



A Datamonitor report

Call Centers in EMEA to 2007

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Why buy this report?

- **Identify** the largest and fastest growing call center markets in the EMEA
- **Target** the most important and fastest growing vertical markets by country
- **Understand** the opportunities across different call center size bands by country
- **Determine** the effect of the IP and multimedia across EMEA
- **Assess** the demand for traditional and emerging call center services across EMEA
- **Maximise** your revenues from key verticals in the call center market

An introduction to the report

A key planning tool for any technology company which relies on the call center market, this report will enable you to identify and target key sub-sectors, geographies and verticals in your quest for increased revenues.

Call Centers in EMEA to 2007 is Datamonitor's core report sizing and segmenting the call center market in Europe, the Middle East and Africa from 2001 to 2007. The report sizes the market in terms of number of call centers and agent positions across the whole of EMEA and in 23 individual country markets, from Ireland to Israel.

In addition, the market is segmented by 13 verticals and four size-bands. Key trends that are discussed in the report include the growth of multimedia contact centers, the uptake of IP technologies, the trend towards hosted and networked call centers, and the growth in call center traffic.

The countries covered in this report are: Austria, Belgium, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Israel, Italy, Netherlands, Norway, Poland, Portugal, Russia, South Africa, Spain, Sweden, Switzerland, Turkey and the UK.

Scope and coverage of the report

- Sizes the call center market by number of call centers and agent positions in 23 EMEA markets from 2001 to 2007
- Segments the market by four call center size-bands by country until 2007
- Segments the total EMEA market and the major markets by 13 vertical markets until 2007
- Growth forecasts for multimedia contact centers, IP call centers and hosted and networked call centers until 2007
- An analysis of the telecoms market across EMEA as it relates to call centers

Report methodology

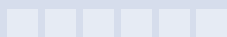
This report is based on extensive primary research, including a regular survey of 250 call center managers, interviews with executives at over 100 call center and CRM technology vendors and telcos across the globe. Information and data was validated both through key company contacts and an extensive in-house quality procedure that crosschecks data between countries and vertical markets.

For more information...

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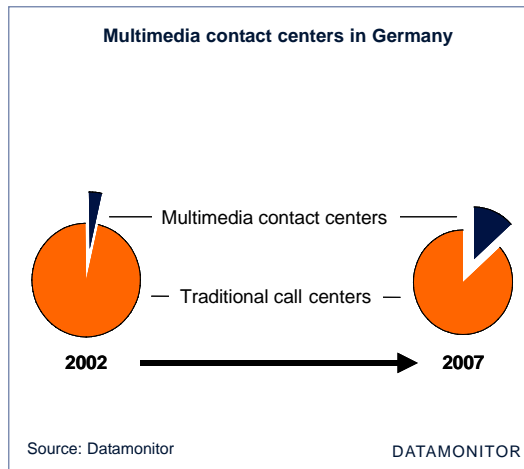
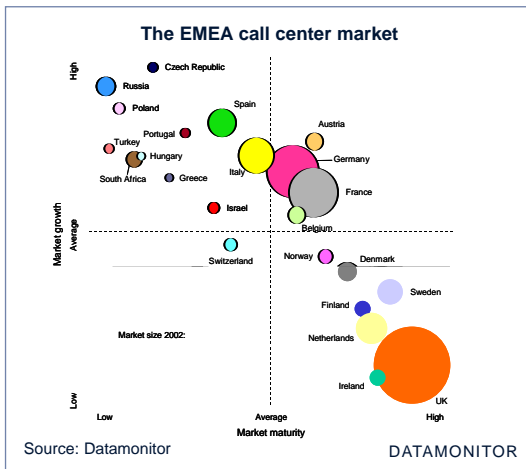
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Key findings and report highlights

- The number of agent positions in EMEA will grow from 1.3m in 2001 to 1.8m in 2002. This represents a CAGR of over 7%.
- The largest call center market in EMEA is the UK. 2.2% of the British working population works in call centers, nearly twice the EU average of 1.2%.
- The fastest growing call center market in EMEA is the Czech Republic, while the slowest growing is Ireland.
- The fastest growing vertical markets in EMEA are public sector and outsourcing.
- Multimedia contact center uptake is occurring most rapidly in more mature Western European markets.



Report structure chapter by chapter

- **The EMEA call center market** - Sizes the market to 2007 in terms of number of call centers and agent positions, with segmentation by size-band, vertical market and multimedia and IP technology penetration
- **Major market chapters** - Each of the major markets (France, Germany, Italy, the Netherlands, Spain and the UK) has its own chapter, containing country specific breakdowns of the data sets contained in the EMEA chapter
- **Minor markets** - Country-by-country analysis of the minor EMEA markets
- **Call centers and telecoms** - An analysis of call center traffic and hosted and networked call centers in EMEA

“...The call center market in EMEA will grow at a CAGR of 7.1% between 2001 and 2007...”

Summary of contents

INTRODUCTION

Call Centers in EMEA to 2007 is Datamonitor's core report sizing and segmenting the call center market in Europe, the Middle East and Africa from 2001 to 2007. The following countries are covered in the report: Austria, Belgium, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Israel, Italy, the Netherlands, Norway, Poland, Portugal, Russia, South Africa, Spain, Sweden, Switzerland, Turkey and the UK.

THE EMEA CALL CENTER MARKET

This chapter analyzes the growth of call center market in EMEA as a whole. The market is sized until 2007 in terms agent positions and number of call centers and is segmented by call center size and vertical markets. In addition, the uptake of multimedia and IP technologies across EMEA is analyzed.

Call centers and agent positions in EMEA

- The total number of call centers and agent positions in EMEA segmented by country
- Market forecasts and growth rates from 2001 to 2007
- Segmentation by call center size

The EMEA call center market by vertical

- Segmenting the EMEA call center market by 13 different vertical markets to 2007
- A discussion of the key issues in each vertical market

Multimedia call centers in EMEA

- A discussion of the key drivers and barriers to multimedia contact center uptake in EMEA
- The market for multimedia contact centers in EMEA, segmented by country to 2007

IP call centers in EMEA

- A discussion of the key drivers and barriers to IP call center uptake in EMEA
- The market for IP call centers and agent positions in EMEA, segmented by country to 2007

CALL CENTERS IN FRANCE

This chapter analyzes the growth of call center market in France. The market is sized until 2007 in terms agent positions and number of call centers and is segmented by call center size and vertical markets. In addition, the uptake of multimedia and IP technologies in France is analyzed and key issues in the French market are discussed.

Call centers and Agent positions in France

- The total number of call centers and agent positions in France
- Market forecasts and growth rates from 2001 to 2007
- Segmentation by call center size

The French call center market by vertical

- Segmenting the French call center market by 13 different vertical markets to 2007

Multimedia call centers in France

- The market for multimedia contact centers in France to 2007

IP call centers in France

- The market for IP call centers and agent positions in France, to 2007

The following country chapters follow a similar structure to 'Call Centers In France' above:

CALL CENTERS IN GERMANY

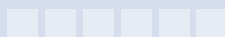
CALL CENTERS IN ITALY

CALL CENTERS IN THE NETHERLANDS

CALL CENTERS IN SPAIN

CALL CENTERS IN THE UK

"...By 2007, call center workers will account for 1.6% of the working population in EMEA..."





MINOR CALL CENTER MARKETS IN EMEA

This chapter analyzes the growth of the smaller call center markets in EMEA to 2007. The market is sized in terms of number of call centers and agent positions and segmented by call center size-band. In addition, there is a discussion of the key issues in the call center market in each country. The following countries are covered in the chapter: Austria, Belgium, the Czech Republic, Denmark, Finland, Greece, Hungary, Ireland, Israel, Norway, Poland, Portugal, Russia, South Africa, Sweden, Switzerland, and Turkey.

Call centers and agent positions

- For each country, the market is sized in terms of agent positions and number of call centers from 2001 to 2007

Call center size-bands

- For each country, the call center market is segmented by size-band to 2007

Key issues in the call center market

- A discussion of the key issues affecting the call center market in each country

CALL CENTER SERVICE PROVIDERS IN EMEA

Over the past 10 years, de-regulation and technological change has had an effect on both telcos and call centers. This chapter analyzes the effects these changes have had on the relationship between call centers, technology vendors and telcos.

The role of service providers in the EMEA call center market

- The service provider as telecoms provider, network services provider, outsourcer and VAR, consultant and systems integrator
- Service provider business models in the EMEA call center market

Call center traffic in EMEA

- Call minutes by country from 2001 to 2007

- Changing traffic: inbound/outbound and multimedia

Networked call centers in EMEA

- The growth of networked call centers in EMEA by country to 2007
- What will be the effect of IP?

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- Modeling methodology

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“...The fastest growing call center markets in EMEA over the next five years will be in Eastern Europe...”

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“...The public sector will be the second fastest growing vertical market for call centers between 2002 and 2007...”



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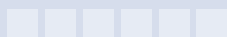
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Alltel	Mitel Telecom
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BT	Peoplesoft
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Cisco	S1 Corporation
CMG	Samsung
Computer Associates	SAP
Convergys	SchlumbergerSema
CSC Financial Services	Sega
Deutsche Telekom	Setec
Diamond Cluster	Siemens AG
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Eyretel	Sony
Fincentric	Staffware
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