



Answer the Call

Raising wages and professionalism in call centres



contents

Introduction.....	1
Workers: educated, highly skilled and undervalued	1
A survey of call centre wages.....	2
The union difference.....	3
Call centres through workers' eyes	4
The Asian hubs: India and the Philippines	4
European strongholds: France and the Netherlands.....	5
Growth centres in Tunisia, Mexico, Brazil and South Africa.....	5
Two models in the United States.....	7
Conclusions and recommendations	7

Introduction

Some two-thirds of all interactions between companies and their customers take place in call centers, via a group of skilled workers who provide this essential person-to-person contact. These workers serve the technology and financial industries, retail, travel, telecommunications, and every other sector in which customers need assistance and advice.

Call center workers make up about 3 percent of the United States' workforce, 1-2 percent in Europe, and numbers are rapidly increasing in Asia, Latin America, and Africa. The most popular destinations for outsourced call centers today are India and the Philippines, with 350,000 and 400,000 workers respectively.¹

Based on their education, skills, and the complex tasks they perform each day, call center workers are professionals. Ideally, professional status includes good wages that are above the national average, recognition of employees' valuable skills, some autonomy and control over work, and clear paths to career advancement. Unfortunately, today too many call center workers find themselves in dead-end jobs with no autonomy and substandard pay.² In the long run, this hurts both workers and employers. Workers who are treated and paid as if they are unskilled and expendable have higher attrition rates and are less productive.³ And those treated as professionals, with high involvement in their own work, avenues for advancement and good pay are happier and more productive.⁴

This report is based on data from wageindicator.org, a project of the WageIndicator Foundation, which collects labor market information from workers in more than 70 countries. In addition, the report uses individual worker interviews, data from the International

Labour Organization, scholarly research, and government-generated statistics from Brazil, France, India, Mexico, the Netherlands, Senegal, South Africa, Tunisia, and the United States. The countries chosen are important in the call center industry and represent several geographical regions in the Global North and Global South. Among these countries, the percentage of call center workplaces with a union presence varies.

Workers: educated highly skilled and undervalued

Most call centre workers are well-educated. In most countries, employees must have at least a high school-level degree. Almost a quarter of call centres primarily recruit workers with university degrees. In the United States, about 60 percent have attended at least a year of university, and in the Netherlands, 52 percent. Of the nations surveyed for this report, France has the highest proportion of workers who have attended university, at 72 percent.⁵

In newly industrialized countries too, a good education is often a prerequisite for call centre work. More than 60 percent of centres in India hire primarily university-educated employees. One of the workers interviewed for this report, Soudane Firas, a team supervisor and five-year veteran of call centre work in Tunisia, has a university diploma in economics and business management.

Three-quarters of call centres in 17 countries studied for the *Global Call Centre Report*, published in 2007, serve a broad spectrum of the public—while business-to-business operations make up about a quarter of centres.⁶ The emphasis on service—or in some cases sales and service—requires an array of skills that take months to master, including being able to absorb new



Survey of call centre wages

in this report, we compare workers in nine nations important in the call centre industry. Below, we look at call centre workers' wages as a percentage of the average worker's wage in each country.

In most of the countries examined here, call centre workers make less than the national average wage for all workers. In Brazil and South Africa, starting wages in call centres are less than half of the national average wage, and they are just slightly above half in Senegal and Mexico. U.S. and French workers earn just under two-thirds of the national average wage in their respective countries, while workers in the Netherlands earn about 75 percent of that modest benchmark. (See chart below.)

product knowledge, manipulate databases, and communicate effectively with a variety of clients. Some jobs—such as providing service advice and diagnostics for technology companies—may require even more highly specialized knowledge.

According to the *Global Call Centre Report*, the amount of training varies from country to country, but on average new hires receive about three weeks of initial training, and it takes from 5 to 25 weeks to become proficient.⁷ In India, in order to work in an international call centre, workers undergo an average of six weeks of initial training, with another three months required for proficiency.⁸ In countries such as India and the Philippines, which focus on English-speaking customers, workers must also hone and prove their language skills.⁹

In many call centres, work is repetitive and employees are frequently under pressure to meet a quota, while having very little control over their own schedules or work flow. Threats, heavy monitoring, and the pace of work lead to quick burnout. Indeed, call centre jobs are considered to be among the ten most stressful.¹⁰ The *Global Call Centre Report*, which examined workers across the globe, found that although a third of call centres have high quality jobs that promote employee wellbeing and discretion over work, only 12 percent of all employees work in these centres—and more than two-thirds work in low or very low quality jobs.¹¹

Location	% of Average Country Wage in 2011 ¹²
Brazil	47%
Mexico	57%
USA	64%
Netherlands ¹³	75%
France	64%
Senegal	51%
South Africa	48%
India	159%
Philippines ¹⁴	127%

Sources: ILO Global Wage Database, 2012; WageIndicator.org; Philippine Department of Labor and Employment.

Given the lengthy training periods and complex skill sets required of call centre workers, the fact that wages remain so low—in both the Global North and Global South—reflects a profound lack of respect for workers in one of the fastest growing industries in the world.

Some scholars suggest that the fact that the majority of call centre workers are women may be a factor in the persistence of low wages. Where women's skills and work are devalued, so are the economic sectors in which they work. And furthermore, when call centre work becomes known as "women's work," then it remains at the bottom of an occupational and wage hierarchy.¹⁵

In contrast to most of the workers examined in this report, call centre employees in India and the Philippines are paid more than their national average wages. In

India they earn 1.6 times, and in the Philippines 1.3 times the average wage. Although average call centre wages exceed the national average in these two countries, they still attract U.S. and European companies seeking low-wage workers. The average gross monthly wage in India is less than five percent of the average in the United States and parts of Europe; in the Philippines it is less than ten percent.¹⁶

These two nations are now the world's leading destinations for the business process outsourcing (BPO) sector and call centre operations. Companies within the BPO sector, such as call centre operators, provide services to external corporations and organizations that include front-office operations such as customer service and back-office duties such as payroll, data entry, and IT support.

The global BPO sector has grown as more organizations are choosing to outsource service functions rather than perform them in-house. Both India and the Philippines put more government resources into training and professionalizing their BPO sectors, especially their call centre workforce, than do some other nations, providing economic and educational support, and perhaps leading to a greater respect for the profession.¹⁷ As of 2013, six of the world's top ten outsourcing destinations are in India, and two are in the Philippines.¹⁸

The Union Difference

The extent to which call centre workers are represented by unions varies widely from country to country. Union representation leads to slightly higher wages: Median annual pay in centres with union presence is, on average, about 7 percent higher than that in non-union centres. In addition, centres in which workers are represented by unions tend to invest more in training, place limits on the use of performance monitoring, and have negotiated rules for sales quotas and incentive pay that make the workplace more worker-friendly.²⁰ In other words, workers are more likely to be treated as professionals in workplaces in which a union is well-established because they have negotiated work rules and grievance procedures that ensure they are treated with respect. With the higher earnings in union-represented call centres comes a lower rate of attrition. For example, in the United States the turnover rate at union call centres is half the rate at non-union centres.²¹

The Problem of Outsourcing

When corporations transfer job functions to subcontractors, either within their own countries (outsourcing) or to other countries (offshoring), they often exert downward pressure on wages and working conditions. On average, subcontractors have 18% lower wages than in-house call centres. The proportion of call centre outsourcing and offshoring varies widely. In countries such as India, 80 percent of companies hire subcontractors to perform call centre operations. In Brazil, roughly 50 percent of companies do. However, in the United States, fewer than 20 percent of companies outsource call centre functions.

Research shows that subcontractors tend to use more part-time and temporary workers and pay lower wages. They focus more on outbound and sales calls, monitor workers more overtly—leaving little room for discretion or group problem-solving—and are rarely covered by union contracts.¹⁹

Union-represented call centre workers sometimes have more opportunities for career advancement. For example, in South Africa managers reported on average that 8.4 percent of employees were promoted within unionized call centres in the previous year compared to only 4.7 percent in non-union call centres.²² But one recent study shows that “unionization is associated with fewer advancement opportunities within call centres, though more advancement opportunities in other parts of the business.”²³

Call centres through workers' eyes

in the call centre industry, companies balance the need to offer high quality service and a desire to cut costs and increase profits. In most countries, companies tip the balance in favor of cost-cutting and diminished quality.²⁴ But trends and challenges differ from nation to nation. Below we take a look at nine countries through the workers' eyes.

There are two sides to the BPO sector—like two sides of a coin. The good side is that you can get a job easily that pays a good salary in a good working environment. The bad thing is that you have no long-term career.

—Salmaan, call centre worker, Mumbai, India

Asia hubs – India and the Philippines

In 2013, the Philippines and India are acknowledged as the primary hubs of the global call centre industry, with 400,000 and 350,000 employees respectively. Workers in these two countries are well-educated, and reports suggest that call centres in the Philippines mainly target the university-educated as employees.²⁵ About 60 percent of Indian call centre workers have university degrees, and Indian call centres also have the highest proportion (97 percent) of permanent, full-time agents.²⁶

In what has been described as a “quiet revolution,” in 2010 the Philippines overtook India as the nation with the largest call centre operations. The government is investing significant resources in infrastructure, incentives to lure new employers, and expansion of educational programs from pre-school through universities to train workers to prepare for these jobs.²⁷ The Philippines will train nearly a million more workers by 2016, for what is projected to be a 15 billion USD BPO business, providing a tenth of the nation’s GDP. About 70 percent of the BPO industry is currently devoted to call centres.²⁸

In shifts that run through the middle of the night until dawn, young Filipino men and women with a strong command of North American English talk to clients on the other side of the world.²⁹ Filipino workers earn higher than average wages, but attrition rates estimated at over 60 percent suggest that most are dissatisfied with some aspects of the job, including lack of advancement, stress, and health issues arising from the unusual schedule.³⁰

In India, the BPO industry remains strong in terms of job creation, employing more than one million people, including some 350,000 in call centres.³¹ Although call centre jobs are relatively well-paid, the structure of the industry lacks avenues for advancement. Competing companies poach good workers with offers of more money, but not the professional fulfillment they seek.³² In both the Philippines and India, pressure to meet targets and overnight shift work leaves employees with little room to balance family and personal lives.

Workers interviewed recently at Indian call centres in Mumbai all praised the BPO industry as one in which it is possible to earn a good salary at the entry level, and one veteran also found security: Manish, an employee who managed to scrape together a loan to continue his education, has more than tripled his starting salary at the company by moving into the position of team leader. “I can now pay for my brother’s education, and am living a good life.”³³

However, most of these workers reveal that call centres do not provide paths for reaching future professional goals.

- Salmaan says he receives a good salary, works in a good facility, and was able to find a job without much struggle. But he believes there are no long-term careers in this sector. “There is no security and no growth in one’s career, even with ten years’ experience.”³⁴
- Samuel says that in this sector one can “achieve fast growth with a high salary,” but he also expresses worry about the pressures of the job and the fact that the sector does not look good for the long-term.
- Sandeep puts it very simply. “The BPO sector is a booming industry, but the future is not safe and there is not satisfaction.”

Relatively good wages place Indian and Filipino workers in a better situation than call centre workers in many other countries, but the picture is far from per-



fect. In both countries, professional opportunities are still lacking, leaving many workers frustrated and uncertain about the future.

European strongholds: France and the Netherlands

France is Europe's second largest call centre market, after the United Kingdom, employing more than 300,000 people, and growing at a rate of four percent per year over the past five years.³⁵ In France, call centres tend to be small—less than 40 employees—and usually serve domestic businesses.

The popular belief is that these jobs require few skills and are monotonous, attracting an unskilled and unstable group of workers. The true portrait of a typical worker is quite different: French call centre workers are well-educated, with at least two years of university and extensive (up to nine weeks) specialized training for the job. The work itself is demanding, usually requiring 10 to 25 weeks to master.³⁶ Despite these requirements, workers are generally offered no incentive pay and no discretion over their work.³⁷

The Dutch call centre industry is considered to have a technically advanced infrastructure and has grown dramatically in the past ten years.³⁸ In the mid-2000s, Amsterdam became a regional hub for U.S. companies expanding into Europe.³⁹ The Netherlands attracts call centres with international business; about a third of all Dutch call centres handle international calls.⁴⁰

As one study noted, the negative image of call centre work is a concern for employers and employees in the Netherlands—and can be addressed by professionalization. The Dutch industry has instituted a system of certificates and quality standards that focus on customer service. Practices associated with less professional, more “production line” call centres are used in the Netherlands, but not to a great extent. For example, continuous monitoring of workers is almost unheard of, and the use of a script is mandatory in only about 25 percent of centres.⁴¹ Many Dutch call centres focus on improving the quality of services, including implementing special training programs, referred to by some as “call centre college.” These moves, toward greater recognition of call centre workers as professionals, are welcome and in keeping with this report's recommendations.



I have been asking for a career path since I started working for the company because I have a great interest in customer relations.

—Soudane Firas, call centre supervisor Tunisia

Growth centres in Tunisia, Mexico, Brazil, and South Africa

In French-speaking countries in northwestern Africa, such as Senegal, Morocco, and Tunisia, call centres are a rapidly growing sector of the economy. The total number of workers is still small compared to giants such as India and the Philippines, but low labor costs and a workforce with excellent language skills have drawn many European companies—primarily to serve the French market—in the past decade.⁴²

Workers in Tunisia's young industry were interviewed for this report, and their stories reveal that they are educated and dedicated, but operate without clear information from supervisors or the ability to fight back against unfair decisions or incorrect wages.

- Soudane Firas has risen to the role of supervisor in a team of about a dozen coworkers, and makes 5,000 USD per year working about 42 hours per week. He is well-educated, with a year of university studying economics and business management. Yet he feels stifled and sees no clear road toward professional growth in his current position.
- Naouar Boudour struggles because he only works part-time, with no fixed schedule. The breaks are

short and performance expectations and bonuses are not adequately explained, so he is looking for another job

In the spring of 2013, Tunisian employees of a French call centre company organized a strike over their poor working conditions. Mouna Chartani, a mother of two, and six-year veteran of call centres explains:

Normally our salaries should have risen. But in fact they are falling. Only half of us are paid bonuses. We are venting our bitterness at being exploited in our own country for [225 euros] while [corporations] earn billions from our efforts.⁴³

When these workers list their day-to-day concerns, they are similar to those of call centre workers around the world: low wages, favoritism, lack of a path to promotion, and unclear or unreasonable demands. The voices of workers in Mexico echo those in Tunisia:

[My company] does not give me any opportunity to grow or to develop a career. They completely disregard me. I know that I am being discriminated against. The way I am treated by supervisors is humiliating: They don't let us go out and don't let me go to the bathroom. I am not given time to eat. . . . Often, I want to quit my job and look for a new one or I worry that out of the blue they will fire me.

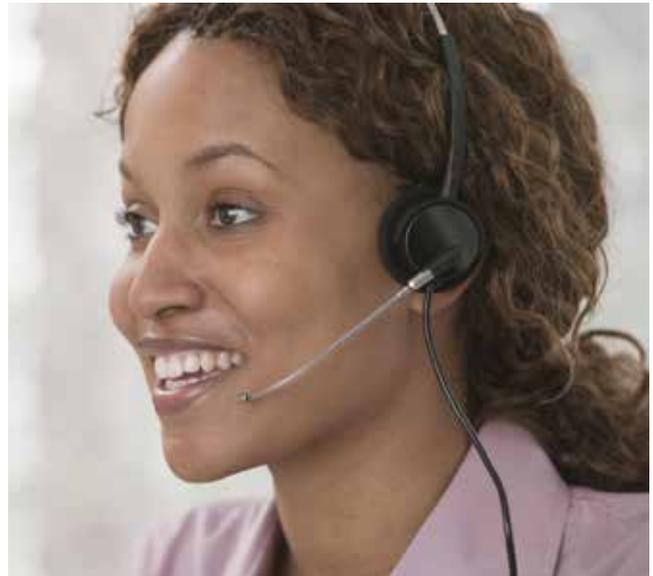
—Berenice, call centre worker Mexico City, Mexico

My "dynamic work schedule" involved working an extra two hours a day from Thursday to Monday without exception. I was promised a bonus but most of the time I never got one. I was not given an opportunity to develop a career in the company because there is no opportunity to change positions.

—Georgina, call centre worker, Mexico City, Mexico

Berenice and Georgina were interviewed at call centres in Mexico in the summer of 2013. Berenice is paid only 1.49 USD per hour, has no paid vacation time, and no additional benefits. Georgina makes only 0.95 USD per hour with no benefits, and was ultimately terminated for what she believes was no clear cause.

Georgina and Berenice both experienced arbitrary and unfair treatment by supervisors, lack of opportunities for advancement, and an uncomfortable and unhealthy working environment. Both are high school graduates who have no university education, and both had what



they believe was inadequate training from their companies. Says Georgina, "The training I was given by the company lasted five days. It was not enough. I learned more from my colleagues."

Mexico, Brazil, and South Africa represent a vanguard of countries expanding employment in call centres. Here the industry is still relatively new, but receiving active encouragement from the government, as is the case in the Philippines.

In South Africa, an effort is underway—using government subsidies—to win more call centre business from North America, with a goal of some 30,000 new call centre jobs by the end of 2015.⁴⁴ South Africa's initial training averages 25 days—10 days more than the global average, but the longer training periods are primarily in unionized centres, which also provide better quality customer service. In part as a result of better training, the country's quit rate of 10.3 percent for employees is about half the global average.⁴⁵

On the other side of the Atlantic, in Brazil, the situation is quite different. Among countries for which data is available, Brazil has one of the highest turnover rates, at 33 percent. One reason for this may be the high proportion of subcontractors in Brazil. At 53 percent, Brazil is second only to India in the number of subcontractors.

It's just like a factory in the early 1900s. It's very stressful. You're very underpaid. If you don't meet the metrics, you're kicked out the door. . . . They make you feel humiliated, stupid, worthless.

—Jim Brillhart, Pennsylvania, United States

The High Cost of Turnover

The costs of turnover in the BPO industry are high. On average, replacing one agent equals 16 percent of the gross annual earnings of a call centre worker. In other words, the replacement cost for one worker equals about two months of a typical worker's pay. If lost productivity is taken into account, replacing one worker equals between three and four months of a typical worker's pay.

But research shows that call centres with union contracts average turnover rates 40 percent lower than non-union sites (24 percent versus 14 percent). And turnover for jobs defined as low quality—in which workers have little discretion over their tasks and intense monitoring of all their activities—have an average of 36 percent turnover, compared with high quality jobs, where turnover averages only 9 percent per year.

In South Africa call centres under union contracts have lower turnover rates than non-union centres, although wage differences are small. The key seems to be opportunity for advancement. Workers in South Africa's unionized call centres are more likely to be promoted than are those in non-unionized centres.⁴⁶

Since we organized our union and bargained our first contract in 1999, I have personally seen what a difference being part of the union can make. It means important benefits like paid vacation, sick leave, and holidays. The company contributes to our retirement savings, and each year we get a bonus based on a share of the profits.

—Vickey Hoots, North Carolina, United States

Two models in the United States

In the United States, there is a marked difference in professional opportunities, wages, and working conditions between unionized and non-union call centres.⁴⁷ Workers in non-union centres consistently report that they are poorly paid, subject to arbitrary decisions by managers, monitored unfairly, and do not receive ap-

propriate training. In general, the atmosphere in non-union call centres is unprofessional and exploitive of the average worker. An anonymous veteran customer service representative with T-Mobile describes frequently changing expectations from managers:

With policies and procedures, change is so frequent. One day there'll be one policy, but the next day you come in, it's totally different. They wanted you to know that policy and execute it, but you've only had seven minutes of time at the beginning of your work shift to go through all these different policies and procedures.⁴⁸

In addition to unreasonable demands—which frequently create health problems due to workers' high stress—call centre employees in the United States also report being fired in order to make room for new hires—at lower wages. Naomi Thornton says that a manager asked her how long she had been with the company, T-Mobile, and when she said she had been employed for eight years, he told her she would soon be fired and replaced by a less expensive worker.

The unprofessional atmosphere that characterizes non-union U.S. workplaces is quite different from the atmosphere in workplaces where employees are represented by a union.

Vickey Hoots has worked as a reservations agent at the US Airways call centre in Winston Salem, North Carolina, for 28 years. She spent six years working on the customer service desk handling troublesome, “escalated calls” from customers. The benefits of a union contract that recognizes workers as professionals helps her company attract new employees. Vickey explains:

I see more and more young people looking for a career in our company because of the great benefits. For example, my contract guarantees me the flexibility to swap shifts with co-workers on short notice. That's a really important benefit, especially for members with small children. Without our union contract, we wouldn't have that flexibility to make changes in our schedules to respond to family emergencies on short notice.

The union contract also guarantees benefits such as regular wage increases, paid vacation, sick days, and a share of the company's profits. All these benefits mean that US Airways passenger service agents tend to make more compensation overall than their non-union peers at American Airlines, for example. According

to Vickey, “those benefits, like profit sharing and shift differentials, mean more money in my pocket.”

In addition, the guarantee that workers will be treated with professional respect and not subject to unreasonable monitoring and arbitrary discipline is, according to Vickey, the thing she values most about her union contract. “Without that protection,” she insists, “I don’t know how I could cope with the stresses associated with this kind of work.”

Conclusion and recommendations

The evidence presented above demonstrates that call centre workers are undervalued. Employers pay wages below the national average in most countries, despite the fact that workers are well-educated, well-trained, and skilled in serving their customers’ diverse needs. Employees in centres with a union presence tend to receive higher wages and experience lower turnover rates, but evidence is mixed in terms of opportunities for promotion and autonomy. In some countries industry and government initiatives provide supportive structures that help workers. For example, in the Netherlands, the in-

dustry supports special certification courses, and in the Philippines the government invests in infrastructure and education to strengthen the BPO sector of the economy.

But further steps are necessary to support professionalism and fair compensation for call centre workers:

- Employees in this valuable industry with critical roles should be compensated above—not well below—the national average wage.
- Pay should be linked to demonstrable skills, and should compare favorably with employees in other industries to avoid high turnover.
- Companies must provide employees with adequate training and the skills to develop meaningful careers for themselves and quality service for customers.
- Training should be broad-based, portable and accredited.
- Workers must be allowed some autonomy and the ability to participate in decisions regarding their own work.
- Monitoring should not be continuous, and should only be done when employees know the purpose; collected data must be used only for that purpose.

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- ⁴⁸ Information and quotes from T-Mobile employees are from interviews conducted by the Communications Workers of America.

Robert Masciola is a corporate researcher who has 20 years of experience in the trade union movement. His focus is on collective bargaining and organizing campaigns. His recent work has included an in-depth analysis of the vulnerabilities of a multi-national mining company and a review of violations of the US federal law known as the Foreign Corrupt Practices Act.

Amy Masciola is a strategic campaign coordinator, writer, and researcher who has worked for the labor movement for more than a decade. An experienced international activist, Amy has collaborated with workers and trade unionists in Europe, Latin America, and Asia. Amy holds a doctorate in history from the University of Maryland at College Park, where she studied and taught the history of women and crime.

Shelley Sperry is a writer and editor who specializes in labor, history, and environmental issues. Recent projects include a white paper on low-wage workers and the U.S. government for the National Employment Law Project and research on guest workers in the Middle East for *National Geographic* magazine.

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