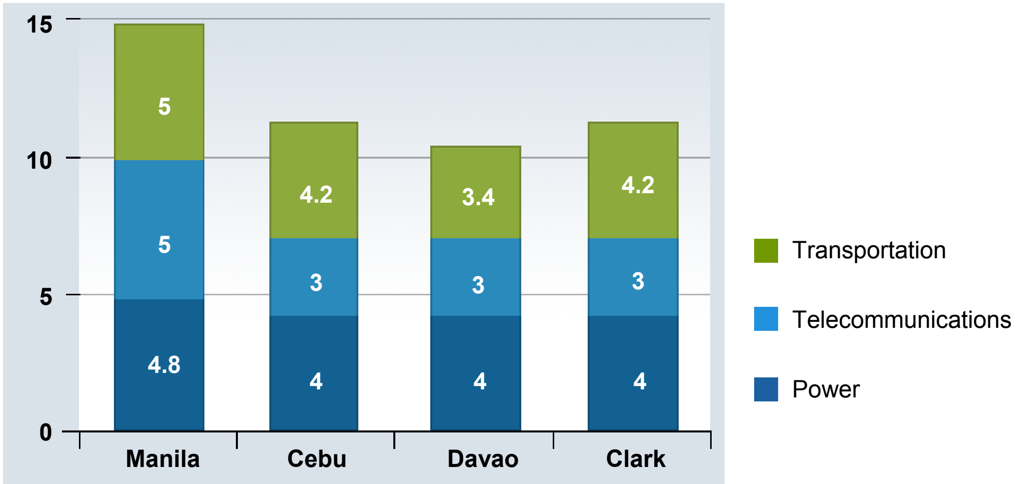
* Ratings are based on data that is current as of March 2005.
Source: neoIT

THE INFRASTRUCTURE FACTOR

Metro Manila's infrastructure is characterized by a stable power supply, six telecommunications carriers providing abundant bandwidth and internal communication links, a good intra-city transportation system, and a busy international airport. The city has continued to manage its infrastructure well even as it developed new infrastructure in several satellite cities, including Quezon. These newly developed cities – also offering excellent infrastructures – are promoted as the future growth engines of Metro Manila.

While its proximity to Metro Manila and its status as a former US military base are advantages for Clark, it is its plan for infrastructure development that will carry the city into a new growth stage. The master plan for the 4,400-hectare main zone and 29,213-hectare sub-zone will transform the city into an airport-driven urban center that is an ideal match to the business requirements of the ICT, aviation support, commercial trading, and other industries.

Figure 8: OCC Infrastructure Factor Index

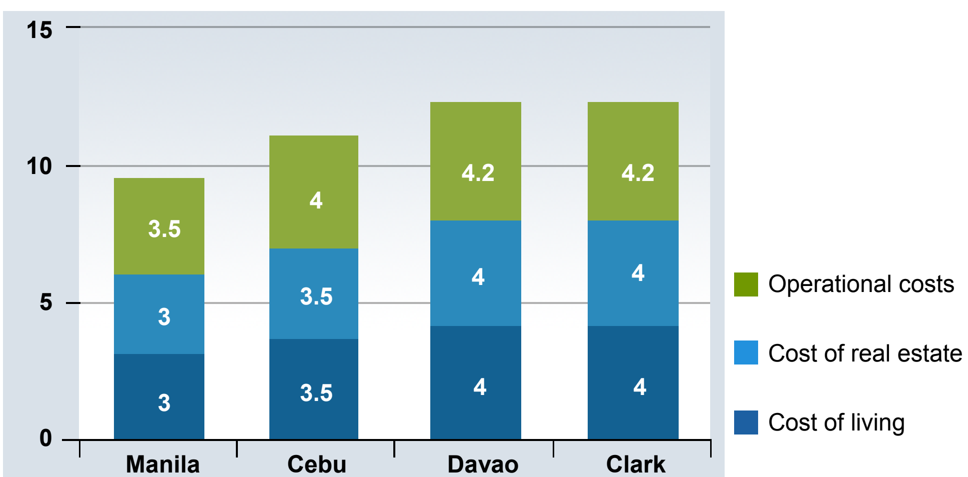


* Ratings are based on data that is current as of March 2005.
Source: neoIT

THE FINANCIAL FACTOR

The increasing demand for outsourcing services in Metro Manila has led – as it invariably does – to an increase in that city's overall cost of doing business. For example, real estate rentals have grown more than 40 percent in the last year, and wage rates currently stand between 15 and 25 percent higher than in Cebu, Davao, or Clark. This higher operational cost reduces the cost-saving potential of Metro Manila as an outsourcing destination.

Figure 9: OCC Financial Factor Index



** Ratings are based on data that is current as of March 2005.*
Source: neoIT

Case Examples: Multi-City Service Delivery From the Philippines

CATEGORY: CLIENT

American International Group, Inc. (AIG) is a leading US-based international insurance and financial services organization. The common stock of the company is listed on the NYSE as well as on the London, Paris, Zurich and Tokyo exchanges. AIG and its set of subsidiaries and affiliates operate a host of businesses, including retirement and pension management, aircraft leasing, and information technology.

AIG's subsidiary AIG-American General (AIG-AG), the US's second largest life insurer, chose to set up its first offshore back-end processing office in the Philippines, in collaboration with AIG's local partner, Philamlife. Jose L. Cuisia, Jr., president and CEO of Philamlife Insurance Co. gave several reasons for the company's choice of the Philippines as its destination for outsourced operations:

- "In terms of quality of labor, the Philippines fared better because its people are more familiar with American jargon and culture.
- Second, our evaluation showed that Western expatriates preferred living in the Philippines, because the lifestyle there is more conducive to their needs. This is important because AIG-AG executives do visit Manila regularly to train local employees as well as monitor and evaluate performance.
- Third, the financial reporting and accounting standards in the Philippines are aligned with US standards.
- Fourth, the Philippine government provided critical support through incentives such as tax holidays and so on.
- Finally, the breadth of experience in insurance operations that Philamlife could offer had helped nudge AIG-AG to outsource to the Philippines: Philamlife has been in business for more than 50 years, whereas AIG-India was a two-year-old operation."

The company currently operates a very mature outsourcing organization with about 500 employees in Manila. It provides back-end processes, such as data entry, policy administration, claims, disbursement and premium processing, and customer service to AIG worldwide.

The company since decided to expand to other cities in the Philippines – for service scalability and also to facilitate disaster recovery. The company located its second center in Cebu and is currently in the process of operationalizing the center.

CATEGORY: SERVICE PROVIDER

spi technologies

Founded in 1980, SPI Technologies specializes in providing content outsourcing solutions in the areas of content capture, conversion and enrichment, financial and transactional business process outsourcing, litigation support, electronic data discovery, editorial and content production, healthcare documentation, and enterprise content lifecycle management. The company also owns e-telecare, the first and biggest call center in the Philippines.

SPI Technologies' major shareholder is TH Lee Putnam Ventures, a New York-based private equity firm focused on business process outsourcing. Through 21 locations in North America, Asia and Europe, SPI Technologies serves more than 150 companies, institutions, non-profit organizations and government agencies worldwide.

The Philippines is the primary service delivery location for the company in Asia. The company has delivery centers in three cities there: Metro Manila, Cebu, and Dumaguete. The facility in Metro Manila – the largest of the company's delivery centers – is capable of delivering services across SPI's portfolio.

In a move to increase its global operations capacity, SPI's healthcare division built a production facility in Cebu City at the same times as it expanded its existing operations in Metro Manila. The initiatives aim to accommodate up to 1,200 agents focus on providing state-of-the-art, HIPAA-compliant medical transcription and information management services to hospitals, multi-specialty clinics, HMOs, insurance companies and health information organizations in the US.

The Dumaguete facility is SPI's newest delivery center for publisher services – aimed at boosting SPI's copyediting ability (the firm currently supports the production of more than 500 journal title) – and is considered one of the first business process outsourcing facilities in Central Visayas.

Conclusions

As offshore outsourcing enters its next phase of evolution, the competitiveness of offshore nations will rest on their ability to develop multiple centers of excellence within their borders – centers that satisfy the skill requirements, delivery capabilities, and risk appetite of outsourcing organizations.

Organizations evaluating the Philippines as a sourcing destination now have more than a single city to consider. Metro Manila might be the established hotspot now, but the country is incubating cities like Cebu, Davao, and Clark – cities that have the potential to become mature centers of excellence. Whether their strengths lay in voice-based call centers, F&A business processes, or animation services, these secondary cities have inherent capabilities that will enable them to service offshore outsourcing needs.

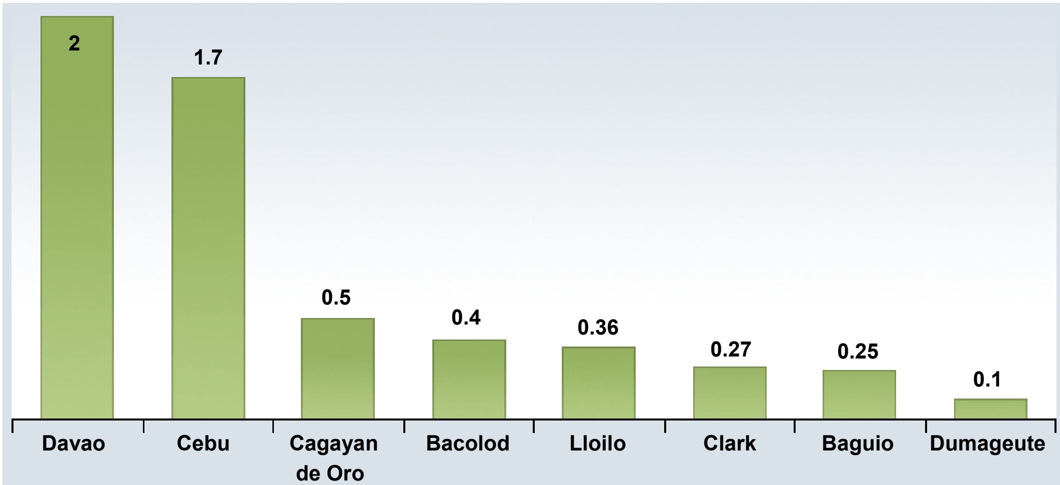
Efforts by the national and local governments to develop city competitiveness are the fuel for the future growth of these Filipino cities. Strategies to enhance firm-level and city-level competitiveness must be adopted. Improving entrepreneurship and management capability by providing assistance to SMEs and triggering reverse brain drain could go far in developing future competitiveness. The local governments also need to create opportunities for firms and cities to access capital by stabilizing macroeconomic conditions and offering subsidies and other financial incentives.

Developing firm-level capabilities also includes promoting the awareness of process needs and creating knowledge partnerships between firms and local educational institutions. Enhancing resource availability and the quality of resources available should include a reformation of the local educational curricula and an increase in industry-institute collaboration.

The development of clusters of cities will be critical in the extension of Filipino competitiveness. The government's roadmap to develop four distinct clusters in the country – a move that should attract significant outsourcing investments – is a step in the right direction.

Appendix 1: Additional Information on Second-Tier Cities

Figure 10: Second-Tier Cities' Population (Millions)



Source: neoIT

Figure 11: Brief Profile of Second-Tier Cities

Clark

Airport : Diosdado Macapagal International
PEZA Zones: Clark Special Economic Zone
ITES companies: America Online, Cybercity Teleservices, Metier and eGlobalVoice
Website: www.clark.com.ph

Bacolod

Airport : Bacalod Domestic Airport
PEZA Zones: NA
ITES companies: No major companies
Website: www.bacolodcity.gov.ph

Dumageute

Airport: Dumageute Domestic Airport
PEZA Zones: NA
ITES companies: Epixstar & SPI
Website: www.dumaguete.gov.ph

Cagayan de Oro

Airport : Cagayan de Oro Airport (Domestic)
PEZA Zones - Pueblo de Oro IT Park
ITES companies: Link2Support
Website: www.cdo.ph , www.cagayandeoro.com.ph

Baguio

Airport : Baguio Domestic Airport
PEZA Zones: Baguio City Economic Zone
ITES companies: ClientLogic
Website: www.baguio.gov.ph

Iloilo

Airport : Iloilo Domestic Airport
PEZA Zones - NA
ITES companies: ePLDT, CallBox & eCommIdeas
Website: www.iloilo.gov.ph

Cebu

Airport: Mactan – Cebu International Airport
PEZA Zones - Arcenas Estate IT Building, Asia Town Info Technology Park, Cebu South Reclamation Project, Innove IT Plaza, JV Square IT Center
ITES companies: R&D (1), Eng. Design (2), Content dev. (1), Animation (1), Data Conversion (2), Call Centers (14)
Website: www.cebucity.gov.ph

Davao

Airport : Davao International Airport
PEZA Zones: First Oriental Business & Industrial Park
ITES companies: G-Com Ltd, Cybercity Tele-services and Sitel
Website: www.davaocity.gov.ph

Source: neoIT

Appendix 2: Role of Government in Developing Competitiveness

Table 2: The Role of Government in Developing Competitiveness

Objective	Action Item	Policies/Mechanisms
Developing firm capabilities	• Upgrading internal capabilities (delivery e.g. software engineering, R&D) through certification, training, development of resources, and organizational development	• Promoting awareness of process needs • Government promotion of awareness of process • Partnerships across different stakeholders (i.e., government, firms, universities)
Management of companies	• Improving entrepreneurship and management in sectors • Linking entrepreneurs with technical people	• Government assistance to SMEs • Trigger reverse brain drain
Enabling financing	• Improving availability of financing for startup and growth of enterprises	• Government and industry efforts to encourage financial sector and cross-sector investments, and joint ventures • Government subsidies and assistance
	• Foreign investments - Improving the environment for foreign investments	• Government action to stabilize the macro-economy, reduce corruption, and provide signaling mechanisms of commitment (e.g. co-investments)
Enabling access to international markets and clients	• Developing contacts with clients • Increasing international visibility of the industry	• Government assistance for attending trade fairs • Visibility through industry associations and overseas Filipinos • Activities of expatriates, foreign partners and investors
Enable domestic company collaboration	• Building of strong complementary firms to give industry a more comprehensive base of competencies	• Government to provide a catalyst • Lead firms' assistance • Local MNCs acting as clients
	• Sharing of information/coordination of efforts across firms	• Formation of a more powerful industry association to coordinate responses and share information
	• Cross-sector spillovers (economic benefits, knowledge etc.)	• Strengthening of other related sector • Formation of partnerships and collaborations between the ITES and other sectors
Enhance availability and quality of resources	• Improvement of human capital through educational sector curricula and other reforms to increase relevance to industry	• Government focus on education • Industry partnerships with education sector • Linkages with foreign universities

* This table is not intended to be all-encompassing.
Source: Adapted from "The Philippines' IT-Enabled Services Industry" by Ted Tschang.

Appendix 3: Notes on the Offshore City Competitiveness Index

To assign each of the eight cities (not including Metro Manila) an attractiveness factor, we first assigned a sub-factor score on a scale of 1 to 5 (low to high). We then created a score for each of the four factors by summing the sub-factor ratings. Then summing the four weighted factors for each city, we generated the final competitiveness rating, which we then normalized assuming a highest possible score of 100. We used both qualitative and quantitative data based on our deep knowledge and experience to assign sub-factor and factor ratings.

People

- Weight: 25%
- Relevant sub-factors: The size of labor pool, Labor quality, Quality of the education system; the Number of existing tertiary schools; and English language proficiency (based on recently concluded English proficiency test conducted by John Clements Consultant Inc.).

Infrastructure

- Weight: 25%
- Relevant sub-factors: Power; telecommunications (availability of a digital network connection); physical roads; and airports.

Financial

- Weight: 30%
- Relevant sub-factors: The cost of living; the availability and cost of real estate; and a rating based on the Philippine City Competitiveness Report conducted by the Asian Institute of Management Policy Center.

Catalyst

- Weight: 20%
- Relevant sub-factors: Government support and initiatives; the presence of similar companies; social and political stability; climate (weather); and key developments catering to the ICT industry.

This perspective is an independent analysis of neoIT and has not been in any way influenced, commissioned or sponsored by any business, government or other institutions.

More information about the offshore outsourcing industry can be found within neoIT's research center at www.neoOffshore.com. For more details about neoIT's offshore advisory and management services, please contact:

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