



DELIVERY GEOGRAPHY SNAPSHOTS

Where the work goes, and why

Philippines · Belize · Honduras

A practitioner's read on three delivery geographies for contact center, CX, and back office work. Sourced figures, an honest view of the trade-offs, and the role each market plays in a delivery portfolio.

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HOW TO READ THESE THREE

There is no perfect answer. It is a mix.

Contact center strategy is no longer about selecting the single lowest cost market. It is about designing a delivery portfolio that balances cost with workforce stability, language, complexity, time zone, and risk. The 2026 picture is one of maturation, not decline. Automation has taken the low complexity volume, however it has raised the bar on the work that remains and made stable, well managed labor more valuable, not less.

These three geographies each earn a different role. Cost is never the wage rate alone, so each snapshot weighs talent depth, attrition, infrastructure, and risk alongside the rate. The value is not in naming the cheapest country. It is in designing the right mix for the specific situation.

PHILIPPINES

The offshore anchor

English voice at scale

The global leader for English voice. The real 2026 decision is no longer Manila. It is which second or third tier city fits the program.

BELIZE

The native-English niche

Quality at modest scale

The only English official country in Central America. A quality niche, not a volume play, with a hard ceiling on how far it scales.

HONDURAS

The bilingual nearshore

Scale below the marquee hubs

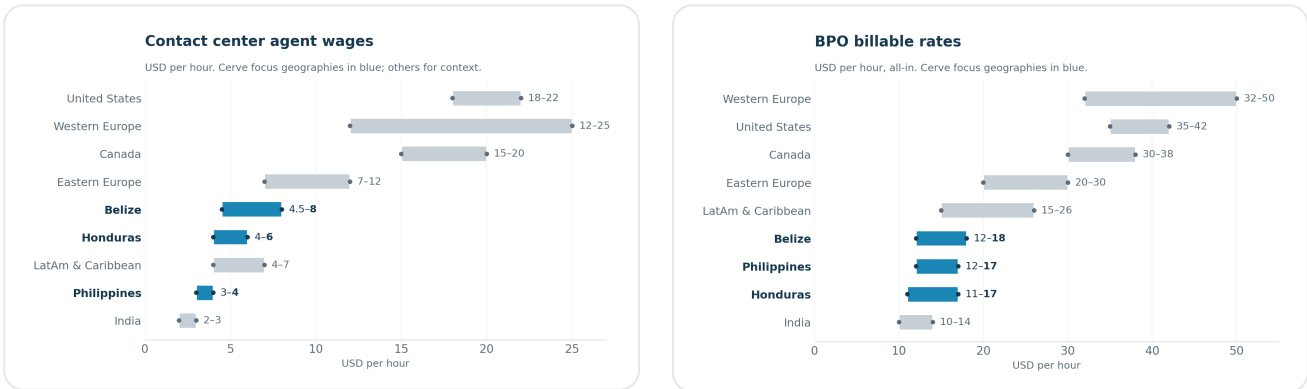
Bilingual talent on US Central time, priced below the established Latin American hubs, clustered inside secured free zone campuses.

A NOTE ON THE NUMBERS

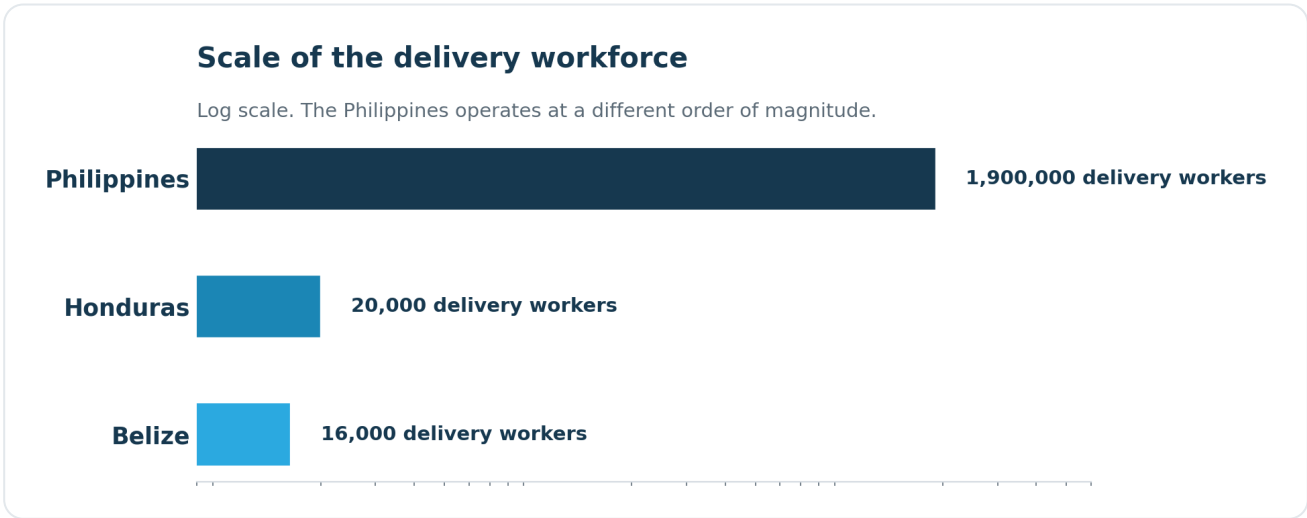
Structural facts are sourced and cited on the references page. Figures that come from vendor or government material rather than audited counts are marked **EST.** and should be read as directional. I would rather show you an honest estimate labeled as one than a precise number I cannot defend.

Cost and scale, side by side

A first read on positioning. On wage and billable rate the three sit in the lower band, with the Philippines and Honduras at the value end and Belize a step up for native English quality. On scale they are not comparable. The Philippines operates at a different order of magnitude, which is the whole point of pairing it with two focused nearshore options.



Philippines and context-market bands per Site Selection Group, 2026 Global Contact Center report.¹ Belize¹³ and Honduras¹⁸ agent wages are vendor-reported estimates.



Philippines workforce per IBPAP.² Belize¹⁰ and Honduras¹⁹ sector counts are estimates.

Philippines



The Philippines remains the global anchor for English voice, and the story for 2026 is no longer Manila. It is the countryside. The national market is large and still growing, however the capital is saturated and expensive, and both the industry and the government are deliberately pushing new work to second and third tier cities. The value for an advisor is knowing which city is ready for which kind of program.

\$40B+IT-BPM
REVENUE,
2025²**1.9M**DELIVERY
WORKFORCE²**~1/3→40%**OUTSIDE MANILA,
TO 2028⁴**\$3-4**AGENT WAGE,
USD/HR¹**\$12-17**BPO BILLABLE,
USD/HR¹

THE THROUGH LINE

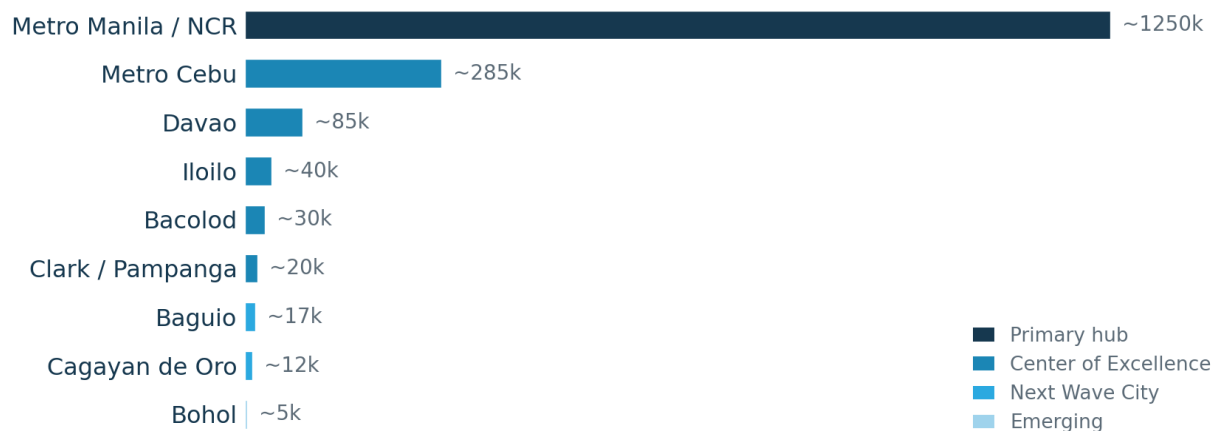
Labor depth and workforce stability are now the binding constraints, not price. In mid-2026 the industry itself revised its 2028 targets downward, from the 2022 goals of \$59 billion and 2.5 million jobs to roughly \$50.5 billion and 2.14 million, reflecting a shift from headcount growth to an AI-ready workforce.³ That is the measured reality. A trained human agent is a trained human agent no matter where they are, and the complex, emotionally charged interactions still land with a person.

The geography beyond Manila

Manila and the NCR are the primary hub and the deepest talent pool, however they carry the cost premium and real saturation. Below the capital, the government and industry use a working framework worth knowing: established hubs are Centers of Excellence, developing sites are Next Wave Cities.⁵

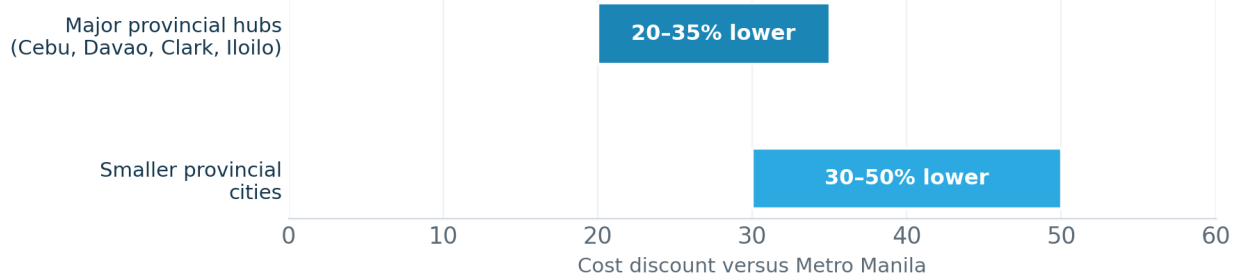
Philippines: the geography beyond Manila

Estimated delivery workforce by city. Directional ranges, not audited counts.



EST. No official city-level headcount series exists. Figures compiled from Colliers, Outsource Accelerator, and regional reporting.⁶⁷⁸

Why work moves to the countryside



EST. Provincial cost discounts per Colliers and industry analysis.⁸

Match the city to the work. Scale and complexity favor Cebu, Davao, or Clark. Cost and retention favor Iloilo, Bacolod, or an emerging site, where attrition is reported under 10 percent against a much higher national average.⁹ A large or hard program may still belong in Manila, and provincial office supply is tightening as demand moves inland.

Belize



Belize is a quality niche, not a volume play, and it is honest to lead with that. It is the only country in Central America with English as the official language,¹² which gives it a native, accent neutral voice advantage that larger and cheaper neighbors cannot match. However the small population puts a hard ceiling on how much you can scale there.

16K+

 SECTOR JOBS,
2025¹⁰
~420K

 NATIONAL
POPULATION¹¹
English

 OFFICIAL
LANGUAGE¹²
\$4.5-8

 AGENT WAGE,
USD/HR **EST.**¹³
CST

 US CENTRAL, NO
DST

THE BINDING CONSTRAINT

With a population near 420,000 and more than 16,000 already in BPO, the sector already absorbs a meaningful slice of the urban working age labor force.¹⁰¹¹ A country this size cannot stand up a single 2,000 to 5,000 seat program quickly without poaching from existing operators, which spikes wage inflation and attrition. Operators work around it by distributing seats across Belize City plus secondary towns.

Belize City is the primary hub and home to the largest operators, with Belmopan and towns such as San Ignacio and Ladyville used to reach beyond it. Belize fits US facing voice and CX where native English quality, neutral accent, and cultural affinity matter more than lowest wage or large scale ramp. Think dozens to a few hundred seats per program. You always get what you pay for, and what you pay for here is voice quality at modest scale.

WATCH ITEM

The south side of Belize City carries a higher US travel advisory level than the country overall,¹⁵ so facility location and agent transport are real operational items. The 2018 Designated Processing Areas Act also tightened the prior incentive regime, so confirm current terms before modeling.¹⁴

COUNTRY THREE

Honduras



Honduras is the mid sized bilingual nearshore option that prices below the marquee Latin American hubs. It offers a Spanish and English workforce, full year alignment with US Central time, and a population around 11 million,¹⁶ roughly 25 times Belize, so it can absorb larger and faster ramps. The work clusters inside secured free zone campuses, principally in San Pedro Sula.

20K+

SECTOR JOBS
EST. 19

10.9M

NATIONAL
POPULATION **16**

3rd

ENGLISH IN
LATIN
AMERICA **17**

\$4-6

AGENT WAGE,
USD/HR **EST. 18**

CST

US CENTRAL, NO
DST

ALTIA, THE CENTER OF GRAVITY

Developed by Grupo Karims, Altia began in San Pedro Sula next to the Central American Technological University, which feeds it talent, and has expanded under the Altia Smart City banner into Tegucigalpa. The campus hosts more than 17,000 jobs on its own.¹⁹ The model is self contained: business park, university, recreation, retail, medical, and residences. It is both the infrastructure answer and the security answer.

Operators on the ground²⁰

Teleperformance

Concentrix

Startek

Allied Global

Alorica

PartnerHero

TWO HONEST CAUTIONS

Security is the gating diligence item. The 2025 homicide rate is down year over year but still high by regional standards,²² which is exactly why the industry runs inside secured campuses with managed transport. And the returnee English thesis, often cited, is documented for Mexico, not Honduras. It stays out of any Honduras claim until a Honduras source surfaces.

Three roles, one portfolio

Set side by side, the roles are distinct. The Philippines is the offshore anchor for English voice at scale, with the real decision being which tier two or tier three city fits the program. Belize is the small, native English niche for quality sensitive voice at modest volume. Honduras is the mid sized bilingual nearshore site that scales further than Belize and prices below the established hubs, with security as the gating item.

A portfolio rarely picks one. It blends them to the client's mix of language, complexity, scale, time zone, and risk tolerance. That is the advisory value: not naming the cheapest country, but designing the right mix for the specific situation.

Worth at least having the conversation

If you are weighing where to place or rebalance delivery, Cerve Global Solutions brings a sleeves rolled up, in the dirt operator's read on these geographies and the full cost stack behind them.

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References and confidence

Structural facts, the national trajectories, the population ceilings, the free zone model, and the time zone facts, are well corroborated. Figures marked **EST.** in this paper, including city level headcounts and the Belize and Honduras wage and sector numbers, draw on vendor, operator, or secondary sources and are directional. All figures are current as of June 2026.

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