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DEPARTMENT OF INFORMATION  
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# digital cities 2025



digitalcitiesph™ roadmap  
**ZAMBOANGA  
CITY**

→ A Digital Industries Guide to  
Invest in Zamboanga City

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# digital ZAMBOANGA

## Executive Summary

Zamboanga City is a formidable force in the information and communications technology (ICT) map of Mindanao and the Philippines, with almost a million people. The city is a thriving and competitive location for digital jobs. The size, quality and scalability of its human resource serve as foundation of the city's potential to effectively host small to large scale companies that provide and perform information and communications technology or ICT-driven services for international and local clients.

With an annual 8,000 college graduates and 17,000 trainees vocational skilled in English, and Chavacano (Spanish-based Creole language) aside from Filipino, Bisaya and local dialects, the city offers investors an ideal ecosystem to succeed and expand in.

Within the center of the city are three large universities, namely, Western Mindanao State University (WMSU), Ateneo De Zamboanga University (ADZU), and Universidad De Zamboanga (UZ). ADZU has been recognized by the Commission on Higher Education (CHED) as a center of development for Information Technology and Center of Excellence in Teacher Education. As of 2021, there more than 2,000 online English teachers within the Zamboanga Peninsula.

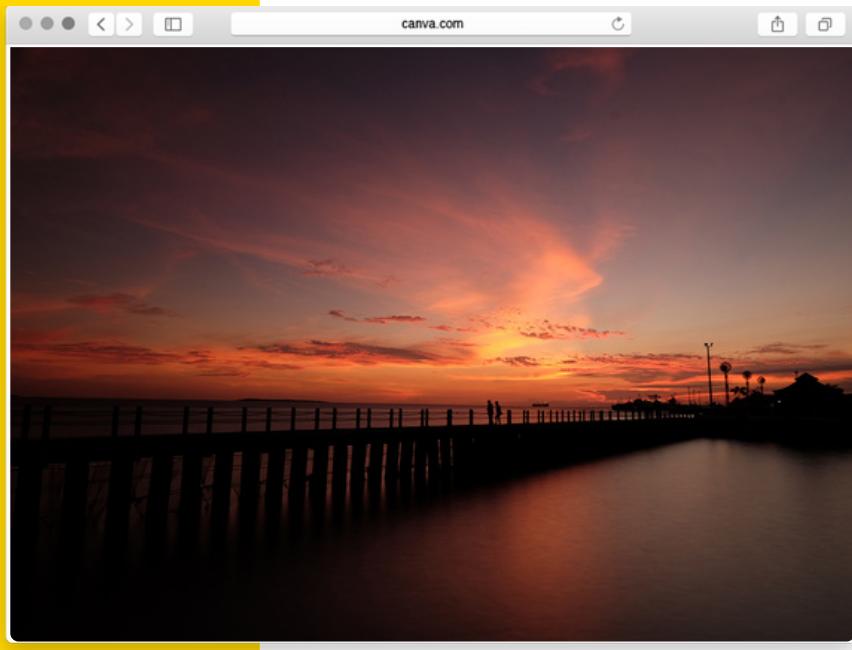
The combination of very strong collaboration between supportive local government and an active private sector gives Zamboanga a bigger edge from other locations.

Several years ago, stakeholders from the academe and business sector joined hands with the city government and national government line agencies to establish the Zamboanga information and communications technology (ICT) Council. To further strengthen the initiatives of the council, the local government initiated the creation ICT-Business Process Management (BPM) Committee with annual budget of Php5M for talent development.

# Executive Summary

## Digital Zamboanga

Quality of life in Zamboanga is high since it has the amenities of a modern city such as good hotels and accommodation facilities, restaurants, food establishments, malls and department stores, resorts and parks as well as other cultural, gastronomic, historical and natural tourist attractions. The city is rarely visited by natural disasters like floods, typhoons, or earthquakes.



Zamboanga's business environment is ideally marked by the presence major telecommunication companies which are capable of providing up to 10 GBPS, buildings and spaces at the Zamboanga Economic Zone, availability of power supply. and accessibility via land, sea and air. The city has does not experience heavy traffic or pollution.

As part of its continuing commitment to improve as an investment location, Zamboanga aims to actively promote the city for digital investments. A comprehensive assessment of the skill levels of graduates as calibrated by the required skills level of ICT industries such Contact Center, Healthcare Information Management (HIM) such as Medical Coding, and Business Process Management or Back Office Services, Creative Industry, Software Development, and Cybersecurity. The aim is to improve curriculum and training modules to increase the quality of talent and develop programs that will focus on higher values services.

It shall market the Zamboanga Economic Zone (ZEZ), a dedicated facility for investors. Currently ZEZ has completed building space as part of its recent expansion. Zamboanga City shall also identify IT-BPM Ambassadors to serve as sharers of success stories and inspire the workforce. Massive information campaign about opportunities and prospects in the IT-BPM and issues such as negative preconceived notions about call centers and BPO work shall also be undertaken.

Innovative proposals to amend local policies to support the ICT sector and the Digital Cities Program activities under the Department of Information and Communications Technology (DICT), creation of an ICT Park in the Zamboanga Ecozone, and an LGU-initiated Innovation Hub are all underway.

# The State of the Philippine IT-BPM Industry

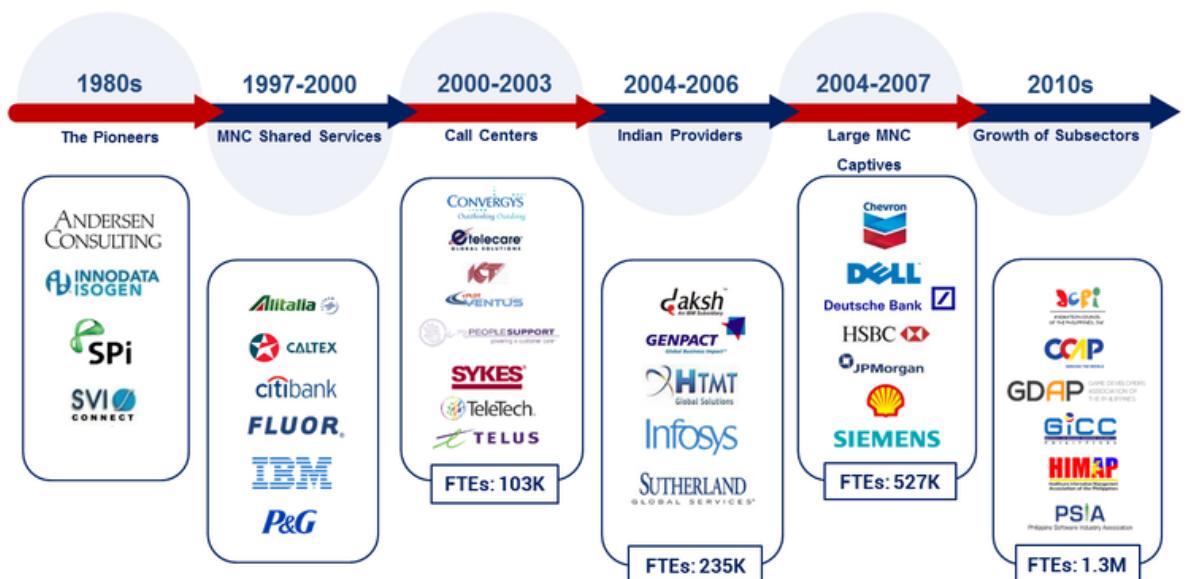
The Philippines is a top tier destination for Information Technology – Business Process Management (IT-BPM) services, and is counted among the leaders in the market. In a span of four decades, the sector has achieved significant growth and progress, in terms of expanding its share of the global market. Today, it is the number one destination for voice-related services, and rapidly growing its capability and potential to offer non-voice BPM and IT services to an increasingly broader set of clients worldwide. The Philippine IT-BPM sector has grown rapidly with a potential market revenue growth of 5.5% and headcount growth of 5.0% per annum from 2020 to 2022.

## HISTORY

The Philippine IT-BPM industry started as early as the 1980s with companies like Andersen Consulting and Innodata providing software development and document processing services. In the next decade, multinational corporations like Citibank and Procter & Gamble set up their back office operations in the Philippines to support their operations in the US.

The new decade saw the entry of the major call center outsourcing companies like Sykes and Convergys. This was the start of a massive growth trajectory over the next ten years, with the major providers from India also joining the fray.

The start of the millennium also saw the different subsectors growing such that each started organizing themselves into their own organizations, following the lead of the software subsector.





## The IT-BPM Subsectors

Since 2010, the Philippines has been the leading voice BPM services provider surpassing all other markets. Today, the industry has proven its ability to evolve by expanding to multi-tower and higher-value services that have attracted investors and locators globally. Offering more complex and digitally-enabled non-voice services, the Philippine IT-BPM industry has transformed to an omnichannel delivery model and continues to provide niche business process services to various industries.



No. 1 leading provider  
of Voice BPO services



World-class IT-BPM  
services to a wide range  
of Fortune 1000 firms



13% global market  
share in 2019



Direct employees at 1.3M  
as of 2019 and projected  
to be 1.6M by 2022



Industry revenue is at \$26.3B  
in 2019 and projected to be  
\$32.2B by 2022

The Philippines offers a diverse range of services to global buyers beyond its traditional strength in voice-based services: contact center & BPO, IT services, health information management services, animation and game development services, and global in-house centers.



ANIMATION



CONTACT  
CENTER



GAME  
DEVELOPMENT



GLOBAL SHARED  
SERVICES



HEALTHCARE



IT AND  
SOFTWARE

These subsectors are organized under their respective organizations:

- Animation Council of the Philippines (ACPI)
- Contact Center Association of the Philippines (CCAP)
- Game Developers Association of the Philippines (GDAP)
- Global In-House Center Council (GICC)
- Healthcare Information Management Association of the Philippines (HIMAP)
- Philippine Software Industry Association (PSIA)

All these organizations fall under the umbrella of the Information Technology and Business Process Association of the Philippines or IBPAP.



## The Philippine Advantage

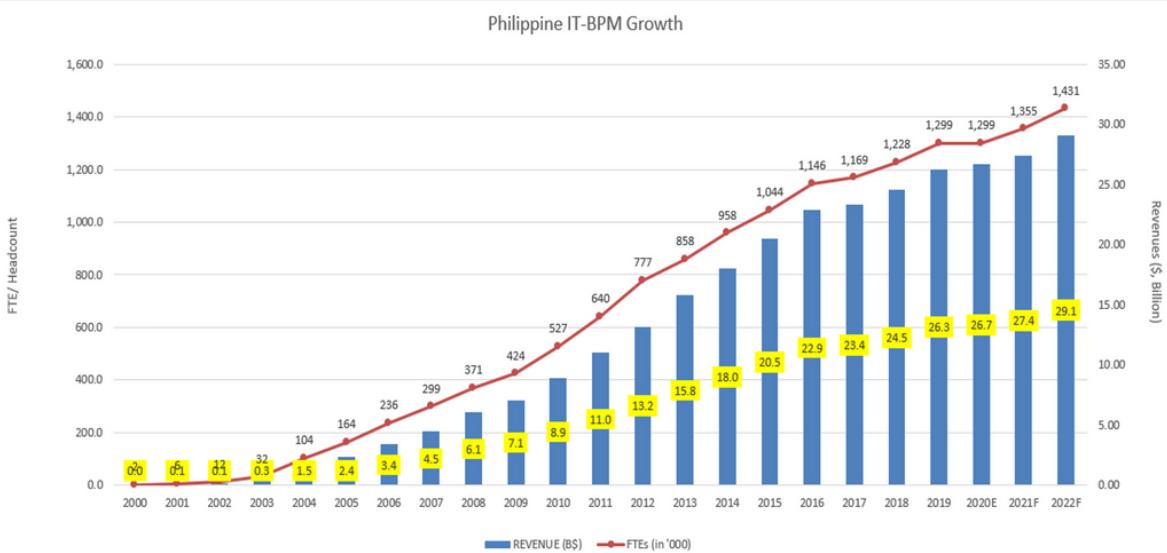


The success of the IT-BPM industry is the result of several factors:

- Robust and diverse talent – the Philippines has a 95% literacy rate, with most people able to speak in English. More than 50% of the population is between the ages of 15 and 49. They possess good communication skills and a high service orientation, characteristics vital to success in the industry.
- Cost competitive – the Philippines provides high quality talent at very competitive rates.
- Expanding infrastructure – the availability of IT parks has helped IT-BPM companies expand very quickly. In addition, the Digital Cities program (and prior to this, the Next Wave Cities program) has helped cities outside the national capital region to develop and attract IT-BPM locators.
- Strong linkages with the government, academe and industry – through the leadership of IBPAP, the industry has maintained a close working relationship with its partners. The government has been supportive in providing fiscal incentives to investors. IBPAP is working closely with the academe to help bridge any skills gaps that may exist.
- Leading in voice capabilities and growing in IT and non-voice business processing



## Industry Growth Outlook



The Philippine IT-BPM industry has shown tremendous gains in the last 15 years. From revenues of US\$3.45B in 2006, the industry is forecasted to contribute US\$29.11B to the economy by 2022. This represents about 8% of the country's gross domestic product (GDP).

More significantly, the industry has grown from 236,000 full time employees in 2006 to a forecasted employment of 1.432 million in 2022.



Biggest generator of jobs with 1.3 million direct jobs and 4.2 million indirect jobs



Significant contributor to the local economy with US\$ 26.3 billion in revenues (with 13% global share)



Advocate of countryside development with 345K jobs in over 20 provinces



Enabler of support industries

- Food: PHP 138 Billion
- Banking: PHP 87 Billion
- Real Estate: PHP 74 Billion
- Hospitality: PHP 64 Billion
- Transportation: PHP 54 Billion
- Other Industries: 550 Billion



Aside from its direct employment of 1.3 million (as of 2019), the industry also generated about 4.2 million indirect jobs. The industry works 24 hours a day, 7 days a week and as such, required support industries like transportation and food services on a full time basis. This accounts for the additional jobs created by the industry.

The industry, in partnership with the Department of Information & Communications Technology (DICT), is a strong advocate of providing jobs in the countryside. The Next Wave Cities program has so far generated 345,000 jobs outside the National Capital Region. With the Digital Cities Program, the industry is aspiring to grow the countryside contribution to about 30% of total employment.

## Government Partnership & Support

The IT-BPM industry has been working closely with, and gaining support given by government agencies such as:

- Department of Labor and Employment (DOLE)
- Department of Education (DepEd)
- Department of Transportation (DOTr)
- Department of Tourism (DOT)
- Commission on Higher Education (CHED)
- Department of Trade and Industry (DTI)
- Department of Science and Technology (DOST)
- National Economic Development Authority (NEDA)
- Department of Public Works and Highways (DPWH)
- Department of Interior and Local Government (DILG)
- Technical Education and Skills Development Authority (TESDA)
- Philippine Economic Zone Authority (PEZA)

The Philippines continues to make considerable progress in the areas of ease of doing business and country competitiveness. For the next phase of IT-BPM, the Philippines will see joint initiatives for talent attraction and development, country marketing, policy shaping, and inclusive growth.



# The Digital Cities Program

The Department of Information and Communications Technology (DICT), together with the IT and Business Process Association of the Philippines (IBPAP) and Leechiu Property Consultants (LPC), has been advocating for inclusive growth and development around the Philippines through the Next Wave Cities™ program since its inception in 2009.

In 2018, with the help of the National ICT Confederation of the Philippines (NICP), DICT and IBPAP rebranded Next Wave Cities into Digital Cities as a response to the findings of research firm Tholons when it comes to innovation, the startup ecosystem, and digital transformation.

The digitalcitiesPH Portal was also launched that year with the goal of providing current and prospective locators with a comprehensive overview of the investment landscape and offer them strategic insights on cities and municipalities across the country.

This 2020, DICT, IBPAP, and LPC launched Digital Cities 2025 to further highlight the value of countryside development and the capability of key locations outside Metro Manila to become thriving business districts and viable investment hubs for IT-BPM services. These Digital Cities will hopefully motivate existing players to expand beyond the National Capital Region and encourage new ones to set up shop in the Philippines.



## The Digital Cities 2025 Scorecard

The Digital Cities scorecard is a four-point evaluation system that assesses possible IT-BPM locations against factors that make a city attractive to investors and locators. These four factors are: talent availability, infrastructure, cost-effectiveness, and business environment.

The criteria used to measure talent availability include number of graduates of higher education, senior high, and technical vocational courses within a 25-kilometer radius of the location's center; presence of educational institutions deemed as Centers of Excellence (COEs) or Centers of Development (CODs); and the location's share in the region's pool of professionals—an indicator of talent density.

Considerations for infrastructure were: expanse of commercial real estate; accessibility by air, land, and sea; capacity of the power and telecommunications grid; number of hotels and other accommodations; presence of major shopping malls; sufficient health facilities; and quality of road networks.

For cost-effectiveness, the scores were based on: wage, power, and rental rates.

Lastly, the following were taken into account for business environment: availability of PEZA IT Ecozones; existence of a local ICT Council; scope of the IT-BPM industry's footprint; vulnerability to natural disturbances; as well as security issues like travel advisories and crime rates.

The “ideal” Digital City, one that would score 100 percent, would require to meet the following parameters (by importance per metric):



### Talent

- Over 12,000 higher education graduates a year
- Over 14,000 higher education enrollees a year
- Over 90% regional employment rate
- More than 4 Centers of Excellence or Centers of Development
- Over 12,000 senior high graduates a year
- Over 8,000 technical vocational course graduates a year



### Infrastructure

- Availability of commercial real estate
- Distance of 0-5 km of air, land, and sea terminals from the city hall
- Digital Fiber Optic Network
- Grade AAA Power Infrastructure
- Availability of DOT-accredited hotels and other accommodations



### Cost

- Competitive rates relative to existing minimum wage guidance for the location
- Less than PHP 300 per sqm/month of commercial real estate rental
- Less than PHP 5.00 per kwh of commercial power rates
- Less than PHP 10.00 per cu.m of commercial water rates



### Business Environment

- Presence of PEZA IT Ecozones
- Presence of ICT Councils
- Presence of IT-BPM company or workforce
- Very low vulnerability to natural disturbances
- Zero travel advisories issued against the city

By category, the talent-related metrics make up 40% of the weighted scores, infrastructure-related metrics 30%, cost-related metrics 10%, and business environment 20%. The scores for each Digital City reflect how close or far it is from the ideal scenario based on predetermined points and weights for each metric. As much as possible, only the latest data from single, credible sources are used to determine the score for each metric for all Digital Cities.



## Digital Cities Interventions

Aside from the identification of the 25 Digital Cities for 2025, DICT, in collaboration with IBPAP and LPC, also aims to provide the necessary support in four (4) areas:

1. Institutional Development - A prerequisite for the other initiatives, institutional development implies the engagement of relevant stakeholders, identification of areas for improvement, and equipping them with the proper skills for the IT-BPM industry.
2. Talent Development and Attraction - Talent development and attraction activities aim to promote careers in the industry, establish comprehensive capability development programs for the workforce and academe, and implement upskilling and reskilling initiatives for existing workforce and potential joiners.
3. Infrastructure Development - Complementing the institutional and talent development initiatives, infrastructure development aims to provide stakeholders with the tools and instruments fundamental to optimizing the city's potential for IT-BPM growth.
4. Marketing and Promotion - To promote the IT-BPM industry here and abroad, a comprehensive marketing and communication strategy, together with advocacy programs, for the countryside are necessary.

With the objective of elevating these locations to their full potential as a thriving IT-BPM hub, the Interventions aim for alignment among government agencies in their pursuit for countryside development and inclusive growth.



Once Islas

## BACKGROUND

# Why Zamboanga?

Zamboanga City, officially the City of Zamboanga, is a 1st class highly urbanized city in the Zamboanga Peninsula region of the Philippines. According to the 2015 census, it has a population of 861,799 people. It is the sixth-most populous and third-largest city by land area in the Philippines.

It is also the third-largest city by land area in the Philippines with a land area of 141,417 hectares with 98 Barangays. Zamboanga City is an independent, chartered city in the country.



Santa Cruz Beach

Zamboanga became a chartered city under Commonwealth Act No. 39 on October 12, 1936 was inaugurated on February 26, 1937. Zamboanga City is an independent, chartered city which was designated highly urbanized on November 22, 1983.

Although geographically separated, and an independent and chartered city, Zamboanga City is grouped with the province of Zamboanga del Sur for statistical purposes, yet governed independently. The city of Zamboanga is politically subdivided into 98 barangays. These are grouped into two congressional districts, with 38 barangays.



## Talent

Region 9-ZAMBOANGA PENINSULA  
**Zamboanga City**  
Province of Zamboanga Del Sur

**5592**

Zamboanga City Graduates of Higher Educational Institutions (HEIs) under CHED (2018)

**40150**

Zamboanga City Enrollees of Higher Educational Institutions (HEIs) under CHED (2019)

**9355**

Senior High School Graduates under DepEd (2018)

**14054**

Province of Zamboanga Del Sur Graduates of Higher Educational Institutions (HEIs) under CHED (2018)

**87068**

Province of Zamboanga Del Sur Enrollees of Higher Educational Institutions (HEIs) under CHED (2019)

**1637**

Province of Zamboanga Del Sur Technical-Vocational (Tech-Voc) Graduates - TESDA (2019)  
819 graduates in Zamboanga City

Zamboanga City has the most universities, colleges and schools in the Zamboanga Peninsula with a total of 17 schools and with an average graduate of 7,816 per year. The City has a total of 44 vocational schools with an average graduate of 16,695 per year. Thirty nine (39) schools offering senior High Schools with more than 9,000 Senior High School graduates per year.

The city has a good number of nursing and medical graduates and is consistently in the top spot in board exams. Ateneo de Zamboanga University, one of the top universities in the country is offering a Bachelor of Science in Information Technology (BSIT) Major in Animation and produces a good number of animators every year.

Zamboanga City is also widely known as the Latin City of the Philippines. having Zamboangueño or locally known as Chavacano, with Spanish as its lexifier and grammar influenced by other Philippine language, as the native language of the inhabitants living around the city and the nearby islands of Basilan.

The city is accessible to graduates from neighboring provinces such as, Zamboanga Sibugay, Zamboanga del Norte, Zamboanga del Sur, Basilan, Sulu and Tawi-Tawi, which can contribute to the talent pool of the City.

## Major Colleges

**Universidad de Zamboanga (UZ)**, formerly known as Zamboanga Arturo Eustaquio Colleges (ZAEC), is one of the premier institutions in Region IX that aims to provide quality and accessible education to the multicultural individuals of Western Mindanao. Founded on October 12, 1948, it continually transitioned and contributed to the changing landscape of education in the Zamboanga Peninsula.



UZ is Western Mindanao's largest private educational Institution that serves students across the region. As part of its commitment, UZ expanded satellite campuses in Ipil, Zamboanga Sibugay, and Pagadian City to reach out to more people in Mindanao.

The university holds approximately 7,000 students or 20% of all college enrollments. It succeeds in providing secondary and tertiary education, technical education, and graduate programs that are DepEd, CHED, and TESDA recognized.

Currently, UZ is proud of its distinctions, 20% of its program offerings received accreditation by the Philippine Association of Colleges and Universities Commission on Accreditation (PACUCOA). It is also an ISO 9001 certified institution since 2002 and migrated to 9001:2015 standard. It is also Investors in People certified for people management and recently certified with ISO 45001 international standard for Occupational Health and Safety.

UZ also pioneered various programs in the region such as Criminology, Emergency Medical Services, Medical Technology, Respiratory Therapy, Pharmacy, Radiologic Technology and the School of Dentistry (SOD), the first and only in the Zamboanga Peninsula, and 32nd in the Philippines, offering a 6-year program in Doctor of Dental Medicine (DMD). These endeavors prove educational greatness and make Institution a global hub for demand programs in allied medicine, producing top-caliber medical professionals in the country.

UZ's flagship program, the School of Allied Medicine (SAM) is the living proof of its topnotch performance. It consistently produces top-notchers from the Medical Technology, X-Ray and Radiologic Technology, Nursing, and Respiratory Therapy licensure examinations that makes it at par with the other universities in the country.

## Major Colleges

**Ateneo De Zamboanga University (AdZU)** mission extends to Zamboanga City and the six provinces of Zamboanga peninsula and the Western Autonomous Region of Muslim Mindanao, addressing needs in instruction, research, and community development; and engaging in the following areas: health, environment, peace, intercultural dialogue, leadership, governance, and the common good.



The university is the only Jesuit University in Western Mindanao and is the only private higher education institution granted full Autonomous Status by the Commission on Higher Education (CHED) in 2019 which is valid for three years.

It offers the following: basic education programs (grade school, junior and senior high schools); baccalaureate programs (Accountancy, Engineering, Education, Information Technology, Liberal Arts, Management, Nursing, and Sciences); professional education programs (Law, Medicine); and graduate programs (masters in Business Administration, Nursing, Education, Arts and Sciences, and doctorate in Educational Administration, Linguistics, Science Teaching and Mathematics). Its programs are accredited by the Philippine Accrediting Association of Schools, Colleges and Universities (PAASCU). For the past three years, AdZU has produced almost three thousand graduates.

Consistently and significantly, AdZU's passing rates in bar and board examinations have been higher than the national passing average. In fact, AdZU has been recognized by the Professional Regulation Commission (PRC) as among the Top Performing Schools in the Nurse Licensure Examination (NLE) for five (5) consecutive years from 2015 to 2019, with some of its graduates landing in the topnotchers list in 2015 (5th, 7th, and 10th), in 2016 (5th, 7th, 9th, and 10th), in 2017 (5th, 9th, and 15 th ), and in 2018 (9th place).

Similarly, PRC granted the same recognition to Ateneo De Zamboanga University (AdZU) as a top performing school for the exemplary performance of AdZU's Accountancy graduates during the Certified Public Accountant Licensure Examination in 2015 (6th place), in 2016 (4th place), and in 2017 (4th place).

The College of Law was in the Top Two (2) overall in the 2019 Bar Examinations for examinees fewer than 63 with a 100% batch passing rate in 2016 to 2017, and one examinee landed in the Top 13th spot in 2017. Its Psychology program produced 8th and 10th placers in the 2015 and 2016 Psychometrician Board Examination.

## Major Colleges

The School of Medicine (SOM) is also enjoying greater recognition, locally and internationally, as a model of Medical Education due to its unique Problem-based and community-centered Curriculum. The CHED technical panel has made it a requirement for new medical schools to visit the SOM as part of its requirement. About 90% of the graduates pass the Physician Licensure Examination (PLE) on the average.

In 2016, the School of Education has been designated by CHED as a Center of Excellence (COE) for Teacher Education. In 2017, AdZU launched the BS in Biomedical Engineering, a pioneering program in the Philippines as the first ever to be offered as full baccalaureate degree.



**Southern City Colleges (SSC)** is a private, non-sectarian institution offering Junior High School (Day and Night), Senior High School, Technical Vocational Education Training Program, College Program, and Competencies Assessment Centers committed to provide quality, relevant, and affordable education through qualified teachers, contributory research, and extension services in Zamboanga Peninsula. Its vision is to become the educational institution of choice, gearing toward the center of development in Information and Technology in Zamboanga Peninsula by the year 2022. The school's is best known for its BS Criminology, and BS Customs Administration.

SSC is the pioneer in private technical education, established in 1946 after the World War II. Our school have good turn outs of graduates who are outstanding men and women of the City and Region. The school has developed and expanded so far producing three main campuses (East, West, and Central). With the President, Dr. Edwin Caliolio, who has links with water district, ZAMPEN, WMSU, ROTARACT, and other agencies, it has helped Zamboanga to be a good location for investor, especially the entrepreneur, and other investors who come to the City.



## Infrastructure

Zamboanga City is accessible by air and sea from the key centers of Manila, Cebu, and Davao. It is the transshipment point for domestically and internationally traded products.

Zamboanga International Airport (ZIA) is considered to be the main entry and exit point when it comes to aviation transport services. For the water transport component, the port of Zamboanga is the shipping hub of Western Mindanao and part of the national port system.

There are two main entry and exit points in Zamboanga City which are both national highways. One is the Zamboanga West Coastal Road or Zamboanga City-Labuan-Limpapa Road, which is in the western portion of the city with Barangay Limpapa serving as its border, while the other is the Pagadian-Zamboanga City Road, which is in the eastern part coming from Tungawan, Zamboanga del Sur. These highways serve as linkages to the other parts of the region like Pagadian City and Dapitan City both span along the east and west coast and intersect in the city proper of Zamboanga. Additionally, Curuan Lunday Road and Licomo Sinoropan Road are considered as entry and exit points of Zamboanga City.

The main electricity provider of Zamboanga City is the National Power Corporation (NPC) and several Independent Power Producers (IPPs) while the Zamboanga City Electric Cooperative (ZAMCELCO) is one of the three (3) power providers that distributes power throughout the city.

ZAMCELCO has seven (7) substations located at Putik, San Jose Gusu, Sangali, Recodo, Ayala, Cabatangan and Zone III (Camachili).

Zamboanga City is a member of East ASEAN Growth Area (BIMP-EAGA), a regional economic cooperation initiative between the several countries in Southeast Asia. As a result of its membership, air and sea routes have been opened between Zamboanga City and Sandakan in Malaysia. The two cities have existing trade relations and have had historical cultural interactions.

The Zamboanga City Water District (ZCWD) is the main distributor of water supply in the City. The source of water supply of Zamboanga City comes from surface source, spring source and production wells. Some of these production wells are stationed at Putik, Guiwan, Gov. Camins, Gov. Ramos, San Roque, and Baliwasan to name a few. The main source of water supply of ZCWD is Tumaga River, which has water quality that is relatively acceptable.

Sixty (60) percent of the water supply comes from this river and is augmented by 22 production wells that are spread throughout the City. In addition, ZCWD has a water treatment plant located in Barangay Pasonanca.

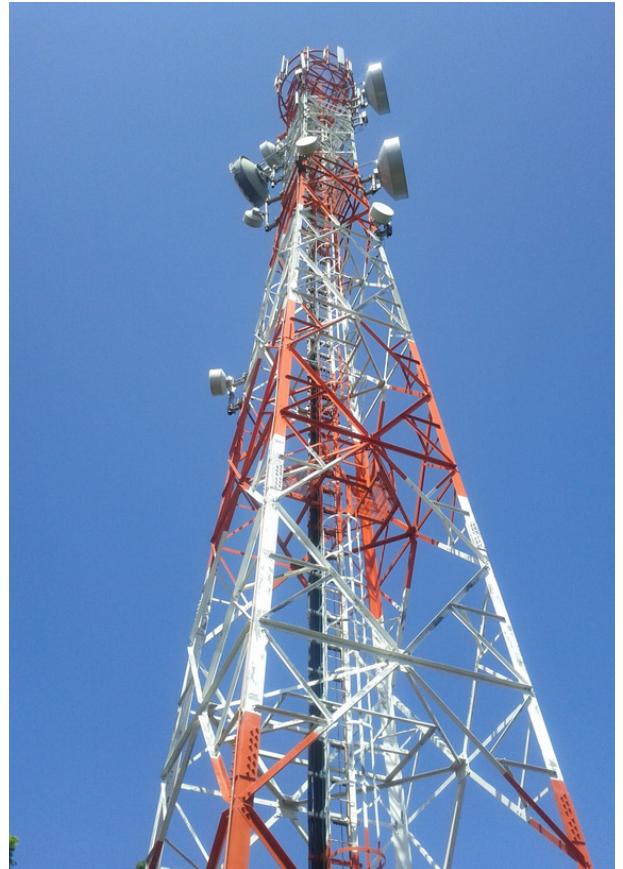
Moreover, the ZCWD and Prime Water Infrastructure Corporation forged a fifty (50) Million Liters per Day (MLD) Bulk Water Supply Agreement to ensure potable water supply in the future. This is located in Barangay Pamucutan and within the jurisdiction of the Zamboanga City Special Economic Zone Authority. The treatment plant is the biggest 50MLD Water Treatment Supply Project and the first ever treatment plant using the Direct Active Pulsation Smart Clarifier Technology with Hydraulic System Valves in the entire country.

The city has also its state-of-the-art Integrated Bus Terminal which is 8km away from the city proper which accommodates approximately 2000 passengers daily. Means of transportation are jeepneys, tricycles, taxis, buses and vans.

The famous KCC Mall is now in Zamboanga City, the 2nd largest Mall in Mindanao. SM Mindpro opened December 2020. Hotels and restaurants are located just near the city and some are just a walking distance from the airport.

There are two (2) major Telcos operating in the City. The PLDT/Smart and Globe/Innove. Their services include Fiber to the home, which can provide up to 500Mbps and both companies also offer leased-line connections of bandwidth.

The city has stable power with fair rate of Php10.18 per kilowatt hour. The city is also enjoying a steady supply of water with a rate of 26.00 per cubic meter.





## Business Environment

The city serves as the Economic Hub for the entire Zamboanga Peninsula and the Island Provinces of Basilan, Sulu and Tawi-Tawi. The city is one of the Top 10 Taxpayers in the country and it has the potential of becoming the No. 1 income generator in the country.

Zamboanga City is also dubbed as the Sardines Capital of the Philippines, for 11 out of 12 sardines companies in the country are produced in the city. Zamboanga City is also dubbed as the Sardines Capital of the Philippines, for 11 out of 12 sardines companies in the country are produced here. The canning factories are converged in the west coast of Zamboanga. Sardine fishing and processing account for about 70 percent of the city's economy.

Situated at the western tip of the Mindanao mainland, Zamboanga City is a natural docking point for vessels traversing the rich fishing grounds of the Zamboanga Peninsula and the Sulu Archipelago. The production of canned sardines in this city have upgraded their production to conform to international food safety and quality standards. Companies that produce these goods are looking to enter new markets in Russia and other European countries.

In 2019, the average yearly income of registered firms in Zamboanga City is amounting to PHP 3,480,850.43. For the new registered businesses, the average capitalization is PHP 561,390.82.

In 2015, the top export product was the Assorted Marine Products, such as Frozen Mollusks like Octopus and Squids, form the bulk of Zamboanga City's Export Sales. This is followed by Seaweeds, Fish, Rubber, Mango, and Processed Fruits and Nuts.



## Business Environment

The Zamboanga City Special Economic Zone Authority and Freeport (ZamboEcoZone), also known as Zamboanga Freeport Authority (ZFA), was created by virtue of the Republic Acts of the Philippines 7903 of the Philippines Constitution in the year 1995. It was authored by then Congresswoman María Clara L. Lobregat. It is located about 23 kilometers from the city proper. It is one of the three current Economic Freeport Zones outside Luzon. It has four BPO designed buildings, the two buildings are ready by 2020 and the other two will be ready by 2021.

The Special Economic Zone was enacted into law on February 23, 1995 and made operational a year later with the appointment of a chairman and administrator and the members of the Board by former President Fidel V. Ramos. It is located about 23 km from the city proper. It is one of the three current Economic Freeport Zones outside Luzon.



The ZamboEcozone will soon finish the construction of two buildings worth P221 Million and equivalent to about 8,000 square meters of leasable space for IT-BPM companies which will locate in Zamboanga City and wish to avail of national government tax incentives.

The ZAMBOECOZONE offers a spacious and secure facility, compliant with BPO Standards ready for lease and with complete amenities, making the Authority an ideal place to establish and expand businesses. ZAMBOECOZONE continues to experience rapid growth in terms of investments due to the favorable business climate and incentives offered.

The city has an active ICT council, the Zamboanga ICT Council, headed by a prominent businessman in the city, and IT- BPM Task Force, headed by no less than the City Mayor. The local government through its Sangguniang Panglungsod passed an ordinance which provide support of 5 Million per year for the ICT development in the city.

The Zamboanga ICT Council is a non-profit organization aimed at developing the ICT/BPM industry of Zamboanga City and Western Mindanao to create sustainable opportunities and generate more jobs using ICT.



## Cost of Doing Business

The City Government of Zamboanga gives tax exemption, privileges and incentives under the Zamboanga City Investment Incentive Code of 2004.

Ordinance No. 437 on the other hand, identified fifteen (15) Investment Priority Areas. Among these are the Business Process Outsourcing (BPO), Creative Industries, and Research and Development and Innovation.

New businesses with a total project cost of 10 Million and above and a minimum number of 10 employees may avail for incentives.

Meanwhile, existing businesses with a total project cost of 3 Million and above and a minimum number of 10 employees may also avail for incentives. Tax exemptions may be granted from three (3) to six (6) years. This will depend on the total project cost, number of employees and upon the approval of the Zamboanga City Investment Incentive Board.

The average rental rate for commercial or office space in Zamboanga City in 2019 is five hundred (500) pesos per square meter. This figure is lower than the average cost of rent in 2018 at seven hundred (700) pesos per square meter.

The presence of local incentive code in Zamboanga City signifies the seriousness of the LGU to attract investors. If qualified, the Zamboanga City Investment Incentives Board will award a certificate of registration granting the company tax exemptions, privileges, and incentives for six (6) years through a board resolution.

The city has stable power with fair rate of Php10.18 per kilowatt hour. The city is also enjoying a steady supply of water with a rate of 26.00 per cubic meter.



# SWOT Analysis: TALENT

## Strengths

- 8,000 graduates yearly and 17,000 graduates of vocational schools
- Graduates fluent in English, Chavacano - Spanish-based creole language, and other foreign languages
- Presence of regular trainings and projects organized by the DICT to train professionals and graduates for various digital skills
- Presence of three big universities (WMSU, ADZU, UZ) and several colleges
- ADZU – center of development for IT and Center of Excellence in Teacher Education
- LGU initiated ICT BPM Committee with annual budget of Php5M for talent development
- 2,000+ online English teachers (ZAMPEN)
- Digital strategies anchored on innovation designed through the collaboration of all stakeholders

## Weaknesses

- Low hire rate
- Graduates do not have industry level skills (need additional training)
- Lack of opportunities to expose students to OJT or apprenticeship

## Opportunities

- Desire of Zamboanguenos who are working outside of Zamboanga to return home to work
- Alumni network composed of skilled and talented professionals who are willing to assist their respective schools
- Homegrown or local companies that open their premises to train students
- Availability of companies for apprenticeship or OJT not related to ICT but understand

## Threats

- Graduates who are constantly recruited by companies located in other cities or other countries
- Nearby cities with BPM companies attract graduates from Zamboanga City (Dumaguete, Cebu, Iligan, CDO, and Davao)



## SWOT Analysis: INFRASTRUCTURE

### Strengths

- Presence of Major Telcos which can provide 10Gbps
- BPO ready buildings at Zamboanga Ecozone
- Land, sea and air accessibility
- Availability of power supply
- Government Network connecting 100 agencies thru FOC

### Weaknesses

- Slow internet connectivity for the general public (oversubscribed internet service)
- Unstable power

### Opportunities

- Large track of real estate for development particularly at Zamboanga Ecozone
- Presence of potential local investors

### Threats

- Occasional power outages



## SWOT Analysis: BUSINESS ENVIRONMENT

### Strengths

- Strong LGU support
- Active DICT Cluster
- Active ICT Council
- LGU initiated ICT BPM Committee with annual budget of PHP 5,000,000
- Zamboanga ECOZONE & Free Port Authority
- Commercial & Financial of Western Mindanao
- Strong Security Forces presence
- Rarely visited by natural disasters
- 1 of 11 city beneficiaries of USAID programs e.g. (ease of doing business)
- Light traffic (travel time residence to office about 30 minutes)
- Rich culture/cuisine, tourist spots and hotels

### Weaknesses

- Bad News articles from nearby municipalities datelined Zamboanga City
- Small BPO operations unsustainable

### Opportunities

- No existing big BPO companies

### Threats

- Travel Advisory
- Near conflict areas



## SWOT Analysis: COST OF DOING BUSINESS

### Strengths

- Ordinance No. 437 on the other hand, identified fifteen (15) Investment Priority Areas
- Compared to metro cities, lower rates on power, rental, and water
- Lower labor cost compared to metro cities

### Weaknesses

- Slow Internet connectivity for the general public
- High public transportation (contracting instead of fare matrix esp. for motorized tricycle)

### Threats

- Tech4ED centers as training centers for ICT and English

### Opportunities

- Occasional power outages

# Strategic Initiatives

## STRATEGY

- Improve learning modalities thru enhanced virtual engagement and online classes of different higher education institutions (HEIs)
  
- Capacity Development (Training of Trainers)
  - Medical Coding - Healthcare Information Management - WMSU
  - BPO Call centers esp. Spanish speaking account - Southern Mandarin and Spanish
  - Software Development - UZ, WMSU, ADZU, and all
  - Cybersecurity and Data Privacy
  
- For Department of Labor and Employment (DOLE), promote and ensure the effective implementation of Adjustment Measures Program - Financial Assistance for Displaced Workers due to COVID-19, such as CAMP, AKAP for OFWs, TABANG OFW Program and TUPAD
  
- Monitor the implementation of the learning continuity plan of every HEIs in its role of providing a higher quality education in the new normal.

## GOAL

**Educational Development:** To strengthen the effectiveness of higher educational institutions in creating quality talent by ensuring the capability of teachers as mentors of the digital workforce

**Talent Scalability:** To ensure that Zamboanga has ready and qualified talent in high value digital jobs

**Talent Supply:** To maintain quality workforce for Zamboanga by ensuring the delivery of benefits and programs to rightful beneficiaries

**Talent Development:** To continuously maintain the development of quality of talent in Zamboanga

# Strategic Initiatives: BUSINESS ENVIRONMENT

## STRATEGY

- National government agencies (NGAs) will include marketing Zamboanga City and ICT in their advocacy programs
- Local government and stakeholders shall revisit the Zamboanga Investment Incentives Code of Zamboanga City to include ICT related incentives
- Encourage digital transactions as the new normal through massive information drive by government
- Support the successful implementation of DICT Projects such as the Digital Cities PH and Free WiFi Program
- Identify, promote and support the creation of workspace for Business Processing firms
- Identify and raise awareness about areas with weak to no Internet connection and promote these areas for inclusion in priority areas for fiber connectivity

## GOAL

- Institutional Marketing and Promotions:** To institutionalize marketing and promotions of Zamboanga City as choice destination for digital jobs among national government agencies (NGAs)
- Fiscal Incentives:** To review, revisit and redesign investment incentives for locators to attract and encourage them set up in Zamboanga
- Building Digital Ecosystem:** To ensure ease of doing business in Zamboanga for investors
- Strong Connectivity:** To leverage on all opportunities to improve and build strong connectivity for Zamboanga City
- Infrastructure Ready for BPOs:** To prepare ready-to-occupy spaces for locators to enjoy incentives and convenience
- Business Environment:** To ensure healthy, safe and conducive business environment for locators

# Strategic Initiatives

## STRATEGY

- Improve and monitor solid waste management programs to ensure cleanliness and sanitation of Zamboanga as a business location
- For the Department of Trade and Industry (DTI) and the Department of Labor and Employment (DOLE), to ensure the effective implementation of DTI-DOLE joint Monitoring on Workplace Prevention and Control of COVID-19
- LGU to allocate fund for ICT related activities; Organize and conduct ICT conferences featuring Zamboanga City as Investment Destination
- Stricter implementation of RA 11032 or the Ease of Doing Business Act for government
- Tax incentives for investors to make it easier for them to invest in Zamboanga
- Improvement or road systems and water supply

## GOAL

**Business Environment:** To ensure healthy, safe and conducive business environment for locators

**Business Environment:** To maintain healthy and safe workplaces in Zamboanga

**Marketing and Promotions:** To leverage on national and local conferences as a platform to promote Zamboanga as an ideal investment location

**Business Environment:** To ensure that investors and local businessmen experience transparency and efficiency in transacting with government

**Business Environment:** To attract investors by offering them fiscal incentives under the local government side from national government incentives

**Business Environment:** To create an ideal business environment by ensuring access to utilities

# Strategic Initiatives

STRATEGY	GOAL
<ul style="list-style-type: none"><li>• Livelihood Programs for Zamboanga residents</li></ul>	<b>Business Environment.</b> This seeks to contribute to poverty reduction and reduce the vulnerability to risks of the working poor, vulnerable and marginalized workers either through emergency employment, and promotion of entrepreneurship and community enterprises
<ul style="list-style-type: none"><li>• Long term Upskilling of graduates</li></ul>	<b>Talent Development.</b> Equip graduates with the necessary digital skills, technical and vocational by providing ISO recognized certifications that will not only improve the quality of graduates but as well as providing the international community with pool of experts in the IT industry.
<ul style="list-style-type: none"><li>• LGU to allocate fund for ICT related activities</li></ul>	<b>Sustainability.</b> To ensure the sustainability of efforts and plans
<ul style="list-style-type: none"><li>• Improve infrastructure on internet and power</li></ul>	<b>Business Environment.</b> To ensure ideal business environment due to presence of strong connectivity
<ul style="list-style-type: none"><li>• Setting up Internet infrastructure and stable electricity/power in critical places like Ecozone</li></ul>	
<ul style="list-style-type: none"><li>• Labor quality improvement</li></ul>	<b>Business Environment.</b> DOLE is innovating its labor and management education services from its traditional pedagogical style of delivery towards a more pro-active, coherent, technology-based, accessible and comprehensive approach. This is to assure quality labor standards and occupational safety and health standards.

# Strategic Initiatives

## STRATEGY

### Establishment of IT Park within the Zamboanga Economic Zone

With the following features:

- BPO COMPANIES
- ICT INNOVATION HUB
- FOOD SHOPS
- COFFEE SHOPS

## GOAL

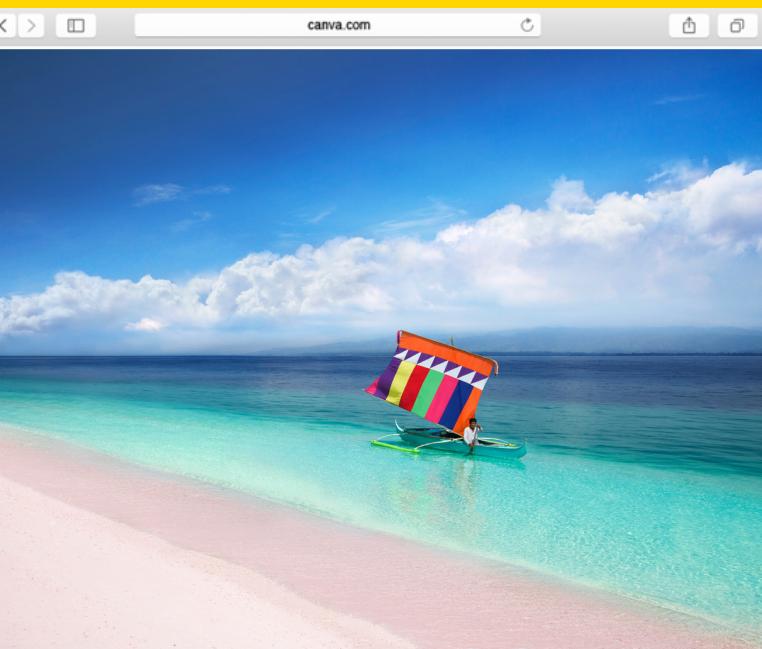
**Business Environment.** In the world of marketing, incentive is what motivates a person to perform an action, be it making a purchase or completing a survey. In other words, enticement is a way to gain customers. This can be done in Zamboanga through the creation of IT Park in ECOZONE.

An IT Park, is a place capable of providing infrastructure and offering support to IT-BPM companies. An IT Park can also provide fellow Zamboangueños a place for relaxation. It opens a lot of different opportunities for job seekers and business investors.

The following are benefits of establishing an IT Park:

1. Provision of Office Spaces for IT-BPM companies
2. Provision of incentives to businesses: IT companies, BPO
3. Provision of an ecosystem for ICT learning and business environment

ICT Innovation Hub serves as a place for all IT enthusiasts where they can learn new skills and/or enhance their skills.



ZAMBOANGA CITY

# Implementation Plan: Talent

Current State	Action Item	Owner	Timeline
There are several programs led by the colleges and universities to support the IT-BPM Industry	<ol style="list-style-type: none"><li>1. Assess skill levels of graduates vs skills required by the industry: Contact Center, Healthcare, and BPO Back Office<ul style="list-style-type: none"><li>• Certifications of industry (calibrated)</li><li>• Tap TESDA</li><li>• Tap line agency certifications (DOST, SPARTA)</li><li>• For HEIs, tap industry for free certifications</li><li>• Certification Trainings and Certification funded by LGU or Private sponsors</li><li>• Conduct hackathons and other competitions to showcase and test local talent (test quarterly)</li><li>• Regular dialogue with industry to be sponsored by schools to calibrate and update courses so that they match the requirement of industry</li></ul></li></ol>	Zamboanga ICT Council in partnership with colleges and universities and the city government of Zamboanga, respective national line agencies exercising mandate over the programs	One activity every month or at least per quarter

# Implementation Plan: Talent

Current State	Action Item	Owner	Timeline
Only a few similar programs are currently designed but the stakeholders are willing to curate more	<p>2. Check with existing BPO companies on missing skills of the graduates to determine how curriculum can be enhanced</p> <ul style="list-style-type: none"><li>• Regular consultation with industry for purposes of curriculum review every school year</li><li>• Review of apprenticeship and OJT standards to ensure exposure and hands-on training for students</li><li>• Special post graduate trainings for potential hires (funded by agencies, private companies, LGU, or alumnus)</li></ul>	Consortium of colleges and universities and the city government of Zamboanga and national government agencies such as TESDA, CHED and DepED	One activity every month or at least per quarter
	<p>3. Conduct orientation sessions for students on opportunities available in the IT-BPM industry to guide students in the course they can take in college</p> <ul style="list-style-type: none"><li>• City wide industry conventions or forum open to students and invite industry speakers and successful Zamboanguenos in different fields of ICT (at least twice a year)</li></ul>	Zamboanga ICT Council in partnership with colleges and universities and the city government of Zamboanga	
	<p>4. Identify and train IT-BPM Ambassadors</p> <ul style="list-style-type: none"><li>• Each HEI will identify its IT-BPM Ambassadors to represent the mission of the school to cater to digital jobs and help support the ICT ecosystem of Zamboanga</li></ul>	Zamboanga ICT Council in partnership with the city government of Zamboanga	

# Implementation Plan: Talent

Current State	Action Item	Owner	Timeline
	<p>5. Conduct massive information campaign on IT-BPM to highlight the benefits and values of joining the IT industries</p> <ul style="list-style-type: none"><li>• Develop regular print, TV, radio, or social media news or reports about the ICT development in Zamboanga</li><li>• Develop a portal for the Zamboanga City Digital Roadmap, ZICTC website, Facebook page, and virtual programs</li><li>• Join national and international events highlighting the talent potential of Zamboanga</li></ul>	Zamboanga ICT Council in partnership with colleges and universities and the city government of Zamboanga	Must commence beginning June 2021
	<p>6. Develop programs that will focus on higher values services, ie programming, networking</p> <ul style="list-style-type: none"><li>• Collaboration with industry/companies for technology transfer (open source projects)</li><li>• Training on HIM, Cybersecurity/Data Privacy, BPO, Software Development, and creative industries</li><li>• Creation of segment-centric local organizations i.e. cybersecurity emergency response team</li></ul>	Zamboanga ICT Council in partnership with industry partners, colleges and universities and the city government of Zamboanga	One activity per quarter
	<p>7. Formalize collaboration platforms among schools by creating organizations or conducting inter-school activities to enhance networking and linkages; and also organize students in ICT for exchange of knowledge and collaborative activities within the year</p>		

# Implementation Plan: Talent

Current State	Action Item	Owner	Timeline
Current hit rate is 20-30%	8. Showcase and Open House activities for HEIS to promote their offerings in support of LGU, DICT, and other NGAs	Colleges and universities	2021
	9. Establish near hire training programs - provide allowance to trainees (TESDA)	TESDA Training Providers e.g. TESDA LSI	2021
	10. Provide training on soft skills: communication (oral and written English proficiency), social interaction, self motivation, decisiveness, psycho-social support <ul style="list-style-type: none"> <li>• Schools should consciously integrate this soft skills in their curriculum</li> </ul>	Colleges and universities in partnership with industry	One every quarter
	11. LGU to support TESDA scholarships for contact center services (source our external sources of funds) <ul style="list-style-type: none"> <li>• Design a local policy or ordinance for scholarships prioritizing ICT and related courses</li> </ul>	Local government of Zamboanga in partnership with colleges and universities	2021
	12. Review and improve senior high school curriculum to include contact center services and medical transcription	Local government of Zamboanga in partnership with schools and national government agencies concerned	Annually

# Implementation Plan: Infrastructure / Cost

Current State	Action Item	Owner	Timeline
1. BPO buildings in Zamboanga (4 buildings for ICT Ecozone on-going)	<ul style="list-style-type: none"> <li>Market the City or Ecozone.</li> <li>Completion of 3rd and 4th buildings (c/o Zambo Ecozone)</li> </ul>	Private and business sector	Within 24 months
2. Sub station but not activated. Shipping issues and travel ban	<ul style="list-style-type: none"> <li>Activation of sub station by Zamcelco.</li> <li>Must be operational before build will be used.</li> </ul>	National government	Within 24 months
3. Zamboanga rates are higher than in Manila	<ul style="list-style-type: none"> <li>Compare and review the other rates in the cities</li> </ul>	Private and business sector	Immediate
4. Power Issues	<ul style="list-style-type: none"> <li>Open communication with the power industry</li> </ul>	National government	Immediate
5. Slow connections in different areas in the City	<ul style="list-style-type: none"> <li>New cell sites</li> <li>Expediting fiber to home</li> <li>Upgrading old equipments</li> <li>More Towers</li> <li>PLDT to start building fiber lines</li> <li>Smart to upgrade to 5G</li> <li>7. Telcos will have a monthly progress of activities/coverage</li> </ul>	ZC	
6. No existing Startup Facility	<ul style="list-style-type: none"> <li>To establish and operationalize the Regional Inclusive Innovation Center (RIIC)</li> <li>ZC initiated ICT Innovation Hub</li> </ul>	DTI DOST DICT ADZU	Immediate
7. Perception that Zamboanga City is unsafe/dangerous	<ul style="list-style-type: none"> <li>Conduct more media orientation about the peace and order situation in Zamboanga and enjoin media to support and promote Zamboanga as a digital city</li> </ul>	Local government	Immediate



Agar Agar Dreams by  
Beatrice Rodriguez

## AROUND Zamboanga



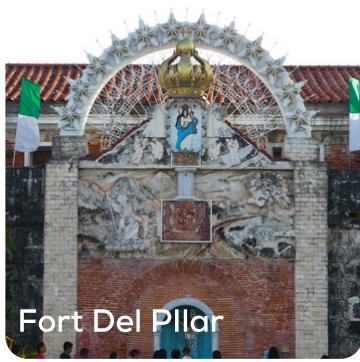
Merloquet Falls



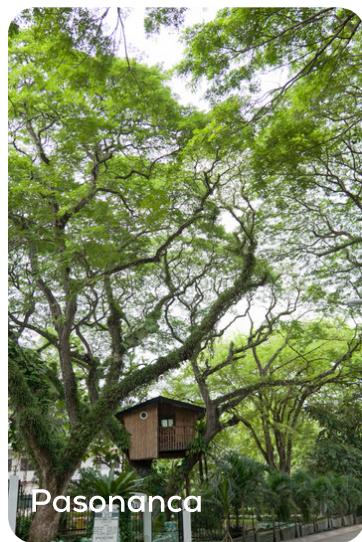
Metropolitan  
cathedral



Santa Cruz Island

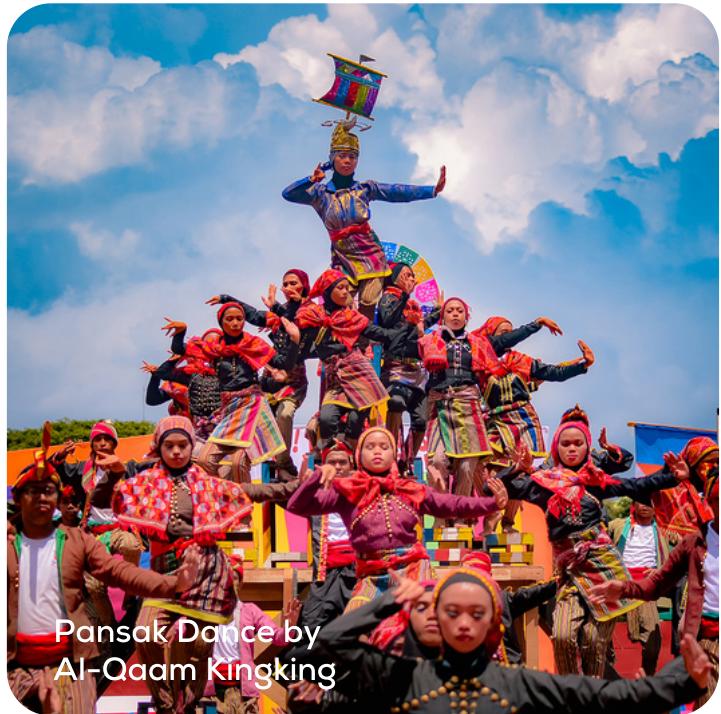


Fort Del Pilar



Pasonanca

# AROUND Zamboanga



# AROUND Zamboanga



Weaving at Yakan Village



Satee



Agar-Agar



Estricta Poderosa by  
Arthur Joshua Rodriquez



Curacha



Knickerbocker



# Stakeholders Speak:

“

It is a gateway to the BIMP-EAGA.

- Glory Halirin

“

The city has good quality education that produces a good number of graduates, and a supportive local and national government.

- Juanito Calingacion, Jr.

“

Investors also need to consider other cities in other provinces and not just those in Metro Manila; and one of these cities is Zamboanga City. Zamboanga City has so much potential and so much to offer. The City's geographical location is strategic as it can serve as a gateway to other cities and municipalities in the far flung areas of the country such as Basilan, Sulu, and Tawi-Tawi. Investors need to take advantage of the high potential of Zamboanga City to be one of the digital cities.

- Ana Kriselda Natividad

“

We have 1M population and have skilled talents within the city. We are also considered as a University town where nearby areas send their children here to study and work.

- Michael Tiu Lim

“

Zamboanga is a center of economy here in Zamboanga Peninsula. Low labor cost, low cost of living. High literacy rate. Less labor problem.

- Nolan Sunico, Ramil Rojas, Jocelyn Wee



Regatta De Zamboanga

“

Investors should locate in Zamboanga City because it provides access to ICT resources and opportunities, provide training on ICT skills; and, provide a facility for digital workers.

- Matildevera Domosmog

“

Zamboanga is a unique city, rarely affected by Typhoon which makes this city a good place for business.

- Nolan Sunico

# Zamboanga ICT Stakeholders Directory

## List of Schools, Companies, Utilities



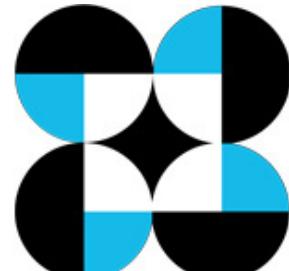
### Department of Information and Communications Technology

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# Zamboanga ICT Stakeholders Directory

## List of Schools, Companies, Utilities



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### Google Educators Group Zamboanga City

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Google Developer Group Zamboanga City  
Yolynne Medina  
Community Manager  
<http://gdgzamboanga.dev/>  
gdgzambo@gmail.com



### Women Techmakers Zamboanga

Fe Grace Tubog  
Ambassador  
<https://www.facebook.com/Women-Techmakers-Zamboanga-100534858078788>

## Useful Links



<https://dict.gov.ph>



<https://www.ibpap.org>



<https://www.facebook.com/DICT.mc1>



<https://www.facebook.com/ZamboangaICT>



Once Islas



THE  
**Design  
Thinking**  
FACTORY