

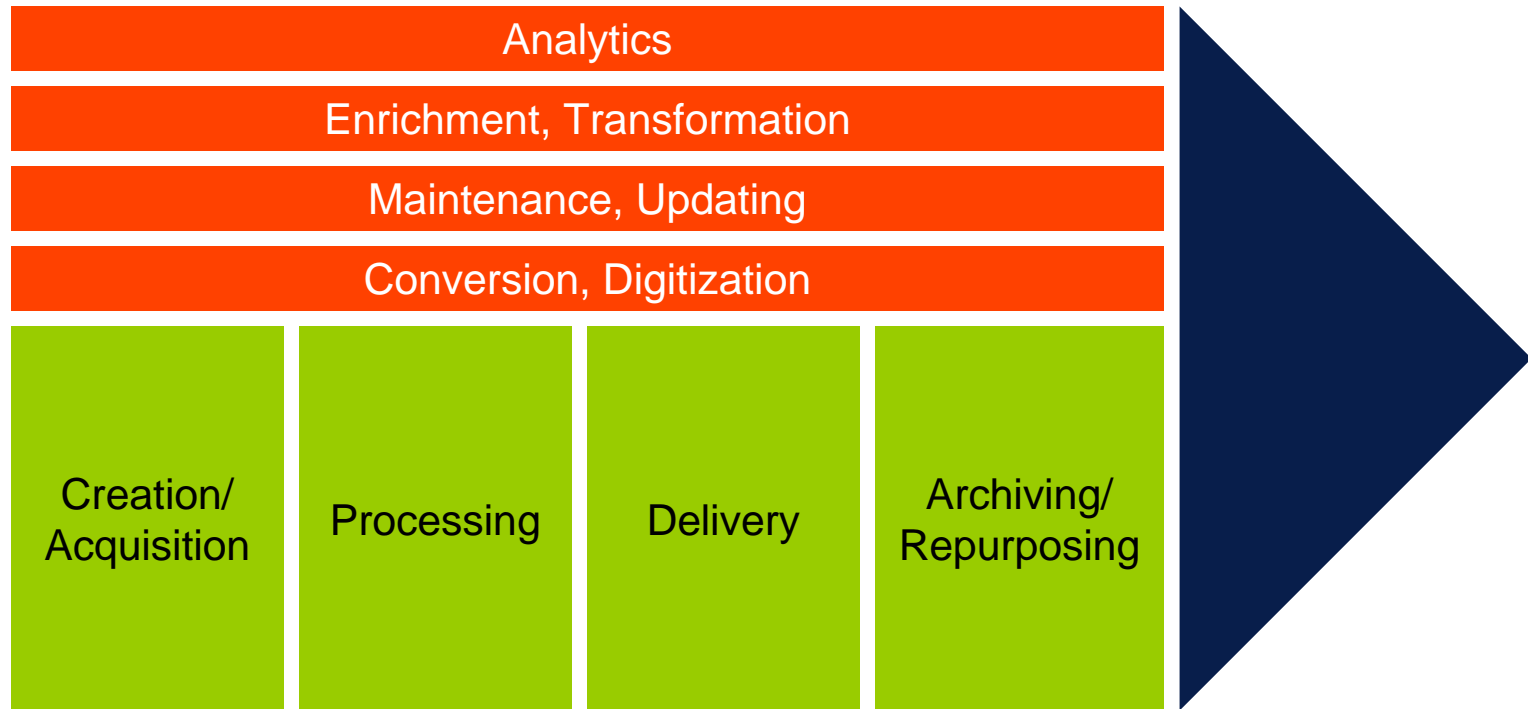


The SPI Story

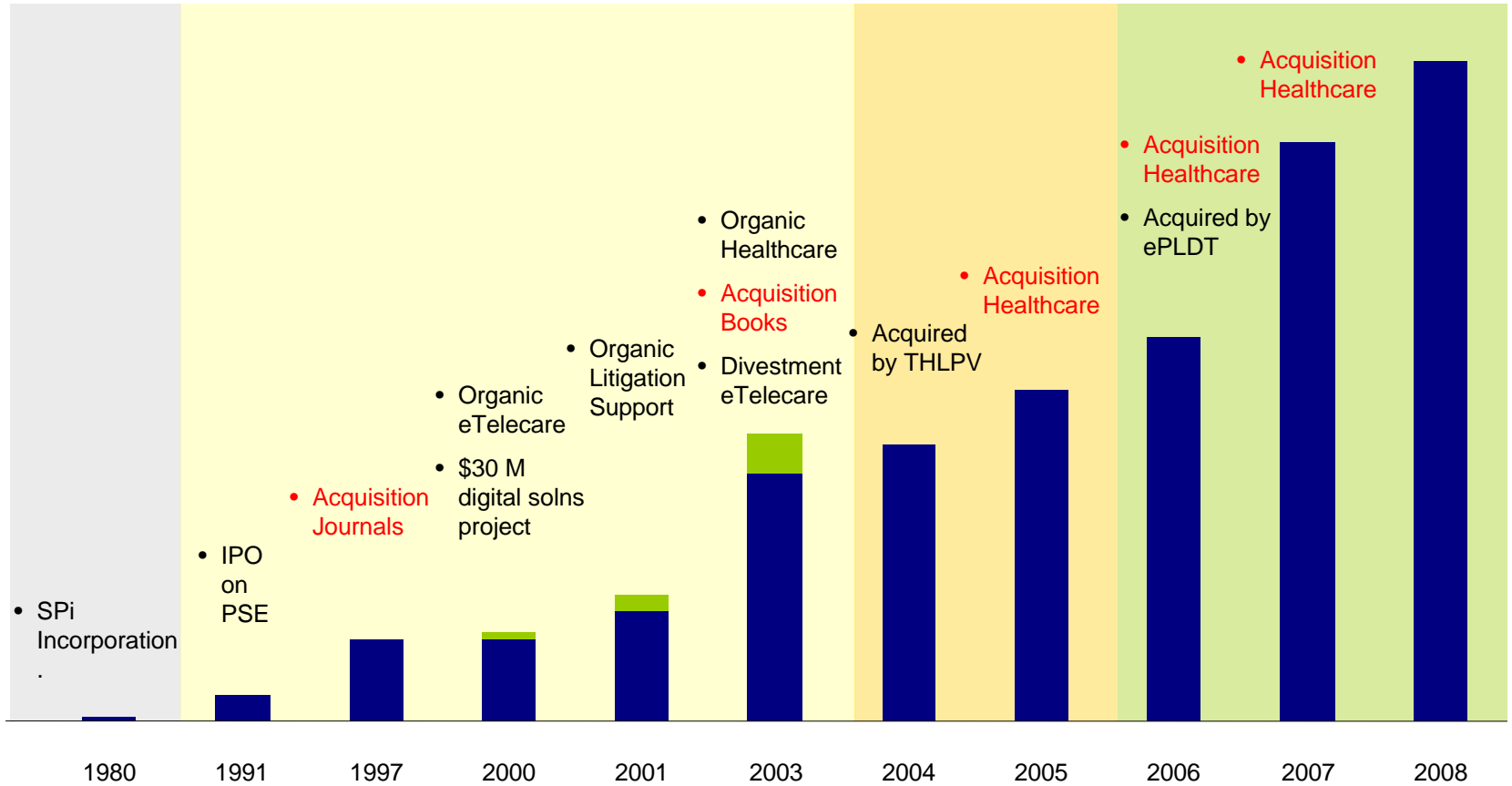
Peter D Maquera
President & CEO, SPI
August 19, 2009



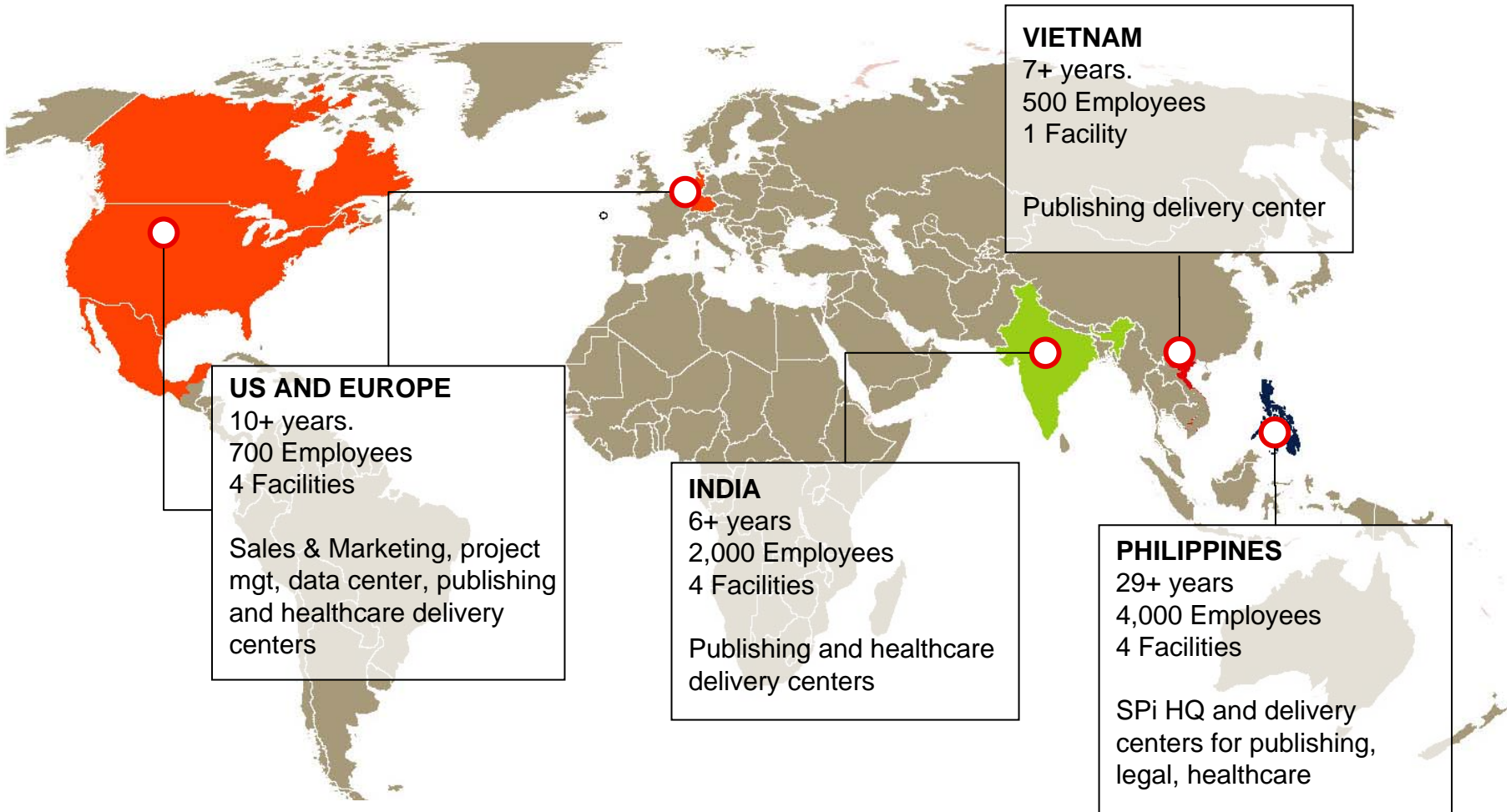
Content Value Chain























History



Global Resource Network



Location – Comparison

Location	Economics	Scalability
Philippines		
Parañaque		
Laguna		
Cebu		
Dumaguete		
India		
Chennai		
Pondicherry		
Coimbatore		
Vietnam		
Hanoi		
US		
Tennessee		
Illinois		

Low  High 

BPO – Trends and Imperatives

Industry Trends

- Consolidation among customers leading to:
 - Rationalization of vendors
 - Preference for larger, full-service providers
 - Larger, end-to-end contracts
 - Expectations beyond just low cost
- Vendors pressured to also consolidate
- Increasing divestment of captives
- More countries competing for BPO

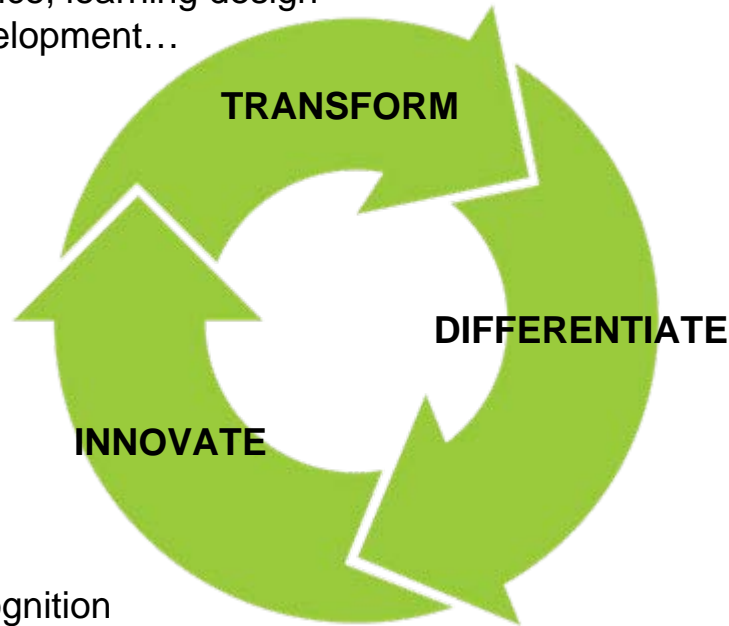


Trends/Imperatives for RP

- Market higher-value capabilities
- Attract more captives to deepen non-voice segment
- Don't forget middle management
- Approve ICT Department – Think Big!
- Support next wave cities
- Longer term:
 - More Global Executives
 - Opportunities for participation by PE players
 - Domestic market?

SPi – Next Generation

- Continue to build higher value added services in healthcare and education:
 - Research, analytics, compliance, learning design and development...



- Continue focus on BPR/Technology:
 - Speech recognition
 - Auto coding
 - Content management

- Position as Platform BPO:
 - Subject matter expertise, IP, scale, and full-service capability



Thank you

