

2013 SURVEY OF IT-BPO SERVICES
(in US\$Million)

Table 1. Revenue, by IT-BPO Category
2004-2013

IT-BPO Category	SALES REVENUE																												
	Levels (in US\$ million)											Growth Rates (in percent)									Percent Share to Total								
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2005	2006	2007	2008	2009	2010	2011	2012	2013	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Contact Center	587	986	1,455	2,051	2,839	4,207	5,260	6,817	7,587	8,394	67.9	47.7	40.9	38.4	48.2	25.0	29.6	11.3	10.6	44.4	49.4	50.1	46.9	44.9	50.9	52.3	56.5	56.4	54.8
Transcription	4	8	20	33	34	57	84	122	198	423	100.4	140.0	60.6	4.1	66.8	48.8	44.3	63.3	113.0	0.3	0.4	0.7	0.7	0.5	0.7	0.8	1.0	1.5	2.8
Animation	12	17	26	29	36	52	63	72	80	88	37.6	52.6	11.2	25.5	44.2	20.6	14.0	11.7	9.4	0.9	0.9	0.9	0.7	0.6	0.6	0.6	0.6	0.6	
Software Development	279	399	707	1,098	1,413	1,672	2,198	2,469	2,848	3,429	43.2	77.1	55.4	28.6	18.4	31.4	12.3	15.4	20.4	21.1	20.0	24.3	25.1	22.3	20.3	21.9	20.4	21.2	22.4
Other BPOs	441	585	697	1,157	2,004	2,270	2,452	2,594	2,736	2,971	32.8	19.1	66.0	73.2	13.3	8.0	5.8	5.5	8.6	33.3	29.3	24.0	26.5	31.7	27.5	24.4	21.5	20.3	19.4
TOTAL INDUSTRY	1,324	1,996	2,906	4,368	6,325	8,258	10,058	12,074	13,450	15,305	50.8	45.6	50.3	44.8	30.6	21.8	20.1	11.4	13.8	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table 2. Export Revenue, by IT-BPO Category
2004-2013

IT-BPO Category	EXPORT REVENUE																												
	Levels (in US\$ million)											Growth Rates (in percent)									Percent Share to Total								
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2005	2006	2007	2008	2009	2010	2011	2012	2013	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Contact Center	561	949	1,330	1,732	2,489	3,938	5,126	6,166	7,062	7,578	69.2	40.1	30.2	43.7	58.2	30.2	20.3	14.5	7.3	63.2	68.4	58.1	49.6	47.1	51.0	54.1	55.3	56.5	53.5
Transcription	4	8	19	25	24	54	75	122	198	422	99.4	124.1	33.2	(4.8)	127.3	37.7	62.1	63.1	112.8	0.5	0.6	0.8	0.7	0.5	0.7	0.8	1.1	1.6	3.0
Animation	8	11	23	27	35	46	54	60	69	75	46.3	100.8	17.1	30.8	31.0	17.8	11.5	15.9	7.5	0.9	0.8	1.0	0.8	0.7	0.6	0.6	0.5	0.6	0.5
Software Development	98	160	455	852	1,148	1,553	1,928	2,381	2,613	3,222	62.5	184.4	87.2	34.9	35.2	24.2	23.5	9.8	23.3	11.1	11.5	19.9	24.4	21.7	20.1	20.4	21.3	20.9	22.7
Other BPOs	217	259	462	855	1,592	2,126	2,288	2,432	2,561	2,879	19.5	78.4	85.1	86.3	33.5	7.6	6.3	5.3	12.4	24.4	18.7	20.2	24.5	30.1	27.6	24.2	21.8	20.5	20.3
TOTAL INDUSTRY	888	1,388	2,288	3,490	5,288	7,717	9,470	11,160	12,503	14,175	56.3	64.9	52.5	51.5	45.9	22.7	17.8	12.0	13.4	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

IT-BPO Category	EXPORT REVENUE										
	Export-to-Revenue Ratio (in percent)										2013
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2013
Contact Center	95.6	96.3	91.4	84.5	87.7	93.6	97.4	90.4	93.1	90.3	90.3
Transcription	100.0	99.5	92.9	77.1	70.5	96.1	89.0	100.0	99.9	99.8	99.8
Animation	62.4	66.4	87.3	91.9	95.8	87.1	85.0	83.1	86.3	84.7	84.7
Software Development	35.3	40.1	64.3	77.5	81.3	92.9	87.7	96.4	91.7	93.9	93.9
Other BPOs	49.1	44.2	66.2	73.9	79.4	93.7	93.3	93.7	93.6	96.9	96.9
TOTAL INDUSTRY	67.1	69.5	78.7	79.9	83.6	93.4	94.2	92.4	93.0	92.6	92.6

Table 2.1.a. Export Revenue, by Country of Destination
2013

IT-BPO Category	USA	Canada	Europe ¹	Japan	India	China	Other Asia ²	Australia-New Zealand	Middle East	Africa	Others	Total Exports
Contact Center	6,675	54	315	12	-	-	50	410	-	-	62	7,578
Transcription	90	-	282	17	1	-	-	32	-	-	-	422
Animation	11	-	0	24	-	-	40	-	-	-	0	75
Software Development	2,008	-	651	163	-	1	52	88	-	-	257	3,222
Other BPOs	1,503	44	631	307	15	5	226	111	3	1	33	2,879
TOTAL INDUSTRY	10,287	99	1,880	523	16	6	367	641	3	1	352	14,175
Percent Share	72.6	0.7	13.3	3.7	0.1	0.0	2.6	4.5	0.0	0.0	2.5	100.0

1/ In particular, United Kingdom, Germany, Switzerland, Ireland, Netherlands, Denmark, Spain and Italy.

2/ In particular, Singapore, Thailand, Hong Kong, Malaysia, Indonesia, Korea and Cambodia.

Table 2.1.b. Export Revenue, by Country of Destination
2012

IT-BPO Category	USA	Canada	Europe ¹	Japan	India	China	Other Asia ²	Australia-New Zealand	Middle East ³	Africa	Others	Total Exports
Contact Center	6,722	9	102	7	-	-	30	191	-	-	1	7,062
Transcription	59	-	134	5	-	-	-	-	-	-	-	198
Animation	-	-	-	38	-	-	32	-	-	-	-	69
Software Development	1,402	-	335	753	-	7	5	110	-	-	1	2,613
Other BPOs	1,234	29	668	257	16	6	230	68	2	6	45	2,561
TOTAL INDUSTRY	9,416	38	1,239	1,060	16	13	297	369	2	6	47	12,503
Percent Share	75.3	0.3	9.9	8.5	0.1	0.1	2.4	3.0	0.0	0.0	0.4	100.0

1/ In particular, United Kingdom, Germany, Switzerland, Ireland, Netherlands, Denmark, Spain and Italy.

2/ In particular, Singapore, Thailand, Hong Kong, Malaysia, Indonesia, Korea and Cambodia.

Table 3. Total Equity, by IT-BPO Category
2005-2013

IT-BPO Category	TOTAL EQUITY																									
	Levels (in US\$ million)									Growth Rates (in percent)									Percent Share to Total							
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2006	2007	2008	2009	2010	2011	2012	2013	2005	2006	2007	2008	2009	2010	2011	2012	2013
Contact Center	243	281	596	1,356	1,387	2,428	3,063	3,372	3,864	15.9	112.0	127.3	2.3	75.0	26.2	10.1	14.6	49.4	45.2	63.8	69.3	53.6	55.2	53.3	46.0	46.2
Transcription	1	2	8	13	16	33	48	90	159	104.5	276.0	55.1	24.2	106.1	45.7	88.0	77.7	0.2	0.4	0.9	0.7	0.6	0.7	0.8	1.2	1.9
Animation	11	18	24	23	63	103	104	77	67	61.8	29.5	(1.8)	167.1	64.0	1.0	(25.9)	(13.0)	2.3	3.0	2.6	1.2	2.4	2.3	1.8	1.0	0.8
Software Development	12	46	189	378	636	895	1,270	2,038	2,268	279.2	306.3	100.3	68.2	40.8	41.9	60.5	11.3	2.5	7.5	20.2	19.3	24.6	20.4	22.1	27.8	27.1
Other BPOs	224	274	117	188	486	938	1,262	1,751	2,009	22.1	(57.3)	60.3	159.1	92.9	34.6	38.7	14.7	45.6	44.0	12.5	9.6	18.8	21.3	22.0	23.9	24.0
TOTAL INDUSTRY	492	622	934	1,957	2,587	4,395	5,746	7,327	8,367	26.5	50.1	109.5	32.2	69.9	30.7	27.5	14.2	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table 3.1 Foreign Direct Investment
2005-2013

IT-BPO Category	FOREIGN DIRECT INVESTMENT																									
	Levels (in US\$ million)									Growth Rates (in percent)									Percent Share to Total							
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2006	2007	2008	2009	2010	2011	2012	2013	2005	2006	2007	2008	2009	2010	2011	2012	2013
Contact Center	213	259	585	1,309	1,330	2,421	3,007	3,338	3,759	21.7	126.1	123.7	1.6	82.0	24.2	11.0	12.6	64.7	68.8	71.2	71.7	56.0	56.4	56.1	48.0	48.1
Transcription	1	2	8	13	13	30	46	90	155	176.2	430.3	55.1	4.4	125.6	53.9	93.3	72.6	0.2	0.4	1.0	0.7	0.6	0.7	0.9	1.3	2.0
Animation	4	18	23	23	40	73	75	76	62	303.8	31.4	1.1	69.1	83.8	3.3	1.4	(18.5)	1.3	4.7	2.8	1.3	1.7	1.4	1.1	0.8	
Software Development	5	34	96	320	632	849	1,211	1,948	2,143	656.6	179.8	233.2	97.6	34.3	42.7	60.8	10.0	1.4	9.1	11.7	17.5	26.6	19.8	22.6	28.0	27.4
Other BPOs	107	64	109	161	361	916	1,016	1,507	1,697	(40.3)	71.2	47.5	124.5	153.9	10.8	48.4	12.6	32.4	16.9	13.3	8.8	15.2	21.4	19.0	21.7	21.7
TOTAL INDUSTRY	329	376	821	1,825	2,376	4,288	5,355	6,959	7,815	14.3	118.5	122.2	30.1	80.5	24.9	30.0	12.3	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

IT-BPO Category	FOREIGN DIRECT INVESTMENT									
	Foreign-to-Total Equity Ratio (in percent)									
	2005	2006	2007	2008	2009	2010	2011	2012	2013	
Contact Center	87.6	92.0	98.1	96.5	95.9	99.7	99.2	98.2	99.0	97.3
Transcription	52.5	71.0	100.0	100.0	84.1	92.0	97.2	99.9	97.1	97.1
Animation	38.4	95.8	97.2	100.0	63.3	70.9	72.5	99.2	92.9	92.9
Software Development	37.0	73.9	50.9	84.6	99.4	94.8	95.4	95.6	94.5	94.5
Other BPOs	47.5	23.2	93.1	85.6	74.2	97.7	80.4	86.1	84.4	84.4
TOTAL INDUSTRY	66.9	60.4	87.9	93.3	91.8	97.6	93.2	95.0	93.4	93.4

Table 3.2.a. Foreign Equity by Country of Investor
2013

IT-BPO Category	USA	Europe ¹	Asia ²	Australia	Japan	India	China	Total FDI
Contact Center	1,708	1,733	89	83	49	96	1	3,759
Transcription	89	35	3	25	1	2	0	155
Animation	(6)	(7)	(14)	(0)	89	(0)	(0)	62
Software Development	312	1,558	30	4	226	7	6	2,143
Other BPOs	352	489	220	79	433	124	0	1,697
TOTAL INDUSTRY	2,454	3,809	328	190	798	228	8	7,815
Percent Share	31.4	48.7	4.2	2.4	10.2	2.9	0.1	100.0

^{1/} In particular, United Kingdom, Netherlands, Germany and France.

^{2/} In particular, Singapore, Hong Kong and Korea.

Table 3.2.b. Foreign Equity by Country of Investor
2012

IT-BPO Category	USA	Europe ¹	Asia ²	Australia	Japan	India	China	Total FDI
Contact Center	1,595	1,304	77	67	5	291	-	3,338
Transcription	67	-	-	28	(5)	-	-	90
Animation	-	-	(7)	-	83	-	-	76
Software Development	177	1,509	94	3	163	2	-	1,948
Other BPOs	755	56	257	12	459	(31)	-	1,507
TOTAL INDUSTRY	2,593	2,869	421	109	705	262	-	6,959
Percent Share	37.3	41.2	6.1	1.6	10.1	3.8	-	100.0

^{1/} In particular, United Kingdom, Netherlands, Germany, Austria and France.

^{2/} In particular, Singapore, Malaysia, Hong Kong and Korea.

Table 4. Employment, by IT-BPO Category
2004-2013

IT-BPO Category	EMPLOYMENT																													
	Levels (count in persons)										Growth Rates (in percent)										Percent Share to Total									
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2005	2006	2007	2008	2009	2010	2011	2012	2013	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	
Contact Center	65,006	96,246	153,683	169,748	212,372	255,765	329,597	433,183	487,757	530,882	48.1	59.7	10.5	25.1	20.4	28.9	31.4	12.6	8.8	68.8	69.7	62.0	62.5	59.8	57.5	61.5	63.8	63.4	62.3	
Transcription	901	1,785	4,956	6,621	4,321	7,060	9,131	11,084	16,997	20,172	98.1	177.7	33.6	(34.7)	63.4	29.3	21.4	53.3	18.7	1.0	1.3	2.0	2.4	1.2	1.6	1.7	1.6	2.2	2.4	
Animation	1,488	1,864	4,482	4,323	5,656	3,732	3,908	3,973	4,164	4,206	25.3	140.4	(3.5)	30.8	(34.0)	4.7	1.6	4.8	1.0	1.6	1.4	1.8	1.6	1.6	0.8	0.7	0.6	0.5	0.5	
Software Development	11,975	17,829	42,657	44,870	49,893	46,987	49,516	55,464	64,922	82,583	48.9	139.3	5.2	11.2	(5.8)	5.4	12.0	17.1	27.2	12.7	12.9	17.2	16.5	14.0	10.6	9.2	8.2	8.4	9.7	
Other BPOs	15,118	20,278	42,267	45,994	82,893	131,267	143,975	175,761	196,092	213,939	34.1	108.4	8.8	80.2	58.4	9.7	22.1	11.6	9.1	16.0	14.7	17.0	16.9	23.3	29.5	26.9	25.9	25.5	25.1	
TOTAL INDUSTRY	94,488	138,002	248,045	271,556	355,135	444,811	536,128	679,464	769,932	851,782	46.1	79.7	9.5	30.8	25.3	20.5	26.7	13.3	10.6	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table 5. Compensation, by IT-BPO Category
2004-2013

IT-BPO Category	COMPENSATION																													
	Levels (in US\$ million)										Growth Rates (in percent)										Percent Share to Total									
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2005	2006	2007	2008	2009	2010	2011	2012	2013	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	
Contact Center	331	556	766	1,090	1,680	1,954	2,805	3,570	4,049	4,549	67.6	37.9	42.2	54.2	16.3	43.5	27.3	13.4	12.4	70.3	72.2	60.5	51.2	60.8	57.2	62.3	62.1	59.4	57.4	
Transcription	2	5	12	24	22	35	48	63	98	125	140.0	142.2	100.7	(8.1)	57.0	36.6	31.7	56.2	27.8	0.4	0.6	0.9	1.1	0.8	1.0	1.1	1.1	1.4	1.6	
Animation	6	8	14	19	27	21	24	27	30	32	35.8	63.3	35.2	42.9	(21.9)	15.8	12.8	11.3	5.4	1.3	1.1	1.1	0.9	1.0	0.6	0.5	0.4	0.4		
Software Development	83	120	249	620	536	557	629	849	1,129	1,524	44.5	106.9	149.4	(13.5)	3.9	12.9	35.1	32.9	35.0	17.6	15.6	19.6	29.1	19.4	16.3	14.0	14.8	16.6	19.2	
Other BPOs	49	80	226	377	497	852	997	1,243	1,507	1,689	64.5	183.0	66.8	31.9	71.4	17.0	24.6	21.3	12.1	10.3	10.4	17.8	17.7	18.0	24.9	22.1	21.6	22.1	21.3	
TOTAL INDUSTRY	471	769	1,266	2,129	2,762	3,419	4,502	5,751	6,813	7,919	63.1	64.7	68.1	29.7	23.8	31.7	27.7	18.5	16.2	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

IT-BPO Category	ANNUAL COMPENSATION PER EMPLOYEE																			
	Levels (in US\$)										Growth Rates (in percent)									
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2005	2006	2007	2008	2009	2010	2011	2012	2013	
Contact Center	5,099	5,772	4,985	6,420	7,912	7,640	8,510	8,240	8,301	8,569	13.2	(13.6)	28.8	23.2	(3.4)	11.4	(3.2)	0.7	3.2	
Transcription	2,295	2,780	2,426	3,644	5,131	4,929	5,206	5,649	5,755	6,198	21.1	(12.8)	50.2	40.8	(3.9)	5.6	8.5	1.9	7.7	
Animation	4,172	4,521	3,071	4,305	4,702	5,568	6,157	6,832	7,257	7,568	8.4	(32.1)	40.2	9.2	18.4	10.6	11.0	6.2	4.3	
Software Development	6,943	6,739	5,827	13,817	10,743	11,849	12,699	15,313	17,383	18,453	(2.9)	(13.5)	137.1	(22.2)	10.3	7.2	20.6	13.5	6.2	
Other BPOs	3,210	3,937	5,345	8,196	5,997	6,493	6,926	7,070	7,687	7,896	22.7	35.8	53.3	(26.8)	8.3	6.7	2.1	8.7	2.7	
TOTAL INDUSTRY	4,989	5,572	5,105	7,841	7,778	7,686	8,398	8,464	8,849	9,297	11.7	(8.4)	53.6	(0.8)	(1.2)	9.3	0.8	4.5	5.1	

Table 6. Profile of Respondents
2013

IT-BPO Category	2013					
	Total	n1	n2	n3	n4	n5
Contact Center	232	14	135	11	11	61
Transcription	80	2	15	13	3	47
Animation	37	5	2	7	1	22
Software Development	332	19	126	51	16	120
Other BPOs	417	19	242	38	20	98
TOTAL INDUSTRY	1,098	59	520	120	51	348

SUPPLEMENTAL TABLES

Table 1. Sales Revenue, by IT-BPO Category

IT-BPO Category	REVENUES																	
	Levels in US\$ Million					Growth Rates (in percent)				Percentage Points Contribution to Growth				Percent Share to Industry Total				
	2009	2010	2011	2012	2013	2010	2011	2012	2013	2010	2011	2012	2013	2009	2010	2011	2012	2013
Contact Center	4,207	5,260	6,817	7,587	8,394	25.0	29.6	11.3	10.6	12.8	15.5	6.4	6.0	50.9	52.3	56.5	56.4	54.8
Transcription	57	84	122	198	423	48.8	44.3	63.3	113.0	0.3	0.4	0.6	1.7	0.7	0.8	1.0	1.5	2.8
Animation	52	63	72	80	88	20.6	14.0	11.7	9.4	0.1	0.1	0.1	0.1	0.6	0.6	0.6	0.6	0.6
Software Development	1,672	2,198	2,469	2,848	3,429	31.4	12.3	15.4	20.4	6.4	2.7	3.1	4.3	20.3	21.9	20.4	21.2	22.4
Other BPOs	2,270	2,452	2,594	2,736	2,971	8.0	5.8	5.5	8.6	2.2	1.4	1.2	1.7	27.5	24.4	21.5	20.3	19.4
TOTAL INDUSTRY	8,258	10,058	12,074	13,450	15,305	21.8	20.1	11.4	13.8	21.8	20.1	11.4	13.8	100.0	100.0	100.0	100.0	100.0

Table 2. Industry Exports, by IT-BPO Category

IT-BPO Category	EXPORTS																	
	Levels in US\$ Million					Growth Rates (in percent)				Percentage Points Contribution to Growth				Percent Share to Industry Total				
	2009	2010	2011	2012	2013	2010	2011	2012	2013	2010	2011	2012	2013	2009	2010	2011	2012	2013
Contact Center	3,938	5,126	6,166	7,062	7,578	30.2	20.3	14.5	7.3	15.4	11.0	8.0	4.1	51.0	54.1	55.3	56.5	53.5
Transcription	54	75	122	198	422	37.7	62.1	63.1	112.8	0.3	0.5	0.7	1.8	0.7	0.8	1.1	1.6	3.0
Animation	46	54	60	69	75	17.8	11.5	15.9	7.5	0.1	0.1	0.1	0.0	0.6	0.6	0.5	0.6	0.5
Software Development	1,553	1,928	2,381	2,613	3,222	24.2	23.5	9.8	23.3	4.9	4.8	2.1	4.9	20.1	20.4	21.3	20.9	22.7
Other BPOs	2,126	2,288	2,432	2,561	2,879	7.6	6.3	5.3	12.4	2.1	1.5	1.2	2.5	27.6	24.2	21.8	20.5	20.3
TOTAL INDUSTRY	7,717	9,470	11,160	12,503	14,175	22.7	17.8	12.0	13.4	22.7	17.8	12.0	13.4	100.0	100.0	100.0	100.0	100.0

Table 3. Industry Total Equity, by IT-BPO Category

IT-BPO Category	TOTAL EQUITY																	
	Levels in US\$ Million					Growth Rates (in percent)				Percentage Points Contribution to Growth				Percent Share to Industry Total				
	2009	2010	2011	2012	2013	2010	2011	2012	2013	2010	2011	2012	2013	2009	2010	2011	2012	2013
Contact Center	1,387	2,428	3,063	3,372	3,864	75.0	26.2	10.1	14.6	40.2	14.5	5.4	6.7	53.6	55.2	53.3	46.0	46.2
Transcription	16	33	48	90	159	106.1	45.7	88.0	77.7	0.7	0.3	0.7	1.0	0.6	0.7	0.8	1.2	1.9
Animation	63	103	104	77	67	64.0	1.0	-25.9	-13.0	1.5	0.0	(0.5)	(0.1)	2.4	2.3	1.8	1.0	0.8
Software Development	636	895	1,270	2,038	2,268	40.8	41.9	60.5	11.3	10.0	8.5	13.4	3.1	24.6	20.4	22.1	27.8	27.1
Other BPOs	486	938	1,262	1,751	2,009	92.9	34.6	38.7	14.7	17.5	7.4	8.5	3.5	18.8	21.3	22.0	23.9	24.0
TOTAL INDUSTRY	2,587	4,395	5,746	7,327	8,367	69.9	30.7	27.5	14.2	69.9	30.7	27.5	14.2	100.0	100.0	100.0	100.0	100.0

Table 4. Industry Foreign Direct Investment, by IT-BPO Category

IT-BPO Category	FOREIGN DIRECT INVESTMENT																	
	Levels in US\$ Million					Growth Rates (in percent)				Percentage Points Contribution to Growth				Percent Share to Industry Total				
	2009	2010	2011	2012	2013	2010	2011	2012	2013	2010	2011	2012	2013	2009	2010	2011	2012	2013
Contact Center	1,330	2,421	3,007	3,338	3,759	82.0	24.2	11.0	12.6	45.9	13.7	6.2	6.0	56.0	56.4	56.1	48.0	48.1
Transcription	13	30	46	90	155	125.6	53.9	93.3	72.6	0.7	0.4	0.8	0.9	0.6	0.7	0.9	1.3	2.0
Animation	40	73	75	76	62	83.8	3.3	1.4	-18.5	1.4	0.1	0.0	(0.2)	1.7	1.7	1.4	1.1	0.8
Software Development	632	849	1,211	1,948	2,143	34.3	42.7	60.8	10.0	9.1	8.5	13.8	2.8	26.6	19.8	22.6	28.0	27.4
Other BPOs	361	916	1,016	1,507	1,697	153.9	10.8	48.4	12.6	23.4	2.3	9.2	2.7	15.2	21.4	19.0	21.7	21.7
TOTAL INDUSTRY	2,376	4,288	5,355	6,959	7,815	80.5	24.9	30.0	12.3	80.5	24.9	30.0	12.3	100.0	100.0	100.0	100.0	100.0

Table 5. Industry Employment, by IT-BPO Category

IT-BPO Category	EMPLOYMENT																	
	No. of Persons					Growth Rates (in percent)				Percentage Points Contribution to Growth				Percent Share To Industry Total				
	2009	2010	2011	2012	2013	2010	2011	2012	2013	2010	2011	2012	2013	2009	2010	2011	2012	2013
Contact Center	255,765	329,597	433,183	487,757	530,882	28.9	31.4	12.6	8.8	16.6	19.3	8.0	5.6	57.5	61.5	63.8	63.4	62.3
Transcription	7,060	9,131	11,084	16,997	20,172	29.3	21.4	53.3	18.7	0.5	0.4	0.9	0.4	1.6	1.7	1.6	2.2	2.4
Animation	3,732	3,908	3,973	4,164	4,206	4.7	1.6	4.8	1.0	0.0	0.0	0.0	0.0	0.8	0.7	0.6	0.5	0.5
Software Development	46,987	49,516	55,464	64,922	82,583	5.4	12.0	17.1	27.2	0.6	1.1	1.4	2.3	10.6	9.2	8.2	8.4	9.7
Other BPOs	131,267	143,975	175,761	196,092	213,939	9.7	22.1	11.6	9.1	2.9	5.9	3.0	2.3	29.5	26.9	25.9	25.5	25.1
TOTAL INDUSTRY	444,811	536,128	679,464	769,932	851,782	20.5	26.7	13.3	10.6	20.5	26.7	13.3	10.6	100.0	100.0	100.0	100.0	100.0

Table 6. Industry Compensation, by IT-BPO Category

IT-BPO Category	COMPENSATION																		Annual Average Compensation per Employee								
	Levels in US\$ Million					Growth Rates (in percent)				Percentage Points Contribution to Growth				Percent Share To Industry Total					Levels in US\$				Growth Rates				
	2009	2010	2011	2012	2013	2010	2011	2012	2013	2010	2011	2012	2013	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013	2010	2011	2012	2013
Contact Center	1,954	2,805	3,570	4,049	4,549	43.5	27.3	13.4	12.4	24.9	17.0	8.3	7.3	57.2	62.3	62.1	59.4	57.4	7,640	8,510	8,240	8,301	8,569	11.4	(3.2)	0.7	3.2
Transcription	35	48	63	98	125	36.6	31.7	56.2	27.8	0.4	0.3	0.6	0.4	1.0	1.1	1.1	1.4	1.6	4,929	5,206	5,649	5,755	6,198	5.6	8.5	1.9	7.7
Animation	21	24	27	30	32	15.8	12.8	11.3	5.4	0.1	0.1	0.1	0.0	0.6	0.5	0.5	0.4	0.4	5,568	6,157	6,832	7,257	7,568	10.6	11.0	6.2	4.3
Software Development	557	629	849	1,129	1,524	12.9	35.1	32.9	35.0	2.1	4.9	4.9	5.8	16.3	14.0	14.8	16.6	19.2	11,849	12,699	15,313	17,383	18,453	7.2	20.6	13.5	6.2
Other BPOs	852	997	1,243	1,507	1,689	17.0	24.6	21.3	12.1	4.2	5.4	4.6	2.7	24.9	22.1	21.6	22.1	21.3	6,493	6,926	7,070	7,687	7,896	6.7	2.1	8.7	2.7
TOTAL INDUSTRY	3,419	4,502	5,751	6,813	7,919	31.7	27.7	18.5	16.2	31.7	27.7	18.5	16.2	100.0	100.0	100.0	100.0	100.0	7,686	8,398	8,464	8,849	9,297	9.3	0.8	4.5	5.1