

# **EURO-TELEWORK – TRENDS AND** **SCENARIOS**

## **TELEWORK AND CALL CENTRES**

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# 1. Introduction

In order to give a picture of telework and call centre activities in the future development, an attempt has been made to collect data on trends and scenarios in this field.

The scope of existing research and publications has been screened and extracted in order to present future perspectives of the development, specifically in the field of:

- telework regulation and social dialogue
- telework and vocational training
- telework and equal opportunities
- telework and call centres

Although differences between countries and regions are tremendous and comparable data is rare, the bringing together of different investigations and empirical studies results in an overall picture of development which should be useful as a framework of discussion of further action and political initiatives.

Specifically the differences between EU and USA are interacting, as they might indicate future trends for Europe due to the time lag of development or structural differences leading to different scenarios.

To give some examples the following list summarises some comparisons:

## 1.1. Differences presumably due to a time lag EU – USA

a) *less teleworkers in EU*: 31 per cent per American households have a home office. But only 26 per cent of the offices are used to support a home-based business. Another 24 per cent are use for after-hours take-home work and only 9 per cent are used by

telecommuters. The rates for Europe differ from country to country but are far below the percentages.

- b) *less women work with internet:* At the end of 1998, only a quarter of Internet users in Europe were women compared to about 50 per cent in the USA.
- c) *20 % growth of call centres in EU:* Reduced telecom costs, the imminent introduction of a single European currency and an emerging culture for teleworking are fuelling 20 per cent annual growth in the European call centre market through the year 2000, whereas a stagnation in the growth - rates in USA is observed now.
- d) *telemarketing (TV):* European companies in general are lagging behind the U.S. in the use of telemarketing. For example, it is estimated that just over 20 per cent of TV advertisement in the UK carry a telephone number – compared with over 50 per cent in the U.S. This will have further consequences, as soon as digital TV will enable the direct link to call centres.
- e) *higher degree of e-analphabetism in EU:* It is recommended that Europe must get more working-age people back into the workforce. Only 61 per cent of the European working-age population are employed, compared with 75 per cent in the U.S. Such a small number of workers over age 55, combined with an ageing population, portends an unsustainable level of prosperity for Europe unless there are radical changes. It is estimated by the European Commission that over the next decade, around 80 per cent of employees will be forced to change to radically new technologies. This means that they will need to be re-educated; if they are to continue to be employable.

- f) *closing of bank and insurance branch – offices:* By 2003, the number of call centre transactions for the banking industry is projected to rise from seven to 12 per month per household.

## **1.2. Differences presumably due to structural differences between EU and USA**

- g) *more intense flexibilisation of work in the USA:* At least 25 per cent of the American workforce will be telecommuters or home office workers by 2005.
- h) *more reliance on personal communication in EU:* Also in the next time, call centres will spend money on upgrading their business. One of the main reason is to support e-commerce because it is estimated that more than 60 per cent of consumers never complete their transactions. They are uncertain about typing their credit card numbers into an online system. By enhancing Web sites with personal contact options, e-commerce can be taken to the next level, away from a vending machine-like paradigm into the realm of a bona fide, full-service, widely adopted business medium.
- i) *due to different languages less virtual call centres in Europe:* Within the U.S., the report predicts, penetration of virtual call centres in relation to all call centres will grow at a compound annual rate of more than 40 percent through 2003. The functionality of the virtual call centre is evolving to support the centre's role in achieving enterprise-wide CRM goals. No longer is each contact centre treated as an individual depository of information. Instead, the caller's needs and relationship to the enterprise drive the routing of

the call to the most appropriate resource in the enterprise.

## 2. Statistical Data

### 2.1. Statistics on telework

According to European Commission's latest annual report on the subject, "the number of teleworkers in Europe has risen to over 4 million."<sup>1</sup>

Now Teleworking and Globalisation makes it necessary to see the future development world wide.

International statistical comparisons make it possible to find out what countries attract particular kinds of telework: call centres, relocated BackOffice's, software development, data entry etc, and which, whilst likely to encourage domestic markets, do not attract export markets. Countries with a good supply of software specialists and with comparatively low wages are strong in the market as destination countries for software development (e.g. Russia, Bulgaria, Romania, Philippines, China, Indonesia and Brazil) . Those which offer the lowest wages however, will always attract the attention of low skill data processing. And such work can always be kept moving, to find the cheapest source of labour. When it comes to attracting telemediated work, even language is not always a precondition; one Chinese data entry facility has been reported as more reliable and half the price of US low-skill sources, even though the operators are only familiar with the English alphabet, not the language."<sup>2</sup>

#### 2.1.1. Statistics U.S.A.

Estimates of the number of teleworkers in the U.S. vary, "but most figures range between three and nine million people (three to eight percent of the workforce). These figures include people

***Estimates of the number of teleworkers in the U.S. range between three and nine million people***

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<sup>1</sup> Wellins, 1999

who work from home at least several days per month of their normal work schedule.”<sup>3</sup> “This figures are also mentioned by Nie<sup>4</sup> who claims that this estimate is likely to low by as much as 1 million, because of the ambiguity of their telecommuting question. High-end estimates claims that there are currently some 15.7 million wage and salary workers (14 per cent of the labour force) spending at least part of their work telecommuting form home-up.”<sup>5</sup>

A study by Wirthlin Worldwide reported in 1998 “that slightly more than 31 per cent per American households have a home office- about 31 million- but of that number, only 26 per cent of the offices are used to support a home-based business. Another 24 per cent are used for after-hours take-home work for outside employers. And only 9 per cent are used by telecommuters.”<sup>6</sup>

As mentioned in a report by the Bureau of the Labor Statistics the “will surely continue and accelerate during the next decade. As they report, the types of jobs likely to grow the fastest in the next five years are those most compatible with telecommuting, including software design, engineering, and many other information services jobs. Many forecasters predict these numbers will continue to rise, but forecasts for the U.S. in the year 2000 vary considerably: from 15 million workers to 44 million workers or 57 per cent of the workforce<sup>7</sup> Other predictions for the U.S. are that “at least 25 per cent of the American workforce will be telecommuters or home office workers by 2005”<sup>8</sup>

***31 per cent per American households have a home office. But only 26 per cent of the offices are used to support a home-based business. Another 24 per cent are used for after-hours take-home work and only 9 per cent are used by telecommuters.***

***At least 25 per cent of the American workforce will be telecommuters or home office workers by 2005***

### **2.1.2. Statistics EU**

Starting with the European Commission’s latest annual report quoted already, on the subject, the number of teleworkers in

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<sup>3</sup> Kurland, Bailey, 1999

<sup>4</sup> Nie, 1999

<sup>5</sup> Nie, 1999

<sup>6</sup> Wellins, 1999

<sup>7</sup> Kurland, Bailey, 1999

Europe “has risen to over 4 million, or almost three percent of the total workforce.”<sup>9</sup> Other estimates count that there “were at least nine million individuals engaging in telework across the continent, although it highly likely that this figure itself is a wild understatement.”<sup>10</sup> This is supported by the European Commission’s latest report that indicates the total number of “European teleworkers is about 6 million with a further 3 million in informal telework arrangements.”<sup>11</sup> But even basic statistics show ‘wide’ variations. “For example, some 25 per cent of the European households are believed to already own a PC, and in some countries this may be as high as 50 per cent or even on a local basis, 100 per cent.”<sup>12</sup>

“The discrepancy between European and US outcomes provides a continuing source of disquiet for policymakers. Even within Europe, there are marked differences of take-up for telework in regional, national and even local terms.”<sup>13</sup>

Internet penetration rates “vary widely among Member States as well as according to income and gender. The vast majority of European Internet users is still concentrated in the North of Europe, though all Member States are experiencing growth. High-income individuals are about twice as likely to be Internet users (37 per cent) as medium-income individuals (19 per cent) and nearly three times as likely as low-income ones (13 per cent).” At the end of 1998, only a quarter of Internet users in Europe were women compared to about 50 per cent in the USA.”<sup>14</sup>

***Number of teleworkers in Europe: almost three percent of the total workforce***

***European teleworkers are about 6 million with a further 3 million in informal telework arrangements***

***At the end of 1998, only a quarter of Internet users in Europe were women compared to about 50 per cent in the USA.***

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<sup>8</sup> Nie, 1999

<sup>9</sup> Wellins, 1999

<sup>10</sup> McClelland, 1999

<sup>11</sup> European Commission, 2000

<sup>12</sup> McClelland, 1999

<sup>13</sup> McClelland, 1999

<sup>14</sup> European Commission, 2000

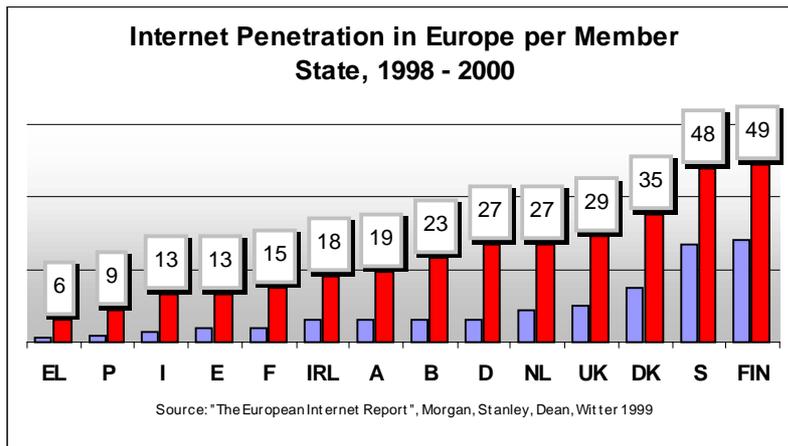


Fig. 1: Internet penetration in Europe per Member State, 1998 - 2000

### 2.1.3. Regional perspective among the European Member States

There are sharp variations from region to region in Europe. In Scandinavia, "for example, the EC study reports the highest overall incidence of telework by relatively progressive labour and public policies. However, much of this telework is of the **home-based employee** from rather than the genuinely self-employed and mobile variety (actually lower than the EC average). Benelux exhibits another pattern. Both Belgium and (more particularly) the Netherlands have much higher proportion of **non-home based telework** than the European average. These countries also show the greatest overlap of the various forms of telework. Southern Europe has least penetration in telework of any form."<sup>15</sup>

The UK, "by contrast, provides a mixed bag reminiscent of the European Union (EU) in general. It has the largest proportion of teleworkers amongst Europe's five major economies, with an expected move towards 10 per cent take-up amongst the working population by 2004. But from the EC report, the UK is disposed to a higher proportion of mobile teleworking and a lower proportion of the SoHo (small office home office) activity to total telework. This is surprising given the acknowledged flexibility in the UK labour market but could be due to various

*The home-based employee*

*Non-home based telework*

*The UK is disposed to a higher proportion of mobile teleworking and a lower proportion of small office home office-activity to total telework*

factors such as the essentially undefined domestic taxation position relating to working at home, or indeed the small size of many UK houses.”<sup>16</sup>

In Germany and Austria, in sharp contrast to other European countries, “where, although home based employee telework remains under the European average as a proportion of total telework, SoHo activity is in fact much greater than the average. There is little overlap between the various forms of telework. These factors seem much less dependent on labour flexibility, but more related to the fact that German SoHo activity might actually be much more established than commentators think, even before the telework era.”<sup>17</sup>

Denmark and the Netherlands “are undeniably early adopter countries and head the list of teleworking populations. At least nine per cent of the workforce in both countries either formally or informally telework.”<sup>18</sup> “A second tier, Finland, Sweden, Belgium, Ireland and the UK, fall into the five to seven per cent range under similar measurements. But the remaining European countries, including France, Germany and all southern Europe are significantly behind this level with less than two per cent of the available workforce engaged in telework activities.”<sup>19</sup>

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<sup>15</sup> McClelland, 1999  
<sup>16</sup> McClelland, 1999  
<sup>17</sup> McClelland, 1999  
<sup>18</sup> McClelland, 1999  
<sup>19</sup> McClelland, 1999

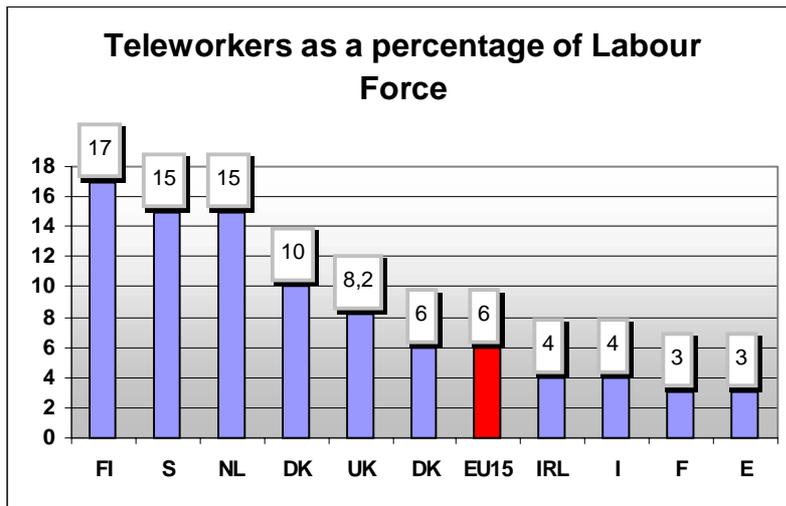


Fig. 3: Teleworkers as a percentage of Labour Force

#### 2.1.4. Who are teleworkers

Almost 70 per cent of the teleworkers are men, “despite the fact that men make up little more than half of those in employment. Women are more likely to be working at home, whilst men are more likely to be work from several different locations, using the home as a base. Over a quarter of all teleworkers (27 per cent) work in the business services sectors with another 25 per cent in the public and voluntary sectors. Most teleworkers are in senior jobs: 28 per cent are managers, 22 per cent are professionals and 18 per cent are in associate professional or technical occupations. Compared with the rest of the working population, teleworkers are more likely to be graduates, to be married and to be in mid-career.”<sup>20</sup>

***Most teleworkers are in senior jobs***

***Teleworkers are more likely to be graduates, to be married and to be in mid-career***

In the past year there “has been proportionally greater an increase among women (at 24 per cent) than men (at 17 per cent). The fastest-expanding teleworking occupation is management, with an increase of 25 per cent in managers working from home. Growth has been especially strong in the financial services sector which has seen an increase of 34per cent in teleworking. Despite an overall decline of 1per cent in

<sup>20</sup> Huws<sup>3</sup>

the numbers of clerical workers in the British workforce, there has been a 12 per cent increase in clerical teleworking. Teleworking is increasing more rapidly amongst employees (at 22 per cent) than the self-employed (at 15 per cent). The self-employed make up only 44 per cent of teleworkers, compared with 46 per cent in 1999 and 48 per cent in 1998”<sup>21</sup>

***The self-employed make up only 44 per cent of teleworkers in 2000, compared with 46 per cent in 1999***

### **Development of routes to telework**

According to EC figures, telework in general “does appear to be more established in **larger enterprises**. Micro-enterprises (employing less than 10 people) are also enthusiastic users of telework. Significantly, it is the small and medium-sized enterprise (SME) level that seems to be the most conservative. For the **traditional organisation**, on the one hand, telework usually begins as some sort of trial covering a limited number of workers at home or in satellite offices. The benefits diffuse out when achievements of the trial are recognised and other business functions throughout the organisation absorb the methodologies. For **newer, or smaller, organisations** already built around networked technology, the benefits tend to be taken (more or less) for granted at the outset, and telework becomes more generally part of a stream of flexible working patterns. A third route is apparent for **freelance or self employed people**, who have a trading relationship rather than an employment relationship with other organisations and who function in a workplace at, or very close to, the individual’s home. But regardless which definition of telework is employed, it is now widely recognised that it is part of commercial web of relationships in a more general sense, coexisting for example in the context of networked and virtual organisations and even more recent applications such E-commerce and teletrade.”<sup>22</sup>

***Telework does appear to be more established in larger enterprises***

***Telework in traditional organisations***

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<sup>21</sup> Huws<sup>3</sup>

<sup>22</sup> McClelland, 1998

### 2.1.5. Steps and barriers

Everybody needs to work as a team for telework. “Consistent disciplines are also crucial for remote staff managers, who themselves may work remotely. Another key factor to successfully developing and maintaining a remote workforce is corporate buy-in at a very high level. Constant feedback from remote workers is vital to the ongoing success of a teleworking program.”<sup>23</sup>

***Constant feedback from remote workers is vital to the ongoing success of a teleworking program***

But still the question “remains how far policymakers should plan for an upsurge in teleworking activity. Telework may be accepted by many companies, but management in many more are resistant to the idea of invisible employees - even if productivity does shoot up by 60 per cent in many cases.”<sup>24</sup> Research data indicate that the “situation is more complex than is commonly believed. Commentators note that even at a basic level, overall information technology investment, the PC investment, mobile phone penetration, the number of Internet hosts, and overall Internet usage will be just some of the factors influencing telework take-up.”<sup>25</sup>

Regarding the critical question of infrastructure: “Here again, needs vary according to the type of telework envisaged. Commentators point out that telework groups should be segmented by at least two major characteristics: the relative degree of control and the relative degree of mobility respectively that potential or actual teleworkers perceive they need. Executive level workers almost certainly have a high degree of control over their working environment, others further down the organisational pecking order, progressively less. Interpreted in another way, the report indicates **that higher mobility/lower control scenarios** depend substantially on investment in the wider public infrastructure, including telecom networks. But as the scenario shifts towards **low mobility/high individual**

***Higher mobility/lower control scenarios***

***Low mobility/high individual control depictions***

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<sup>23</sup> Wellins, 1999

<sup>24</sup> McClelland, 1999

**control depictions**, the report points out that the dependency shifts to the users of the technology, both on an enterprise and individual basis."<sup>26</sup>

## **2.2. Statistics on call-centres**

Reports have shown there are today "more than 100.000 call centres world-wide, a number that is expected to hit 300.000 by 2001."<sup>27</sup> "By the year 2000 hundreds of thousands of workers world-wide will be employed by telephone call centres."<sup>28</sup>

### **2.2.1. Statistics U.S.A.**

Up to 125,000 exist in the U.S. today. "The principal activity of call centres-telemarketing-now accounts for an estimated 10 million employees in the U.S., a number quickly approaching the 19 million employed in manufacturing. Although most of these telemarketers are employed in traditional activities such as reservations, credit, or collections, companies increasingly are using them to staff fulfilment centres, customer service operations, and help desks. Now aggressive firms are upping the ante by creating call centres for proactive product marketing."<sup>29</sup>

Call centres were introduced in the U.S. in the 1970s by airlines. "Call centres in the U.S. now number about 70,000, reports Datamonitor. And the number of call centres is expected to continue growing to an estimated 78,000 over the next three years. Even so, the proliferation of call centres is likely to slow somewhat, from expanding at a 4 per cent clip in 1998 to an increase of just under 1 per cent by 2003, Datamonitor reports. Slower growth is anticipated because of consolidation and new technologies that increase the efficiency of call-centre

***Call centres is likely to slow from expanding at a 4 per cent clip in 1998 to an increase of just under 1 per cent by 2003***

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<sup>25</sup> McClelland, 1999

<sup>26</sup> McClelland, 1999

<sup>27</sup> Frost & Sullivan Inc., 1999

<sup>28</sup> Demaret, Grumian, 2000

employees. One such technology is automatic call distribution, a system that routes calls to employees best trained to handle certain questions. In the past, call centres were seen as a way to cut costs by using technology, rather than humans, to automatically answer routine inquiries such as questions on the status of an order. But today companies are realising the value of the information contained in their call centres.”<sup>30</sup>

***Call centres were seen as a way to cut costs***

***Today companies are realising the value of the information contained in their call centres***

The rapid growth of U.S.-call centres in insurance “ranks the industry as one of the fastest adopters of agent desktop applications. Increasingly, ‘insurers’ demands revolve around integration of call centres with the Web, agency offices, kiosks and other distribution channels so that clients, agents, underwriters, billing departments and others can connect to the same set of customer data. The growing importance of the customer relationship to insurers will increase the number of call centre agent seats in the industry from 50.000 in 1997 to 67.000 in 1998. Insurers are cutting out the middleman and reducing costs, while offering customers round-the-clock access to quotes, underwriting and billing procedures – all in the name of improved customer retention.”<sup>31</sup>

***Insurers’ demands circle around integration of call centres with the Web, agency offices, kiosks and other distribution channels***

By 2003, the number of call centre transactions for the banking industry “is projected to climb from seven to 12 per month per household, while the numbers of branches and automated teller machines will remain flat at 12. Part of that growth will come from online banking, as call centres gear up to handle e-mail, live chat sessions, voice over the Internet and videoconferencing.”<sup>32</sup>

***By 2003, the number of call centre transactions for the banking industry is projected to rise from seven to 12 per month per***

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<sup>29</sup> Schriener, 1998

<sup>30</sup> Kroll, 2000

<sup>31</sup> Schwartz, 1998

<sup>32</sup> Marlin, 1999

## 2.2.2. Statistics European Union

In 1999 “there were about 12.600 call centres across Europe, rising to almost 19.000 by 2003”<sup>33</sup> and “more than 2 per cent of workers in Europe will be employed in call centres.”<sup>34</sup>

“Reduced telecom costs, the imminent introduction of a single European currency and an emerging culture for teleworking are fuelling 20 per cent annual growth in the European call centre market through the year 2000. US-companies, setting up call centres to serve European customers, are a significant source of that growth. Having experienced the positive impact of providing U.S. customers with toll-free numbers, many U.S. companies are eager to replicate this strategy in Europe. And European customers are clamouring for more American-style customer service. This trends are expected to continue. Competitive telecommunications tariffs; the availability of well-educated, multilingual staff; attractive tax breaks; and government grant packages have made countries like Ireland popular locations for pan-European centres.”

Other studies report that the total numbers of call centres in Europe is estimated at 9.000. “Ovum consultants expect this figure to grow to 22.000 by 2002. Meanwhile the Yankee Group estimates the total European call centre market for equipment and services to be \$22 billion. The services segment of this market is approximately \$1.5 billion and is forecast to reach \$ 5.3 billion by the year 2000.”<sup>35</sup>

“Almost 50 per cent of this segment are represented by outsourced services, which are growing at 35 per cent to 45 per cent per year. Datamonitor and Dataquest estimate that the number of agent positions in Europe rose nearly 40 per cent in 1996. By the year 2001, it estimates there will be 670.000 agent positions in Europe. Since call centres are a by-product of the

***By 2003, more than 2 per cent of workers in Europe will be employed in call centres***

***20 per cent annual growth in the European call centre market through the year 2000***

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<sup>33</sup> Flack, 1999

<sup>34</sup> Anonymous<sup>9</sup>, 2000

<sup>35</sup> Malloy, 1998

direct marketing industry, the widespread acceptance of direct marketing as a way of doing business is driving the growth in call centres. The Federation of European Direct Marketing (FEDMA) predicts that by the year 2000 telemarketing could command as much as 20 per cent of Europe's \$33 billion direct marketing industry. While experts fail to agree on the precise magnitude of growth in call centres, all concur that telemarketing in Europe will see enormous growth over the next few years."<sup>36</sup>

***Call centres as a by-product of the direct marketing industry***

There are a few reasons why U.S.-companies setting up call centres to serve European customers: "In the past two years, leading-edge companies have begun to integrate the pan-European and the U.S. centres. This strategy allows companies to route call to agents in the U.S. and Europe depending on agent availability. Further the mismatch between the adoption of the telephone by many European companies and the European consumer's desire for toll-free numbers presents a gaping opportunity for U.S. direct marketers. European companies in general are lagging behind the U.S. in the use of telemarketing. For example, it is estimated that just over 20 per cent of TV advertisements in the UK carry a telephone number – compared with over 50 per cent in the U.S.. And attractive incentives are available from a number of government agencies for companies planning to establish pan-European centres"<sup>37</sup>

***European companies are lagging behind the U.S. in the use of telemarketing***

### **2.2.3. Regional perspective among the European member states**

Telemarketing in Europe "is rapidly developing from its roots in the U.K. and in financial services organisations. In geographical terms, the U.K. still dominates – accounting for over 45 per cent of agent positions. However, the use of telemarketing in Germany and France is now showing signs of rapid growth. The

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<sup>36</sup> Malloy, 1998

<sup>37</sup> Malloy, 1998

Spanish, Belgian and Italian markets are also seeing similar expansion.”<sup>38</sup>

While Ireland is “home to many of the European call centres – and is stepping up the incentives to attract US companies – the United Kingdom is still by far the leader of this field in Europe. According to a report<sup>39</sup> prepared by the International Federation of Commercial, Professional and Technical Employees (FIET) more than half the 6000 call centres in Europe are based in Great Britain or 38 per cent of the world market.”<sup>40</sup> But the market in the UK is matured and this “also means that it is not growing as fast as it was, and not as fast as some European countries. Call centre growth in the UK was between 15 and 20 per cent– compared with Italy which was growing at about 80 per cent in 1999. One country that UK does have to compete against strongly, however, is Ireland.”<sup>41</sup> For UK “it was found that 58 per cent of call centres were based in London or the Southeast rather against the conventional belief that call centres are a Northern phenomenon, says the report. Nevertheless, competition between the different UK and Irish regions to be seen as the call centre location of choice is strong.”<sup>42</sup>

Sweden, “with its strong industrial base and stable economy, is now recognised as a northern European location of choice for expanding international teleservice agencies. Sweden is one of the three most developed markets in Europe, where the trend toward outsourcing is particularly prevalent. According to Datamonitor's study, technology and telecom will drive call centre growth in Sweden,”<sup>43</sup>

Call centres “are different among the European member states. It is import for a ‘European call centre` and it’s employees to be

***More than half the 6000 call centres in Europe are based in Great Britain***

***In 1999, call centre growth in the UK was between 15 and 20 per cent – compared with Italy which was growing at about 80 per cent***

***Sweden is one of the three most developed markets in Europe***

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<sup>38</sup> Malloy, 1998

<sup>39</sup> Demaret, Grumiau, 2000

<sup>40</sup> Demaret, Grumiau, 2000

<sup>41</sup> Flack, 1999

<sup>42</sup> Flack, 1999

<sup>43</sup> Moliteus, 1999

and fluent“ in several languages. “English, French or Spanish, for example is important. But here other factors also come into play. Denmark and the Netherlands are in the market for English, and Greece for French, because these are common second languages, whereas former French or Spanish colonies may not have sufficient people with fluency in those languages, or may lack the quality of infrastructure to support a large call centre.”<sup>44</sup>

## 2.2.4. General development of call centres

### Costs of call centres

Although “a lot of companies always planned to offer dual access channels, with the Web being used to acquire customers and the call centre to service them, the company had to act early to protect service levels in the call centre and keep costs down. It is cost reduction that most supports the Net-first argument. The most frequently quoted – rather misquoted – figures compare transaction costs between retail outlets, call centres and online on a ratio of 1 : 0.5 : 0.1 per action, respectively. But American Bankers estimate that a transaction at a teller costs \$ 1.07, while online the cost is 21 cents. While it does not provide a figure for the call centre, this is likely to fall halfway between the two. This reduction in overheads is what fuelled the growth of call centres in the first place, especially in financial services, as it allowed companies to replace expensive retail outlets and staff with cheaper telephone-based services. Now that same logic is being applied to the replacement of call centres with Websites.”<sup>45</sup>

***Transaction costs between retail outlets, call centres and online on show a ratio of 1 : 0.5 : 0.1 per action***

### Employment

In the UK, for example: “although only 4 per cent of call centres are currently employing homeworkers, a further 42 per cent expect to do so in the future, and attitudes to managing

***Only 4 per cent of call centres are currently employing homeworkers***

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<sup>44</sup> Anonymous<sup>5</sup>, 1999

<sup>45</sup> Reed, 1999

homeworkers appear to be cautiously positive in the majority of cases, with 12 per cent unequivocally in favour but a more measured 44 per cent believing that it is a good idea to use homeworkers in some cases."<sup>46</sup>

Some catalogers "are betting that their customers would buy more from a telephone rep who sounds much like themselves, and they are hiring call centre employees from the same demographic as their target audience."<sup>47</sup> Companies create an atmosphere that "could be heard and felt by its customers calling into the customer service centre. The concept of hiring phone reps who 'speak your customers' language"<sup>48</sup> is probably more common in the business-to-business sector.

### **Telemarketing**

So far, "direct marketers' connection with the consumer has been delivered via the telephone, but the telephone is in danger of being outmoded by digital television technology. Whatever the pace of this development, it will have an increasing impact on telemarketing industry. In the long run, companies currently dependent on call centres, including the telemarketing bureau's themselves, will have to recognise that they are in the business of providing direct information – if the medium changes then so must they."<sup>49</sup> Telemarketing can be affected in two main ways. "First, call centres will have to be able to handle communications in all formats - voice, fax, or e-mail - and give equal weight to all of them. It won't be good enough to leave the emails to the end of the day. Second, all types of technology, from automated call handling and voice recognition software to faxbacks and auto e-mail formats, will be used to keep costs down. This will enable managers to focus their best people on the calls where the personal touch makes a real difference."<sup>50</sup>

***Call centres will have to be able to handle communications in all formats***

***All types of technology will be used to keep costs down***

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<sup>46</sup> Huws, Denbigh, O'Regan, 2000

<sup>47</sup> Del Franco, 1999

<sup>48</sup> Del Franco, 1999

<sup>49</sup> Simon, 1998

<sup>50</sup> Gofton, 1999

## Development of E-Commerce

The integration of the internet and E-commerce will be the next future step for call centres. E-commerce started to emerge as a viable and extremely cheap method of purchasing products. But customer satisfaction is absolutely essential for online sales.

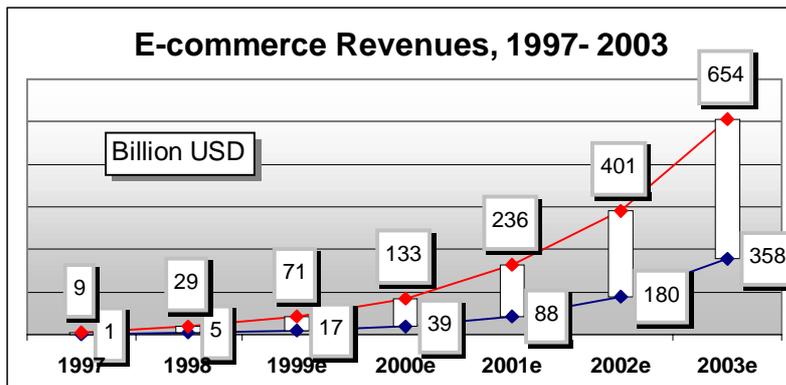


Fig. 3: E-commerce Revenues, 1997 - 2003

In order to meet these expectations, “companies engaging in e-commerce are now beginning to implement multimedia interaction centres. These new centres let customers, prospects, suppliers, distributors and business partners choose to have their questions addressed synchronously, in real-time, through immediate voice call-back, online chat, videoconferencing and visual collaboration. The ultimate benefits of interaction centres include increased customer profits. The ready availability of multimedia PCs, multiple telephone lines and technical sophistication is already speeding the acceptance of **business-to-business** (b-to-b) interaction centres.”<sup>51</sup>

### ***Business-to-business interaction centres***

“Real-time customer interaction can be implemented in several ways. Customers can interact with company representatives using online chat or they can have a telephone conversation. The agent's responses to the customer can be based on intelligent hypertext scripts that augment the agent's skills and knowledge. These scripts can guide the agent's discussion with

<sup>51</sup> Polertzky, Eidsvik, 1999

the customer and provide links to guide the customer's browser to relevant content on the Web. In addition, the agent and customer can engage in a whiteboard conferencing session that enables both parties to draw diagrams and fully interact both graphically and verbally. **business-to-consumer** (b-to-c) interaction centres are booming as well.”<sup>52</sup>

***Business-to-consumer  
interaction centres***

This is due, “in part, to the proliferation of technologies such as cable modems, DSL, ISDN and multiple phone lines. Voice over Internet Protocol (VOIP) technology is now allowing voice and data to be carried over a single telephone line. Nearly 40 percent of Internet-enabled households have more than one phone line according to Forrester Research. Interestingly, many online retail businesses are finding that a large percentage of their customers are shopping on the Web from their place of employment where they have a high-speed Internet connection plus a telephone line. Collaboration technologies can be used for **consumer-to-consumer** (c-to-c) interactions as well. In this scenario, consumers can collaborate as they jointly interact with a company's Web site. For example, a sister living in Massachusetts and her brother living in California could visit a retailer's Web site together and select birthday gifts for their parents. Effectively, the retailer is building a "community of interest" on its Web site. The retailer is attracting more customers, providing a comfortable, familiar method of shopping with friends and family members and ultimately generating more business from the Web.”<sup>53</sup>

***Consumer-to-consumer  
interactions***

Is the World Wide Web a future concern for call centres? “The average number of customers using the telephone for customer service in the U.S., for example, has dropped from 90 per cent to 70 per cent in just a few years in certain industries.”<sup>54</sup>

But predictions “that the World Wide Web heralds the death of call centres are widely rejected. What is certainly going to

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<sup>52</sup> Polertzky, Eidsvik, 1999

<sup>53</sup> Polertzky, Eidsvik, 1999

<sup>54</sup> Jones, 1999

happen is that the emphasis will change. Many requests for information, traditionally met by putting a brochure in the post, could be eliminated. Customers will simply download the information they want from the Web site. On the other hand, a good Web site can stimulate calls, and call centres will still have to be there to handle those inquiries.”<sup>55</sup> Also in the next time, “call centres will spend money on upgrading their business. One of the main reasons is to support e-commerce because it is estimated that more than 60 per cent of consumers never complete their transactions. They are uncertain about typing their credit card numbers into an online system.”<sup>56</sup>

By enhancing Web sites “with personal contact options, e-commerce can be taken to the next level, away from a vending machine-like paradigm and into the realm of a bona fide, full-service, widely adopted business medium.”<sup>57</sup> “Relying on automated services may even result in higher costs. When, for example, Fidelity Investment launched an online banking service in the US it found that for every Net transaction, the site generated three calls to the call centre. Many companies in the UK could experience the same thing.”<sup>58</sup>

***Every ‘Net transaction’  
generates three calls to  
the call centre***

### **Product Development**

Customer support applications are another future trend. They are called “automatic solution finder”<sup>59</sup> and they “are providing instant help to company representatives on the answers customers give to specific questions.”<sup>60</sup> Those systems “cut the time it takes to train customer support representatives, from a month to less than three days. Furthermore support representatives productivity has in some cases tripled.”<sup>61</sup>

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<sup>55</sup> Gofton, 1999

<sup>56</sup> De Pompa, 1999

<sup>57</sup> Reed, 1999

<sup>58</sup> Reed, 1999

<sup>59</sup> De Pompa, 1999

<sup>60</sup> De Pompa, 1999

<sup>61</sup> De Pompa, 1999

### 3. Social Dialog and regulation of telework

Almost “no future data on any of the relevant subjects for social dialog or social relations to either shape the discussion or aid our imaginations is available.”<sup>62</sup> Even in the U.S. “there is not a single significant ongoing effort to monitor empirically either the dissemination of information technology or the resulting social changes it may producing”<sup>63</sup>

#### 3.1. Regulation of telework or labour market regulation

In the UK, for example, it is “now commonplace for professionals to spend some time at home and some time at the office, often without any formal company scheme or policy. In fact, according to a 1997 survey carried out for BT, only six per cent of organisations had any formal approach to teleworking, although 49 per cent had some kind of informal arrangements. Among organisations employing more than 1,000 people, three-quarters now have some kind of flexible working in place.”<sup>64</sup>

Companies in other countries, for example in the U.S., “launched an alternative work arrangement that allows employees to propose different ways to get their jobs done—including telework, compressed work weeks, job sharing and flexible hours.”<sup>65</sup> “All these arrangements can be seen as an important factor in helping employees balance their work and family lives.”<sup>66</sup> And studies in the US have been shown that “42 per cent of employees have ever looked for another job due to difficulty balancing work and family life.”<sup>67</sup> And for some

***Only six per cent of organisations have any formal approach to teleworking***

***In the US, 42 per cent of employees have ever looked for another job due to difficulty balancing work and family life***

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<sup>62</sup> Nie, 1999

<sup>63</sup> Nie, 1999

<sup>64</sup> Wellins, 1999

<sup>65</sup> Reese, 2000

<sup>66</sup> Reese, 2000

<sup>67</sup> Reese, 2000

companies “telework has been helped to retain skilled information technology staff. Telework can attract therefore high-skilled professionals.”<sup>68</sup>

"The transformation of labour markets places great demands on families. To do well in flexible labour markets, workers need to have extensive information networks. Workers with more and better education enjoy greater access to information, have larger networks and more choices, and can more easily adjust to change. Labour markets favour highly educated parents and encourage their children's education. The networks needed for parents to be effective in flexible labour markets require more sophisticated decision-making and organisation than in the past. Families lacking the capacity to make informed decisions or the resources to act on them are still forced to be flexible but are much less sustainable. Some countries have publicly subsidised systems of support for working parents that make it easier simultaneously to work and to rear a healthy family.

### **3.1.1. Benefits and disadvantages**

Research results about the influence of telework on morale are contradictory: On the one hand studies report that telework is increasing job satisfaction and therefore is improving work morale because of increased flexibility in the location and timing of work. On the other hand reports “have shown that teleworkers job satisfaction is lower than office workers due to office working conditions or the amount of job variety or job security.”<sup>69</sup>

However, organisational factors such as task predictability, IT support, and electronic co-ordination are found to have similar influences on satisfaction with communication for both groups. Managers should develop strategies for managing a network of distributed workers (i.e., workers in a variety of different

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<sup>68</sup> Roche, 1998

<sup>69</sup> Hill, Miller, Weiner, Colihan, 1998

geographic locations) and suggest a number of different managerial actions."<sup>70</sup>

At least conventional research studies have shown that teleworkers give back about half of their commute time to the company in the form of longer work hours."<sup>71</sup>

Some authors "argue that trust can be predicted by perceptions of other team members' ability, integrity, benevolence, and propensity to trust. The relative importance of these predictors may vary by time and phases of teamwork. The authors found that, in the early phases of teamwork, team trust was predicted more strongly by integrity and benevolence. The salience of perceived ability on trust diminished over time. They found that the members' own propensity to trust had a significant, although unchanged, effect on trust. The authors also report that high-trust teams exhibit 'swift trust'. Finally, the authors provide several suggestion to reinforce trust and eventually improve team process outcome. They found that Web-based groupware can improve communication among the participants and help to build virtual communities. However, organisations should be aware that technology alone cannot build virtual communities. They report that Web-groupware is a pull technology that requires users deliberately to access the system. In cases where users did not find a compelling need or desire to interact, the system did not help to build a virtual community."<sup>72</sup>

Other studies have shown "that more than a quarter of full-or-part-time workers who use the Internet more than 5 hours a week said that the Internet has increased the amount of time working at home without decreasing the amount of time working in the office."<sup>73</sup>

In American society today, "the workplace is regarded as one of the major centres for friendships and has grown steadily in this

***Teleworkers give back about half of their commute time to the company in the form of longer work hours***

***Team trust was predicted more strongly by integrity and benevolence***

***Web-based groupware can improve communication and helps to build virtual communities***

***Internet has increased the amount of time working at home without decreasing the amount of time working in the office***

***Workplace as one of the major centres for friendships because of personal contact, collegiality, and community in an increasingly isolated society***

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<sup>70</sup> Igbaria, 1998

<sup>71</sup> Hill, Miller, Weiner, Colihan, 1998

<sup>72</sup> Igbaria, 1998

regard throughout much of this century, as other arenas have declined. As a result, the workplace has actually been elevated to one of the few remaining predictable sources of personal contact, collegiality, and community in an increasingly isolated society. Some social scientist predict therefore that when one type of institution fails to meet some deep-seated human need, another is often (but not inevitably) invented to take up at the slack. They emphasise that there are long-term effects to consider. Ongoing, face-to-face connections foster trust and personal integrity in people's business dealings. But the more isolated work is from other parts of one's social world, the more business ethics suffer. Anonymity can lead people to believe they can get away with the shoddiest behaviour."<sup>74</sup>

### **3.1.2. Teamwork organisation:**

With less face-to-face contact, different practices are required in order to keep up to speed. Having a regular phone call checklist, for example, and having regular and planned face-to-face sessions to ensure not only consistent contact, but also to ensure that the contact is substantial. This way, each session has more value, and relates directly to issues such as career building and impact on clients.

***Regular and planned face-to-face sessions ensure consistent contact***

Another key factor in successfully developing and maintaining a remote workforce "is corporate buy-in at a very high level, and a culture already suited to structure and discipline. It would be very difficult to work in an unstructured environment because there would be no checkpoints or means to understand where difficulties or problems lay. The existence of corporate disciplines beforehand make an excellent starting point."<sup>75</sup>

***Existence of corporate disciplines***

It is recommended that "Europe must get more working-age people back into the workforce. Only 61 per cent of the

***Europe must get more working-age people back into the workforce***

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<sup>73</sup> Anonymous<sup>9</sup>, 2000

<sup>74</sup> Nie, 1999

European working-age population are employed, compared with 75 per cent in the US. Such a small number of workers over age 55, combined with an ageing population, portends an unsustainable level of prosperity for Europe unless there are radical changes.”<sup>76</sup>

## 4. Telework and vocational training

Information technology, electronics and telecommunications have a higher profile than ever, and it continues to rise – so vocational training and distance learning have to keep pace.

### 4.1. General development

Improving technology “will revolutionise the way we do business and earn our living. Most companies will bring in staff on project-by-project basis. This staff will use advanced communications to work together from anywhere as if they were in the same office. Workers will change jobs frequently, but won’t want to move each time, so they will most likely make use of abundant telework centres, full of infotechequipped hot desks. Local communities will benefit from reduced commuting, lower stress, and greater cohesiveness.”<sup>77</sup>

It is estimated by the European Commission that over the next decade, “around 80 per cent of employees will be forced to change to radically new technologies. This means that they will need to be re-educated; if they are to continue to be employable. On the other hand, in view of the financial pressure being experienced by the organisations involved- due to the rapid pace of change which is at one extreme forcing them out of business and at the other creating the new opportunities for them to move in- it is likely that the task of re-educating these individuals will fall to government, and in particular, to the EC to stimulate such programmes of re-education. Due to the

***EC has to stimulate programmes of re-education***

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<sup>75</sup> Wellins, 1999

<sup>76</sup> Anonymous<sup>10</sup>, 2000

<sup>77</sup> Kurland, Bailey, 1999

uncertain speed of development in the demand of lifelong learning , it may though be very much more unpredictable than that for formal education. Since this sector is currently dominated by face-to-face teaching – most often one-to-one in the workplace, it will be revolutionised by the greater availability of a wider range of distance- and open-learning technologies.”<sup>78</sup>

“But ‘life long learning’ education is something “which traditional education has not yet contemplated as a task. An increasing part of our education might therefore to happen outside the established educational system. With private finance taking an increasing role to supplement the traditional dispersion of public funds that are locked into the initial education sector.”<sup>79</sup>

“Parts of “education” which should benefit most directly from technological developments are.”<sup>80</sup>

- **Internet**; the short length, and comparably low price, of these modules will, at one extreme, let individuals make them almost an impulse purchase; whilst still allowing to integrate the modules within their overall educational programme. At the other extreme, it will allow large numbers of small providers the opportunity to supply text-based offerings aimed at meeting specialist needs.
- **Television**: At one extreme, the hundreds of different channels available will allow the space for educational material to have its own channels. In future it is likely that this will be more firmly located in overall programmes of education, specifically planned by students and their advisors.
- **Books**: the market for the printed word, even in the forms of books and journals, will also expand. In fact, for most of the decade, it is likely to remain the central element of even informal education.

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<sup>78</sup> Mercer, 1999

- **Teaching institutions:** these, too, are likely to greatly expand their output, although only a few of them will become major providers of the volume distance learning modules. It is therefore critical to recruit large numbers of new teachers to tutor and counsel the new students. The major source may come from the 50+ age group. A first step will be the provision of “teach the teachers” programmes.”

Approximately “81 million out of the 117 million people aged under 25 in the European Union are in educational institutions. This ‘Net-Generation’ will live and work in a world where mobile phones, PCs, Internet etc. are ubiquitous.”<sup>81</sup>

It is said “that the availability of materials and content for online learning is not a problem, it is on to say that there are problems in developing the economic model underpinning delivery and the organisational capacity to support online-learners.”<sup>82</sup>

Other authors suggest to “create a new kind of service designed specifically to assist the growing numbers of adults needing professional career counselling addressed through the creation of career centres fully equipped and staffed to the needs of the adults.”<sup>83</sup>

***Career centres fully equipped and staffed to the needs of the adults***

Scenarios of future vocational training and distance learning are discussed by Willmore: “how the HRD (human resource development) profession might evolve during the next 5 to 7 years.” In his first scenario, the ‘**sub city scenario**’, most organisations have a small core of indispensable employees and a lot of temps and subcontractors. Work in these organisations is project-driven with definable start and end dates. Almost all HRD work and functions are now being outsourced. This is because it has become too difficult for small and medium-sized firms to pay their overhead and operating

***The ‘sub city scenario’***

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<sup>79</sup> European Commission, 2000

<sup>80</sup> Mercer, 1999

<sup>81</sup> European Commission, 2000

<sup>82</sup> Pullin, 1999

<sup>83</sup> Douglas, 1998

expenses.” Because of the “time pressure in the new economy and the difficulty of finding people who are good fit for specific roles within a project, sub work is highly lucrative.”<sup>84</sup>

The second scenario is about the ‘boundaryless world’: “almost all work is done over distance using virtual interaction and technology. Practically everyone belongs to at least one community of practice or informal network solely for professional learning. Such groups are based on an area of interest, professional level of expertise, or industry focus – not geographic focus. Because these networks and communities are self-supporting and volunteer based, almost all have norms about participation. For instance, each member must provide resources and time to support the network. If you do not contribute regularly, you’re usually expelled. HRD managers spend most of their time learning and connecting rather than performing. In a world of new global conglomerates that span multiple industries, companies don’t depend on one country as a base of operations. Big companies have found ways to capture and leverage knowledge, and they invest heavily in intellectual capital. Probably it is industry-related if companies invest heavily in human development (author suggests IT, software, and systems integration) or if they hold employees responsible for their professional development and learning (e.g. finance, health care, and manufacturing).”<sup>85</sup>

### ***The ‘boundaryless world’***

Willmore’s third scenario describes the ‘**caste system**’. “Corporate mergers so prevalent in the nineties continued to proliferate. The world now sees new global conglomerates that span multiple industries. Through mergers and a new class of multinational executives, merged firms typically have strong ties to many nations and don’t depend on one country as a base of operations.”<sup>86</sup>

### ***The ‘caste system’***

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<sup>84</sup> Willmore, 1999

<sup>85</sup> Willmore, 1999

<sup>86</sup> Willmore, 1999

The best of the big firms “have found ways to capture and leverage knowledge and they invest heavily in intellectual capital. For HRD professionals, a clear set of competencies has emerged. To be able to hold a job at one of these big firms requires expertise in ROI (return on investment), measurement, and evaluation. All HRD initiatives are driven by major strategic goals and evaluated by quantitative measures, usually reflected as a form of business results.”<sup>87</sup>

The fourth scenario describes a ‘**silo economy**’ where the “wave of consolidation has reached tidal proportions. The number of competing firms within any particular industry continues to diminish as businesses acquire market share by buying out competitors. Part of what’s driving that is economy of scale. HRD professionals are finding themselves in a series of separate but parallel worlds driven by the industry or sector they work in. Some sectors (IT, software, and systems integration) invest heavily in human development. High-tech firms provide extensive support for HRD initiatives, but industries such finance, health care, and manufacturing hold employees responsible for their professional development and learning. HRD staff in such organisations have little support, funding, or perceived value.”<sup>88</sup>

### ***The ‘silo economy’***

## **4.2. Further steps and barriers**

The long-term ramifications of vocational training and distance learning on a global scale “may include a lessening of immigration to the U.S. and the diminishment of U.S. engineering and business schools as premier degree-granting institutions. For example, as communication technology allows software development to spread to India, fewer India engineers will seek higher degrees- and ultimately employment- in the

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<sup>87</sup> Willmore, 1999

<sup>88</sup> Willmore, 1999

U.S. Domestic high-technology firms will find it more difficult to attract talent, but they also may have less need for it.”<sup>89</sup>

The Sevilla Institute suggests for individuals, “the main issues are education- and training systems to raise literacy levels, mitigate skill-shortages and foster true lifelong learning. The efforts for organisations are to better exploit the productivity and efficiency gains of external networking and internal knowledge management. On a European level the diversity of knowledge and learning traditions of citizens, organisations, regions and nations must be preserved, deepened, but also harnessed for the greater and shared prosperity of all Europeans. This all must reflect in both specific learning-policy actions and a policy learning process itself.”<sup>90</sup>

## 5. Telework and equal opportunities

### 5.1. Age

The principle demographic feature of the next ten years “will be steady ageing of the working population. This will take different forms in different countries. In Denmark, the Netherlands and Germany the salient feature is a substantial growth (between 50 per cent and 300 per cent) of the 50+ age groups in the years up to 2010. In some countries, such as Finland and Ireland the ageing is counterbalanced by a relatively large younger cohort. The upper age group, for instance for the Spanish working population will still be diminished by the low birth rates during the Civil War.”<sup>91</sup>

***Substantial growth of the 50+ age groups in the years up to 2010***

### 5.2. Gender

The main source of growth in the active population for telework or call centres “in recent years has been and in the future is likely to be women. Even though all European countries expect

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<sup>89</sup> Kurland, Bailey, 1999

<sup>90</sup> Gavigan, Ottitsch, Mahroum, 1999

<sup>91</sup> Burgelman, Ducatel, 2000

higher female participation, the scope for increasing the workforce by raising these rates is quite variable. In Scandinavia the gap between activity rates of men and women is already quite small at around 5 to 8 per cent. In Denmark it is forecast to converge to within 3 per cent by 2005, but in Sweden in the past year female employment has actually fallen indicating that some kind of ceiling might have reached. Elsewhere, the starting gaps are greater and are expected to converge towards the 5 to 10 per cent levels. In the extreme case of Italy, with one of the lowest average participation rates at 37 per cent in Europe there are expectations of a continuing rise to 50 per cent by mid-decade.”

GfK has recently conducted a study “among young opinion leaders aged between 14 and 20 across 16 countries of Central Europe. Surprisingly, despite all the fuss which has been made in the past few years over the socialising effects of the Internet and the World Wide Web, the more intellectual and creative among Europe's teens show no desire for the Global Village or for teleworking. But our young opinion leaders are surprisingly suspicious of IT. They believe it removes human interaction and stops people talking. The Internet splits the genders. Boys - who it seems are often less articulate than girls - appreciate the ability to talk to others through the keyboard but girls do not.”<sup>92</sup>

Although women “make up half the workforce in the U.S., they account for only 20 per cent of those working in high-tech jobs. The American Association of University Women Educational Foundation reports the reason is that girls are turned off in school and college by the way information technology is used, applied and taught.”<sup>93</sup>

More intense competition on a world-wide scale makes firms acutely aware of costs and productivity. The solution many employers have reached is to reorganise work around

***In Scandinavia the gap between activity rates of men and women is already quite small at around 5 to 8 per cent***

***Young European opinion leaders are suspicious of IT***

***Internet splits the genders***

***Girls are turned off in school and college by the way information technology is used, applied and taught***

***Reorganise work around decentralised management***

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<sup>92</sup> Croft, 1998

<sup>93</sup> Anonymous<sup>7</sup>, 2000

decentralised management, customised products, and work differentiation, such that work tasks become individualised and workers differentiated. This makes it much easier to subcontract tasks, employ part-time workers and hire temporary labour for some specific tasks, while other 'core' work is multi-tasked and carried out in teams. Workers are being defined less in terms of the particular long-term jobs they hold than in terms of the knowledge they have acquired through studying and working. The acquisition of a 'knowledge portfolio' enables them to move between firms and even between types of work, as jobs are redefined and demand shifts."<sup>94</sup>

***Core and peripheral competence: outsourcing jobs and multitasking by teams***

"The effect of individualisation and differentiation is to separate more workers from the kind of permanent, full-time job in stable businesses that characterised post-Second World War development in Europe, Japan, the United States and other industrialised countries. An earlier factory revolution drove a wedge between workers and the products they made (in a Taylorist model); the new transformation is dissolving the identity that workers developed in relation to industrial institutions, especially the corporation and the trade union. Workers are being separated both from their traditional identities built up over more than a century and from the social networks that enabled them to find economic security. The job and everything organised around the job - the friends at work, the afterwork meeting places, the trade union, even group transport - lose their social function. They are becoming as 'permanently temporary' as the work itself."<sup>95</sup>

***New transformation is dissolving the identity that workers developed in relation to industrial institutions***

"The traditional social integrators, apart from the workplace and job-centred social networks, are the family and the community. In times of transition, whether from agricultural society to industrial, industrial to post-industrial, or (as now) local or national to global, families and communities are called upon to bear the greatest responsibility for preserving social cohesion.

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<sup>94</sup> Carnoy, 2000

<sup>95</sup> Carnoy, 2000

Families also transmit much of the skills and knowledge needed by children to succeed in the adult work world. So it is not surprising that, whenever these workplace transitions occur, families and the communities that form around work organisations are strained.”

In the meantime, the nuclear family with a full-time mother managing the home - the family that sustained and nurtured the Industrial Revolution has been transformed. The new style of work organisation that is successfully responding to the competitive pressures of a globalized economy has come to depend on the relatively cheap, highly productive and highly flexible labour increasingly supplied by these wives and mothers. And this has occurred just as there is the greatest need for a strong, cohesive family with time and energy to invest in the education and well-being of both adults and children during the difficult transition towards new forms of work and personal life.”<sup>96</sup>

## 6. Call Centres

### 6.1. General Development

Call centres “have been long-time bastions of innovation because of their immense size and healthy budgets. But after decades of sinking heavy investments into legacy-based call-centre platforms, many corporations are now pulling those operations into the enterprise. That trend signals a fundamental change for Internet telephone.”<sup>97</sup>

Call centres come in two types. “**Inbound centres**, often with staffs of 1,000 or more, answer incoming customer calls. They're the easiest to operate because customers initiate the calls and are willing to co-operate to get what they want. Staffers may have some technical knowledge but usually rely

#### *Inbound centres*

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<sup>96</sup> Carnoy, 2000

<sup>97</sup> Jones, 1999

on interactive computer screens to prompt the conversation. Turnover is nominal. The other type, “**outbound centres**, is the source of calls we hate-outgoing calls that interrupt our dinner trying to sell us something. These centres usually are smaller (50 to 200 employees). The work is stressful, causing turnover that often exceeds 150 per cent annually. The new, proactive trend, however, finds manufacturers using outbound centres to stay in touch with customers-the price drop tip, for instance-hoping that the interaction will increase sales, satisfaction, and loyalty. The prototype is Georgia-Pacific Corp., which consolidated 100 local offices into a 1,000-person call centre in Atlanta primarily for such proactive calls. Usually, though, a firm launching such a telemarketing initiative starts small, co-locating the call centre with another company facility because it's easier to manage and provides a career path.”<sup>98</sup>

## ***Outbound centres***

## **6.2. Future Technologies used**

Call centres today combine voice, e-mail, and Web messages into a single repository. Harnessing standard applications such as Microsoft Explorer as well as features such as Web callback, Web chat, and voice over Internet, Encompass leverages customer relationship management software already residing in many mega call centres. The most discussed future technologies are:

- Multichannel technologies
- Speech recognition

### **6.2.1. Multichannel**

With the “emergence of voice over internet protocol (IP) and real-time online chat, the Internet has taken call centres to a new level - sometimes beyond the skills of corporate information technology (IT) and network managers. These managers are now scrambling to transition into Internet-based

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<sup>98</sup> Schriener, 1998

computer telephony integration and advanced IP-based call centres. They want to make this breakthrough for a simple reason: to serve their customers better. Ultimately, the goal is to leverage customer relationships to gain greater revenue/profits from their current base and add new customers as well. To achieve this, many businesses are implementing Internet-based call centre technology and applications.”<sup>99</sup>

“One enormous challenge customers face is sorting out the sheer number of suppliers in the Internet call centre arena. In an ideal integrated environment, all types of messages, whether they're received via phone, fax, e-mail or as hand-written notes, would funnel into a centralised call centre. Representatives would then respond via the method the customer requests, while simultaneously viewing complete on-screen information on the customer's purchases. This would include information on the customer's history with that supplier and the status of that customer's most recent questions or concerns. on Internet-based call centre integration can cut costs in their value chain, capture new customers and maintain loyalty via high-volume sales through the lowest cost channel.”<sup>100</sup>

***Simultaneously viewing complete on-screen information on the customer's purchases***

***Capture new customers and maintain loyalty via high-volume sales through the lowest cost channel***

### **6.2.2. Speech recognition**

“Another key development is Voice eXtensible Markup Language (VoiceXML), which is a language specification for dialogs using speech recognition or touch-tone as input and text-to speech or recorded audio for reply. With VoiceXML, call centres will be able to custom design their own call management system at a far lower cost and in much less time. As we have seen, the advent of VoiceXML technology will have considerable impact on the commercial and consumer environments. The net result of these impacts will be a dramatic growth in advanced wire/wireless telecommunications systems. VoiceXML, automatic speech recognition and new text-to-

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<sup>99</sup> De Pompa, 1999

<sup>100</sup> De Pompa, 1999

speech engines will allow telecom manufacturers to build the equivalent of the old-style "candlestick" telephones."<sup>101</sup>

Speech recognition can often "reduce the need to add agents and fits nicely into plans to automate call-centre operations. These applications usually pay for themselves in less than a year"-<sup>102</sup> for example:

- "Investment companies such as Charles Schwab allow customers to call for stock quotes or execute trades. Callers simply say the name of any of about 14,000 stocks or indexes to get current quotes.
- Meanwhile, Sears directs calls to departments within the store using speech recognition. Not only has it helped reduce requirements from thousands of operators to hundreds, the calls are directed more quickly and accurately.
- Similarly, travel reservations and information are increasingly handled by telephone speech recognition. Customers and employees of American Airlines and United Airlines, for example, can get information or make reservations using speech recognition
- Other industries using the technology include insurance (e.g., for retirement plan self-administration) and banking (for easier-to-use telephone banking and bill paying). In healthcare, Patient InfoSystems uses speech recognition from Voice Control Systems"<sup>103</sup>

***Call for stock quotes***

***Directs calls to departments***

***Travel reservations and information***

***Insurance and banking***

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<sup>101</sup> De Pompa, 1999

<sup>102</sup> Meisel, 1999

<sup>103</sup> Meisel, 1999

## 6.3. Future Call Centres

### 6.3.1. The virtual call centre

Virtual teams consist of team members who are geographically dispersed and who come together by way of telecommunication technology (e.g. e-mail, video conferencing).

Today a revolutionary change “happens in nearly every aspect of the traditional outbound call centre, from its mission to its position in the enterprise. No longer a single-function, telephony-only operation, the outbound call centre, like its inbound counterpart, is being transformed at an unprecedented rate into a multifunctional, multimedia, customer service contact centre.”<sup>104</sup>

***Outbound and inbound call centre are being transformed into a multifunctional, multimedia, customer service contact centre***

**Trend 1:** “The contact centre emerges as a vital resource for customer relationship management (CRM).” “As businesses focus increasingly on their customer relationships, the contact centre - usually the primary (and sometimes only) customer forum for live interaction with a business unit is emerging as a fundamental component of an enterprise-wide customer relationship management strategy. According to the Oxford Group, a high-tech marketing and research firm, approximately 60 percent of contacts from customers are coming into the enterprise via the contact centre. This fact, combined with the emerging role of customer service as a point of market differentiation and catalyst for customer loyalty, is heightening the importance and elevating the stature of the contact centre in the enterprise. For companies ranging from entrepreneurial start-ups to Fortune 500 powerhouses, a vigorous commitment to customer service has become the cornerstone of enterprise-wide marketing initiatives. The renewed commitment to customer service is having a profound impact on the role the

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<sup>104</sup> Sarkisian, Le, 2000

contact centre plays in the corporate enterprise.”<sup>105</sup>

**Trend 2:** “The virtual call centre is growing in popularity. With dramatic advances in networking, organisations from all industries are building ‘virtual’ call centres, in which multiple sites are linked and function as a single contact centre. The virtual call centre can be described as several groups of agents - often, but not always, in separate locations (individual call centres, remote offices, homes) - who are treated as a single entity for call handling, reporting, management and scheduling purposes. Another defining characteristic of the virtual call centre is that the centre's disperse architecture is transparent to the consumer. Virtual outbound call centres, when implemented properly, can offer several important advantages, including performance improvement, enhanced reliability should a system or site become disabled, lower telecommunications costs, time zone efficiencies and access to an expanded labour pool. The virtual call centre has been gaining in popularity for several years, and a recent report from the analyst group, Datamonitor, proclaims that, ‘the virtual call centre's time has come’. Within the U.S., the report predicts, penetration of virtual call centres in relation to all call centres will grow at a compound annual rate of more than 40 percent through 2003. The functionality of the virtual call centre is evolving to support the centre's role in achieving enterprise-wide CRM goals. No longer is each contact centre treated as an individual depository of information. Instead, the caller's needs and relationship to the enterprise drive the routing of the call to the most appropriate resource in the enterprise. All agents, voice response systems and electronic access systems are viewed as a single resource pool.”<sup>106</sup>

Advanced technology, often referred to as ‘best time to call’ software, provides outbound call centre decision support that creates an optimised calling schedule that determines which

***The virtual call centre links multiple sites functions as a single contact centre***

***Lower telecommunications costs and an expanded labour pool***

***Penetration of virtual call centres in relation to all call centres will grow at a compound annual rate of more than 40 percent through 2003***

***‘Best time to call’ software, provides decision support that creates an optimised calling schedule***

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<sup>105</sup> Sarkisian, Le, 2000

<sup>106</sup> Sarkisian, Le, 2000

valuable customers to call and the best time to call them. With the aid of this technology, call centre productivity can be increased by at least 15 percent. It works by building a database of prior call history for use in segmentation, scoring, reporting and staffing. This database aids in developing and deploying proprietary, customised statistical models that predict the likelihood of contactability (right-party contact, wrong-party contact and no contact), response and promise to pay.”<sup>107</sup>

Using “the champion/challenger technique, managers can quantify the benefits of technology and continually test and refine call-targeting strategies. The automated scoring platform enables monthly development of custom statistical models to predict the likelihood of contacting customers at different times of the day. It also determines the likelihood that customers will make a promise to pay once contacted. Because the automated modelling increases right-party contacts and high-priority contact rates, a call centre receives better contact estimates, which in turn produces increased productivity gains.”<sup>108</sup>

***Champion/challenger technique***

***Automated scoring platform***

The virtual call centre “opens up many opportunities for flexible management of variable workloads including facilitating the transfer of work to other time-zones, outsourcing or the use of teleworkers.”<sup>109</sup>

### **6.3.2. Call centre as an information centre**

Like DaimlerChrysler, “a number of manufacturers are finding that the information gathered by their call centres is valuable in helping build better processes and products, as well as in nurturing relationships with customers and business partners. With all the customer knowledge in one place you “can elevate the understanding the company has on a customer, and use the information to make business decisions. Today each call from auto mechanics handled by the company's Service Technical

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<sup>107</sup> Le, 2000

<sup>108</sup> Le, 2000

Assistance Resource (STAR) Centre is electronically transferred to the firm's engineering database. Each customer works with a specific representative. As they talk, the rep can key into a database of notes from their conversations, as well as the customer's orders and requests. The representative can search the database by key words, so that he or she can quickly get back up to speed during subsequent conversations."<sup>110</sup>

### 6.3.3. Call centre as a contact centre

Call centres "are morphing into what some call 'customer contact' centres." "That is, they're becoming central points for customers' messages from any medium, as well as companies' responses."<sup>111</sup>

***The company's entire organisational structure needs to be reorganised around the customer***

Companies are integrating "their operational support systems and call centres into an enormous central warehouse of data, but the company's entire organisational structure needs to be reorganised around the customer. In addition, the whole thing must be accessible from the Web. Aggregating data into summaries is a black art that is pivotal to the value of the data warehouse. For example, if a summary takes a customer's monthly bill as the sole indicator of spending, then vital information in a CRM context could be missed. If most of their bill was racked up on calls from Europe to the US, this detail would give a CSR the opportunity to proactively market a low-rate calling plan when that customer calls in about an unrelated matter. The company envisions customers visiting its Web site to view their bills, and then being presented with personalised content and discount offers targeted according to the user's profile."<sup>112</sup>

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<sup>109</sup> Huws, Denbigh, O'Regan, 2000

<sup>110</sup> Kroll, 2000

<sup>111</sup> Kroll, 2000

<sup>112</sup> Nye, 1999

#### **6.3.4. Human resources call centre**

Increasingly, “companies are learning that by funnelling phone calls to representatives armed with the appropriate information, it is possible to adopt employee self-service as a corporate strategy, but also offer human assistance, when necessary. Many companies “not only cut administrative costs by creating a more efficient way to distribute information, but they also improve the overall quality of service. Instead of workers having to make an appointment with a person in the human resources department, they can call the system at their convenience. Increasingly, employee self-service and call centres are part of a tightly integrated strategy: Supply individuals with the information to conduct transactions on their own, but provide help when it's needed.”<sup>113</sup>

***Human resource call centres can reduce administrative work***

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<sup>113</sup> Greengard, 1999

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These trends are likely to materialize within the coming two or three decades. A longer-term forecast should inevitably require inclusion of political and social aspects of the TNC activities, with the future scenarios to be determined by high variability of these factors. So, who is going to inhabit the transnational business jungle in the 22nd century? Scenario #1. Strangling Ficuses. Photo: babowenphotography Strangler fig tree engulfed cypress tree. This setting presents the worst nightmares both for antiglobalists and advocates of customary international relations based on domination of n