



Talent Transformation: The IT-BPM Way

- Founded in 2004
- Non-profit, non-stock
- Enabling organization for the IT-BPM Industry Associations (IAs) and Global In-House Center (GICs)
- Serves as the one-stop information and advocacy gateway for the industry

- Assists investors in setting up operations easily and quickly
- Conducts business research for the industry
- Serves as the gateway for knowledge sharing and networking among members
- Enables PPP for talent development programs

Vision:

To make the Philippines the destination of choice
for the global business process management

Mission:

Promote the competitive advantages and the growth potential of the Philippines in existing and new areas of business process management and support the industry in areas such as offshore marketing, education and training, security and privacy, legislation and public policy, among others.



CCMP

SERVING THE WORLD







THE LAST OF US

NAUGHTY DOG

IBPAP[®]
IT & Business Process Association
PHILIPPINES

G D P GAME DEVELOPERS
ASSOCIATION OF
THE PHILIPPINES





industry OVERVIEW

number
1 **voice**
Outsourcing Destination

by the numbers

ranked 2nd
**Global Outsourcing
Destination**

by the numbers

impact
917K jobs
2013 employment*
largest private
sector job creator

by the numbers

US\$
16.1 billion
2013 IT/BPM Revenue

by the numbers

One Million

by 2014 year end

growth
1.3 million
direct employment
by 2016

by the numbers

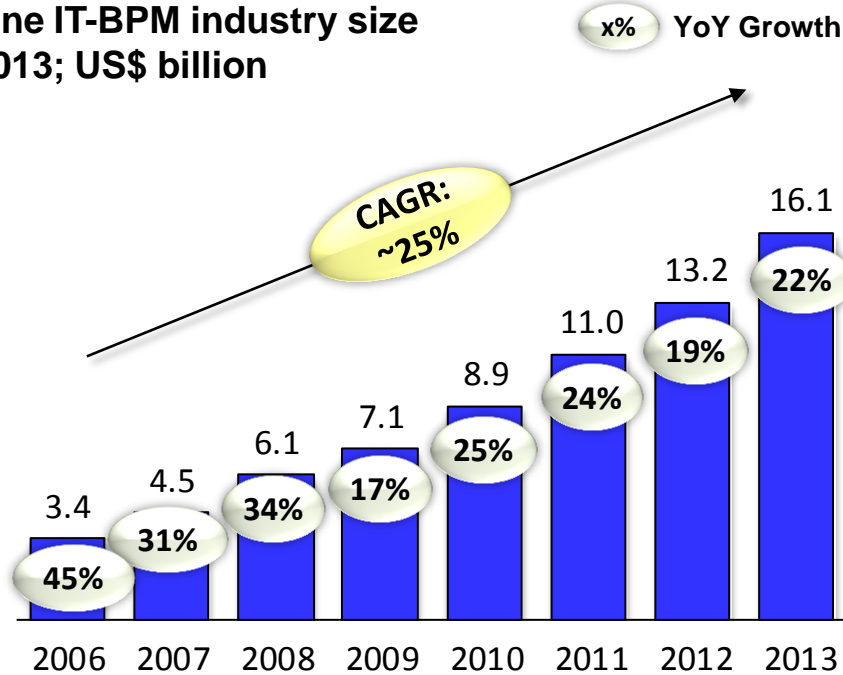
US\$
25 billion
2016 IT/BPM Revenue

by the numbers

Philippine IT-BPM INDUSTRY

Philippines 2013 Performance

Philippine IT-BPM industry size 2006–2013; US\$ billion



# FTEs (~'000)	2006	2007	2008	2009	2010	2011	2012	2013
	236	298	371	424	527	640	777	917

Global share ¹	2006	2007	2008	2009	2010	2011	2012	2013
	5%	6%	6%	7%	8%	9.5%	10.4%	11%

	FTEs	Revenue (US\$M)	Rev % inc. fr '12
Voice BPO	586,000	10,000	15%
Non-voice BPO/KPO	169,818	2,915	18%
ITO	71,196	1,767	52%
Health Info Mgt & Care	65,895	988	114%
Engineering Services	11,920	216	5%
Animation	9,200	132	0%
Game Development	3,500	50	0%
TOTAL FTEs	917,529	16,067	19%

¹Philippines IT-BPM market as percentage of global offshore services market, in revenue terms

Sources: BPAP, ACPI, CCAP, GDAP, HIMOAP, PSIA

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The Philippine Talent Pool

Number of college degree graduates	2013 Projection	2016 Projection
Medical and natural sciences, allied fields	158,159	183,459
Business, accounting, and related fields	119,526	129,168
Social and behavioral sciences, education	67,474	65,558
Engineering and architecture	57,799	63,191
IT-related and mathematics	57,921	65,420
Fine arts, masscom, humanities	13,549	14,673
TOTAL Tertiary level	533,273	584,474

- ◆ 500,000+ college graduates per year
- ◆ 3,000+ CPAs
- ◆ English proficiency & other languages
- ◆ Affinity with Western culture
- ◆ Customer service orientation
- ◆ Highly trainable
- ◆ Cost effective
- ◆ High level of commitment and loyalty

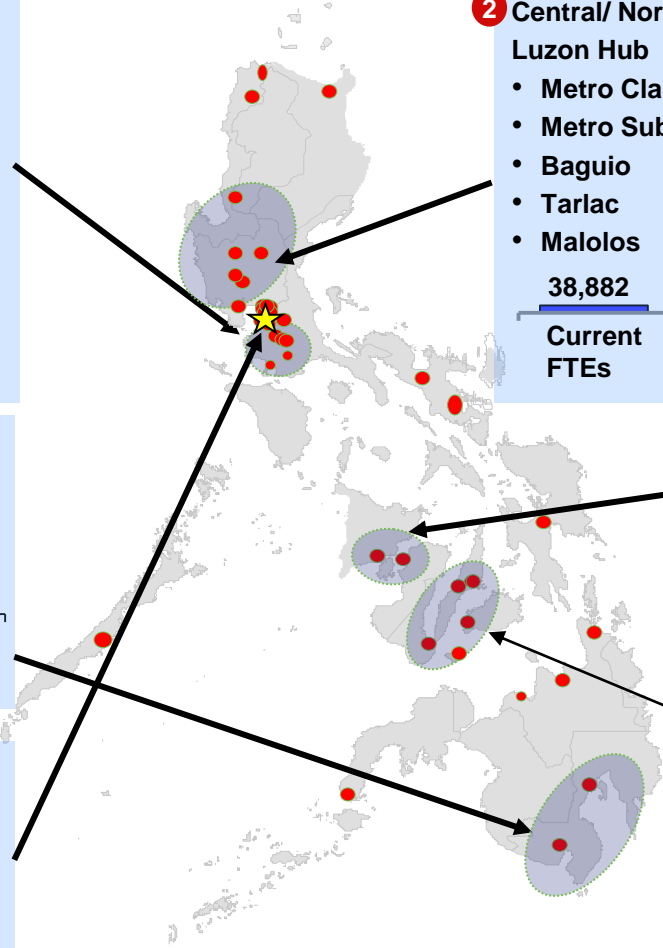
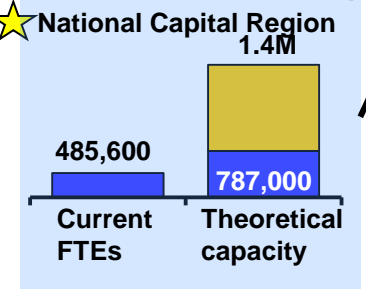
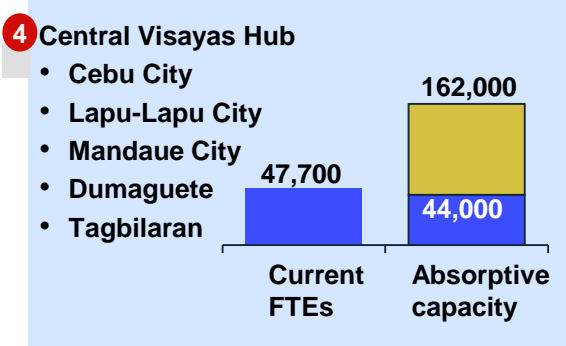
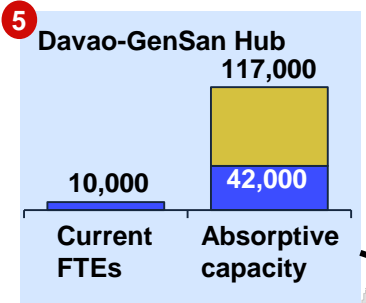
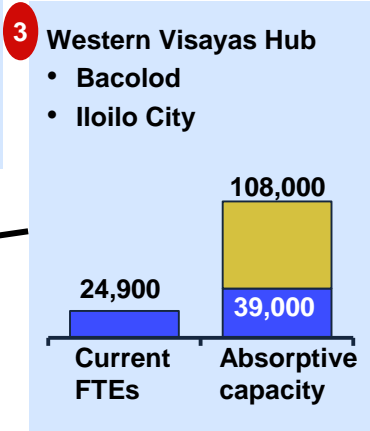
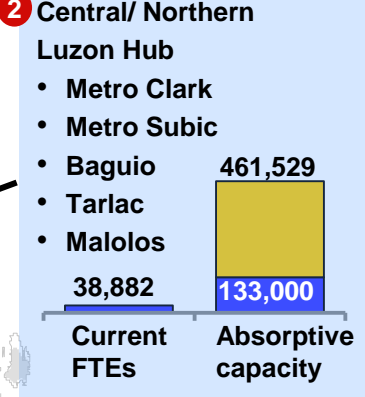
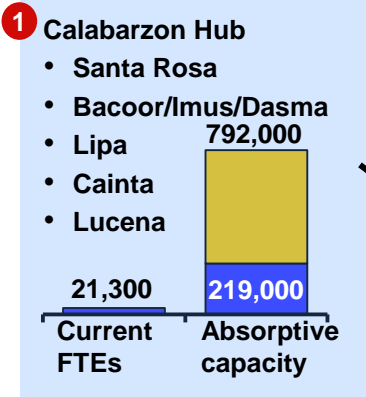
	Pop	Labor force	Unemp rate	Literacy
World	7,111M	3,302M	6.0%	83.7%
India	1,221M	487M	8.5%	61.0%
China	1,350M	799M	6.5%	92.2%
Brazil	201M	106M	5.5%	88.6%
Philippines	105M	41M	7.0%	92.6%

Source: CHED 2012; CIA World Factbook 2012-2013; NSO 2013; indexmundi.com

Growth of IT-BPO industry means economic growth of the entire Philippines

75% of IT-BPO jobs are in NCR, with only 25% of PH graduates; IT-BPO is biggest private-sector job creator and employer in many tier 2–3 cities

★ NCR
 ■ Absorptive capacity at current yield rates
 ■ Additional capacity at targeted yield rates



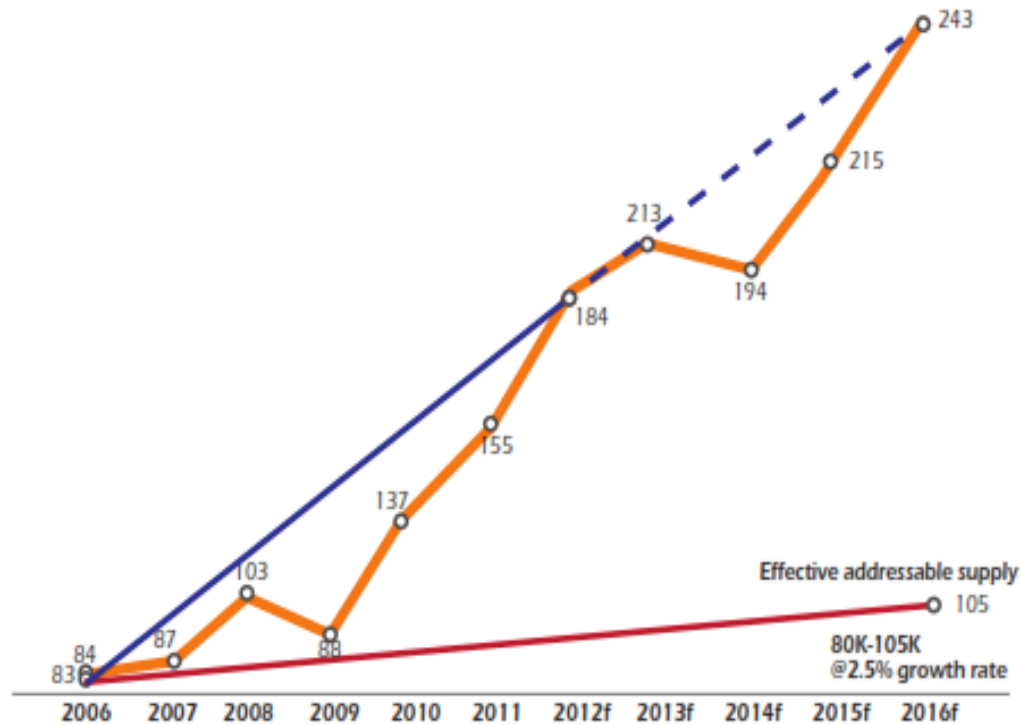
industry challenges

Roadmap 2016 Talent Gap

Graph 14. Demand and supply projections of entry-level industry talent in the Philippines, 2006–2016

- Total talent demand (Accelerated Case)
- Effective addressable talent supply (as is)
- Actual and projected supply with industry and government talent programs

IT-BPM thousand full-time employees



f: forecast

Source: IBPAP and Everest Group analysis (2012)

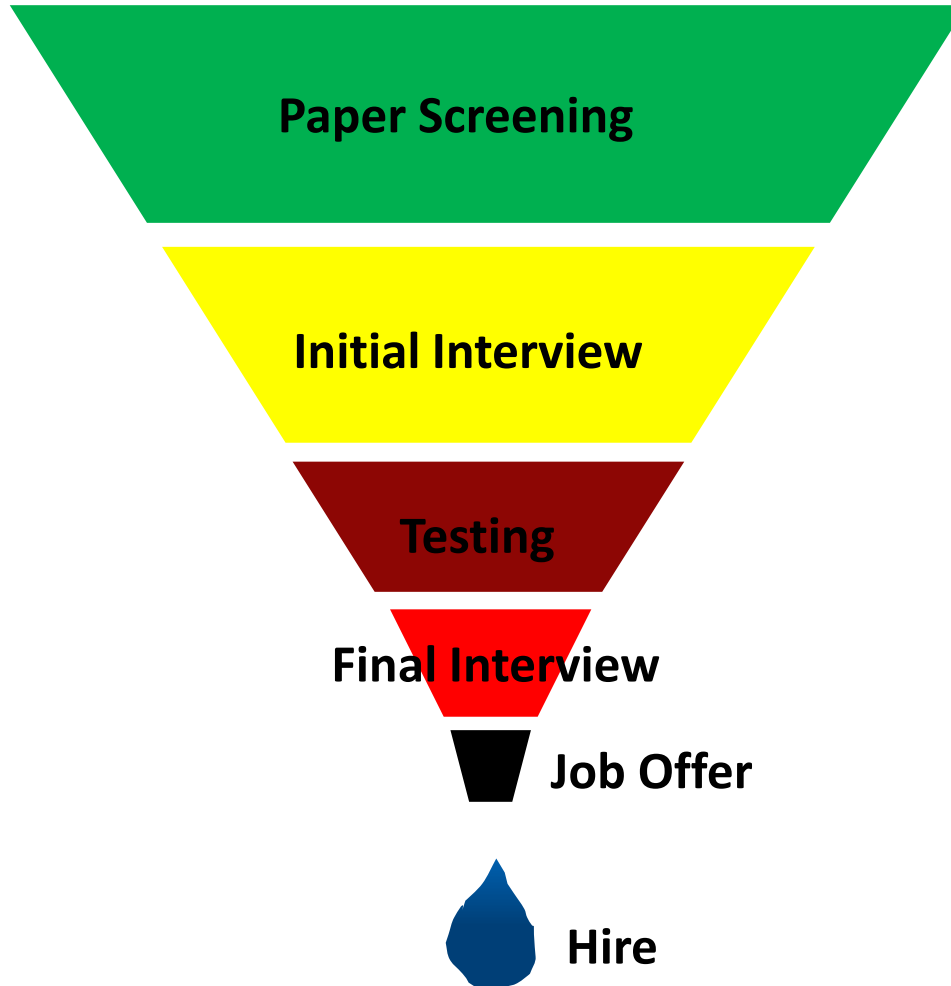
Applicants responding to
Advertisement online

School/campus fairs

Applicants responding to
Advertisement in
newspapers

Walk-in applicants

Job fairs



100 Applicants



7-10 Hires*

**raise the
standards**

industry
talent development
initiatives

Talent Development Programs



Global Competitiveness Assessment Tool (GCAT)



An industry developed test to assess competencies in basic skills for employment in the IT-BPO and GIC and other service industries

Key Programs to Raise Standards

Service Management Specialization Track (in Undergraduate Education)



A 21-unit minor course or specialization track taken by business and IT majors in college intending to go into IT-BPO and GIC or other service industries.

Global Competitiveness Assessment Tool (GCAT)



What is GCAT?

- **Industry-initiated assessment program**
- **Proactively generates industry-ready talents for the Philippine IT-BPM industry**
- **Standardizes the competency assessment system for applicants in the IT-BPM sector**

Competencies Assessed by GCAT

Basic Skills

- **Learning Ability (Verbal and Numerical)**
- **English Proficiency**
- **Perceptual Speed and Accuracy**
- **Computer Literacy**

Behavioral

- **Service Orientation**

GCAT

Industry and Academe Results

Approximately 2,500 employees from about 25 IT-BPM Companies assessed from 2010-2011

Close to 20,000 graduating students from about 90 schools and universities nationwide assessed from 2010-2013*

* Additional 12,000 students assessed in AY 2013-2014 not included in this survey

Participating Companies

BPAP

- Accenture (CCAP)
- Access Worldwide (CCAP)
- ANZ
- Aegis PeopleSupport (Baguio) (CCAP)
- Baker & McKenzie Global Services
- Chartis
- Hinduja (CCAP)
- HSBC
- Infinit-O
- Ingram Micro
- Integra
- Intelenet
- NYK TDG
- Open Access Marketing
- Pettigrew
- Sitel (CCAP)
- Stream (CCAP)
- Sutherland (Camsur) (CCAP)
- Teleperformance (CCAP)
- WNS (CCAP)

Participating Companies

CCAP

- Pacific Hub
- Visaya KPO
- Concentrix

PSIA

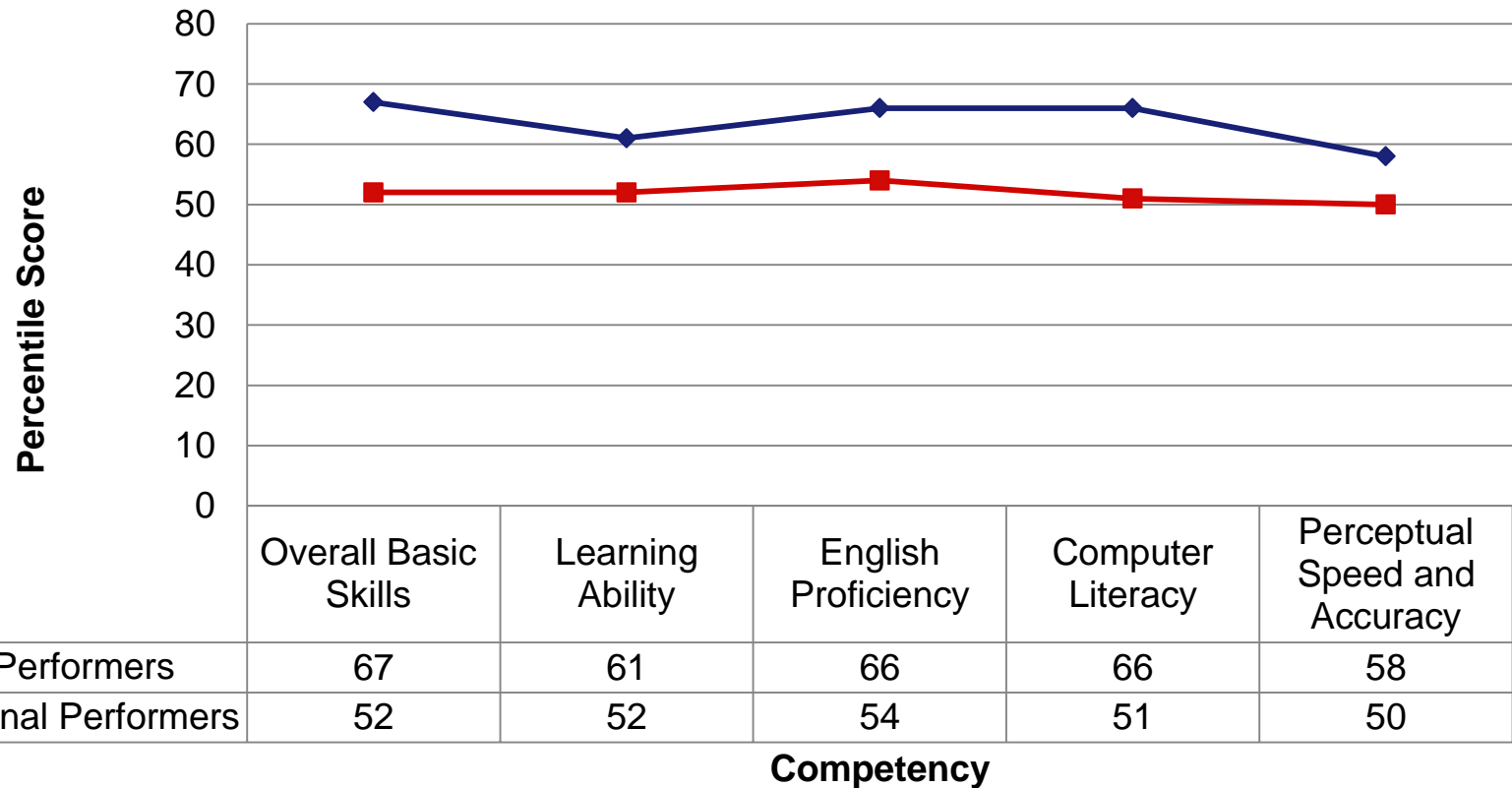
- Pointwest Technologies
- Headstrong
- HP
- RCG IT

HIMOAP

- Total Transcription Solutions Inc.
- mX Secure
- SPi Global
- Ziplt Solutions

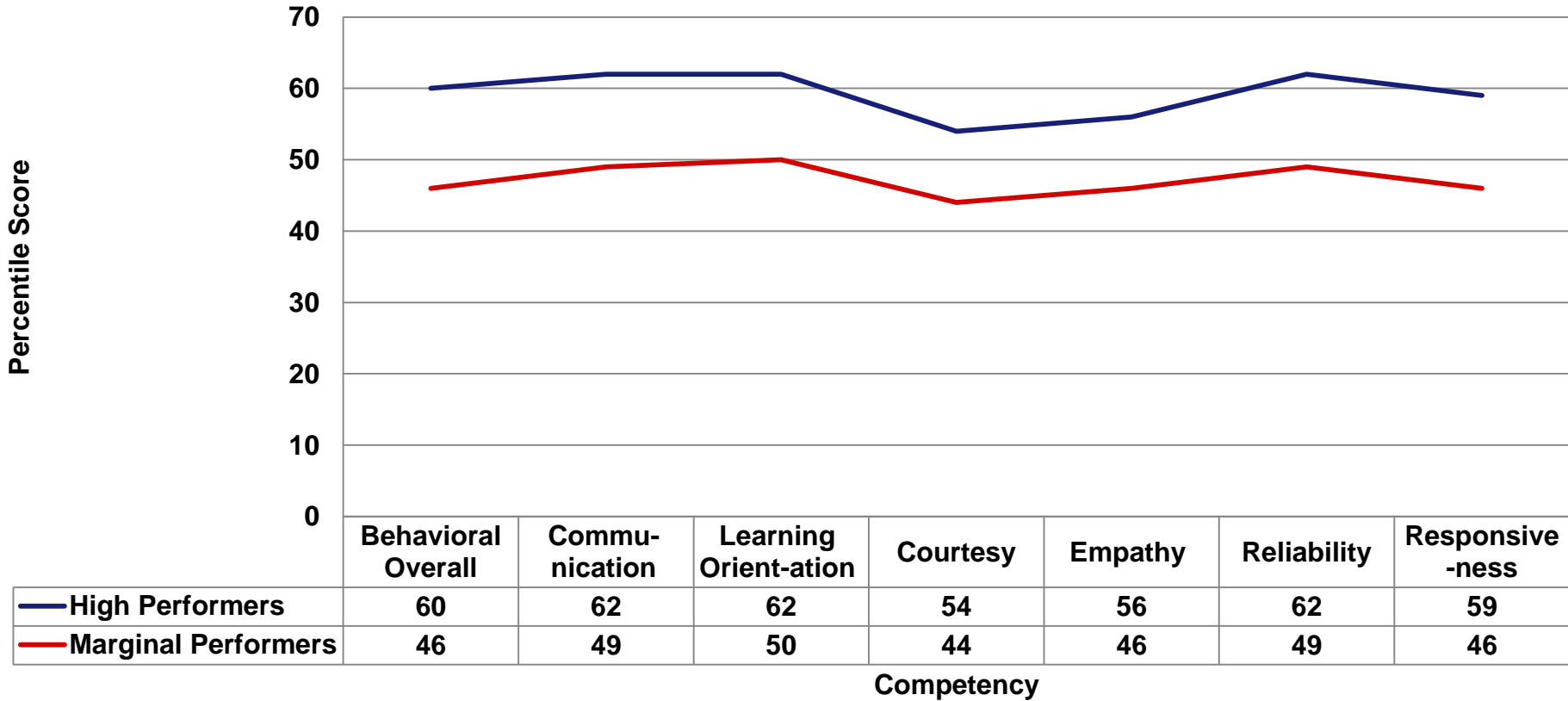
No. of employees assessed –
2,500

Industry Results: Scores between Percentile Scores of High and Marginal Performers



◆ High Performers ■ Marginal Performers

Industry Results: Scores between Percentile Scores of High and Marginal Performers



Colleges and Universities Participated (NCR)

- Centro Escolar University – Makati
- Centro Escolar University – Manila
- De La Salle – College of St. Benilde
- Emilio Aguinaldo College – Manila
- FEU Diliman
- FEU Morayta
- Jose Rizal University
- Lyceum Manila
- St. Paul University
- Mapua Intramuros
- Mapua Makati
- National Teachers' College
- STI (Caloocan, Fairview, Pasay,)
- University of Makati
- University of Sto. Tomas
- Miriam College
- St. Scholastica's College
- Our Lady of Fatima Univ.

Colleges and Universities Participated (Luzon)

BAGUIO

- AMA
- Saint Louis University
- University of Cordilleras
- STI – Baguio

BULACAN

- Centro Escolar University – Malolos
- STI (Balagtas, Baliuag)

PAMPANGA

- Angeles University Foundation
- Holy Angel University
- University of the Assumption

LAGUNA/CAVITE/ BATANGAS

- De La Salle University – Dasmaringas
- Emilio Aguinaldo College – Cavite
- Lyceum Laguna
- St. Michael’s College of Laguna
- STI (Calamba, San Pablo, Tagaytay)

Colleges and Universities Participated (Luzon)

NUEVA ECIJA

Wesleyan University
Araullo Phinma University
CIC
CRT
NEUST
Central Luzon State University

METRO CLARK

Mabalacat College
St. Nicolas College
Clark International College

ALBAY

AMA Legazpi Campus
Bicol University
Divine Word of Legazpi
Polytechnic University of Tabaco,
Albay
STI Legazpi
Southern Luzon Technologica
College

BATANGAS

FAITH

CAMARINES NORTE

Our Lady of Lourdes, Daet

Colleges and Universities Participated (Visayas)

- Cebu Doctors' University
- STI – Mandaue
- ABE
- Bacolod City College
- Bago City College
- Binalbagan Catholic College
- Carlos Hilado Memorial College
- Colegio de San Agustin
- Colegio de Sta. Rita
- La Consolacion College
- STI
- University of St. La Salle
- Visayan Maritime Academy Global One
- Western Visayas Institute of Technicians
- West Negros University

Colleges and Universities Participated (Mindanao)

Zamboanga City

AMA Computer College
Ateneo de Zamboanga
Pilar College
Southern City Colleges
Universal College of Southeast Asia
Pacific
University of Zamboanga
Western Mindanao State University
Zamboanga City State Polytechnic
College

Cagayan de Oro:

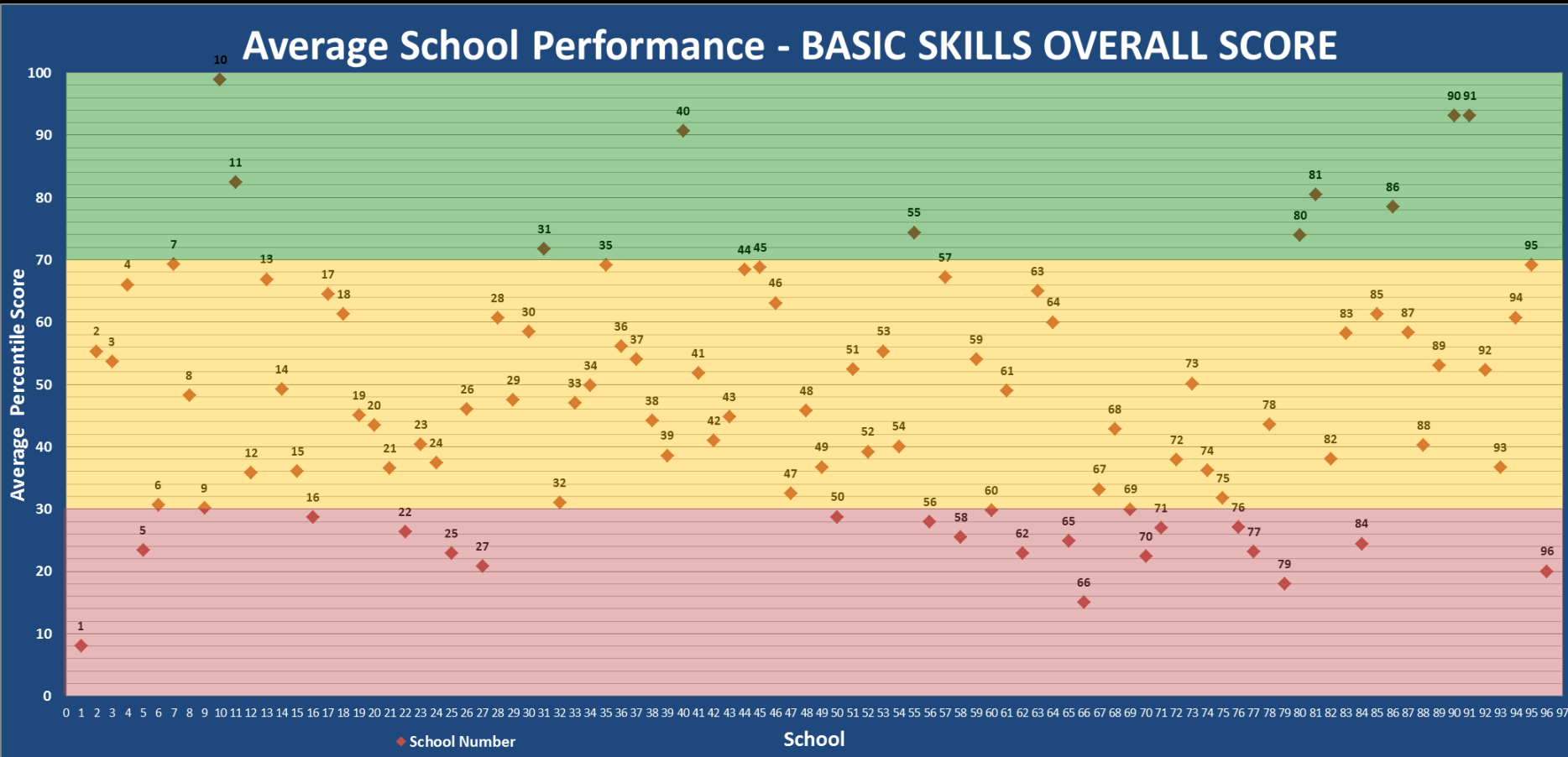
Ateneo – CDO

Davao:

Davao Vision Colleges
Holy Cross of Davao
Brokenshire College
Reliance Transcriptions, Inc.
MTC Academy

Average Scores – Basic Skills Overall Score

Average Scores Per School for Basic Skill Overall Score



low performers
(0-30th Percentile)

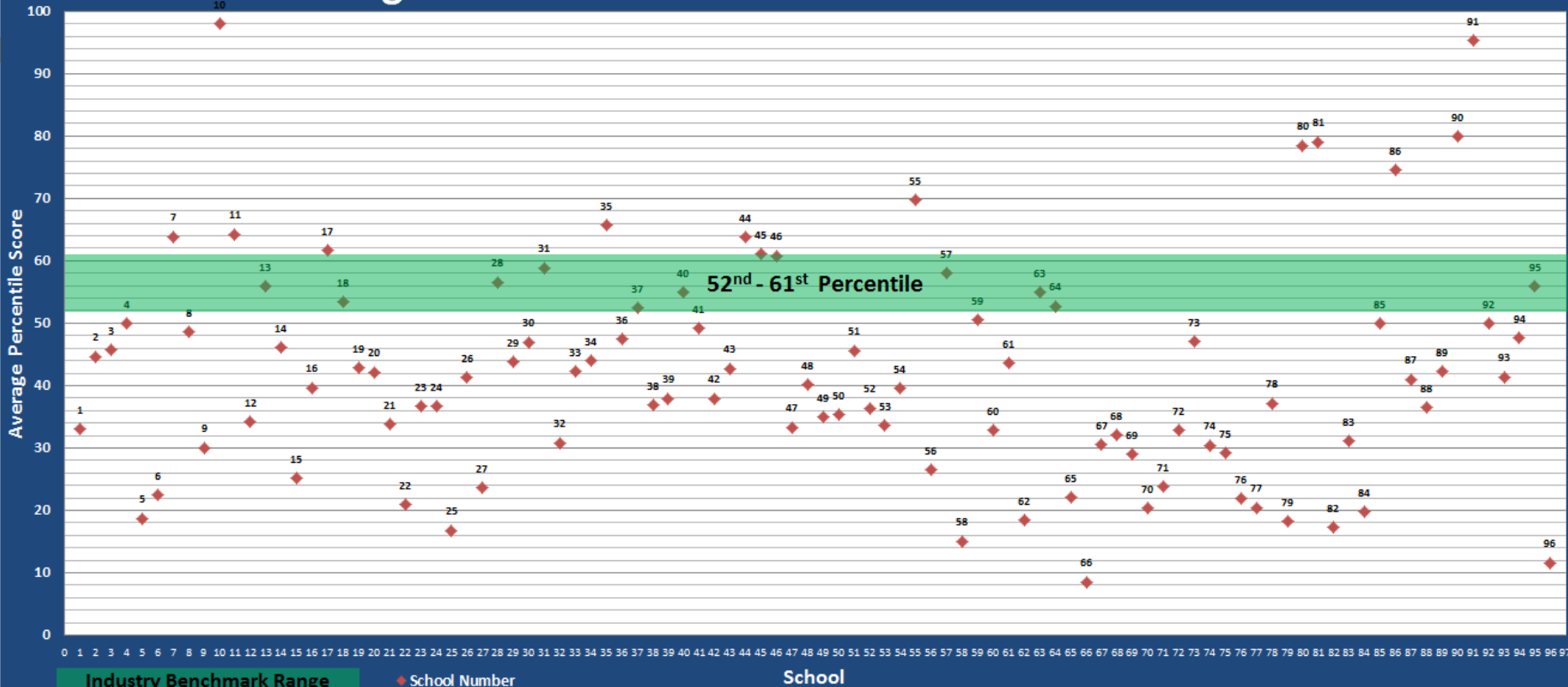
average performers
(31st-70th Percentile)

high performers
(71st-100th Percentile)

Average Scores – Total Cognitive Ability

Average Scores Per School for Cognitive Ability Vis-a-Vis Industry Score

Average School Performance - TOTAL COGNITIVE ABILITY

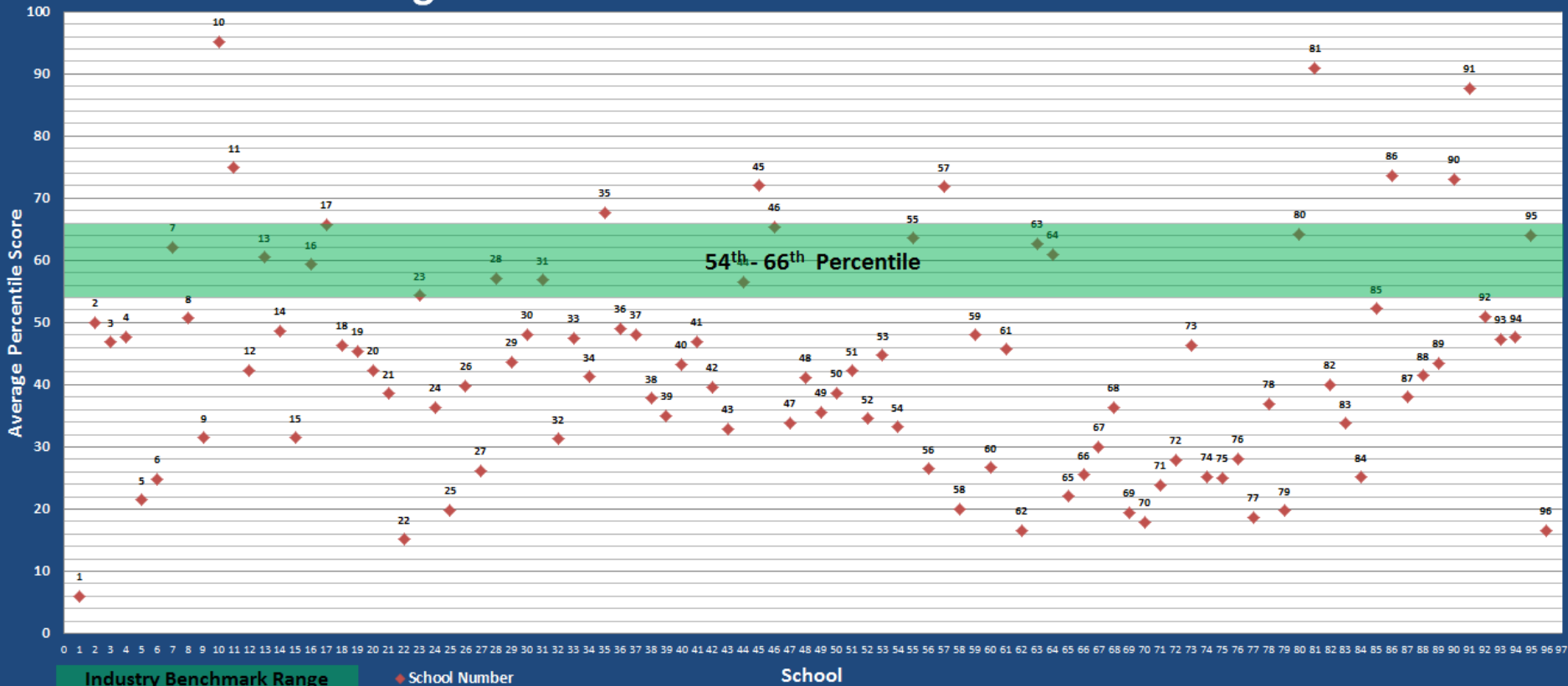


Industry Range

Average Scores – English Proficiency

Average Scores Per School for English Proficiency Vis-a-Vis Industry Scores

Average School Performance - ENGLISH PROFICIENCY

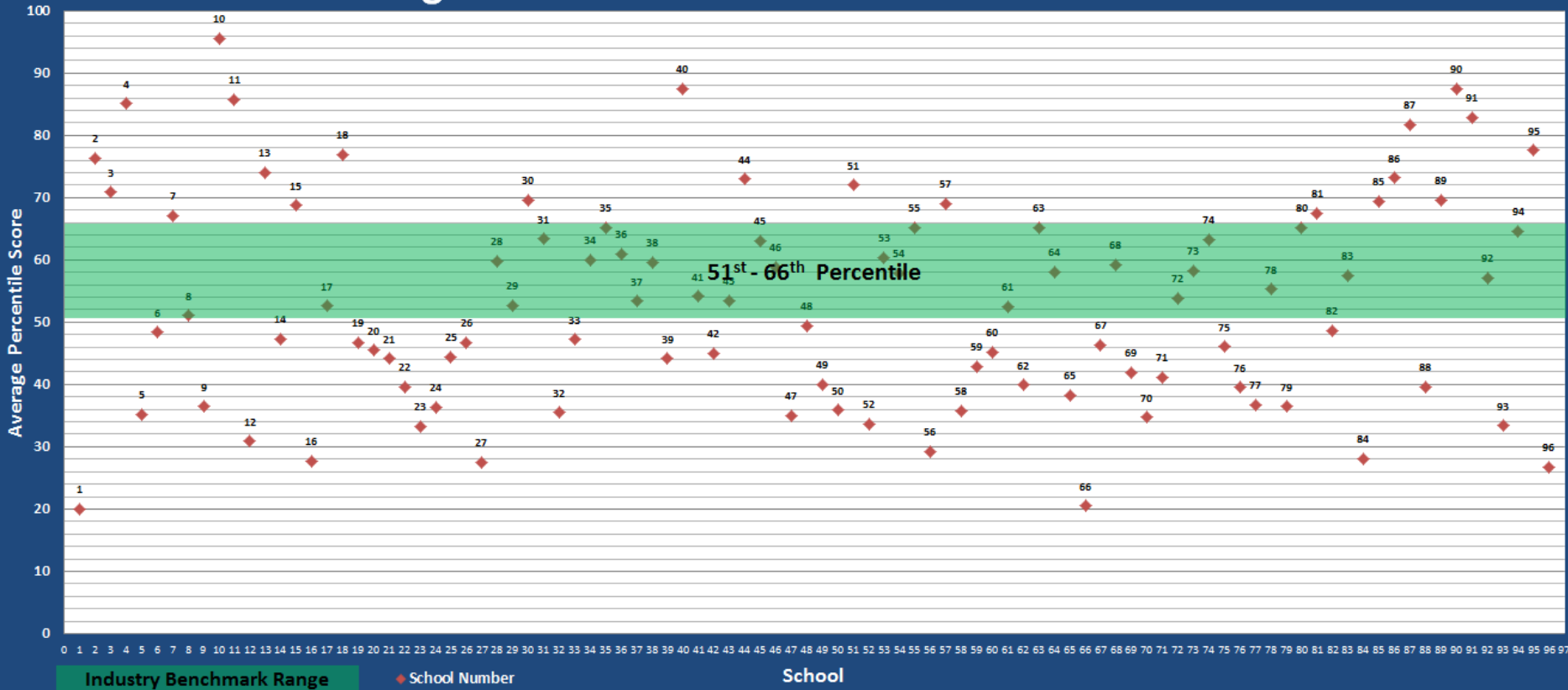


Industry Range

Average Scores – Computer Literacy

Average Scores Per School for Computer Literacy Vis-a-Vis Industry Scores

Average School Performance - COMPUTER LITERACY

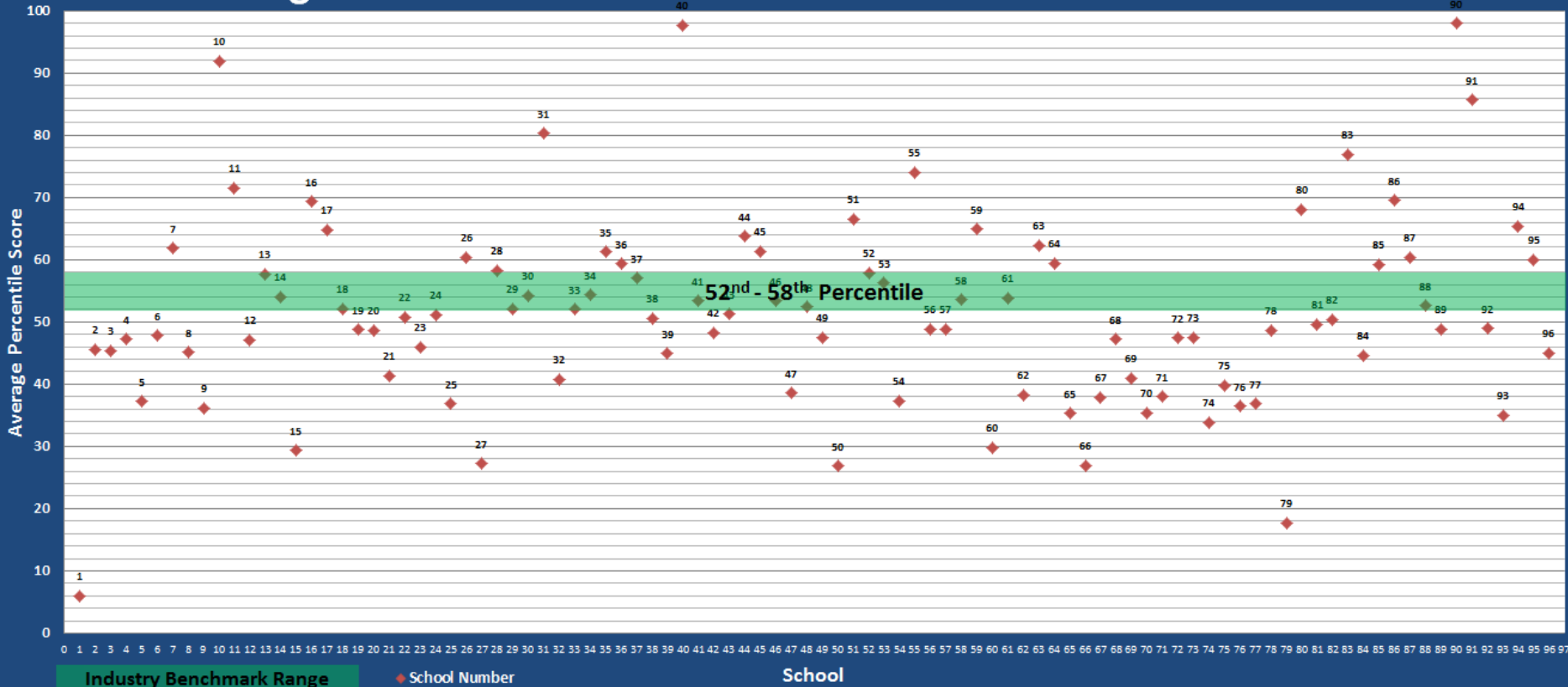


Industry Range

Average Scores – Perceptual Speed and Accuracy

Average Scores Per School for Perceptual Speed and Accuracy Vis-a-Vis Industry Scores

Average School Performance - PERCEPTUAL SPEED AND ACCURACY

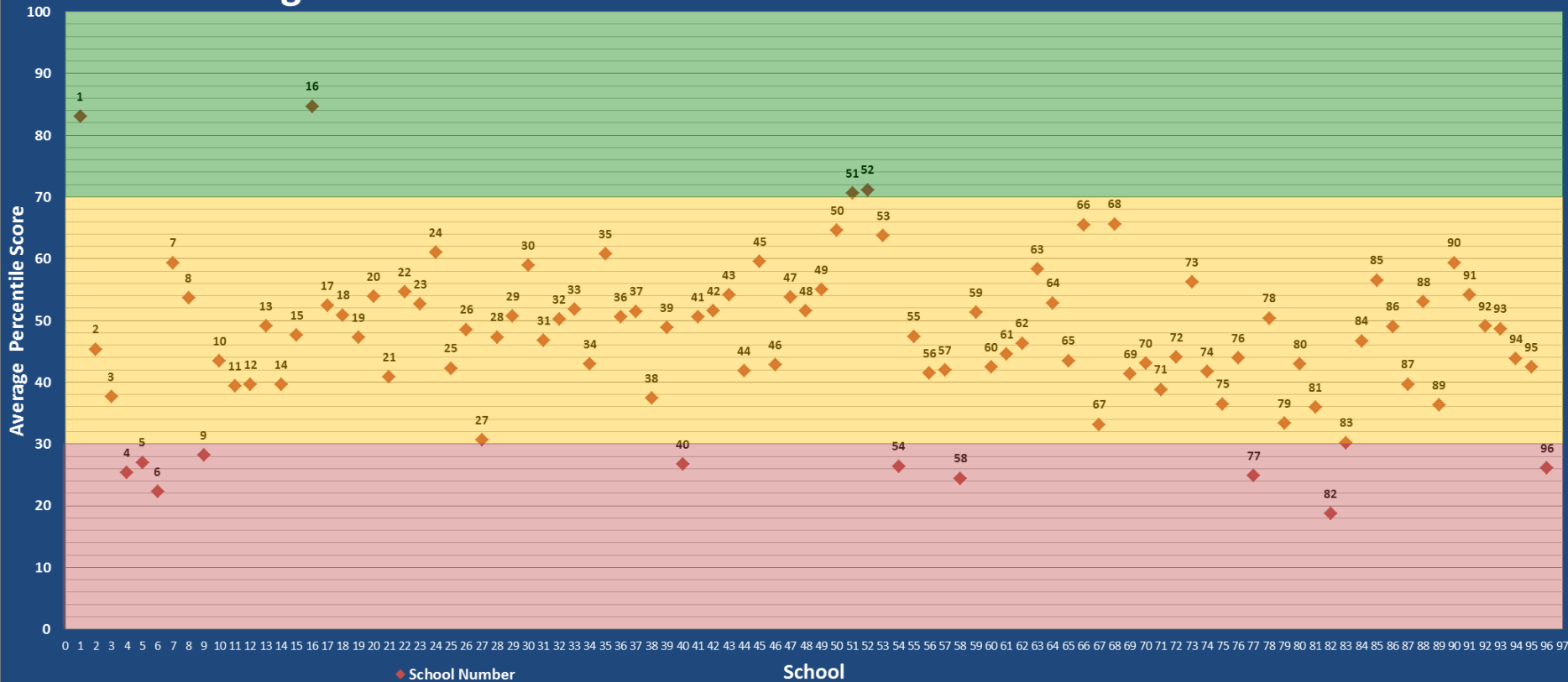


Industry Range

Average Scores – Behavioral Skills Overall Score

Average Scores Per School for Service Orientation Overall Score

Average School Performance - BEHAVIORAL SKILLS OVERALL SCORE



low performers
(0-30th Percentile)

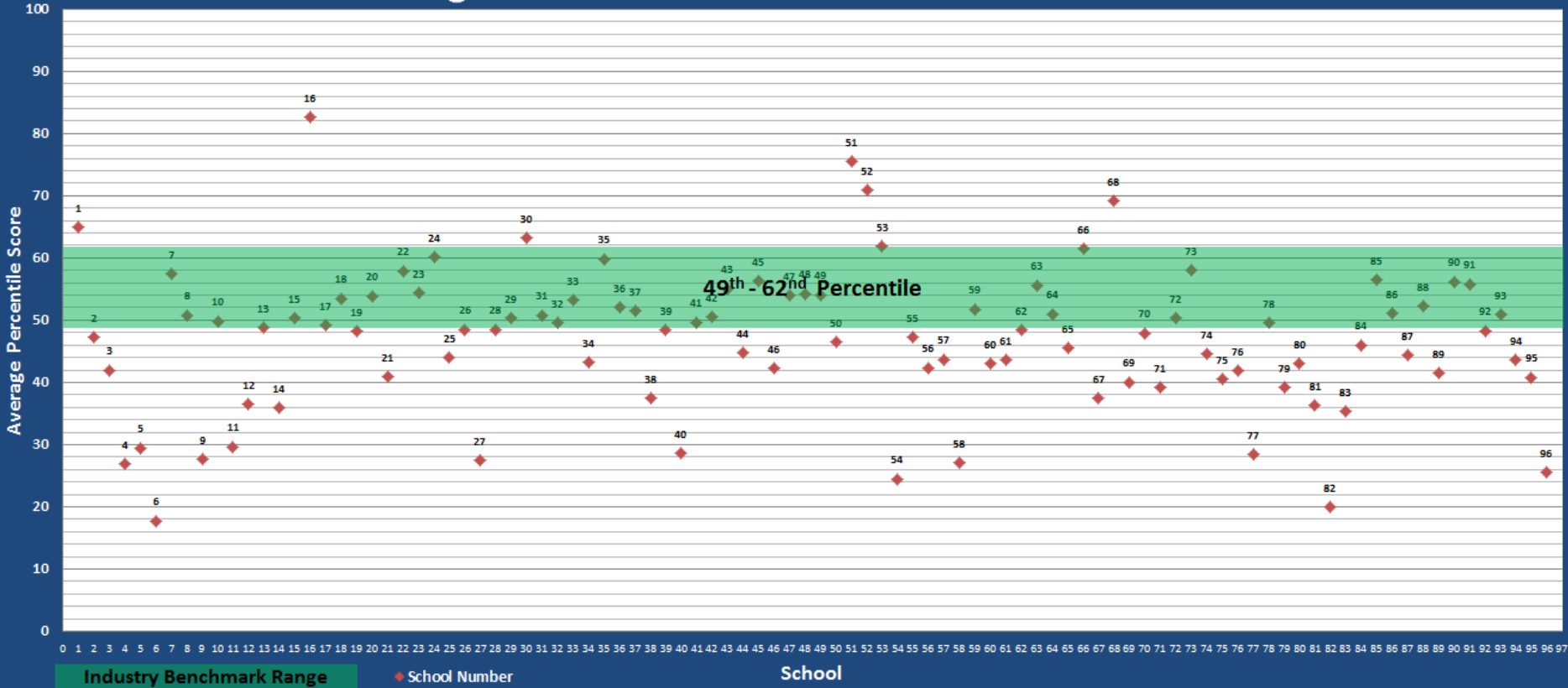
average performers
(31st-70th Percentile)

high performers
(71st-100th Percentile)

Average Scores – Communication*

Average Scores Per School for Communication Vis-a-Vis Industry Scores

Average School Performance - COMMUNICATION



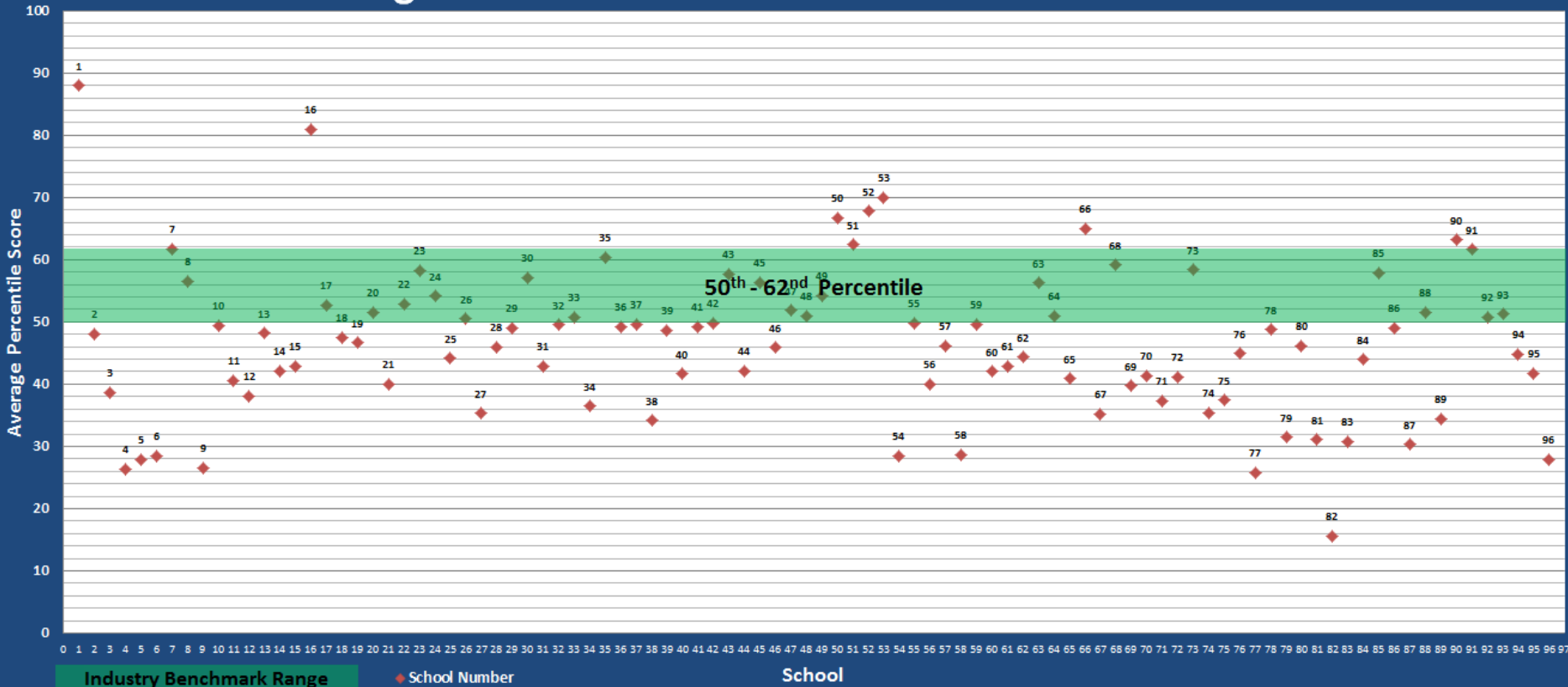
Industry Range

* Communication: providing service and keeping customers informed in language they can understand and relate to.

Average Scores – Learning Orientation*

Average Scores Per School for Learning Orientation Vis-a-Vis Industry Scores

Average School Performance - LEARNING ORIENTATION



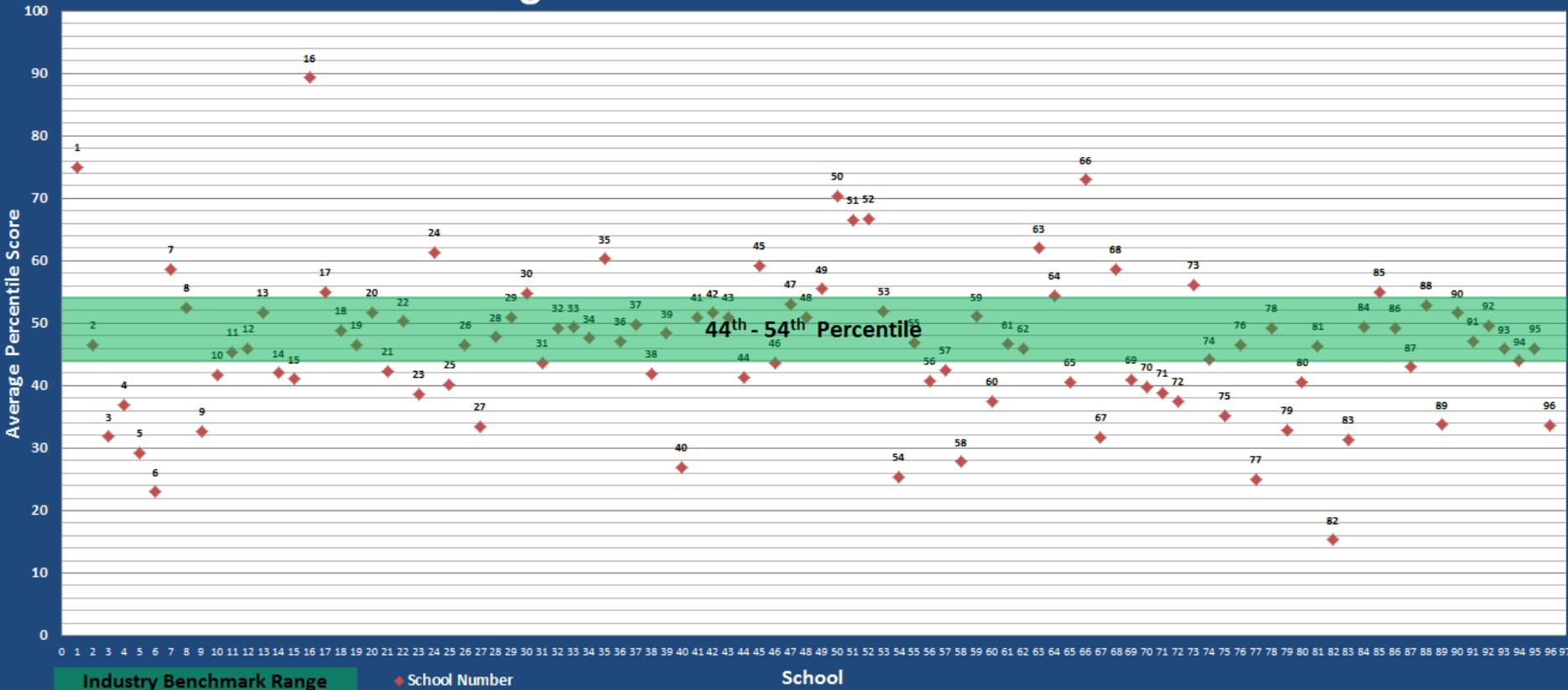
Industry Range

* Learning orientation: willingness to learn product or service information

Average Scores – Courtesy*

Average Scores Per School for Courtesy Vis-a-Vis Industry Scores

Average School Performance - COURTESY



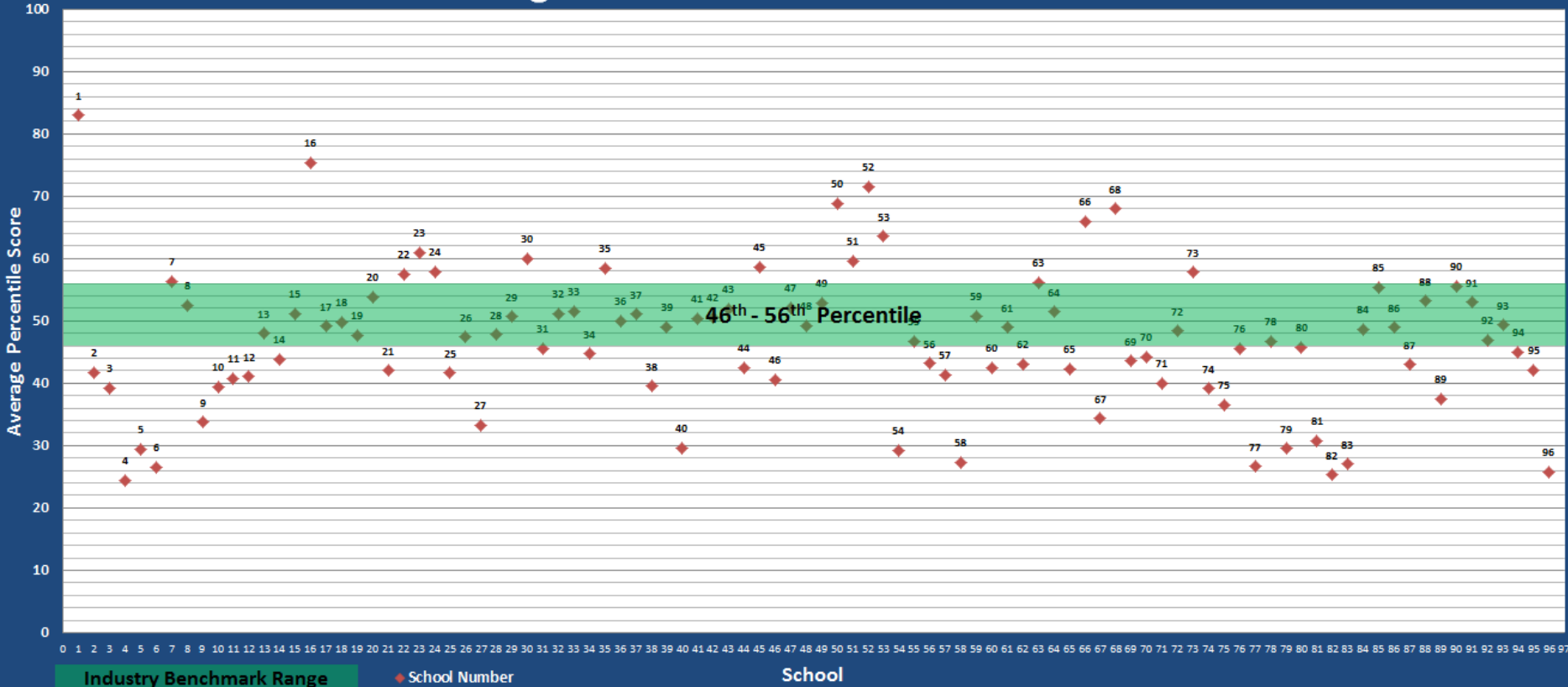
Industry Range

* Courtesy: politeness, respect, consideration, access, and friendliness of personnel

Average Scores – Empathy*

Average Scores Per School for Empathy Vis-a-Vis Industry Scores

Average School Performance - EMPATHY



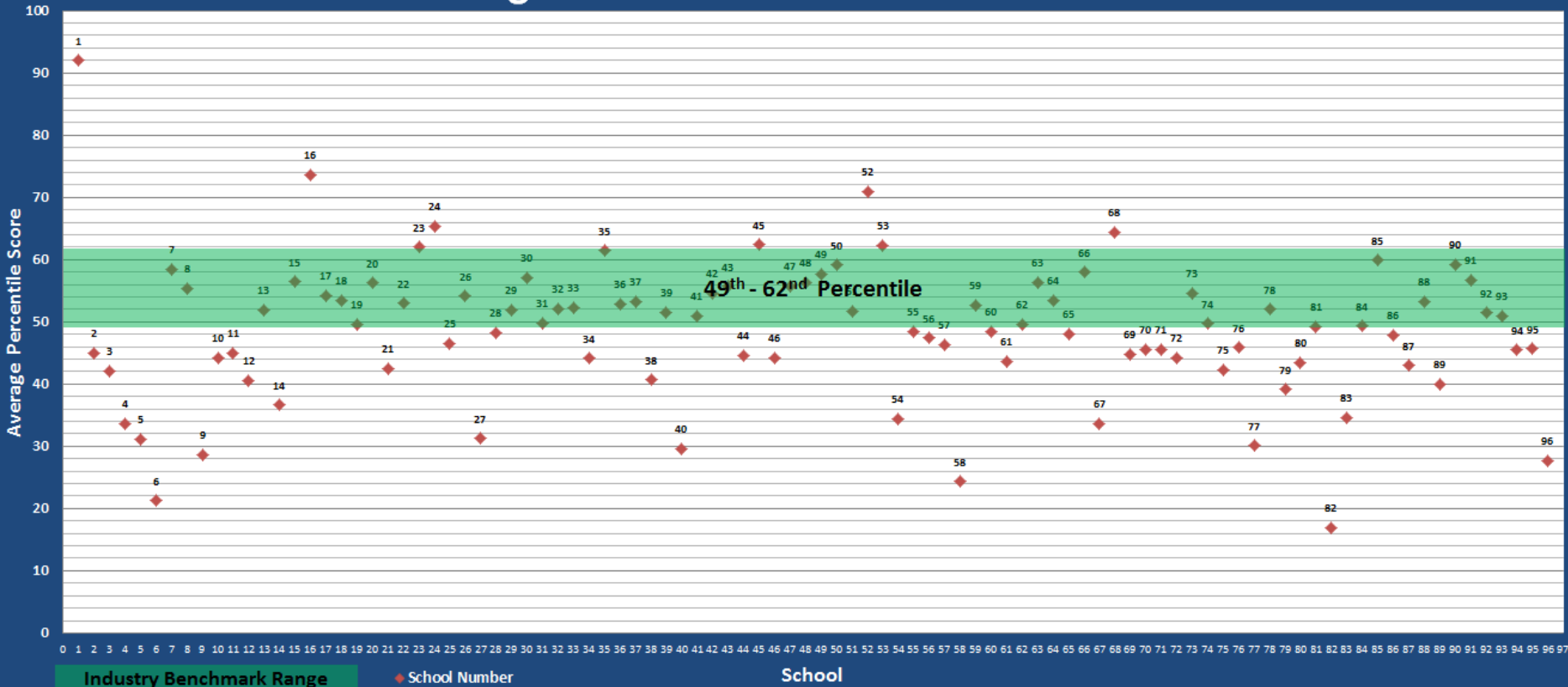
Industry Range

* Empathy: Knowing the customer and making the effort to understand the customers' needs

Average Scores – Reliability*

Average Scores Per School for Reliability Vis-a-Vis Industry Scores

Average School Performance - RELIABILITY



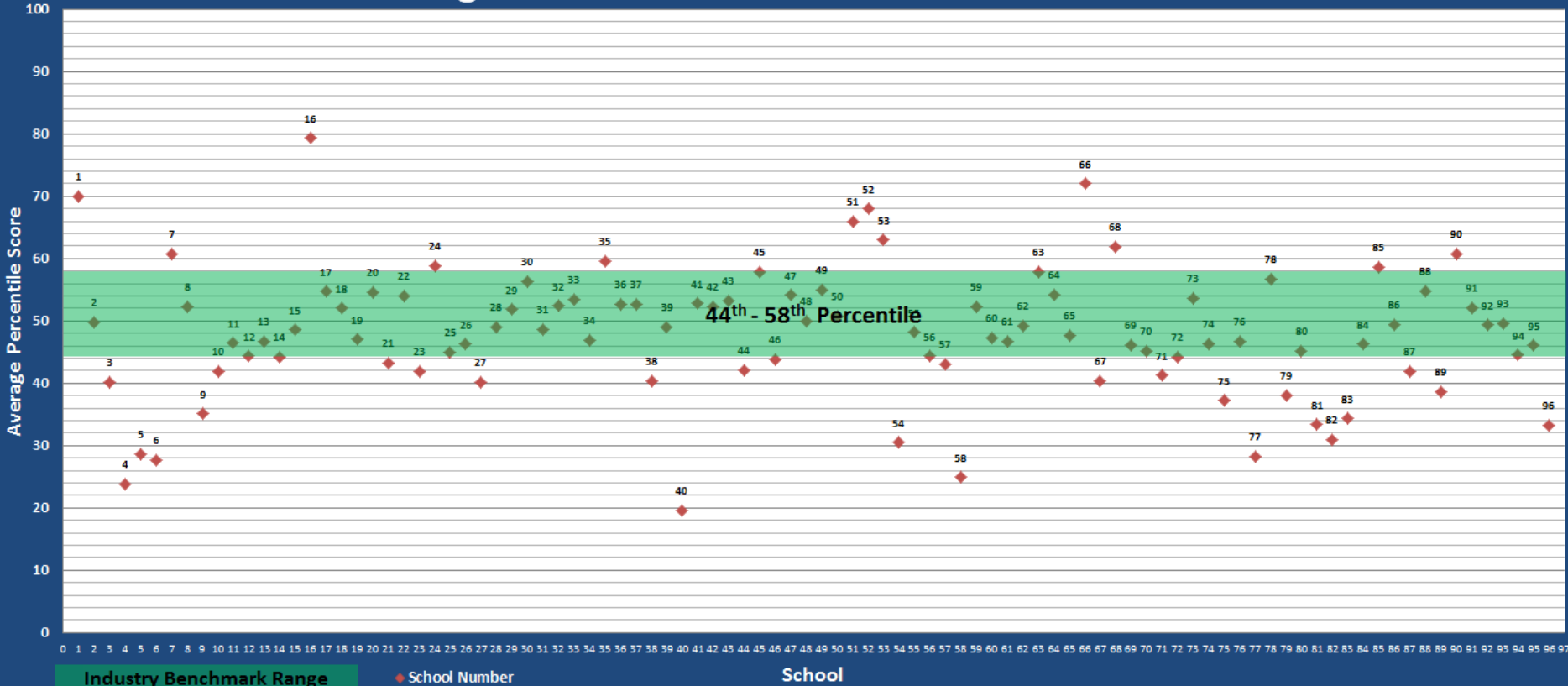
Industry Range

* Reliability: consistency of performance and dependability

Average Scores – Responsiveness*

Average Scores Per School for Responsiveness Vis-a-Vis Industry Scores

Average School Performance - RESPONSIVENESS



Industry Range

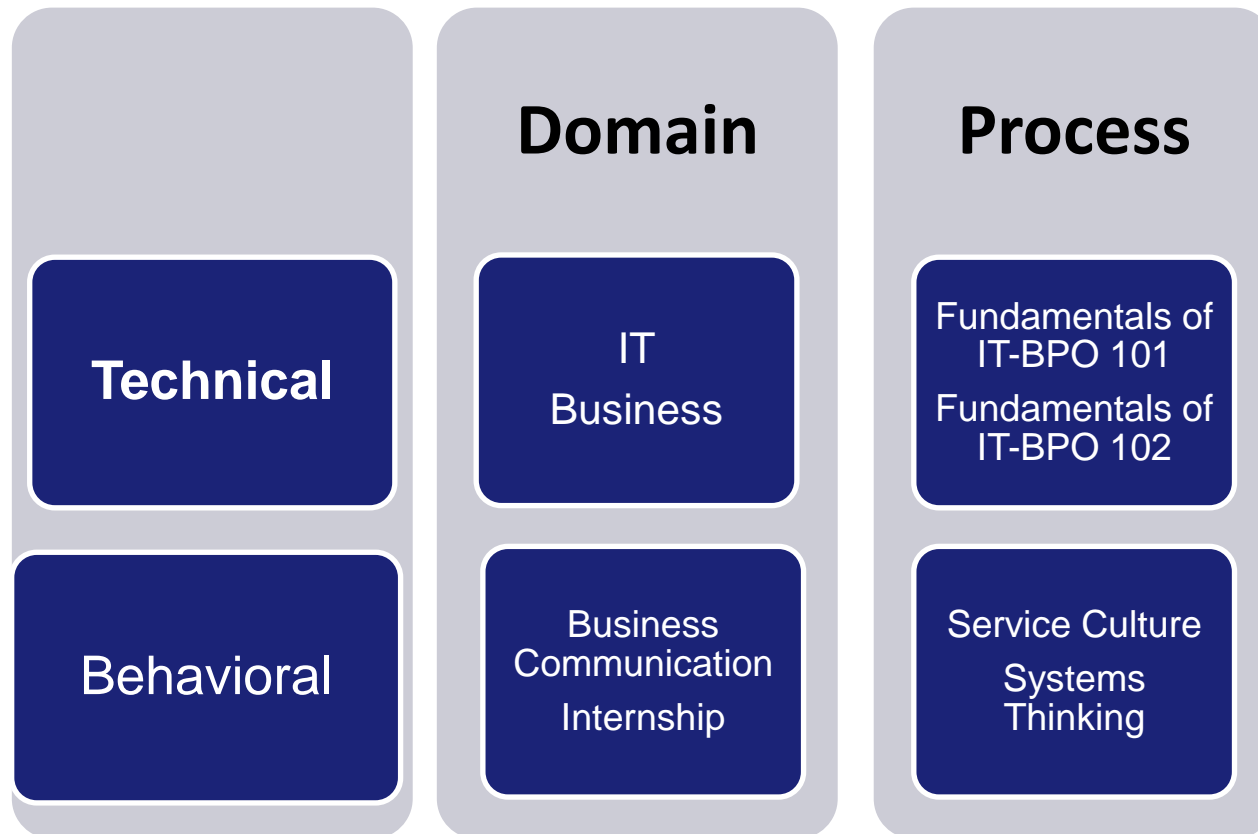
* Responsiveness: willingness and readiness to provide service

Service Management Specialization Track (in Undergraduate Education)



**Approved by the Commission on Higher Education
(CHED) under CMO Nos. 6 and 34 series of 2012**

How does Service Management address the competencies identified in GCAT?



Service Management Specialization Track under CMO No. 6 and 34, Series of 2012

Committee members include :

- **Core industry representatives** from IBM, Accenture, HP, Stream Global, Philippine Software Industry Association (PSIA), Health Information Management Outsourcing Association of the Philippines (HIMOAP)
- **Academe representatives** from Asia Pacific College, Jose Rizal University, Our Lady of Fatima and member schools of Phil. Assoc. of Collegiate Schools of Business
- Other industry and academe representatives

Service Management Specialization Track under CMO No. 6 and 34, Series of 2012

IBPAP Specialization Track

- Business Communications for the Global Workspace
- Service Culture
- Principles of Systems Thinking
- Fundamentals of IT-Business Processes of Outsourcing 101
- Fundamentals of IT-Business Processes of Outsourcing 102
- OJT/ Internship Program 600 hours
 - 21 units (including OJT)
 - Approved for Business and IT courses

THUS CMO 6 and 34, Series of 2012



Republic of the Philippines
OFFICE OF THE PRESIDENT
COMMISSION ON HIGHER EDUCATION



CHED MEMORANDUM ORDER (CMO)

No. 06
Series 2012

SUBJECT: ADDENDUM TO CMO NO. 39, S. 2006 ENTITLED, POLICIES
STANDARDS AND GUIDELINES FOR BACHELOR OF SCIENCE IN
BUSINESS ADMINISTRATION (BSBA) PRESCRIBING ADDITIONAL
ELECTIVES ON SERVICE MANAGEMENT FOR BUSINESS
PROCESS OUTSOURCING



Republic of the Philippines
OFFICE OF THE PRESIDENT
COMMISSION ON HIGHER EDUCATION



CHED MEMORANDUM ORDER (CMO)

No.: 34
Series of 2012

SUBJECT : ADDENDUM TO CMO 53, s. 2006, REVISED POLICIES, STANDARDS AND
GUIDELINES FOR INFORMATION TECHNOLOGY EDUCATION (ITE) PROGRAMS
PRESCRIBING SPECIALIZATION TRACK ON SERVICE MANAGEMENT FOR
BUSINESS PROCESS OUTSOURCING

For Service Management for BA – SY 2012-2013/ 2013-2014 (Pilot run)

Pilot Project Academic Institutions, SY 2012-13, SY 2013-14

Modality	Participating Schools
HEI Specialization Track	1. Jose Rizal University
	2. University of Makati
	3. Lyceum of the Philippines - Laguna
Higher School	1 school (Asia Pacific College) to model BPAP program in Higher school (grade 11 and 12)

The pilot period, where Industry Professor was engaged as both instructor and teacher trainer. Likewise, they transferred the learning to other teachers.

Some students in this pilot program are now employed with the following companies where they had their OJT work:

- GenPact
- Ingram Micro
- American President Lines PAC

Industry Academe Partnership

- Strategic alliance with the IT-BPM companies



- In discussions with more than 20 IT-BPM companies to partner with the 17 SUCs



Participating Schools



Asia Pacific College



Lyceum of the Philippines Laguna



University of Makati



Companies which Hosted Interns

SMP Pilot Interns Hired



3 Hired
60% with Job Offer
60% Hire Rate

3 Hired
100% with Job Offer
100% Hire Rate



5 Hired
64% with Job Offer
45% Hire Rate

15 Hired
27% with Job Offer
18% Hire Rate



13 Hired
100% with Job Offer
100% Hire Rate



Benjie A. Gulmatico, 26

Internship: Multi-Trade Contracting (MTC) Staff, APL Co.

Profile:

Benjie first went to school without the moral support of his father. He experienced being bullied by some of his classmates for not believing him to succeed. He ended quitting from his studies and landed in many different jobs to help provide his family's basic needs.

For years, he worked in a bakery, garment factory, public market and in a construction site. Realizing that he couldn't

actually save nor really help his family due to very low salary for his works, he thought of doing something else bigger that could change his life for the better. As a person of many dreams, he knew that he needed to go back to school and continue his studies. The Alternative Learning System (ALS) Muntinlupa accepted Benjie into the program and he later

had a grasp to his longed high school diploma. In June 2012, he was among the few who were admitted into the APC Higher School Program with scholarship. While the Program prepares and equips Benjie with the work skills

"As a person of many dreams, I believe that the APC Higher School Program will help me become a successful person. It is my goal to have a better life ...and I will achieve it."

and competencies in the world of Information, Technology and Communication, it also helped Benjie gain the support and trust of his father after realizing the capabilities of his son. Benjie's father who works as a fisherman and his mother as a domestic helper in Singapore are still his inspirations in performing best in his undertakings at the present. Benjie believes that having a stable job in an IT-BPO Company will soon alleviate the financial difficulty of his family.



Jessabel Buelba, 23

Internship: Contract Administration Staff, APL

Profile:

Jessabel is a single mom to her 4-year old son. She was 17 and in third year high school when she got pregnant. Due to young age and financial instability, Bel later separated from the father of her child. She went back to school and graduated through the Alternative Learning System (ALS) in Parañaque City. As a single mom, sending a growing son to school without a stable income source is formidable. Her father who works as a jeepney driver and her mother who works as an OFW in Russia strived to provide the needs of their 4 children and Jessabel's son.

It was summer in 2012 when APC Higher Program came as a once in a lifetime opportunity for Bel to take her biggest step forward for her and her son's future. She

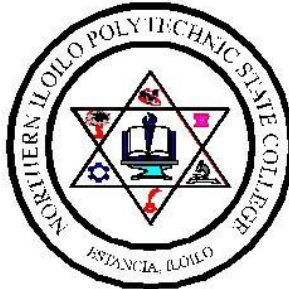
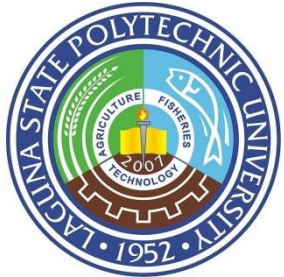
became one of the Pilot students of the program and granted with a scholarship. While in the Program, she once again realizes the importance of education as a way to attain success in life. She sees APC Higher School Program

as a bridge to the fulfillment of her dreams. She knew that all the learnings and the experiences that she will obtain from the program would prepare and equip her with professional skills

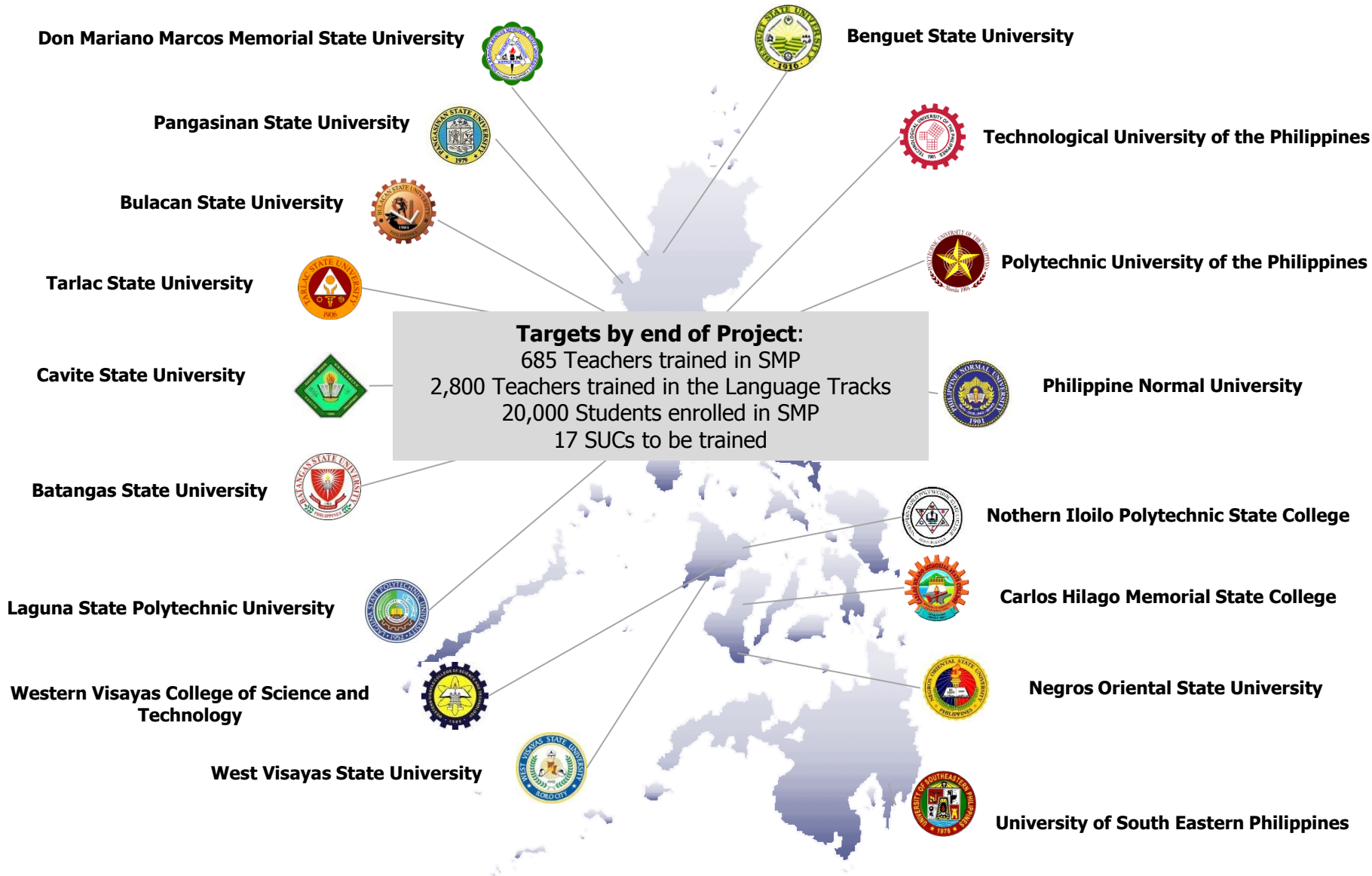
"Two years from now, I will be a professional career person, passionate and well-motivated to improve my life for me and my family."

and competence at work in the future. Jessabel is now enjoying the few remaining hours in the completion of her internship while looking forward to her summer job in the company right after the internship. Moreover, she is excited to the bigger and greater work opportunities that will come next.

CHED Funded Project: SMP Participating Schools



17 Participating State Universities and Colleges



17 Participating State Universities and Colleges

Project to date

Don Mariano Marcos Memorial State University

- 32 SMP trained Teachers
- 8 Language trained Teachers

Pangasinan State University

- 40 SMP trained Teachers
- 8 Language trained Teachers

Bulacan State University

- 45 SMP trained Teachers

Tarlac State University

- 33 SMP trained Teachers
- 8 Language trained Teachers

Cavite State University

- 59 SMP trained Teachers
- 3 Language trained Teachers

Batangas State University

- 67 SMP trained Teachers
- 80 Language trained Teachers
- 802 Students enrolled in SMP

Laguna State Polytechnic University

- 56 SMP trained Teachers
- 71 Language trained teachers
- 2987 Students enrolled in SMP

West Visayas State University

- 25 SMP trained Teachers
- 2 Language trained Teachers

Benguet State University

- 24 SMP trained Teachers
- 25 Language trained Teachers

Technological University of the Philippines

- 33 SMP trained Teachers
- 23 Language trained Teachers

Polytechnic University of the Philippines

- 51 SMP trained Teachers
- 4 Language trained Teachers
- 89 Students trained in SMP

Philippine Normal University

- 20 Language trained Teachers

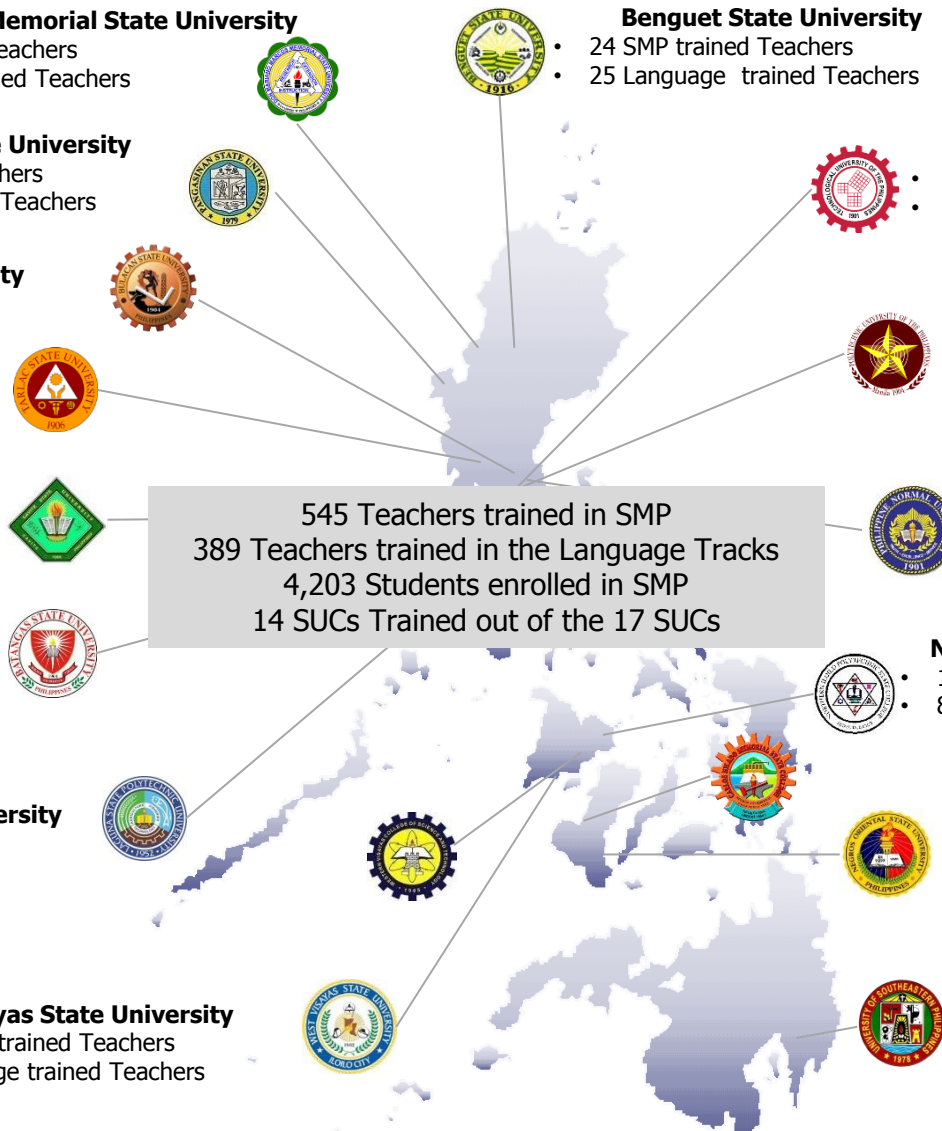
Nothern Iloilo Polytechnic State College

- 19 SMP trained Teachers
- 8 Language trained Teachers

Negros Oriental State University

- 61 SMP trained Teachers
- 57 Language trained Teachers
- 325 Students enrolled in SMP

545 Teachers trained in SMP
 389 Teachers trained in the Language Tracks
 4,203 Students enrolled in SMP
 14 SUCs Trained out of the 17 SUCs



Completed Teachers Training – Luzon and Metro Manila

SMP Teacher Training - April 21-30, 2014 at Asia Pacific College, Makati City

School/No. Of teachers	BPO 101/102	Bus Comm	Serv Cult	Sys Thnk	Location
Asiatech	1	0	0	1	Bicol
Baliuag University	1	0	0	0	Bulacan
Computer Systems Tech Institute	1	0	0	0	Cagayan
CVCITC	1	0	0	0	Bicol
FEU EAC	1	1	1	1	Manila
MSEUCFCI	1	0	0	0	
Siena College	1	0	0	0	Manila
WRI College	1	0	0	0	Bicol
Total	8	0	1	1	

Completed Teachers Training - Calabarzon

SMP Teacher Training - April 21-30, 2014 at Asia Pacific College, Makati City

School/No. Of teachers	BPO 101/102	Bus Comm	Serv Cult	Sys Thnk	Location
Colegio ng Lungsod ng Batangas	2	1	1	1	Batangas City
DLSU Dasma	4	4	4	3	Dasmaringas, Cavite
Eastern Quezon Colleges	1	1	1	0	Gumaca, Quezon
Imus Institute	2	1	1	1	Imus, Cavite
La Consolacion Binan	0	1	1	1	Binan, Laguna
Lyceum Batangas	1	1	1	1	Batangas City
Manuel S. Enverga Univ	4	2	3	3	Lucena, Quezon
Rizal College	0	0	1	1	Taal, Laguna
San Mateo College	3	0	1	1	San Mateo, Rizal
St. Dominic	1	0	0	0	Bacoor, Cavite
Total	18	11	14	12	

Basic English Skills Training Program (BEST)

&

Advanced English Pre- Employment Training (AdEPT)

Teacher Training (BEST and AdEPT)

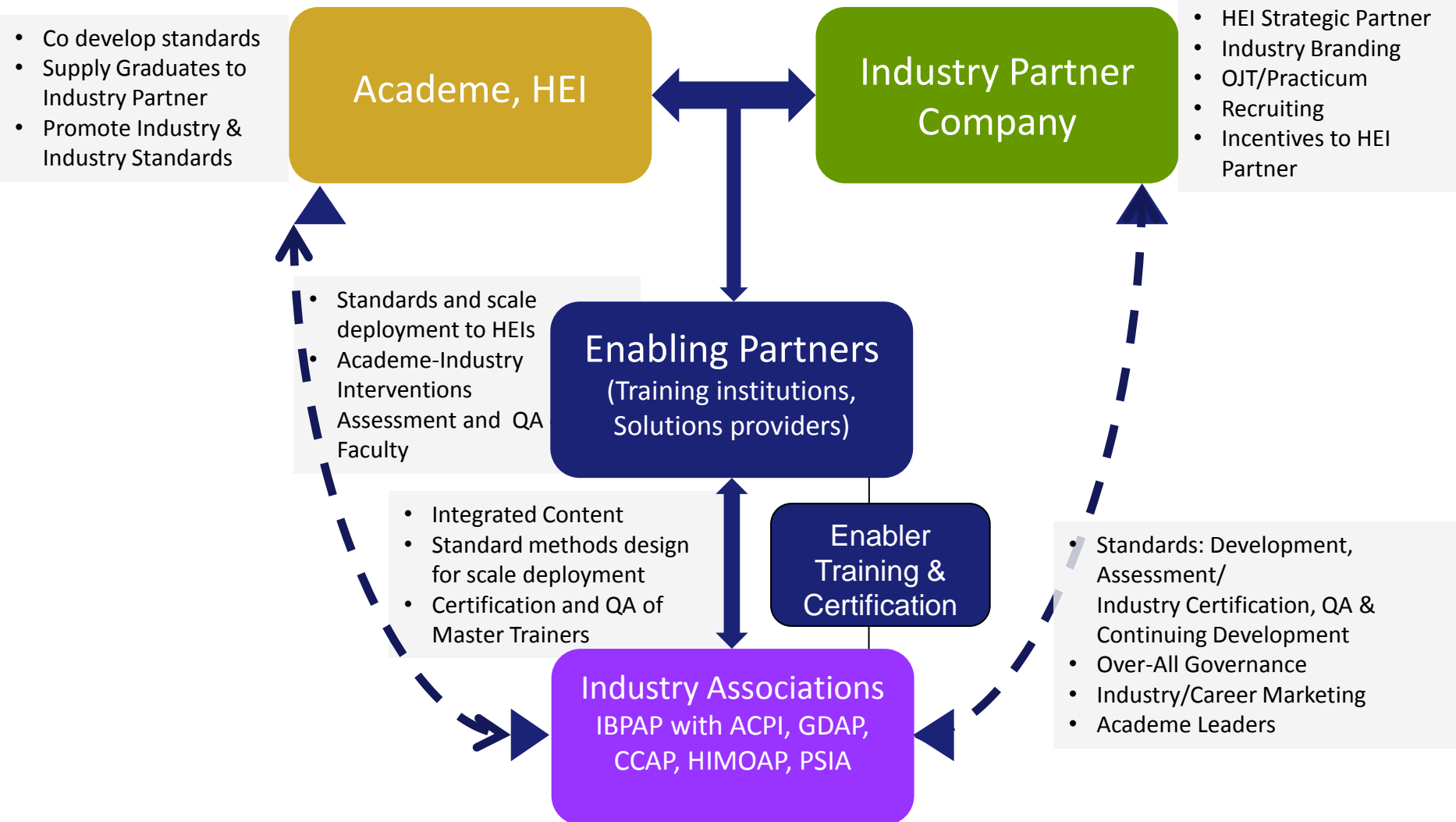


- The **Basic English Skills Training (BEST)** is an E-Learning pre-cursor to AdEPT (Advanced English Pre-employment Training) to increase the number of those qualified to go through near hire training which is AdEPT. The subjects will cover English Fundamentals as well as Listen and Type, Vocabulary Build up, Speech lessons, Reading Comprehension.

- **Advanced English Proficiency Training (AdEPT)** is an industry standard of language training that adopts the 5 AdEPT essentials. This training for faculty can be conducted not just for English faculty but for faculty members of other subjects who would like to further understand the training methodologies in the industry. It also has an e-Learning platform for English proficiency.

PROJECT FRAMEWORK: ACADEME-INDUSTRY ALIGNMENT

MODEL: CHED-IBPAP PROJECT



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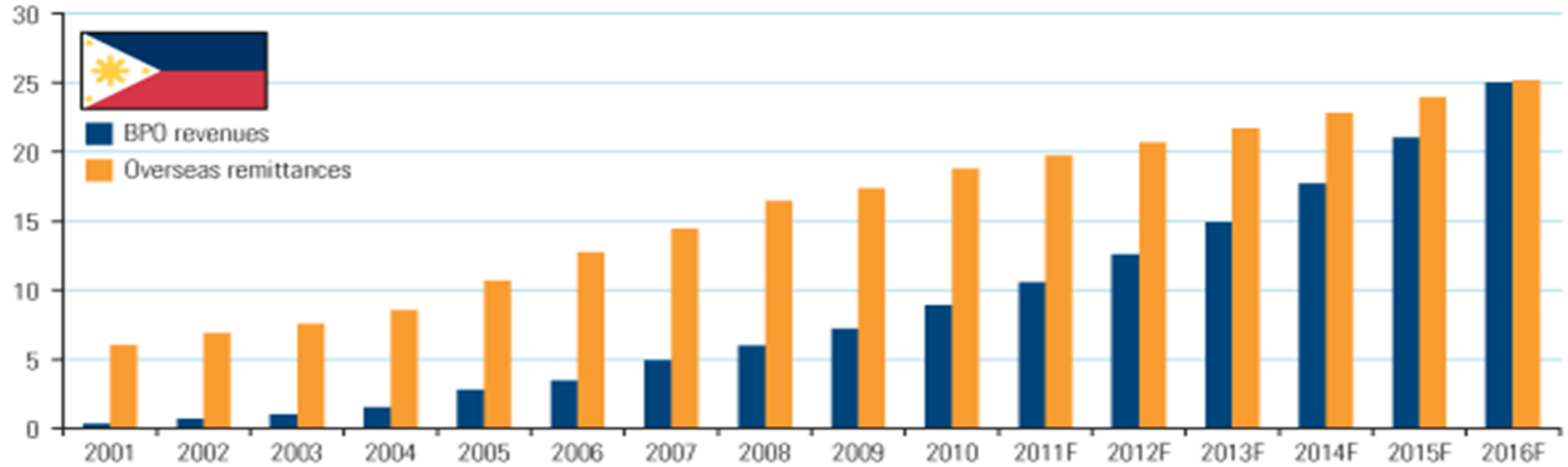
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In billions of dollars



Source: CLSA Asia-Pacific Markets, BSP, Business Processing Association of the Philippines (BPAP)

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