

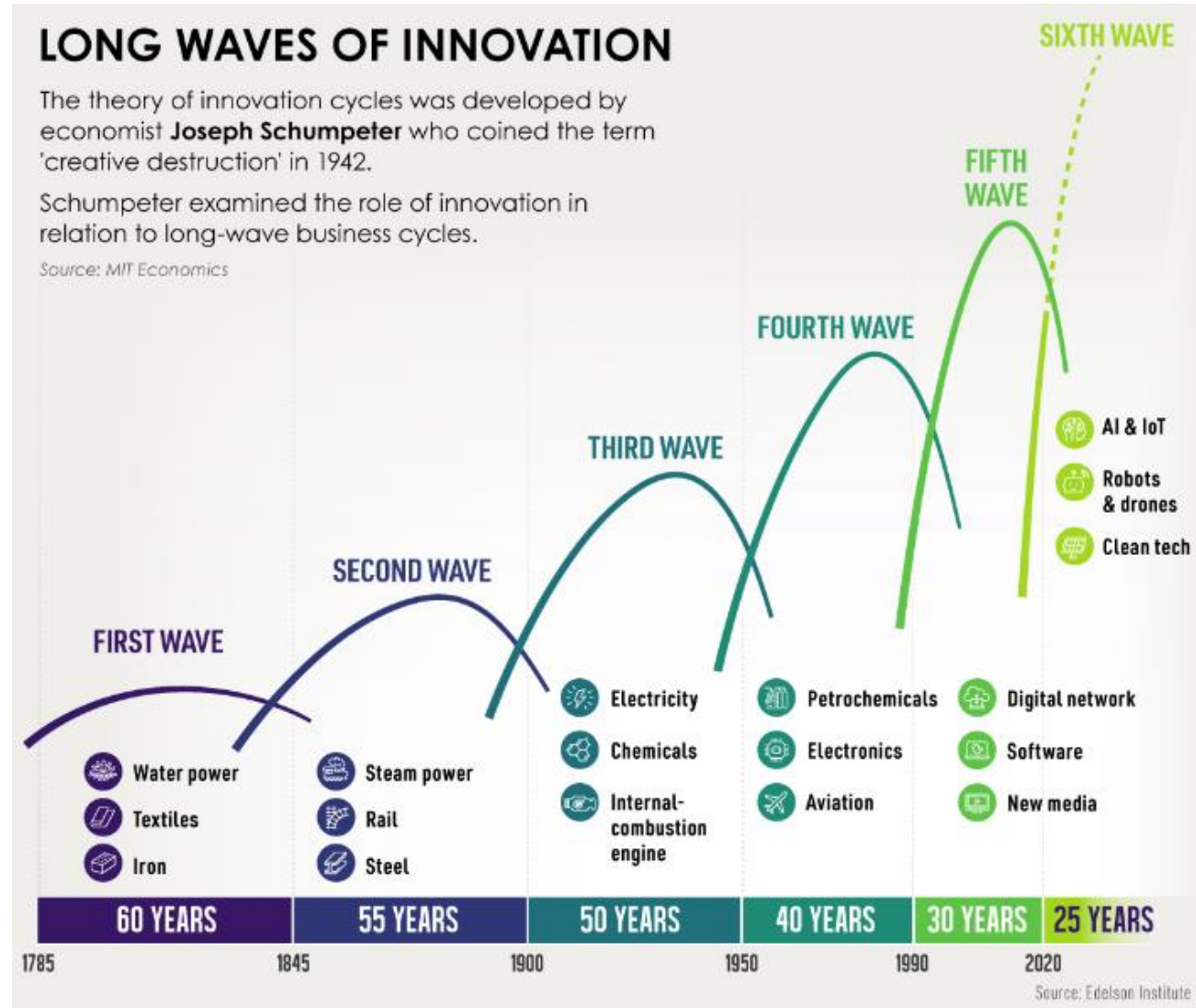


# The Economic Impact of Generative AI:

The Future of Work in the Philippines

20 June 2023

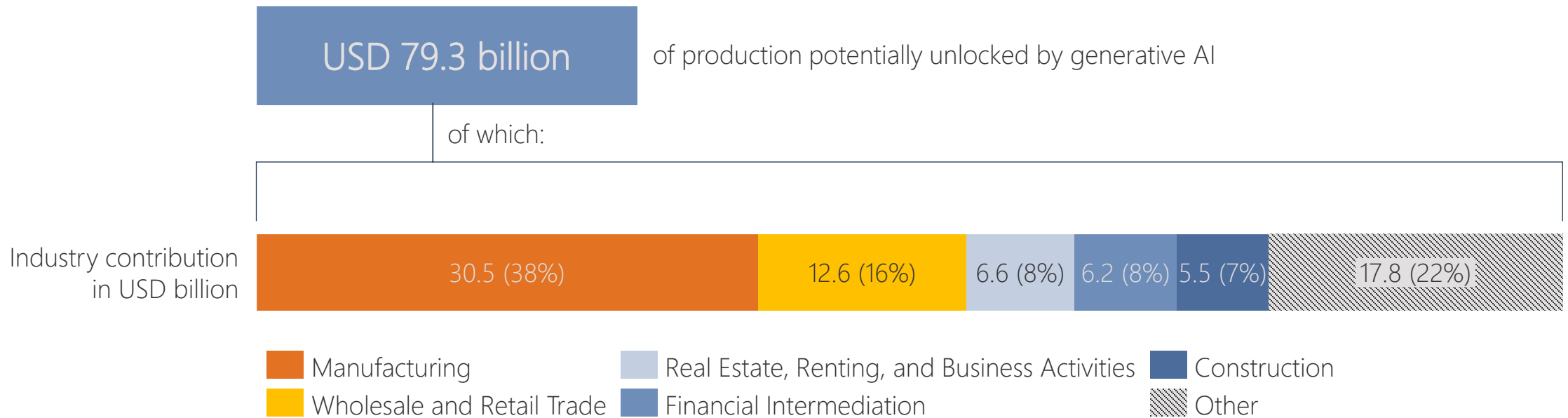
# The sixth wave of innovation





# Unlocking the USD79.3 billion opportunity

Production in the Philippines potentially unlocked by generative AI  
USD billions



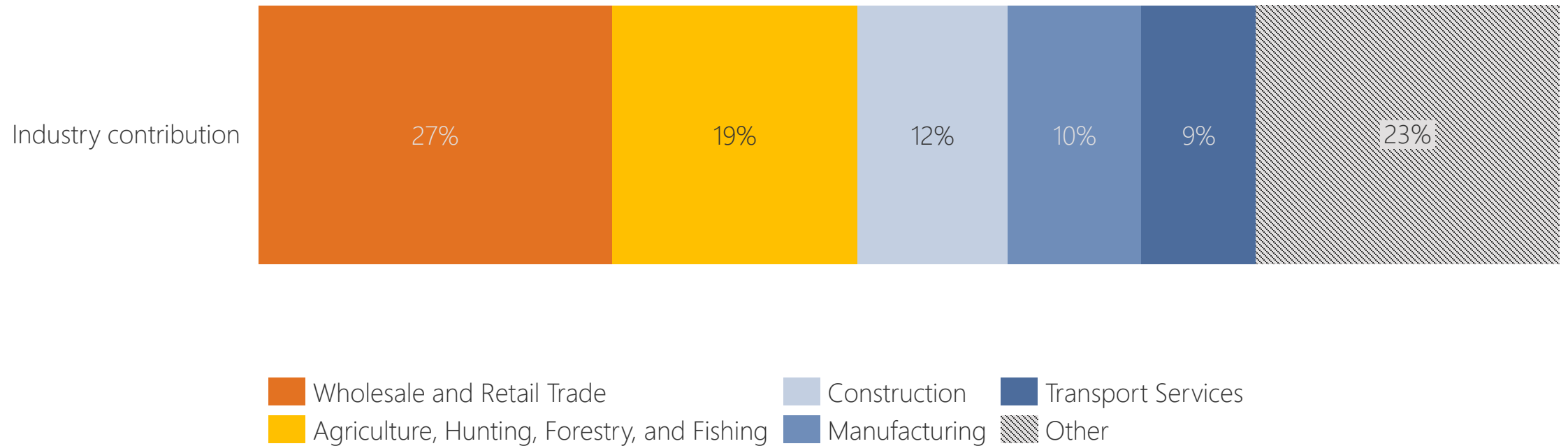
Note: Other includes: Agriculture, Hunting, Forestry, and Fishing; Mining and Quarrying; Hotels and Restaurants; Telecommunications; Transport Services; Education; Health and Social Work; and Other Personal Services. The analysis excludes the Public Sector and Utilities.

Sources: Access Partnership analysis, ILO, National Center for O\*NET Development.

# Transforming the work experience for local workers



Work activities in the Philippines potentially transformed by generative AI, industry contribution  
% of total contribution



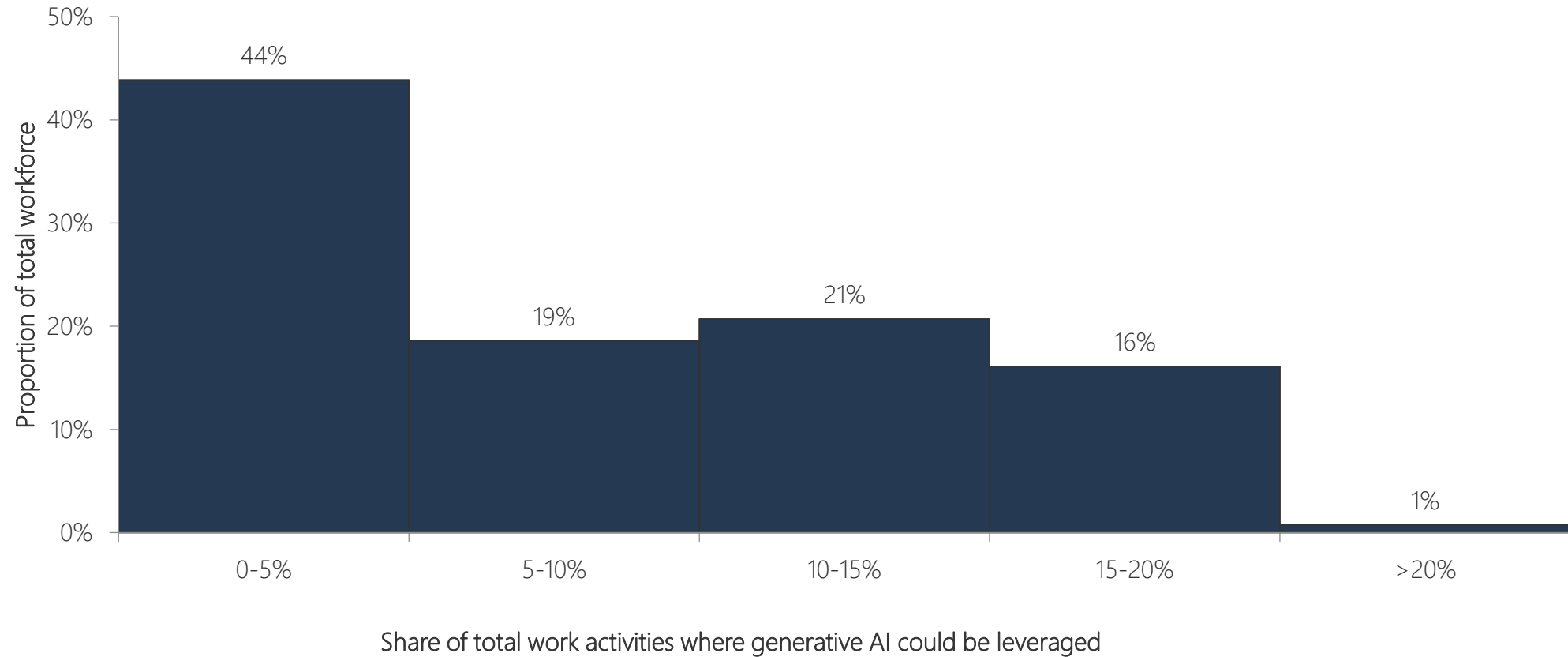
Note: Other includes: Mining and Quarrying; Hotels and Restaurants; Telecommunications; Financial Intermediation; Real Estate, Renting and Business Activities; Education; Health and Social Work; and Other Personal Services. The analysis excludes the Public Sector and Utilities.

Sources: Access Partnership analysis, ILO, National Center for O\*NET Development.



# Generative AI will change the focus within jobs

The potential to leverage generative AI in the Philippines workforce  
% of total workforce



Note: The analysis excludes the Public Sector and Utilities.  
Sources: Access Partnership analysis, ILO, National Center for O\*NET Development.

# Three channels of change

01

Unleashing creativity

02

Accelerating discovery

03

Enhancing efficiency



# 01 Unleashing creativity



## Creating written content

Tata Consultancy Services (TCS) is building a Chat-GPT style solution using proprietary data for automated code generation, content creation, copywriting, and marketing.



## Creating visual content

Heinz used DALL-E 2 (an image generation tool) to produce an image of a ketchup bottle with a label similar to Heinz's to argue that *"This is what 'ketchup' looks like to AI."*



## Supporting ideas generation

Eiichiro Oda, the creator of the popular One-piece manga, noted that ChatGPT provided creative inputs that helped Oda overcome writer's block and that the next installation of One-piece will be heavily drawn from it.

# 02 Accelerating discovery



## Supporting materials discovery

IBM Research built a generative model that can propose new antimicrobial peptides (AMPs) with desired properties.

In the span of a few weeks, researchers were able to identify several dozen novel candidate molecules — shortening a process that can normally take years.



## Making information more accessible

The Bhashini project by the Indian Ministry of Electronics & Information Technology seeks to create an AI-powered national language translation system which could increase accessibility of internet content to India's non-English speaking population.

This could unlock vast troves of information to a new cohort of researchers and innovators



## Supporting better learning outcomes

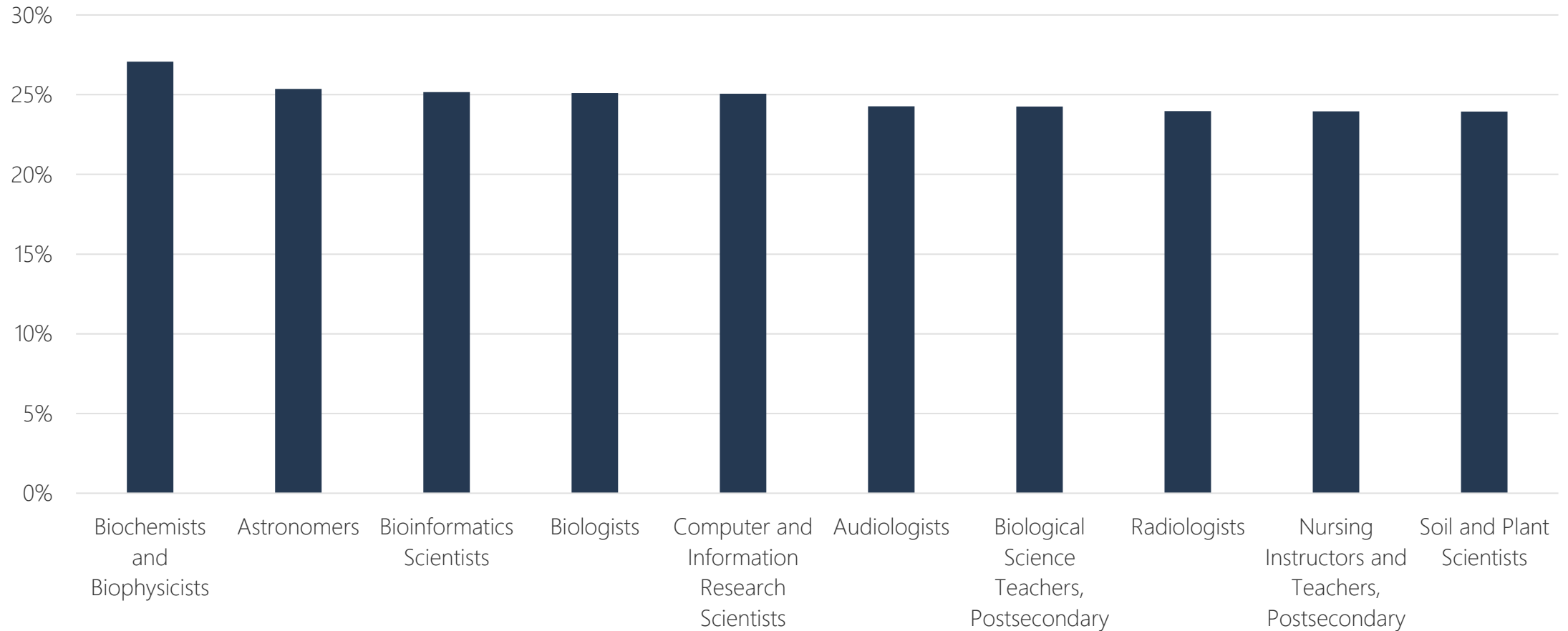
Philippines startup Stock Knowledge has been collaborating with the Department of Education since 2021 to explore new learning methods by leveraging innovative digital technologies such as AI to make learning more engaging and effective.





# ...by supporting research and discovery

Generative AI's potential, adjusted for likelihood, top ten occupations  
% of total affected work activities



Notes: The analysis is done on a global level. These results represent occupations with the greatest share of tasks that are transformed by generative AI. The adjustment for likelihood considers the potential degree of implementation of generative AI within each occupation. This adjustment is categorical (i.e., low / medium / high) according to the relative pay levels for each occupation, based on an assumption that the motivation to implement is greater for higher paid jobs. Sources: Access Partnership analysis, National Center for O\*NET Development

# 03 Enhancing efficiency



## Solving client problems faster

A recent study of customer support agents in the Philippines found that those given access to generative AI tools were able to successfully solve client problems more quickly—with productivity gains of around 14%.



## Streamlining government

The Japanese government is exploring the possibility of using generative AI tools to enhance the efficiency of administrative duties.

They plan to use generative AI to assist with filling-out online application forms, generating responses before parliamentary hearings, and predicting questions during news conferences.



## Improving healthcare outcomes

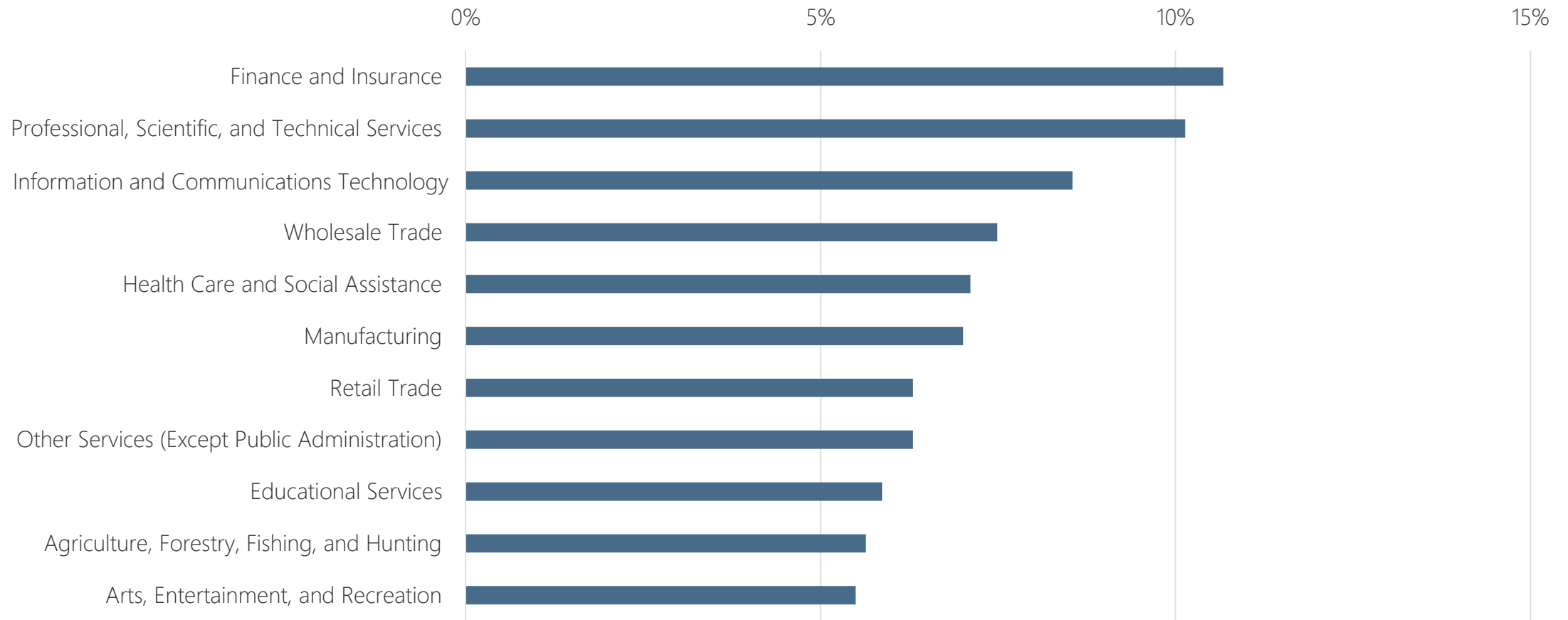
In collaboration with NVIDIA, Mitsui has launched Tokyo-1, a generative AI-powered supercomputer designed to accelerate the drug discovery process.

Leading pharmaceutical companies such as Astellas Pharma, Daiichi-Sankyo, and Ono Pharmaceutical looking to leverage Tokyo-1 to improve patient outcomes and reduce costs.



# ...by supporting economy-wide workplace efficiency

Generative AI's potential by industry, adjusted for likely impact on occupations  
% of total affected work activities



Notes: Excludes public sector, real estate, and utilities. The analysis is done on a global level. These impacts have been adjusted for 'likelihood'. The adjustment for likelihood considers the potential degree of implementation of generative AI. This adjustment is categorical (i.e., low / medium / high) according to the relative pay levels for each occupation, based on an assumption that the motivation to implement is greater for higher paid jobs.  
Sources: Access Partnership analysis, National Center for O\*NET Development

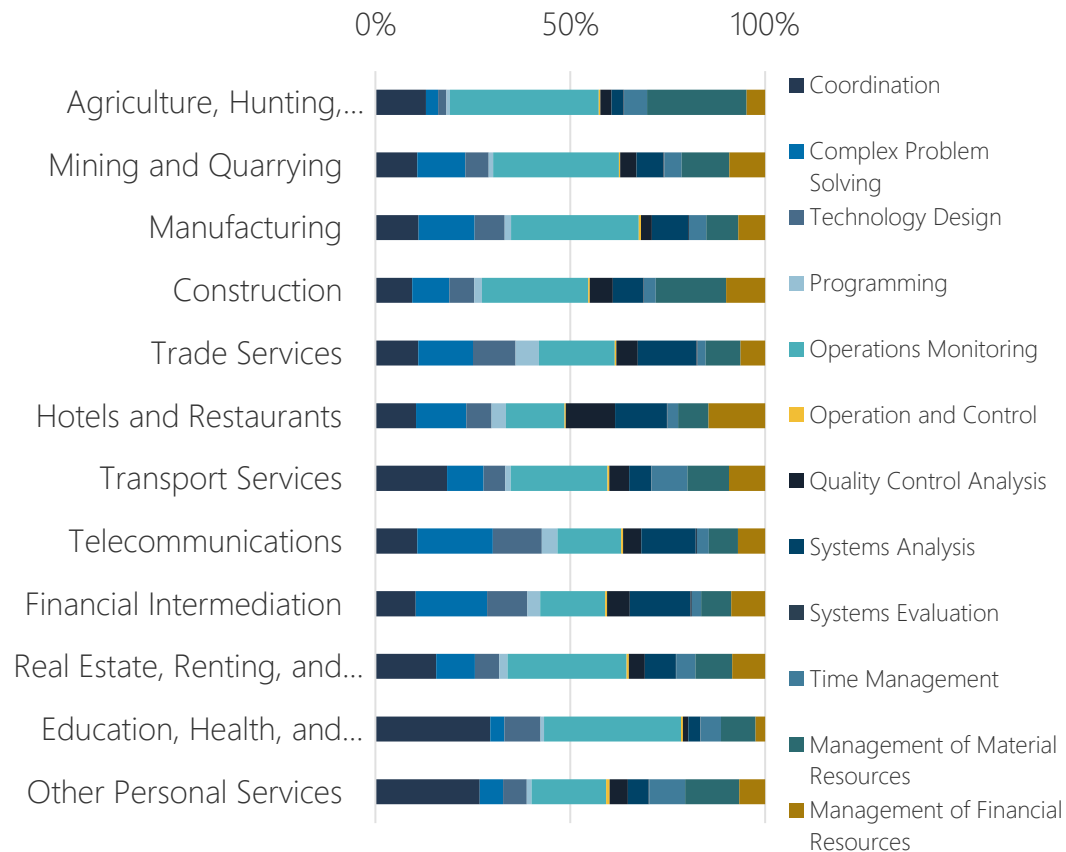


# Upskilling for an AI-ready workforce

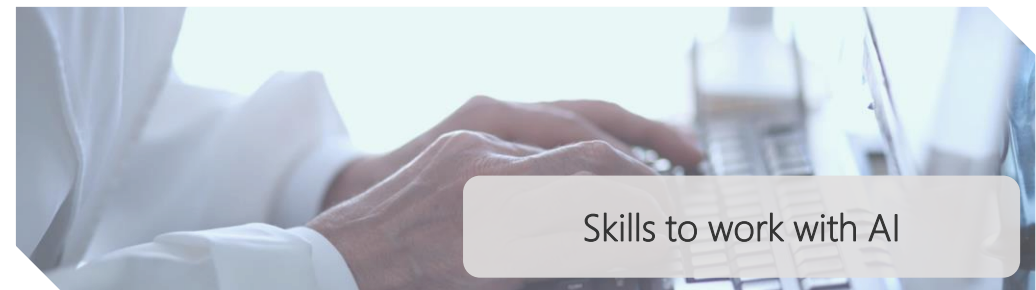
Uplifting the current stock of skills

Developing future-ready skills

Generative AI and its potential impact on cross-functional skills  
% of total impacted cross-functional skills



Note: The analysis is done on a global level. The analysis excludes the Public Sector and Utilities.  
Sources: Access Partnership analysis, National Center for O\*NET Development.

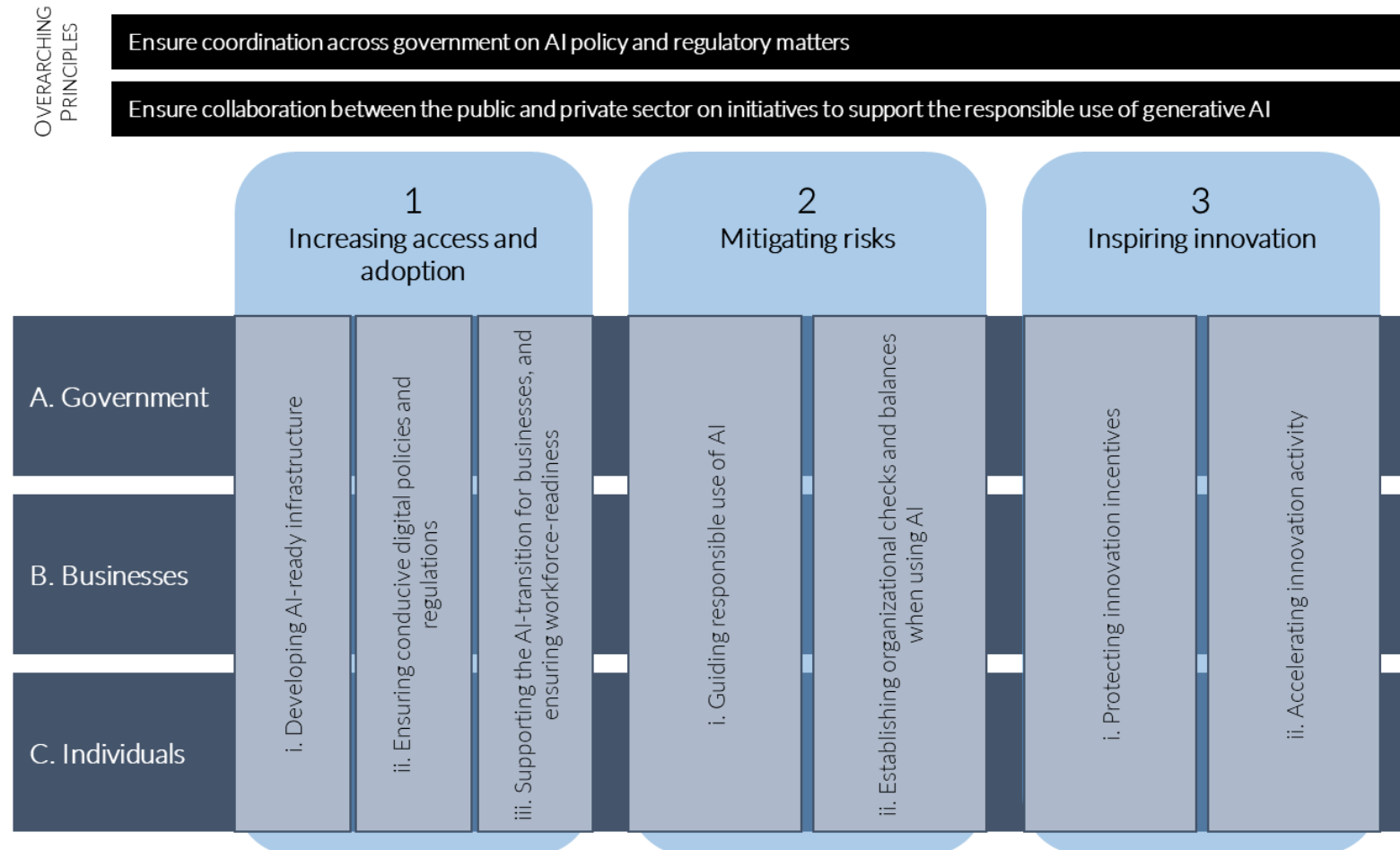


Sources: KPMG (2018). Learning to Learn: The future-proof skill; Microsoft (2023). Will AI Fix Work?.



# Harnessing the potential of generative AI

A framework of three policy objectives



 Thank you



## Contact details

**Marcus Ng**

Director, Economics Strategy  
[marcus.ng@accesspartnership.com](mailto:marcus.ng@accesspartnership.com)