Building an AI-ready Philippines

The talent imperative

Contents

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	Page
Foreword	3
Executive summary	4
The future of work in the age of AI	6
Readiness: The foundation for broader AI participation	9
Gaps in AI readiness	9
Priority levers for AI readiness	11
Innovation: From adoption to value creation	13
Hurdles to innovating with AI	14
Scaling advanced AI capability	15
Responsibility: Governing AI at scale	18
Gaps in oversight and inclusion	18
Institutionalizing AI responsibly	20
The way forward	22
Appendix	24
Success stories	24
Glossary	27
About the research	30
How to read this report	30
Authors	31
Contributors	31
References	32

Foreword

Artificial intelligence is reshaping the basis of economic power and productivity. Around the world, policymakers and business leaders alike recognize AI's potential to transform industries, accelerate growth and redefine national competitiveness. For the Philippines, this moment carries both unprecedented opportunities and challenges.

AI's significance extends well beyond headline economic gains. It is set to reconfigure the structure of work across the Philippines' services backbone, reshaping how value is generated, governed and scaled within core industries. While AI will augment instead of replacing most roles, the transition will require deliberate management. Whether productivity gains translate into sustained competitiveness and broadly shared opportunity will depend on the ability to align reskilling systems, workforce mobility and institutional capacity with technological change.

Momentum is evident. Filipino workers are adopting AI tools at speed, enterprises are embedding intelligent systems into core operations, and the government has set a national direction through the AI Strategy Roadmap 2.0. Yet momentum alone will not secure advantage. Structural constraints—from foundational skills gaps and uneven infrastructure to limited research intensity and shortages in advanced AI and governance expertise—continue to moderate the pace of upgrading into higher-value mandates.

Depth and resilience of talent, not just access to tools, will determine the next phase of competitiveness. As more routine, repeatable work gets automated, governments, institutions and individuals good at connecting systems, making data-informed decisions and establishing strong governance will have an edge. Countries that strengthen foundational skills, deepen advanced specialization and embed responsible governance alongside AI deployment will move decisively from labor-cost advantage to intelligence advantage.

The Philippines enters this transition with real strengths: a young workforce, a globally embedded services sector and rising digital ambition. The imperative now is alignment, ensuring that investment in skills, research, governance and infrastructure keeps pace with accelerating enterprise transformation.

For Philippine leaders, this is a decisive moment. AI is advancing faster than the systems, skills and institutions that have traditionally supported growth, and the choices made now will shape competitiveness for years to come. This report is intended to guide decision-makers across government, industry and education to act with urgency and coordination. It lays out both a diagnosis of where gaps remain and a practical pathway toward making the Philippines not just a participant in the AI revolution, but a nation capable of shaping its direction and rewards.

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Executive summary

The Philippines stands at a pivotal moment as artificial intelligence (AI) reshapes the delivery of global services. The country is uniquely positioned to benefit from the AI-led transformation, given its competitive economy underpinned by a US$40 billion information technology and business process management (IT-BPM) sector.[1] AI is also a disruptive force as it reshapes the work of more than half of Filipino workers, enhancing productivity for many, but displacing others. The defining challenge is whether the country can equip its workforce and organizations to turn disruption into durable, inclusive growth by building the skills, institutions and pathways needed to harness AI for sustained productivity and better-quality jobs.[2]

Our analysis emphasizes that while workers, employees and public institutions in the Philippines have started adapting to the evolving AI skills landscape, the larger opportunity lies in strengthening the capabilities and infrastructure that enable AI-led growth.

Foremost among them is talent. The Philippines will need to unlock the potential of its people to capture AI's full economic promise. Whether it can do so depends on its ability to build strength across three interlocking dimensions: **Readiness**, the capacity to adopt AI effectively at scale; **Innovation**, the ability to develop AI capabilities; and **Responsibility**, the institutional capability to deploy AI equitably.

Readiness

In terms of readiness, continued progress will depend on strengthening foundational capabilities alongside ongoing reforms. For the Philippines, learning outcomes remain an area of priority: adults trail regional peers in science, technology, engineering and mathematics (STEM) and information and communication technology (ICT) skills, highlighting the need to accelerate upskilling as AI tools become more embedded across occupations.

At the firm level, expanding managerial capability and deepening the skilled labor pool will be essential to fully capture the benefits of advanced technologies.

These efforts must be reinforced by continued improvements in digital infrastructure. Enhancing the reliability and affordability of internet connectivity and electricity supply will strengthen competitiveness and broaden participation in online learning and digital work, particularly beyond major urban centers.[3]

Addressing the readiness gap requires intervention at three levels. First, the country must strengthen learning and democratize digital fluency and AI literacy across the education continuum. It must embed core competencies not only in K–12, but across technical and vocational pathways and higher education.

Second, readiness cannot end at graduation. The Philippines will need a lifelong learning system co-designed with industry, built around stackable and employer-linked credentials that allow workers to upgrade continuously while remaining employed.

Finally, expanding reliable, affordable internet and power beyond major cities is critical to scaling both learning and AI use across the country. Connectivity and energy access must be treated not merely as infrastructure issues, but as talent enablers.

Innovation

When it comes to **innovation**, sustained AI advantage depends not only on broad adoption but also on whether people deepen their technical capability fast enough to move into higher-value mandates. As AI diffuses across sectors, the focus shifts from general digital familiarity to specialized expertise, especially in roles like data engineering, machine learning, MLOps, cybersecurity and digital risk management, where systems-level expertise matters more than task-level proficiency.

Here the gap is more pronounced. Advanced AI talent remains limited in scale and unevenly distributed, shaped by a smaller domestic ecosystem and competition for globally mobile ICT talent. Research intensity also remains modest, preventing the accumulation of deep technical expertise and frontier experimentation.

Closing the innovation gap requires deliberate capability-building. The Philippines needs a stronger applied AI talent pipeline, with a focus on specialized skills that support AI deployment and higher-value services.

Research and development can thrive when industry–academia collaboration becomes the default model, with co-designed curricula, faculty development, apprenticeships and capstone-to-hire pathways that align training with real market demand.

Innovation capacity also needs to extend beyond large enterprises. Scaling AI adoption among small and medium enterprises can build a critical mass of practical users who apply AI across operations, marketing, customer engagement, finance and compliance, strengthening the broader ecosystem.

Finally, setting up regional hubs and expanding applied research participation outside the National Capital Region will reduce concentration risk and broaden the base of technical expertise, ensuring geographically diversified innovation capability.

Responsibility

Responsibility is the third dimension of sustained AI advantage, ensuring that deployment is well governed and growth remains inclusive. While AI is expected to augment many roles in the Philippines, transition pressures are uneven. Displacement risk is concentrated in clerical functions that underpin the country's services backbone, particularly in routine-intensive roles. Exposure is also more pronounced among certain socioeconomic groups. Women, who are disproportionately represented in these occupations, face higher risk of occupational imbalance if mobility and redeployment pathways do not keep pace.

Institutional capacity presents a parallel hurdle. Shortages persist in critical AI governance roles, including cybersecurity specialists, AI risk assessors, model validators and compliance translators, limiting the system's ability to deploy AI safely and credibly at scale. At the same time, AI hiring and deployment remain clustered in the National Capital Region and a handful of urban centers, slowing diffusion and reinforcing geographic concentration of opportunity.

Strengthening responsibility therefore requires capability as much as regulation. Responsible AI principles like privacy, security, transparency, safe deployment and human oversight must become embedded workplace competencies across organizations, alongside stronger public-sector coordination and execution capacity.

Workforce transition strategies must go beyond training. Workers at risk of displacement should be offered reskilling paired with practical support to transition into new jobs.

Inclusion must also be designed deliberately. Targeted pathways and enabling support should prioritize women, youth, workers in high-exposure and low-complementarity roles, particularly within IT-BPM and regions outside major urban hubs.

The Philippines has momentum to capitalize on the AI opportunity. What it now requires is coordination, scale and speed. If readiness, innovation and responsibility are strengthened in tandem, AI can become a catalyst for higher productivity, more competitive services and broader-based prosperity.

The future of work in the age of AI

Artificial intelligence (AI) is no longer a frontier technology. It is becoming a foundational layer of the global economy. AI could contribute $10.3 trillion to global GDP by 2038, according to Accenture Research analysis, the equivalent of generating new economic value on a scale comparable to adding half of the world's largest companies to the global economy.[4,5]

For the Philippines, the upside story is similarly compelling. By 2030, AI is expected to unlock US$79 billion in productive capacity, equivalent to one-fifth of the country's 2022 GDP.[6] Crucially, this opportunity extends beyond adoption alone. The Philippines has the potential to participate more actively in the global AI economy, leveraging its globally distributed workforce to capture higher-value mandates with AI-enabled services, while enterprises at home develop new and niche applications, improve existing AI solutions and localize AI products and services for Filipino consumers.[7]

The IT-BPM industry will play an important role in shaping this trajectory. As a major player in the global outsourcing ecosystem, it generated revenue of US$40 billion in 2025 and accounts for 8% of the Philippines' GDP.[8,9]

Due to the Philippines' distinct economic structure and labor market characteristics, AI is estimated to transform the work of 56% of workers in the country in at least a portion of their current roles.[10] However, AI is more likely to complement the Philippine workforce rather than replacing workers entirely.

According to the IMF, 36% of workers in the Philippines are highly exposed to AI **(Figure 1)**.

Of these, 22% of workers have high complementarity,[i] and are more likely to harness the productivity benefits of AI than be replaced by it, while 14% are in roles with low complementarity and face higher displacement risk. Reskilling pathways and worker transition systems are therefore urgently needed.

Employees and employers in the Philippines are moving fast to leverage AI's productivity benefits, with significant increases in AI-related job vacancies and training enrolment. 86% of knowledge workers already use AI at work—well above global and regional averages.[12]

Figure 1: AI exposure and complementarity in the Philippines[11]

AI exposure	AI complementarity	Share of Philippine workforce	Example occupations
High	High	22%	General and operations managers, first-line supervisors, teachers and teaching assistants, lawyers, civil engineers
High	Low	14%	Customer service representatives, telemarketers, accountants, auditors, secretaries, administrative clerks
Low	Not Applicable	64%	Farm workers, construction laborers, janitors, maids and cleaners, waiters, textile workers, food preparation workers

([i]AI-exposed jobs with high complementarity are those where AI is likely to augment rather than replace, potentially increasing productivity. Jobs with low complementarity are susceptible to displacement by AI.)

IT-BPM: A $40 billion sector at an inflection point

The Philippines' IT-BPM industry is a major provider of IT-enabled services across contact center and business process services, global capability centers (GCCs), IT and software, healthcare information management, animation and game development. It is a key employment generator, with 1.9 million workers and employment growth of 4% in 2025. Yet nearly three-fourths of workers in the industry face high AI exposure with low complementarity, leaving them vulnerable to displacement.[13]

Figure 2: The Philippine IT-BPM industry: Segment highlights[14]

Contact Center & Business Process Services **1.62M** FTEs **$33.6B** Revenue (2025F)	**Global Capability Centers (GCC)** **270K** FTEs **$8.7B** Revenue (2025F)
IT & Software Services **190K** FTEs **$6.2B** Revenue (2025F)	**Healthcare Information Management** **210K** FTEs **$4.5B** Revenue (2025F)
Animation Services **8.42K** FTEs **$90M** Revenue (2025F)	**Game Development Services** **7.22K** FTEs **$110M** Revenue (2025F)

The AI divide

To capitalize on this strong momentum and realize the full potential of AI, the Philippines needs to address several structural hurdles. Improvements in digital infrastructure, regulatory clarity and advanced skills development are critical.

Funding avenues are another constraint limiting the spread of the local ecosystem of AI companies and dedicated AI investments. A study by the Philippine Institute for Development Studies (PIDS) noted that venture capital is limited, which makes it difficult for businesses to secure the necessary capital for AI investments.[15]

The skills pipeline presents the most immediate area for action. The Philippine technology sector is expected to generate 1.1 million new jobs by 2028,[16] creating significant opportunity, provided the supply of STEM and ICT talent expands in parallel.

Figure 3: AI adoption surges in the Philippines[17,18]

Growth in AI job vacancies **6×** Between 2021 and 2025	**Growth in Gen AI job vacancies** **115×** Between 2021 and 2024
Gen AI training enrolment surge **+383%** Between 2024 and 2025	**Percentage of knowledge workers using AI at work** **86%**

Strengthening education pathways beyond primary or secondary education, addressing instructor shortages and broadening access to high-quality training will help ensure that innovation capacity keeps pace with enterprise demand. Attention is also needed to ensure that AI adoption benefits are broadly shared. As task transformation affects occupations unevenly, particularly in clerical roles where women are over-represented, targeted reskilling and mobility pathways will be essential to support inclusive participation in higher-value roles.[19]

The government is aware of these challenges and has already sprung into action. The **Department of Trade and Industry's National AI Strategy Roadmap 2.0** adopted in 2024 outlines a vision to integrate AI across various sectors to boost competitiveness, foster research and development collaboration and prepare the workforce for future jobs while ensuring responsible AI governance. All this points to an economy looking to adapt swiftly to an evolving skiltls landscape.[20]

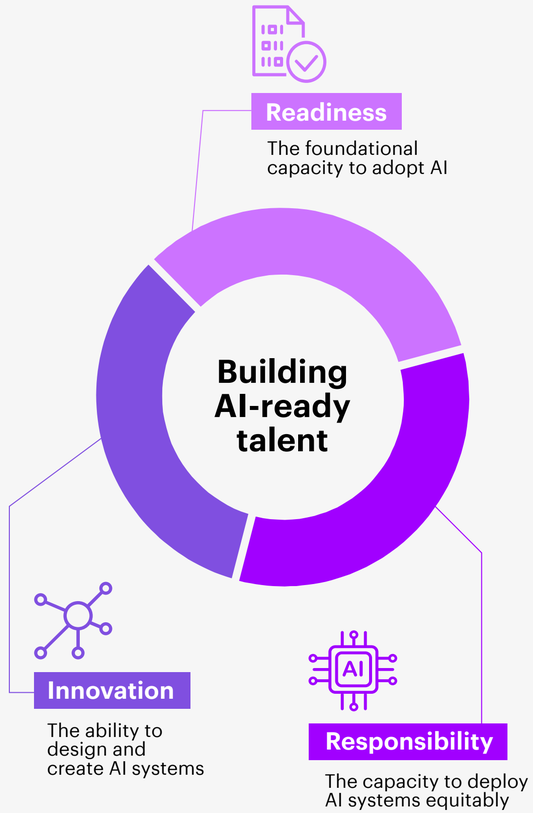
Building on this progress, sustained implementation and stronger coordination across government, education providers and industry can help scale these initiatives faster and ensure the benefits of AI adoption are widely shared.

Three talent dimensions of AI adoption

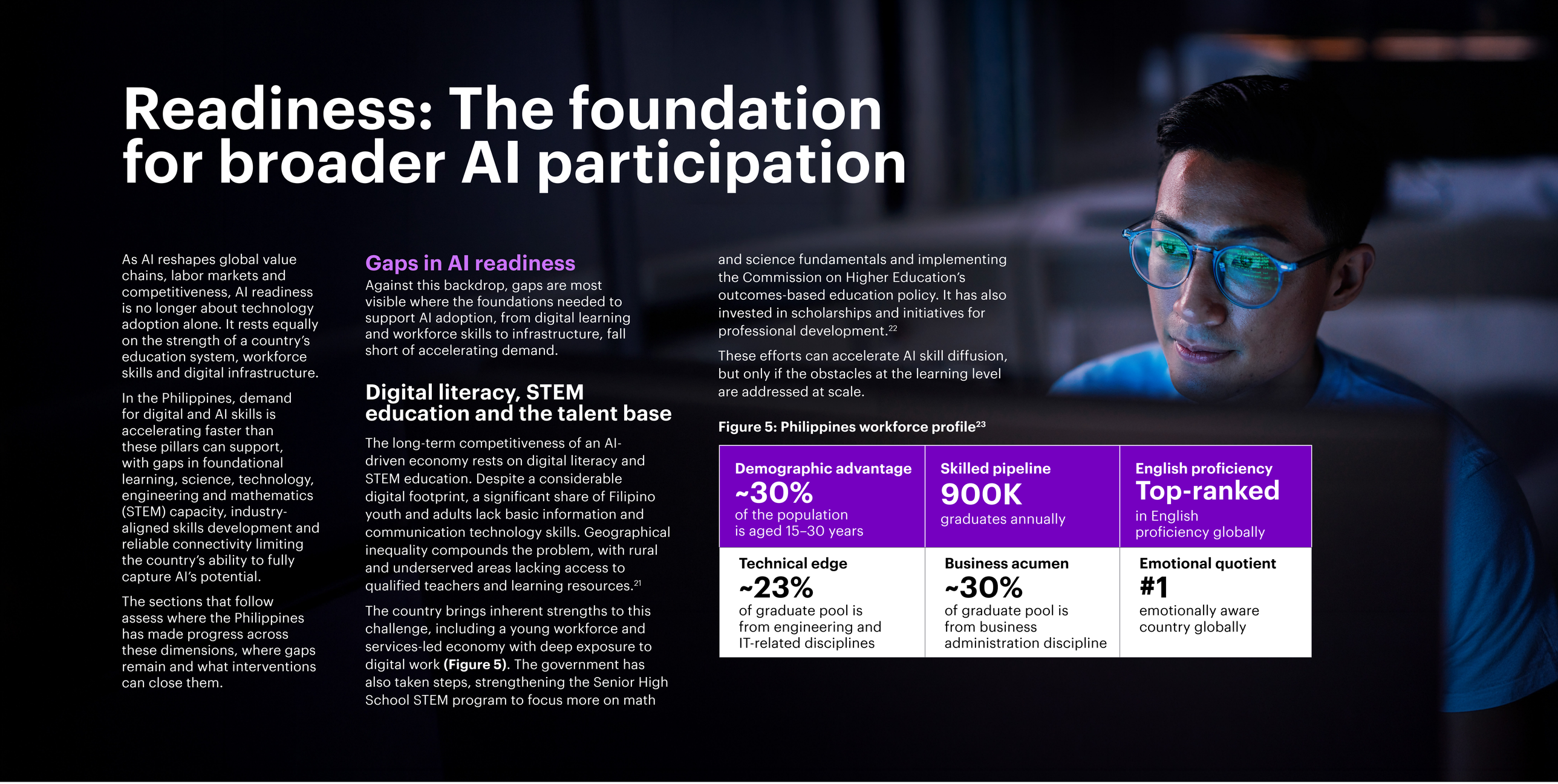
The Philippines needs coordinated interventions to uplift its people to capture the upside of AI while minimizing inequality and transition costs. In this report, we examine the skills gap in the Philippines through the lens of three talent dimensions that drive AI adoption **(Figure 4)** and interventions to overcome the gap:

1. **Readiness**, the foundational capacity to adopt AI
2. **Innovation**, the ability to design and create AI systems
3. **Responsibility**, the capacity to deploy AI systems equitably

Figure 4: How talent shapes AI impact



Readiness: The foundation for broader AI participation



As AI reshapes global value chains, labor markets and competitiveness, AI readiness is no longer about technology adoption alone. It rests equally on the strength of a country's education system, workforce skills and digital infrastructure.

In the Philippines, demand for digital and AI skills is accelerating faster than these pillars can support, with gaps in foundational learning, science, technology, engineering and mathematics (STEM) capacity, industry-aligned skills development and reliable connectivity limiting the country's ability to fully capture AI's potential.

The sections that follow assess where the Philippines has made progress across these dimensions, where gaps remain and what interventions can close them.

Gaps in AI readiness

Against this backdrop, gaps are most visible where the foundations needed to support AI adoption, from digital learning and workforce skills to infrastructure, fall short of accelerating demand.

Digital literacy, STEM education and the talent base

The long-term competitiveness of an AI-driven economy rests on digital literacy and STEM education. Despite a considerable digital footprint, a significant share of Filipino youth and adults lack basic information and communication technology skills. Geographical inequality compounds the problem, with rural and underserved areas lacking access to qualified teachers and learning resources.[21]

The country brings inherent strengths to this challenge, including a young workforce and services-led economy with deep exposure to digital work **(Figure 5)**. The government has also taken steps, strengthening the Senior High School STEM program to focus more on math and science fundamentals and implementing the Commission on Higher Education's outcomes-based education policy. It has also invested in scholarships and initiatives for professional development.[22]

These efforts can accelerate AI skill diffusion, but only if the obstacles at the learning level are addressed at scale.

Figure 5: Philippines workforce profile[23]

Demographic advantage **~30%** of the population is aged 15–30 years	**Skilled pipeline** **900K** graduates annually	**English proficiency** **Top-ranked** in English proficiency globally
Technical edge **~23%** of graduate pool is from engineering and IT-related disciplines	**Business acumen** **~30%** of graduate pool is from business administration discipline	**Emotional quotient** **#1** emotionally aware country globally

Labor market signals and the skills mismatch

Digital occupations are expanding, especially in advanced segments of the services sector. In 2023, digital workers comprised 12% of the workforce, 9% of them in the formal sector.[24] These roles typically require secondary or tertiary education. Beyond explicitly digital positions, even traditional jobs increasingly require digital competence grounded in foundational literacy and numeracy.

Recent labor market data highlights the rapid rise in employer demand for AI capabilities. Job postings requiring AI skills increased more than sixfold between 2021 and 2025, climbing from 8,814 to 56,376 **(Figure 6)**. Although AI-related roles still account for less than 1% of total job postings, their share has steadily increased, signaling a gradual shift from niche technical specialization to broader workforce relevance and increasing the risk of skills mismatch.

Infrastructure bottlenecks

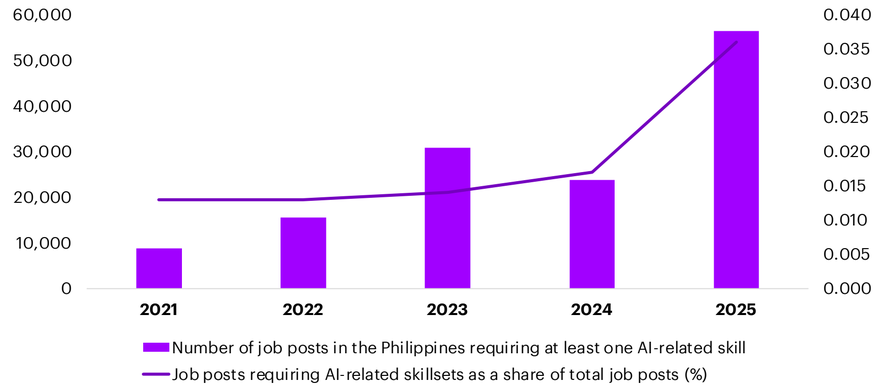
Beyond skills and education, digital connectivity and energy infrastructure remain practical limiters on AI readiness, especially outside major urban centers.

Historically limited telecom competition contributed to poor connectivity and higher consumer costs; with ICT regulations evolving, the Philippines has an opportunity to improve competition, service quality and cost efficiency. Better connectivity in rural and underserved regions would expand access to online learning, skills development and AI-enabled work.

Fixed broadband access remains a key bottleneck for enterprise digitalization, particularly for smaller firms that still rely heavily on mobile connectivity. The Philippines' access to fixed broadband (proxied by households) is 30 percent, much lower than Viet Nam's 81 percent, Malaysia's 55 percent and Thailand's 51 percent **(Figure 7)**. Catching up with regional peers in terms of access, speed and cost of digital connectivity requires a combination of more competition and more investment in infrastructure.[25]

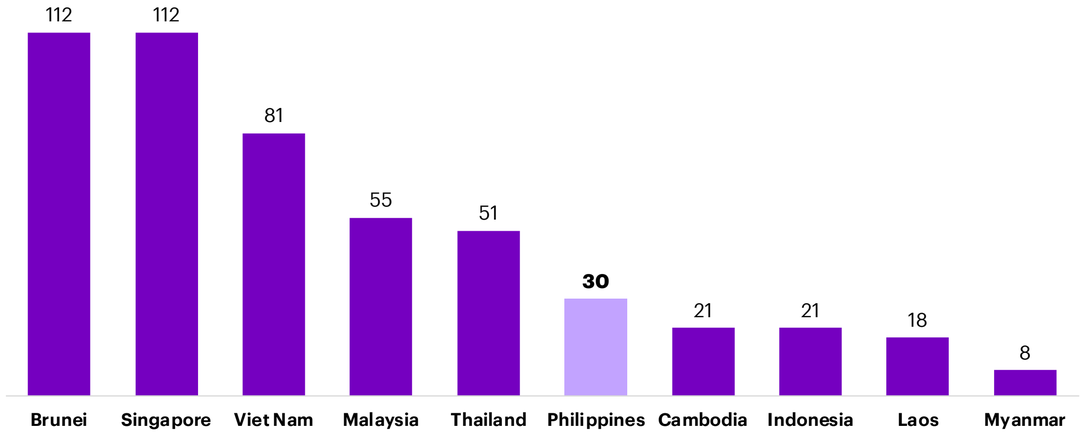
Energy affordability is another constraint on digital competitiveness, particularly for data center investment and compute-intensive workloads. Although the Asia-Pacific data center market continues to grow strongly due to demand for AI infrastructure and cloud services, projected capacity in the Philippines is less than 1 GW by 2035, compared to 4.5 GW in Malaysia and 2.6 GW in Thailand, due to structural constraints such as high electricity prices.[26]

Figure 6: Job postings requiring AI skills (2021 – 2025) in the Philippines



Source: Accenture Research analysis based on data from Lightcast

Figure 7: Fixed broadband penetration for selected East Asian countries (% of households, 2023)



Source: Country Growth and Jobs Report, Philippines - Running Uphill: Growth, Jobs, and the Quest for Productivity, World Bank, 2025[27]

Priority levers for AI readiness

Targeted reforms in foundational learning, workforce development and digital infrastructure will enable the Philippines to accelerate adoption while ensuring that participation in the AI economy is broad-based and sustainable.

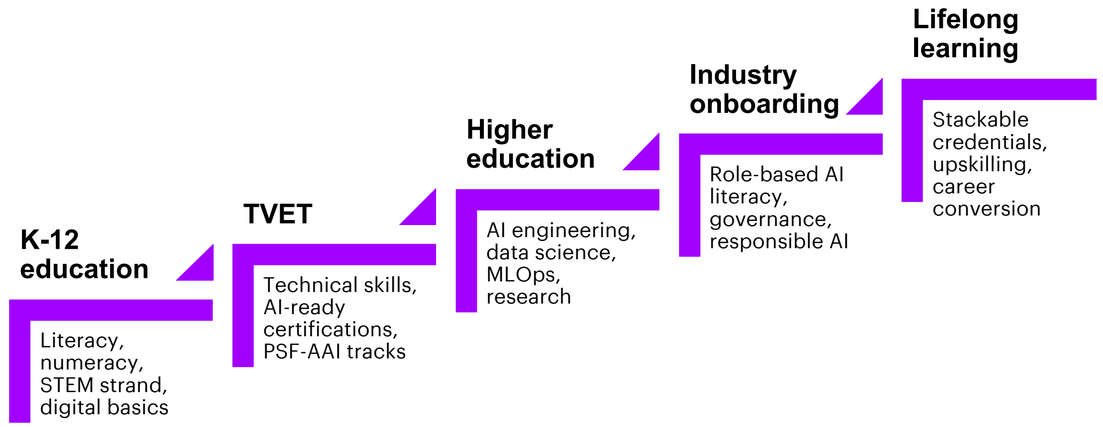
Strengthen digital and STEM learning

The Philippines' ability to compete in an AI-driven economy depends first on making AI literacy universal. The country is already taking concrete steps in this direction. In January 2026, the Philippines Department of Education launched **Project AGAP.AI**, an initiative that aims to increase AI usage to deliver better learning outcomes across the public education system. As part of this, the Department will roll out AI Ready ASEAN Philippines, a nationwide training program expected to reach up to 1.5 million participants which will introduce AI and cover practical classroom applications, ethics and data privacy and ways to address risks such as misinformation.[28]

International experience shows how to make early exposure to emerging technologies mainstream. **India's Atal Tinkering Labs**, now active in over 10,000 schools, provide students with hands-on exposure to robotics, AI and design thinking through structured school-based innovation spaces. **Singapore's Code for Fun**, jointly run by Infocomm Media Development Authority (IMDA) and the Ministry of Education, reaches more than 50,000 students each year, normalizing computational thinking and AI exposure as mainstream capabilities rather than niche enrichment activities.[29, 30]

Building on this direction, AI literacy and digital skills need to become part of basic education in the Philippines. This means updating curricula in K–12, Technical and Vocational Education and Training (TVET) and higher education to cover essential data, AI concepts, responsible AI and practical tools across various fields **(Figure 8)**. Faculty training and new learning models, including blended and mobile formats, will broaden access. To keep pace, this learning must be backed by investment. **Malaysia's 2025 budget**, for instance, allocates RM7.8 billion for TVET expansion and targeted support for STEM, AI and R&D, showing how investment in education can be aligned to future labor market needs.[31]

Figure 8: The stages of creating an AI talent pipeline: Foundational learning to continuous upskilling



Locally relevant AI resources are essential to ensure all individuals can access training, apply AI systems and seek new opportunities regardless of literacy barriers. The **Philippine Skills Framework for Analytics and AI (PSF-AAI)**, launched in 2024, establishes a nationally aligned competency architecture spanning seven AI and analytics career tracks from foundational awareness to advanced specialization. By aligning education pathways with industry-defined roles and government upskilling programs, it provides a structured mechanism to strengthen the AI talent pipeline in step with accelerating employer demand.

Institutionalize lifelong, industry-aligned learning

Readiness cannot end at graduation. As AI accelerates and digital roles expand across services and traditional sectors alike, workforce readiness needs to extend beyond the classroom and into continuous, industry-aligned learning.

The Philippines must institutionalize a lifelong learning system across the workforce co-designed with industry. Examples of public-private collaboration are emerging. **Google and Accenture** have partnered to train Filipinos for an AI-powered workplace. The initiative aims to expand access to AI-ready skills through Google Career Certificates and AI Essentials programs integrated into workforce retraining initiatives. Efforts also include support for displaced workers and scholarships for underserved students in regions such as Visayas and Mindanao.[32]

Similarly, the Philippines' Technical Education and Skills Development Authority (TESDA) is collaborating with Microsoft to help equip over 100,000 women learners with AI and cybersecurity skills, while the IT and Business Process Association of the Philippines (IBPAP) plans to work with Microsoft to train people in the IT-BPM sector in competencies such as critical thinking, complex problem solving, bias detection and prompt engineering, to better work with AI.[33]

In Thailand, the Department of Skill Development (DSD) is collaborating with public and private sectors to design 13 courses to upskill and reskill over five million workers. Learning is modular, accessible and tightly linked to labor market demand. Workers are encouraged to take skill tests to qualify for higher wages.[34,35]

Governments and employers can also expand the AI talent pool by setting up community learning hubs and mobile training units for rural, low-income and marginalized groups, including gig and informal workers. For instance, the Brazilian government's **ConectAI** initiative in collaboration with Microsoft and 26 other partners delivers free AI fluency, digital literacy and cloud training nationwide, targeting low-income and underserved communities.[36]

Ensure universal digital access

Reliable, affordable internet connectivity and electricity supply are prerequisites for AI deployment and workforce participation. Talent strategy must therefore include affordable connectivity and reliable power where learners live and work, alongside community-based access points and localized language support that helps widen the AI talent pool beyond major cities.

Efforts are already underway in the Philippines. The **Philippine Digital Infrastructure Project (PDIP)**, a US$288 million initiative launched in 2024, aims to enhance broadband connectivity and improve the country's cybersecurity framework. Completing the country's fiber backbone, connecting Manila to Southern Luzon, and establishing 750+ free Wi-Fi sites across Mindanao are key components of the initiative.[37] The **"Konektadong Pinoy"** Act passed in August 2025 simplifies the licensing process for new telecom market entrants, promotes infrastructure sharing and allows new and smaller players to invest in data infrastructure.[38]

Other countries offer compelling models too. For instance, **Viet Nam's digital transformation strategy** aims to enable universal fiber access, nationwide 5G rollout, new undersea cable routes and AI-ready, energy-efficient data centers aligned with ambitions to build hyperscale data hubs and compete among leading digital economies.[39] **India's National Broadband Mission 2.0** similarly links nationwide broadband expansion to workforce inclusion and capability development.[40]

Workforce reinvention in the Philippines

Globally, Accenture is becoming a skills-driven organization, aligning talent with business priorities while helping leaders deploy AI with humans firmly in charge. In the Philippines, that strategy is visible in AI and **agentic learning programs** that help people build skills, explore career pathways and apply AI responsibly in client and delivery environments.

Progress is already evident. Nearly 60% of Accenture's workforce in the Philippines is now proficient in agentic AI. Learning is practical, with advanced programs focused on designing, building and deploying AI agents across major enterprise platforms.

Large-scale, locally led initiatives such as **ATCP Agenticon** have accelerated that momentum, engaging more than 8,000 participants across Manila, Cebu and Ilocos. Through immersive sessions, live demonstrations and hackathons, teams have generated hundreds of AI-driven ideas, many moving toward real-world application.

Backed by Accenture's **$1 billion annual global investment in learning,** these efforts are helping Accenture Philippines build skills, solutions and talent for a human+ future.

Innovation: From adoption to value creation

AI redefines competitiveness by reshaping the nature of work. Across sectors, it compresses standardized tasks while expanding demand for hybrid roles that combine domain expertise with technical fluency and governance oversight. Value is shifting toward roles that supervise systems, interpret outputs, manage risk and integrate AI into core business processes.

This shift is already visible in services. Banks use AI to improve monitoring and screening, reducing false positives and moving people from routine processing to higher-value risk judgement. Digital-first providers apply AI at scale to strengthen credit decisions and streamline collections. A major Philippine financial institution has collaborated with Accenture to rearchitect its digital banking platform, embedding AI-driven personalization, automated security protocols and cloud-native APIs across identity management and customer engagement.[41]

In healthcare, providers deploy AI-assisted imaging and coding tools alongside claims automation platforms such as SwiftClaims,[42] which uses machine learning to streamline health insurance reimbursement workflows. These systems improve throughput and also elevate the importance of professionals who can validate output, ensure compliance and safeguard regulatory integrity.

For the Philippines, sustained advantage hinges on how effectively the country can deepen and retain the specialized technical, analytical and governance capabilities needed to embed AI within complex enterprise environments. Increasingly, it also depends on the ability to build and govern AI in ways that create value locally. Industry and government leaders have called for the Philippines to shift from just consuming AI technology to developing, adapting and deploying AI solutions that reflect local language, data, regulatory requirements and sector needs, while strengthening the domestic ecosystem of talent, research and firms.[43]

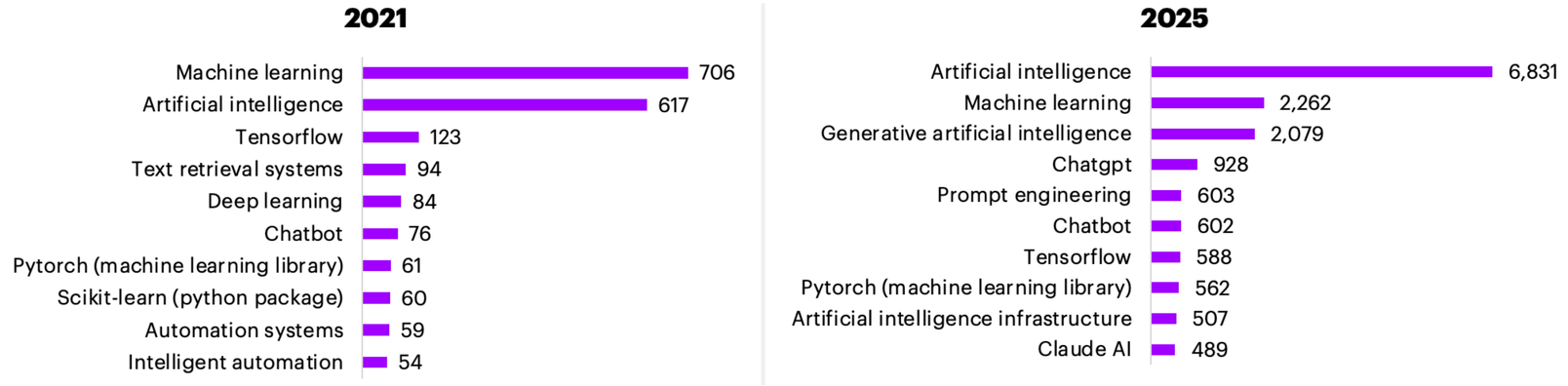
Hurdles to innovating with AI

Moving from AI adoption to value creation requires strengthening the capabilities that support advanced specialization and enterprise integration. As firms take on more complex, technology-intensive mandates, gaps in research depth, talent intensity and ecosystem alignment become increasingly consequential.

Escalating complexity of work and evolving AI-enabled roles

Consider the evolving composition of work within the IT-BPM and Global Capability Center (GCC) ecosystem. While traditional process delivery, such as standardized back-office and customer support services, remains significant, a growing share of new responsibilities now centers on analytics, cloud engineering, enterprise IT modernization and AI-enabled transformation. In other words, the sector is not simply expanding by doing more of the same work. It is gradually shifting toward more complex, technology-intensive functions that require deeper technical expertise. For instance, in October 2025, Equinix entered the Philippine market, introducing AI-ready interconnection capabilities and expanding carrier-neutral data center capacity in Manila.[44] These facilities enable enterprises to connect securely to global cloud and AI platforms and support complex hybrid and multi-cloud workloads.

Figure 9: Shifts in critical AI skills across software developer/engineer, artificial intelligence engineer and marketing specialist roles, 2021 vs. 2025 (number of job postings mentioning selected AI skills)



Source: Accenture Research analysis based on data from Lightcast

At the same time, a large share of the services workforce remains concentrated in routine-intensive roles that are more exposed to automation. The result is a layered transformation: growth in advanced, integration-heavy functions alongside continued vulnerability in standardized segments. Sustained upgrading will therefore depend not only on expanding infrastructure and attracting investment, but on accelerating the development and redeployment of specialized talent so that more workers can participate in higher-value mandates.

Moreover, as enterprise mandates become more complex, the structure of roles within those mandates is also evolving. Automation redistributes tasks within jobs. Predictive workforce analytics platforms apply AI to employee feedback and attrition risk analysis in high-churn IT-BPM environments, shifting emphasis from execution to supervision, interpretation, model validation and systems coordination.[45]

Labor market data further illustrates how AI roles in the Philippines are evolving. In 2021, demand centered on classical machine learning capabilities such as TensorFlow, deep learning and model-building tools. By 2025, hiring intensity has shifted toward generative AI, prompt engineering, AI infrastructure and platform-level tools such as ChatGPT and Claude **(Figure 9)**. This progression reflects a broader transition from standalone model development to deployment, orchestration and system-level integration, reinforcing the need for more advanced and continuously updated skill formation pathways.

The result is hybrid skill profiles that combine domain expertise with applied AI fluency and oversight responsibility. Roles such as AI operations supervisors, workflow integration specialists, digital risk analysts and data governance professionals bridge technical teams and business units. In regulated sectors such as banking and healthcare, where AI output must remain auditable and accountable, these integrative roles are becoming central to operational resilience.

In this scenario, the binding constraint is the availability of professionals capable of embedding AI systems within workflows, managing model risk and sustaining performance integrity at scale.

The specialization divide

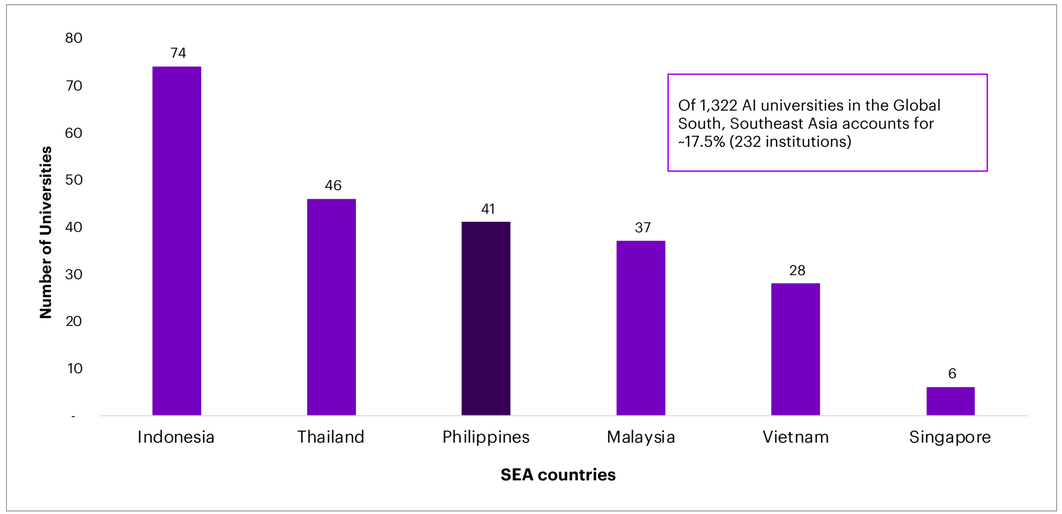
As roles evolve, the deeper question is whether the national talent pipeline can scale fast enough to support them. In the Philippines rising demand for specialized AI talent collides with limited supply, amplifying hiring pressures in advanced roles. Compared with established innovation hubs, the domestic AI ecosystem remains modest in both scale and investment, limiting the pool of experienced AI builders and depth of advanced career pathways.

International mobility compounds the problem. Filipino ICT professionals are globally competitive and actively recruited abroad. While this reflects workforce strength, it can tighten domestic availability in precisely the high-skill segments required to anchor AI-enabled mandates locally. Talent competition is therefore both domestic and transnational.

Without parallel expansion in advanced academic capacity, the domestic pipeline for AI engineers, researchers and systems architects may struggle to scale in line with mandates.

However, higher education capacity in AI is a challenge. Of the 1,322 universities in the Global South offering AI-related academic programs, 232 are located in Southeast Asia, of which 41 are in the Philippines **(Figure 10)**. While this reflects meaningful regional participation, Southeast Asia represents less than one-fifth of Global South AI university capacity.

Figure 10: Technical universities offering AI-focused academic programs in Southeast Asia



Source: EduRank.org, an independent metric-based ranking of 14,131 universities from 183 countries globally[46]

Scaling advanced AI capability

Scaling advanced AI capability requires a decisive shift from broad adoption to specialization depth. The Philippines must strengthen its applied AI talent pipeline, expanding advanced training, research pathways and deployment-oriented roles in areas such as data engineering, MLOps and AI security. It must align these efforts directly with higher-value enterprise mandates. When these elements evolve together through concentrated centers of excellence, structured government–industry–academia collaboration, small and medium enterprise enablement and regional innovation hubs, they create the conditions for deeper specialization and durable competitive advantage.

Concentrate capabilities to build the talent pipeline

Building depth in the talent pipeline requires deliberate concentration of capability. Countries that have accelerated advanced specialization have done so by integrating applied research, shared compute, data assets and advanced training within coordinated national platforms rather than dispersing efforts across fragmented initiatives. This reduces duplication, improves access to shared infrastructure and shortens the path from experimentation to validated, real-world deployment.

Steps in this direction include the launch of the National Artificial Intelligence Center for Research and Innovation (NAICRI), the Philippines' first central hub of AI research to help implement its National AI Strategy. NAICRI operates on four strategic pillars: national AI computing infrastructure, AI talent and research capability, governance and strategic coordination and regional innovation and inclusive growth. One of its key features is a shared computing backbone that will allow researchers, government agencies and enterprises to train AI models and run complex simulations.[47]

Saudi Arabia's PIF-backed HUMAIN initiative also exemplifies this approach by investing simultaneously in national data centers, cloud infrastructure, AI models and sector-specific applications, anchoring local innovation, high-skilled job creation and IP development in support of Vision 2030.[48]

Institutionalize government -industry-academia co-design

Innovation thrives when government, industry and academia operate in concert rather than in silos. To move from AI adoption to sustained AI creation and raise national R&D intensity, the Philippines must institutionalize collaboration as the default model for both research and curriculum design.[49]

At the policy level this means government investing in applied research, supporting startup incubation and using regulatory sandboxes that enable responsible experimentation. Curricula must also evolve in step with enterprise demand. Institutionalizing co-design, through industry-defined competency maps, faculty development tied to real use cases and structured apprenticeships can reduce time-to-productivity for graduates and ensure training systems scale in parallel with mandate complexity. Employers in turn must contribute real-world use cases, datasets and technical mentorship while nurturing local startup ecosystems. When these partnerships are structured deliberately, they attract capital, deepen talent and accelerate the development and deployment of AI solutions.

One example is **Brazil's National AI Plan**, developed jointly by government, industry and academia. It combines applied research funding, talent development and regulatory modernization under a unified framework. Backed by up to R$23 billion in planned investment over four years, the plan emphasizes the creation of locally relevant AI solutions, acquisition of advanced compute infrastructure including a top-tier supercomputer, workforce training and innovation support mechanisms that translate research into sectoral application.[50]

South Korea's K-Humanoid Alliance also illustrates how coordinated public–private alignment can accelerate advanced AI and robotics capability at scale. Launched by the Ministry of Trade, Industry and Energy, the alliance brings together leading robotics companies, top universities and AI research institutes to position Korea as a global leader in humanoid robotics by 2030. With projected investments exceeding KRW 1 trillion and structured collaboration between AI model developers and hardware manufacturers, the initiative integrates research, advanced talent development and commercialization.[51]

Create a critical mass of AI-enabled small and medium enterprises

Small and medium enterprises (SMEs) constitute the majority of firms in the Philippines and are central to productivity diffusion. Without broad-based SME AI adoption, AI-driven gains risk remaining concentrated within large enterprises and advanced delivery centers.

The national objective should be to create a critical mass of competent SME AI users—owners, managers and frontline teams able to apply AI across operations, marketing, customer engagement, finance and compliance. This requires practical, deployment-oriented training models, shared services support and sector-specific toolkits aligned with real business use cases.

Efforts in this direction include the ASEAN Foundation's two-year **AI for MSME Advancement in ASEAN** program, focused on hands-on, practical uses of AI such as streamlining operations, boosting online sales and managing finances. It covers the Philippines along with other countries in Southeast Asia.[52] Additionally, the International Labor Organization launched the **AI for Digital Novice MSMEs** program which offers 16 tailored AI modules for startups and existing enterprises and promotes inclusive digitalization through partnerships with government and community organizations under the Digital-PINAS Joint Program.[53]

Korea's coordinated SME AI training initiatives demonstrate how targeted literacy and support programs can accelerate adoption across smaller firms. **Korea SMEs and Startups Agency (KOSME)** signed a partnership with **the Korea Industry Intelligence Association** in 2025 to develop AI training programs for small businesses and venture-backed startups nationwide. This includes courses designed to strengthen AI literacy and practical application skills among SMEs and aligns with preferential support initiatives such as the AX Sprint Preferential Track, a fast-track SME policy loan program, to help smaller firms embed AI into their core functions.[54]

Strengthen regional innovation capability

AI skills in the Philippines are mostly found in a few big cities and a small number of companies. As more businesses start using AI in everyday work, those same places will keep getting the best projects and improving faster while many other regions and organizations fall behind. If nothing is done to spread AI skills and opportunities more widely, the country could end up with a "two-speed" economy: a few hubs move ahead quickly, and the rest don't get the same opportunities to build talent or grow higher-value work.

To address this imbalance, the Philippines needs to deliberately build advanced capability beyond the usual big-city hubs: setting up regional AI centers, improving access to computing infrastructure outside major metropolitan areas, strengthening research participation in state universities and colleges and training and supporting faculty. The objective is not dispersion for its own sake but building regional assets in a structured manner that aligns with national competitiveness goals.

The Philippines' **National Artificial Intelligence Center for Research and Innovation** is already taking steps in this direction with the aim of expanding access to AI benefits beyond major urban centers through regional hubs, shared computing resources and targeted training. This will equip MSMEs with tools for forecasting, logistics, health management and disaster preparedness, enabling broader access to AI-driven development.[55]

South Africa's recent efforts offer a relevant illustration of ecosystem-level coordination. Through its **G20 Presidency**, the country has advanced initiatives such as the **G20 AI Task Force** and the **AI Hub for Sustainable Development** to address what it describes as an "AI equity gap." By mobilizing partnerships across government, academia and industry, promoting inclusive research, strengthening private-sector engagement and investing in interoperable digital infrastructure, South Africa is seeking to catalyze regional innovation ecosystems rather than allow AI capability to remain concentrated in a few global centers.[56]

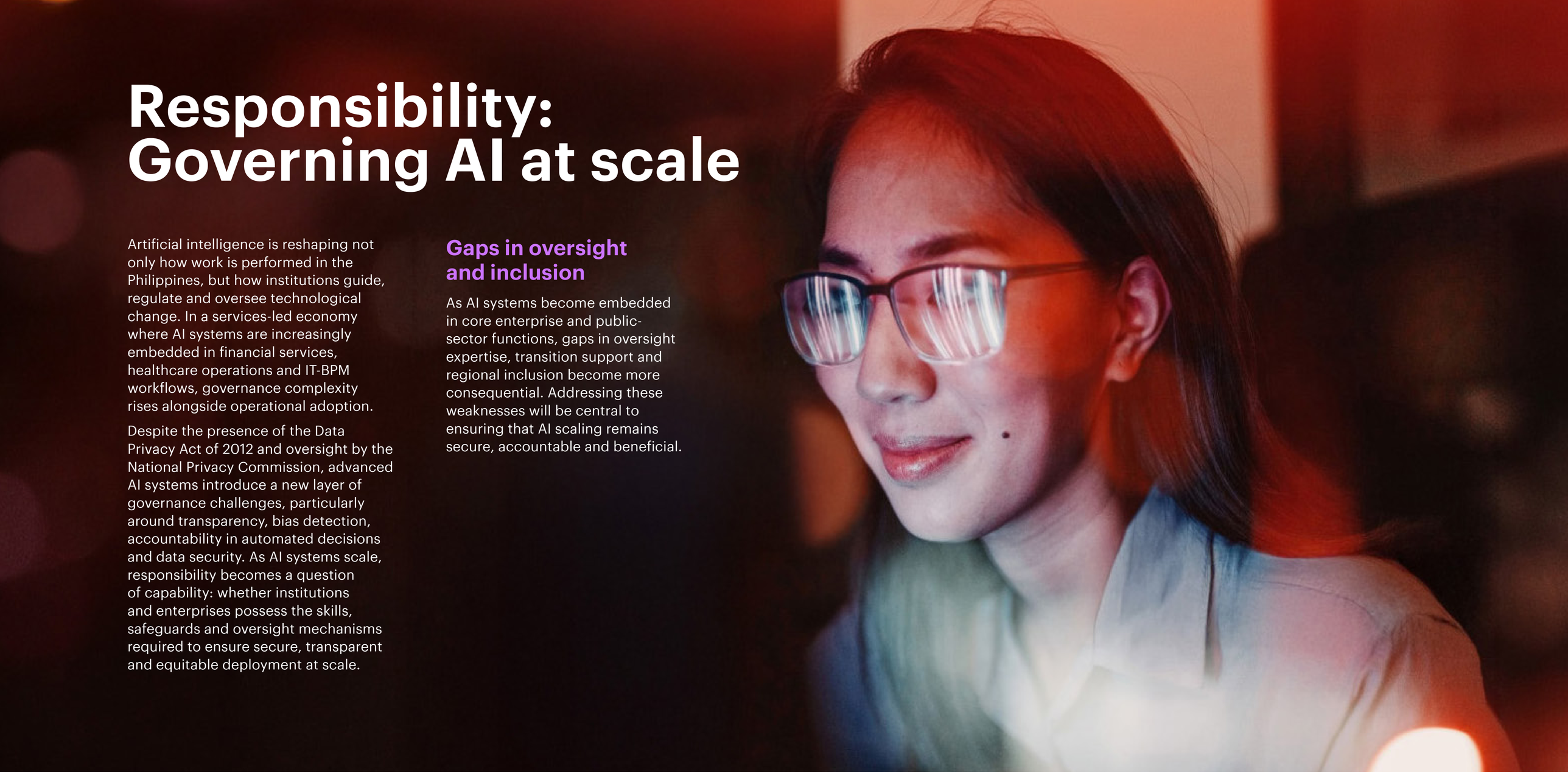
Responsibility: Governing AI at scale

Artificial intelligence is reshaping not only how work is performed in the Philippines, but how institutions guide, regulate and oversee technological change. In a services-led economy where AI systems are increasingly embedded in financial services, healthcare operations and IT-BPM workflows, governance complexity rises alongside operational adoption.

Despite the presence of the Data Privacy Act of 2012 and oversight by the National Privacy Commission, advanced AI systems introduce a new layer of governance challenges, particularly around transparency, bias detection, accountability in automated decisions and data security. As AI systems scale, responsibility becomes a question of capability: whether institutions and enterprises possess the skills, safeguards and oversight mechanisms required to ensure secure, transparent and equitable deployment at scale.

Gaps in oversight and inclusion

As AI systems become embedded in core enterprise and public-sector functions, gaps in oversight expertise, transition support and regional inclusion become more consequential. Addressing these weaknesses will be central to ensuring that AI scaling remains secure, accountable and beneficial.



Governance capacity imbalance

As AI adoption accelerates across the Philippine economy, governance capacity is not expanding at the same pace. In high-volume service sectors such as IT-BPM, financial services, healthcare and digital platforms, this imbalance heightens operational and reputational exposure. AI systems increasingly influence transaction screening, customer authentication, diagnostic support, content moderation and automated decision-making. As these systems shift from experimental tools to embedded infrastructure, oversight capability becomes a strategic workforce requirement rather than a peripheral regulatory function.

This integration elevates demand for professionals who can supervise models, validate outputs, document risks and ensure regulatory compliance. While the Philippines operates under the Data Privacy Act of 2012 and the oversight of the National Privacy Commission, advanced AI introduces governance challenges that extend beyond traditional privacy compliance. Issues such as algorithmic bias, explainability, misinformation, deepfake misuse and intellectual property ambiguity require expanded institutional capability and cross-functional oversight.

Yet governance depth remains uneven. Shortages of advanced cybersecurity professionals, AI risk assessors, model validators and compliance translators persist even as enterprise deployment accelerates. Without parallel expansion in oversight expertise and institutional coordination, AI systems may scale faster than the safeguards designed to manage them. The central challenge is alignment: whether risk management capacity, regulatory sophistication and enterprise governance mechanisms can evolve in step with the increasing complexity of AI integration.

Workforce risk and transition exposure

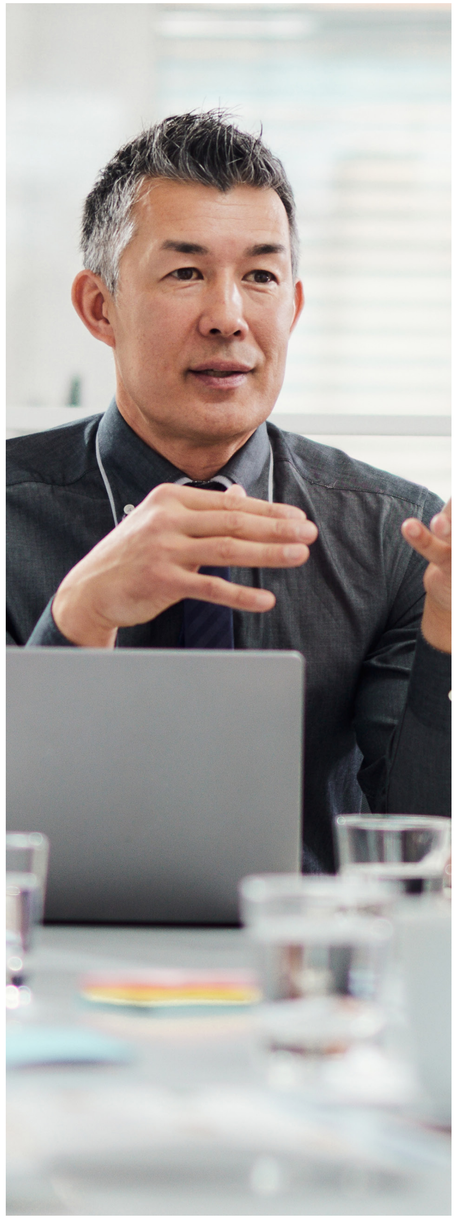
Responsible use of AI extends beyond model governance to managing the workforce consequences of task redesign and automation. In the Philippines, AI-driven transformation is reshaping task composition within occupations rather than eliminating job categories outright. However, the redistribution of tasks is uneven. In a services-dominated labor market, where IT-BPM, finance, retail services and administrative support roles account for a large share of employment, automation pressures concentrate in routine-intensive and clerical functions. Within the IT-BPM sector, industry reporting reflects this compositional shift: overall employment continues to expand, yet isolated instances of AI-linked headcount reductions highlight pressure within standardized support functions even as analytics, digital and technology-enabled roles grow.[57]

Transition exposure is not evenly distributed. AI-related task exposure is more concentrated among urban, college-educated service workers, particularly in clerical and administrative occupations. Gender patterns are also evident, as women remain disproportionately represented in several routine-intensive service roles.[58] These distributional dynamics suggest that task transformation may amplify existing occupational imbalances if workforce mobility and redeployment capacity do not keep pace. The structural risk is not aggregate employment contraction, but the speed and unevenness of task redistribution relative to the capacity of workers and institutions to absorb transition.

Uneven AI diffusion

The distribution of AI capability across the economy remains uneven. Advanced AI hiring and enterprise deployment are concentrated in the National Capital Region and a limited number of urban hubs, reflecting geographic clustering of digital talent, infrastructure and ecosystem maturity. While these centers drive early upgrading, regional disparities in connectivity, training access and institutional capacity constrain broader diffusion.

Without deliberate expansion beyond established nodes, AI-driven gains risk concentrating where ecosystem depth already exists. This could reinforce a two-speed transition, with higher-value mandates and advanced roles clustering in select regions while other parts of the economy remain peripheral. Ensuring even diffusion will require strengthening regional infrastructure, expanding access to advanced training and aligning local institutions with national innovation priorities. The responsibility challenge is therefore not only to govern AI effectively, but to ensure that its benefits and opportunities extend beyond a narrow geographic and institutional core.



Institutionalizing AI responsibly

Institutionalizing responsible AI requires scaling governance capability in step with deployment. Strengthening oversight expertise, regulatory coordination and enterprise-level safeguards will be essential to ensure that AI systems are secure, transparent and accountable. By embedding responsibility into institutional practice, rather than treating it as compliance afterthought, the Philippines can align innovation with public trust and long-term resilience.

Embed responsible AI capabilities across organizations

The Philippines should embed responsible AI use across enterprises and government institutions to ensure safe, effective and coordinated adoption. As AI becomes part of day-to-day operations, organizations need system-wide governance capabilities in privacy and security fundamentals, safe prompting and data handling, transparency, human oversight and clear escalation protocols for high-risk use cases. This is particularly relevant where "bring your own AI" behavior creates operational and legal exposure.

These competencies should form part of onboarding, role-based training and manager development. The **UAE's Chief AI Officers' Training Program** provides one reference model, combining academic instruction with applied learning in AI governance, ethics and sector applications to strengthen public sector AI leadership.[59]

Government institutions must also strengthen AI capabilities across policy design, procurement, data governance, evaluation and digital service delivery. Clear coordination mechanisms and dedicated teams are essential to translate strategy into execution.

Since 2022, the Philippines has intensified efforts to formalize its AI governance architecture, with multiple bills proposing dedicated oversight bodies such as a National AI Commission, risk-based regulatory frameworks and safeguards including an AI Bill of Rights and labor protections. These are complemented by the National AI Strategy Roadmap 2.0, the establishment of the Center for AI Research and updated guidance from the National Privacy Commission. Together, they reflect a clear shift toward institutionalizing responsible, whole-of-nation AI governance.[60]

India's National AI Competency Framework illustrates how defining lifecycle-wide AI competencies spanning planning, design, deployment and monitoring can institutionalize principles of fairness, transparency, privacy, security and accountability. Building responsible AI capacity across enterprises and the public sector is critical to scaling AI adoption securely and sustainably. [61]

Integrate reskilling with transition protection

The Philippines' workforce transition strategy must combine reskilling with mechanisms to protect workers, including income support where feasible, rapid redeployment pathways, career counseling, job matching and employer commitments to internal mobility. Without these safeguards, workers who are most exposed to automation will be the least able to take advantage of reskilling opportunities, especially in routine-heavy roles and informal jobs.

India's e-Shram–NCS integration links the national e-Shram digital registry of informal workers with the National Career Service (NCS) to transition workers into safer, formal employment. Using the country's Aadhaar national digital ID system, local access centers and AI-enabled tools such as multilingual translation, skills-gap analysis and job matching, the platform improves visibility, access to social protection and structured employment pathways. The platform has over 310 million registered workers and has guided 17.8 million toward formal jobs, reducing reliance on intermediaries and supporting more inclusive, rights-based use of AI in labor market integration.[62]

Similarly, **Singapore's Career Conversion Programs** demonstrate how structured transition pathways, through "place and train," "attach and train" and job redesign models, enable mid-career workers to reskill while maintaining income stability, supported by government-funded salary offsets and training allowances.[63,64,65]

Effective transition systems are therefore not ancillary to AI adoption; they are essential to sustaining workforce resilience during rapid task redistribution.

Design targeted inclusion pathways

AI transition risks and opportunities are unevenly distributed and hence require interventions. Priority should be given to workers in high-exposure, low-complementarity roles, particularly within IT-BPM, and to groups facing structural barriers to reskilling: women in routine and clerical occupations, youth entering the labor market and regions heavily concentrated in services hubs. Effective response begins with clear segmentation of roles by exposure and complementarity, followed by employer-validated reskilling pathways that move workers from routine tasks to higher-complementarity functions such as AI-supported quality assurance, escalation handling and analytics.

Employers play a central role. Structured redeployment pathways, internal mobility programs and bias-aware AI development practices help ensure productivity gains translate into upward mobility rather than displacement. Embedding equity-by-design principles across hiring, training and AI system development reduces the risk of widening existing divides.

Inclusive design must also account for linguistic, cultural and socioeconomic barriers. Programs should be tailored across gender, geography, literacy and income levels, supported by multilingual and locally relevant AI systems. **Viet Nam's "Empower Her Tech"** program, co-organized by the United Nations Development Program (UNDP) and Alobase, illustrates how focused digital skills training can expand participation among young women, people with disabilities, ethnic minorities and LGBTIQ+ communities.[66] **India's** public AI stack—including **BHASHINI, BharatGen** and **AdiVaani**—shows how national platforms can embed translation, India-centric foundation models and tribal-language inclusion directly into digital infrastructure, broadening access at scale.[67,68,69]

Accenture's Women of Worth (WoW) program helps women in Singapore relaunch their careers in technology after a career break. Part of the **Infocomm Media Development Authority's Relaunch** initiative, the program is delivered by Accenture, the Singapore Business Federation and IMDA.

WoW combines technical learning with practical support to help participants return to work with greater confidence. Through fully sponsored Future Readiness e-learning on Accenture LearnVantage, participants can earn up to 16 certifications across four areas: technology business skills, digital design and UX, software development and programming and disruptive technologies. Topics include agile, UX, Python, SQL, DevOps, generative AI, cloud, cybersecurity and data science.

The program goes beyond training. Structured learning is complemented by mentorship, networking and community support, helping returning professionals rebuild confidence, strengthen connections and navigate their return to the workforce.

The way forward

AI is reshaping how economies grow and how work is organized, and the scale of the opportunity is already clear. For the Philippines, the upside is significant, provided that firms and workers can adopt it effectively. Yet, value will not be captured by access to AI tools alone. The country must also build the skills, advanced specialization and governance capacity to match the pace of adoption.

This matters acutely because the Philippines is both well-positioned and highly exposed. AI will reshape the country's services backbone, especially its IT-BPM sector, through task automation and augmentation. The binding constraint is clear: skills development must accelerate and broaden far beyond a narrow "tech talent" lens. However, the country faces deep foundational constraints, such as lack of ICT skills, limited advanced research footprint for AI specialization and uneven uptake among socioeconomic and regional clusters. These gaps slow progress and limit how quickly workers can progress into AI-enabled tasks and roles.

The way forward is therefore a coordinated talent acceleration plan, executed as one agenda across the three pillars of readiness, innovation and responsibility **(Figure 11).**

Figure 11: Building AI-ready Filipino talent: The way forward

Imperatives for stakeholders

For the Philippines, the decisive factor will be how quickly the country can equip its people so that skills, talent pipelines and institutional capabilities can keep pace with AI diffusion, enabling a shift from labor advantage to intelligence advantage and positioning the country to compete on higher-value services.

Delivering on this agenda requires aligned action across four stakeholder groups, each with a distinct role in accelerating readiness, deepening innovation and embedding responsibility.

Government/policymakers

- Prioritize foundational learning and teacher upskilling
- Mainstream AI literacy and digital fluency across K–12, TVET and higher education
- Build a lifelong learning system with industry-linked credentials
- Treat connectivity and power as talent enablers, expanding affordable access beyond major cities
- Strengthen AI governance capacity across policy, procurement, data governance, evaluation and service delivery

Academic institutions

- Modernize curricula to embed digital and AI competencies across K–12, TVET and higher education pathways
- Invest in faculty capability development so instruction keeps pace with tools and workplace use cases
- Develop advanced specialization tracks and research-linked training that feeds the applied AI pipeline
- Institutionalize industry co-design: competency mapping, faculty development tied to real use cases, applied pathways
- Embed responsible AI principles into curricula and professional training pathways

Industry/employers

- Move from ad hoc training to role-based AI upskilling, manager capability-building and clear progression pathways tied to productivity outcomes
- Co-own stackable credentials with training providers that map to hiring needs
- Partner with academia to co-design curricula and reduce time-to-productivity through apprenticeships and capstone projects
- Embed responsible AI capabilities (privacy, security, safe prompting, human oversight, escalation protocols) into onboarding, role-based training and manager development
- Commit to workforce safeguards through structured redeployment pathways, internal mobility and bias-aware practices

Employees

- Develop digital fluency and AI literacy as baseline skills for employability
- Continuously upgrade through stackable learning pathways during employment
- Engage in training that supports movement into higher complementarity tasks and roles
- Adopt responsible AI use practices at work (e.g., safe data handling, privacy/ security basics, appropriate oversight/escalation)
- Participate in reskilling and mobility programs designed for workers in exposed roles

The opportunity is real and the foundations are in place. What the Philippines needs now is coordination, scale and speed. If government, academia, industry and workers move together across readiness, innovation and responsibility, AI can become a catalyst for higher productivity, more competitive services and broader-based prosperity.

Appendix

Readiness

Success stories

Country	Challenge	Solution	Impact
Strengthen digital learning and STEM exposure			
 Philippines strengthens K–12 and STEM pathways to reinforce AI foundations[70,71]	Foundational literacy and STEM gaps constrain AI capability formation, with more than 90% of late primary-age children struggling to comprehend age-appropriate text.	Implementation of K–12 reform, expansion of the Senior High School STEM strand and CHED's outcomes-based higher education framework to strengthen science and digital competencies.	Reinforces the base of the AI talent pipeline and supports sustained digital readiness.
 India scales early innovation exposure through Atal Tinkering Labs	Limited early exposure to emerging technologies restricted long-term STEM participation.	Establishment of over 10,000 Atal Tinkering Labs equipped with robotics, AI and design tools under the Atal Innovation Mission.	Democratizes early innovation exposure and expands STEM participation nationwide.
Institutionalize lifelong, industry-aligned learning			
 Philippines expands industry-aligned digital training through TESDA	AI job postings increased sixfold (2021–2025), creating skills mismatch risk.	Expansion of modular digital training programs in analytics, cybersecurity and automation aligned to competency-based certification.	Strengthens workforce mobility and supports transition into AI-complementary roles.
 Singapore institutionalizes continuous workforce upgrading through SkillsFuture[72]	Rapid technological change required continuous workforce reskilling.	Modular, stackable credentials in AI, automation oversight and digital technologies, tied to labor market analytics and employer consultation.	Embeds lifelong learning within national workforce strategy and reduces structural skills lag.
 Malaysia aligns Budget 2025 with AI-ready workforce development	TVET and STEM infrastructure gaps limited readiness for semiconductor, AI and EV sectors.	RM7.8 billion allocated for TVET expansion and targeted investment in STEM-focused education and infrastructure.	Aligns national training investment with emerging technology-intensive sectors.
Ensure universal digital access			
 Philippines advances ICT regulatory reform to expand broadband penetration[73]	Only ~30% of households are connected to fixed broadband, limiting online learning and AI-enabled work outside urban centers.	Regulatory modernization to increase telecom competition, promote broadband rollout and strengthen digital infrastructure investment, including support for AI-ready data centers.	Expands access to online education, remote work and AI-enabled enterprise adoption nationwide.
 Viet Nam integrates fiber, 5G and AI-ready infrastructure under digital transformation strategy	Digital ambitions required universal connectivity and advanced infrastructure.	Nationwide fiber rollout, 5G expansion and development of AI-ready, energy-efficient data centers.	Builds foundational infrastructure to support AI-intensive workloads and digital services growth.

Country	Challenge	Solution	Impact
Concentrate capabilities to build advanced AI specialization			
 Philippines advances AI Strategy Roadmap 2.0 to coordinate applied AI ecosystem	R&D expenditure at 0.32% of GDP constrains frontier experimentation and advanced AI specialization depth.	AI Strategy Roadmap 2.0 promotes applied AI research, structured government–industry–academia collaboration and regulatory sandboxes for responsible experimentation.	Strengthens research-to-deployment pathways and builds specialization aligned with enterprise mandate complexity.
 India establishes AI Centers of Excellence in priority sectors[74]	Need to deepen applied AI capability in healthcare, agriculture and sustainable cities.	Creation of AI CoEs integrating interdisciplinary research, domain expertise and sectoral application under structured governance.	Anchors advanced AI research within national priority domains and strengthens specialized talent formation.
Institutionalize government–industry–academia co-design			
 Brazil launches National AI Plan to align research, compute and talent development	Fragmented AI ecosystem limited commercialization and infrastructure scale.	Multi-year National AI Plan with planned R$23 billion investment, integrating research funding, compute infrastructure and workforce development.	Builds coordinate innovation infrastructure and strengthen domestic AI capability.
 South Korea accelerates advanced specialization through K-Humanoid Alliance	Global AI and robotics competition required integrated ecosystem collaboration.	Alliance between Ministry of Trade, Industry and Energy, robotics firms and universities to coordinate AI model development and commercialization.	Concentrates advanced AI and robotics capability under national strategic alignment.
Create a critical mass of AI-enabled enterprises			
 Philippine financial institutions embed AI within regulated workflows[75]	Financial institutions faced challenges scaling AI beyond pilots due to governance, compliance and risk management concerns.	BSP's Project SAPIENS reviewed AI and ML adoption across the financial sector, while institutions expanded AI use in fraud detection, AML/KYC, customer service and credit assessment under emerging governance frameworks.	Accelerates AI adoption at scale, improving operational efficiency, risk management, fraud detection and customer experience.
 South Korea expands SME AI literacy through KOSME initiatives	SMEs lacked structured pathways to AI adoption.	AI literacy programs and preferential transformation tracks target small businesses and startups.	Broadens AI diffusion beyond large enterprises and strengthens ecosystem depth.

Country	Challenge	Solution	Impact
Embed responsible AI capabilities across organizations			
 Philippines reinforces AI governance under Data Privacy Act and NPC oversight	Generative AI introduces new risks including bias, explainability gaps and automated decision accountability.	Data Privacy Act of 2012, oversight by the National Privacy Commission and reinforcement of responsible AI principles under AI Strategy 2.0.	Provides regulatory continuity and strengthens institutional safeguards for AI deployment.
 India operationalizes lifecycle-wide AI governance architecture	Need to balance innovation with accountability and inclusion.	India AI Governance Guidelines and National AI Competency Framework embedding fairness, transparency, privacy and accountability principles.	Establishes coordinated national AI governance architecture.
 UAE launches program to train Chief AI Officers for the government	As the UAE positions itself as a global hub for future technologies, government leaders need stronger AI literacy and governance capabilities to steer national AI adoption effectively.	The UAE launched a specialized Chief AI Officers' Training Program combining academic instruction with hands-on learning on AI trends, governance, ethics and sector-specific applications to equip leaders with practical decision-making tools.	The program strengthens public-sector AI leadership, supports the UAE's AI Strategy 2031 and advances the nation's ambition to become a global leader in AI-driven governance.
Integrate reskilling with transition protection			
 India's e-Shram–NCS integration transitions informal workers into formal employment	Informal workers in India lack formal protections, visibility in public systems and access to safe, quality employment due to structural, digital and linguistic barriers.	India launched e-Shram, a digital registry linked to Aadhaar, to support informal workers. Through local access centers and AI-powered tools like multilingual translation, skills-gap analysis and job-matching, the platform integrates with the National Career Service to guide workers towards safer employment.	Over 310 million workers are now registered and linked to social protection. Integration with NCS has guided 17.8 million toward formal jobs, reducing reliance on brokers and enabling inclusive, rights-based AI use in employment generation.
 Philippines prioritizes redeployment within highly AI-exposed IT-BPM workforce	Nearly three-fourths of IT-BPM workers score high on AI exposure but low on complementarity.	Emphasis on redeployment into analytics, AI operations, digital risk management and higher-complementarity roles.	Mitigates uneven transition risk while strengthening higher-value service mandates.
 Singapore enables mid-career mobility through Career Conversion Programs	Automation increased mid-career displacement risk.	Structured "place and train" models with employer collaboration and wage support.	Enables protected workforce redeployment during technological transition.

Glossary

Term	Definition
Advanced AI	Accenture defines Advanced AI as gen AI, agentic AI and physical AI, and does not include data, classical AI or RPA.
Advanced AI skills	Advanced AI skills include machine learning, deep learning, MLOps, data engineering, natural language processing (NLP), large language models (LLM), computer vision, agentic AI, AI governance, and AI security, among others.
AI complementarity	The extent to which AI enhances or augments human tasks rather than replacing them.
AI ecosystem	The network of organizations, resources and stakeholders involved in the development of AI technologies, including government entities, companies, research institutions and support structures such as funding infrastructure, regulatory frameworks and talent pools that collectively contribute to the growth and development of AI.
AI governance	AI governance is the set of rules, regulations, ethical and technical frameworks, and similar mechanisms that guide the development and deployment of artificial intelligence technologies.
AI-enabled transformation	The redesign of business processes and service delivery models using AI to improve productivity, accuracy and decision-making.
AI-ready infrastructure	Digital infrastructure, including data centers,, high-speed connectivity and cloud access, designed to support AI workloads and advanced computing requirements.

Term	Definition
Algorithmic bias	Systematic errors in AI systems that result in unfair or discriminatory outcomes due to biased training data or model design.
Artificial intelligence (AI)	Artificial Intelligence (AI) encompasses multiple technologies that enable computers to sense, comprehend, act, and learn. AI includes techniques such as machine learning, natural language processing, knowledge representation, computational intelligence, among others.
Association of Southeast Asian Nations (ASEAN)	ASEAN is defined by the following countries: Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Timor-Leste, Viet Nam.
Automation exposure	The degree to which tasks within a job can be performed by AI or automated technologies.
Business process management (BPM)	Business process management (BPM) is a discipline that uses various methods to discover, model, analyze, measure, improve and optimize business processes. A business process coordinates the behavior of people, systems, information and things to produce business outcomes in support of a business strategy. Processes can be structured and repeatable, or unstructured and variable. Though not required, technologies are often used with BPM. BPM is key to align IT/OT investments to business strategy.

Term	Definition
Carrier-neutral data center	A data center facility that allows multiple network providers to operate within it, promoting connectivity choice and competition.
Cloud engineering	The design, deployment and management of cloud-based infrastructure and services.
Contact center	A contact center supports customer interactions across a range of channels, including phone calls, email, Web chat, Web collaboration, and the emerging adoption of social media interactions, and is distinct from telephony-only call centers. Although contact centers support more than one channel, they do not necessarily involve the use of universal queuing. Instead, they may support multiple channels but use separate systems and, in some cases, business processes to do so. Key underlying technologies include automatic call distribution, computer-telephony integration, interactive voice response and outbound dialers.
Cybersecurity	Cybersecurity helps individuals and organizations reduce the risk and impact of cyber-attacks. Its core function is to defend the digital services and devices from online threats, which includes safeguarding the vast amounts of data and personal information stored locally or in the cloud. Cyber security also ensures that innovative and emerging technologies (such as AI) can be deployed in a secure way, so the opportunities they present can be fully realized.
Data engineering	The development and maintenance of systems that collect, organize and process large datasets for analytics and AI applications.
Data governance	The definition of data governance includes the collection of processes, policies, roles, metrics, and standards that ensure an effective and efficient use of information. This also helps establish data management processes that keep data secure, private, accurate, and usable throughout the data life cycle.

Term	Definition
Explainability	The ability to understand and interpret how an AI system reaches its decisions or outputs.
Generative AI/gen AI	Generative AI is the umbrella term for the ground-breaking form of creative artificial intelligence that can produce original content on demand. Rather than simply analyzing or classifying existing data, generative AI can create something entirely new, whether text, images, audio, synthetic data, or more.
Global capability center (GCC)	A Global Capability Center (GCC), also known as a captive center, shared service center, or global in-house center, is a facility or team established by a multinational corporation (MNC) to manage critical business operations from a centralized location. Unlike traditional outsourcing, GCCs are owned and controlled by the parent company, allowing enterprises to maintain oversight of quality, security, and intellectual property. They are designed to enhance organizational capabilities, drive innovation, and support digital transformation across the enterprise.
Governance capacity	The institutional and organizational ability to oversee, regulate and manage AI deployment responsibly.
Hybrid multicloud	An IT architecture that uses a combination of multiple public and private cloud services to distribute workloads and enhance flexibility.
Information and communication technology (ICT)	ICT is an extension of IT and refers to the various tools and platforms that facilitate the exchange of information among individuals and groups. This encompasses a wide range of devices, applications, and networks.

Term	Definition
Information technology (IT)	IT is the common term for the entire spectrum of technologies for information processing, including software, hardware, communications technologies and related services. In general, IT does not include embedded technologies that do not generate data for enterprise use.
K-12	The educational system that encompasses kindergarten through grade 12, representing the primary and secondary education provided to children and adolescents, typically from ages 5 to 18, before entering higher education or the workforce.
Machine learning	Advanced machine learning algorithms are composed of many technologies (such as deep learning, neural networks and natural language processing), used in unsupervised and supervised learning, that operate guided by lessons from existing information.
Micro-credentials	Short, focused, competency-based educational modules designed to certify specific skills in a rapidly evolving job market. They offer a flexible, often digital-first approach to learning, allowing individuals to quickly upskill or reskill.
MLOps	MLOps (Machine learning operations) is a set of practices that helps data scientists and engineers to manage the machine learning (ML) lifecycle more efficiently. It aims to bridge the gap between development and operations for machine learning. The goal of MLOps is to ensure that ML models are developed, tested, and deployed in a consistent and reliable way.

Term	Definition
Numeracy	The ability to understand, use, and apply mathematical concepts and skills in everyday situations. This includes basic arithmetic, interpreting data, solving problems, and making sense of numerical information in practical contexts.
Specialization intensity	The depth and concentration of advanced technical skills within a workforce or industry.
STEM	STEM stands for Science, Technology, Engineering and Mathematics, encompassing disciplines that drive innovation and address global challenges.
Systems integration	The process of connecting different digital systems, platforms and tools so they operate as a coordinated and interoperable whole.
TVET	Technical and vocational education and training' (TVET) is understood as comprising education, training and skills development relating to a wide range of occupational fields, production, services and livelihoods. TVET, as part of lifelong learning, can take place at secondary, post-secondary and tertiary levels and includes work-based learning and continuing training and professional development which may lead to qualifications. TVET also includes a wide range of skills development opportunities attuned to national and local contexts. Learning to learn, the development of literacy and numeracy skills, transversal skills and citizenship skills are integral components of TVET.

About the research

Governance capacity imbalance

This research followed a multi-pronged approach integrating data science with qualitative analysis. The study draws on insights from:

1. **Accenture in-house advanced analytical modeling**

Analytical approach: We analyzed job trends and skill trends, with a focused assessment of AI and AI-related roles over a five-year period to quantify medium-term changes in labor demand and emerging skill requirements. Trend analysis was conducted to assess shifts in hiring volume, skills composition and the emergence of AI skills in the Philippines.

- Source: Lightcast
- Time horizon: 2021–2025

2. **Comprehensive secondary research and literature study**

We generated insights based on Accenture Research analysis drawing on information from leading global institutions, government sources and publicly available case studies.

- We conducted an extensive review of global publications to identify patterns in talent readiness, innovation ecosystems and responsible and equitable AI deployment. Insights were triangulated with evidence from leading global and multilateral organizations, including World Economic Forum (WEF), World Bank, International Labour Organization (ILO), International Monetary Fund (IMF), Information Technology and Business Process Association of the Philippines (IBPAP), United Nations Educational, Scientific and Cultural Organization (UNESCO).
- We used government websites and newswires to gather information on country-level AI initiatives and public-private partnership frameworks.
- We analyzed publicly available national and corporate case studies to document best practices in AI education, skill and infrastructure development, innovation and governance.

How to read this report

This report combines a clear-eyed assessment of workforce, capability, and governance gaps with practical pathways to help the Philippines and its organizations capture AI's productivity upside responsibly and inclusively.

Several findings refer to **exposure** (the share of tasks that could be affected by AI) and **complementarity** (the extent to which AI augments rather than substitutes tasks). These concepts are not predictions of layoffs or firm-specific outcomes. They signal where task redesign and reskilling needs are likely to be greatest.

The report highlights uneven impacts across regions and demographic groups, for example women in routine-intensive service roles, to prioritize **inclusion by design** through targeted mobility pathways, expanded access to training and employer practices that broaden participation in higher-value work.

References to privacy, security, bias and misinformation reflect the reality that governance must scale with deployment. These are manageable risks when organizations build clear policies, oversight roles, monitoring, and human-in-the-loop controls—especially for higher-risk use cases.

Country examples serve as **benchmarks and design references**. They illustrate policy instruments, program models and implementation choices that may be adapted to the Philippine context. They are not a scorecard or like-for-like comparison across countries with different starting points, institutions, demographics and economic structures. When the report cites peers, it identifies transferable lessons: what to emulate, what to tailor and what to avoid to accelerate progress in ways that fit local realities.

The report attributes all data points and examples to sources cited in the endnotes. Quantified statements should be read with the definitions provided in the glossary and the research methods described in "About the research." Figures that rely on third-party datasets reflect the underlying taxonomy and time window of those sources.

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