

French SPPI – 82.20 call centres

Voorburg Group 2014, Dublin

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Structure of the presentation

A) Classification

B) Market characteristics

C) Producer price series

D) Quality adjustment, specific formula of aggregation, dissemination

A) The European economic classifications

NACE 82.20 : **This class includes** the activities of:

- inbound call centres, answering calls from clients by using human operators, automatic call distribution, computer telephone integration, interactive voice response systems or similar methods to receive orders, provide product information, deal with customer requests for assistance or address customer complaints
- outbound call centres using similar methods to sell or market goods or services to potential customers, undertake market research or public opinion polling and similar activities for clients

CPA 82.20 : **This class includes:**

Only 1 subcategory CPA6

- taking orders for clients by telephone
- soliciting contribution or providing information for clients by telephone
- telemarketing

This item excludes: This subcategory excludes:

- sales promotion services, if no orders are received, see 73.11.19
- market research services, see 73.20.1
- public opinion polling services, see 73.20.20

A) Borderline cases (other than quoted above)

With 82.99:

82.99.12 Telephone based support services

Automatic wake up by phone services would be classified in 82.99.12

With 58.12 and 82.99:

Provision of phone number or address (on the base of a directory or mailing list) by telephone would be classified in 82.99, but by paper or by internet in 58.12 (including advertising incomes in 58.12.20)

“Contact centres”: more and more “call centres” include also internet communication, “chat”, etc.

A) Other characteristics to note in the SPPI survey classification

Inbound or outbound:

■ Inbound:

- ⇒ After-sales, hotline, helpdesk for end customers
- ⇒ Backoffice, secretariat

■ Outbound:

- ⇒ Telemarketing, prospection toward potential end customers
- ⇒ Satisfaction survey, other studies and outcalls

Onshore or offshore:

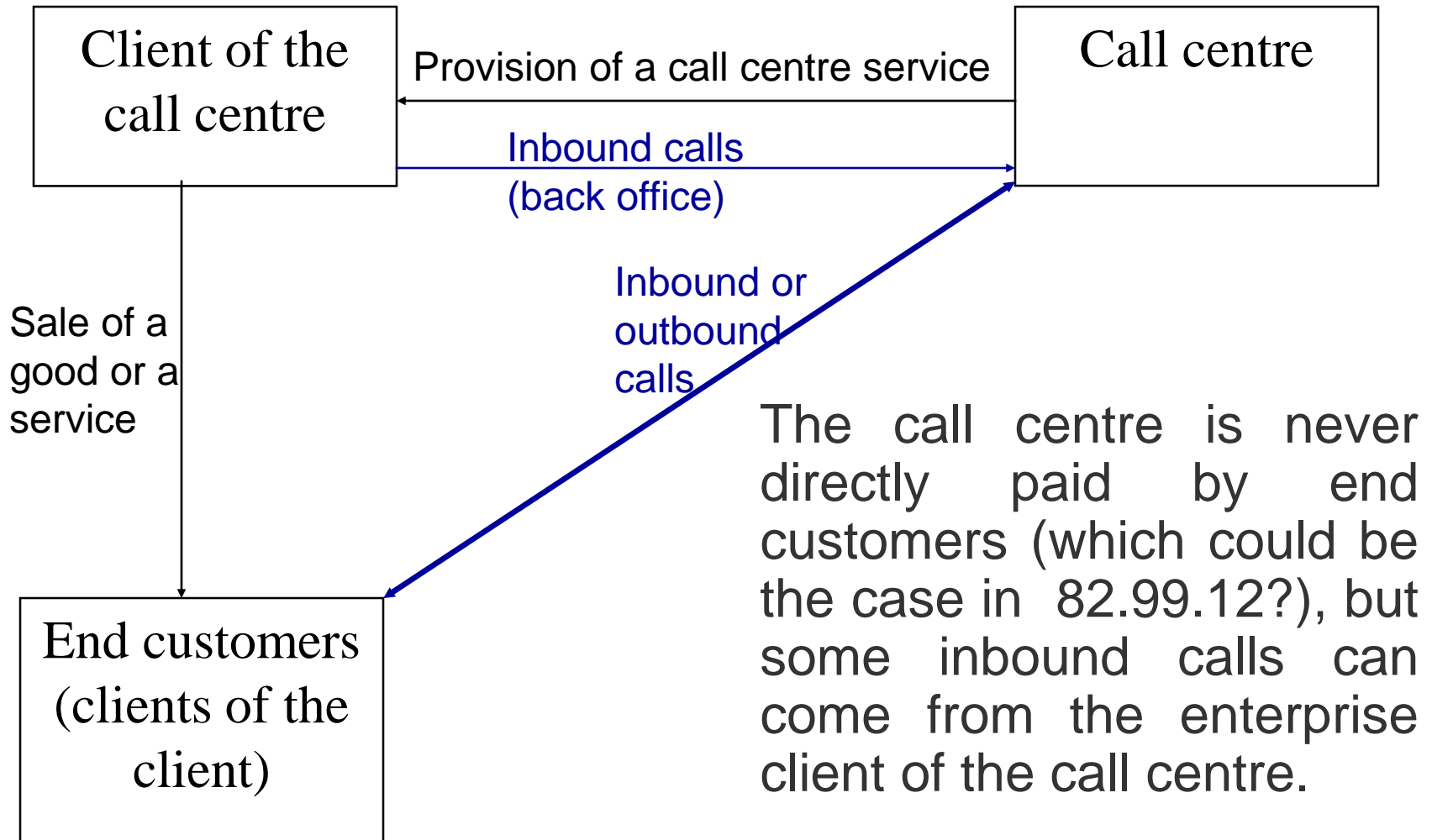
■ Onshore:

- ⇒ outsourced by the client, but within the same country

■ Offshore:

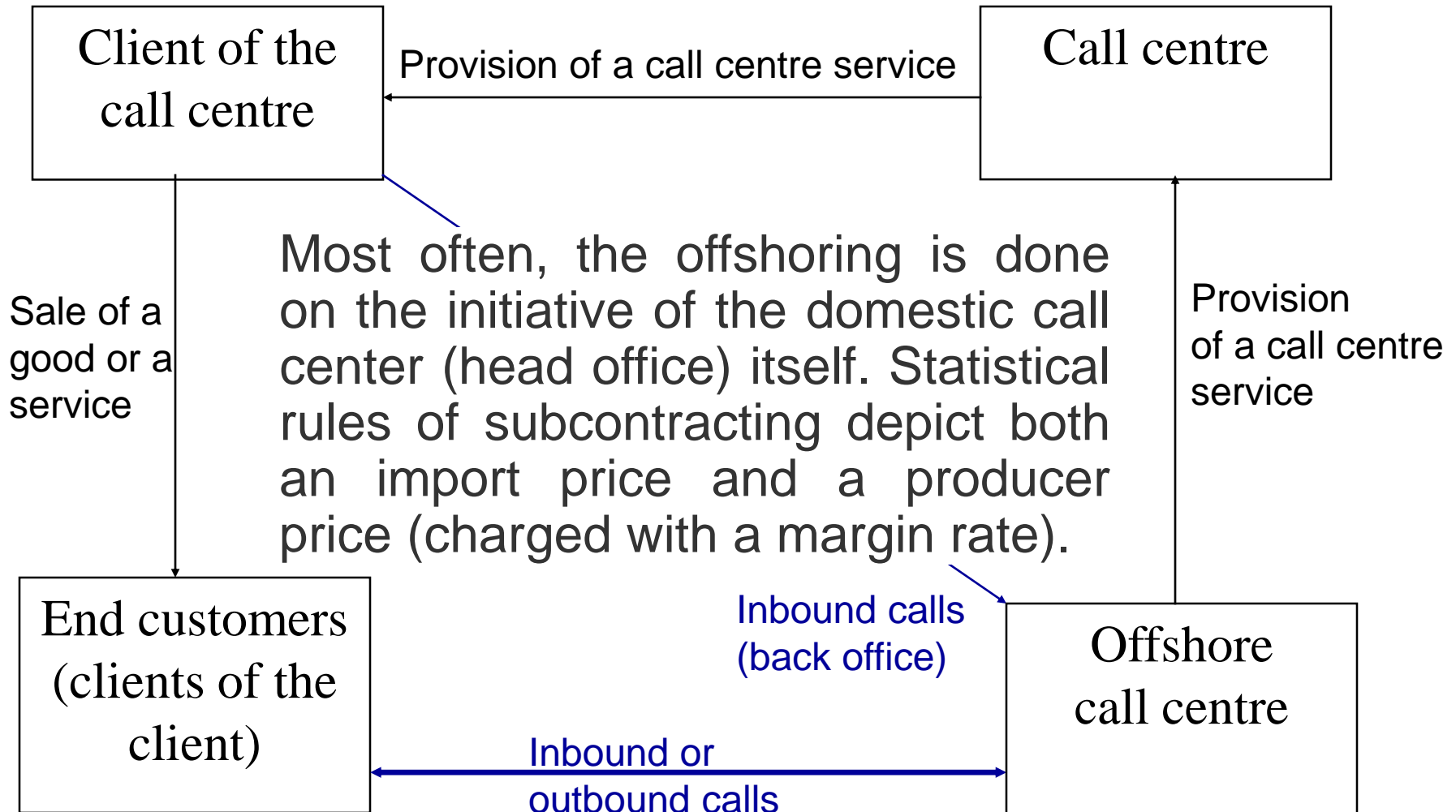
- ⇒ outsourced by the client or by the domestic call center itself (subcontracting), in another country

A) Onshore call centres



The call centre is never directly paid by end customers (which could be the case in 82.99.12?), but some inbound calls can come from the enterprise client of the call centre.

A) Offshore call centres



B) French market characteristics

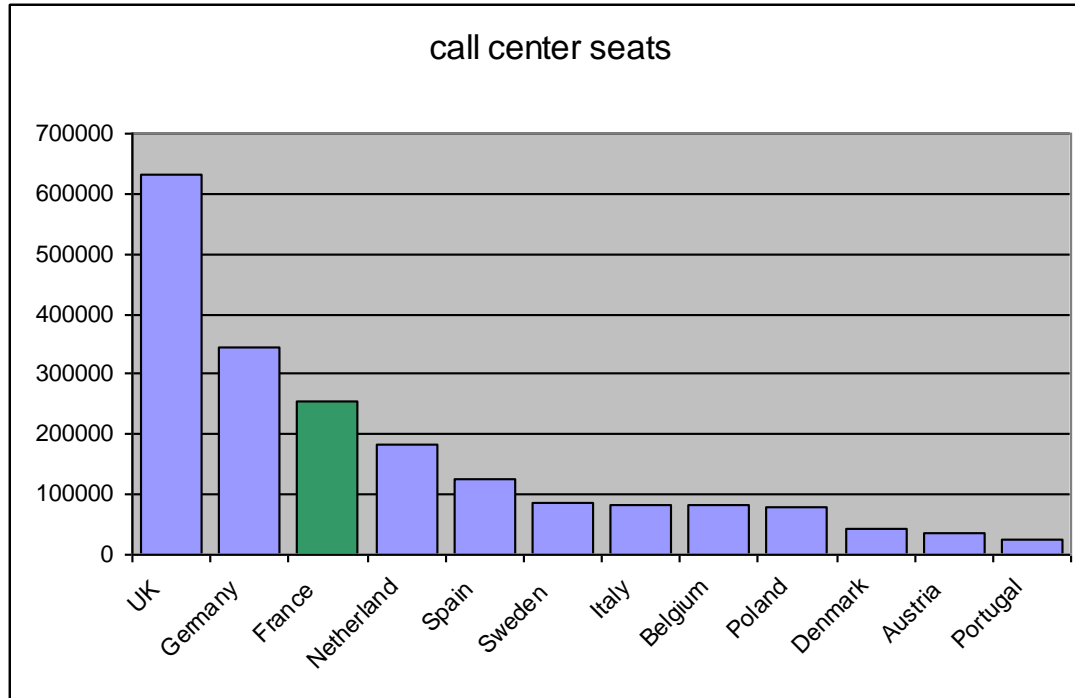
75% of call centres are supposed to be “inhouse” (then not described as activity units with turnover, production, value added and so on) and 25% “outsourced”.

75% of the (outsourced) activity would be “onshore” and 25% “offshore” (then outsourced twice).

The global market is developing, and the two “25%” rather increasing.

~ 270.000 jobs in total in France, of which ~ 50.000 jobs outsourced, + ~ 28.000 jobs offshored

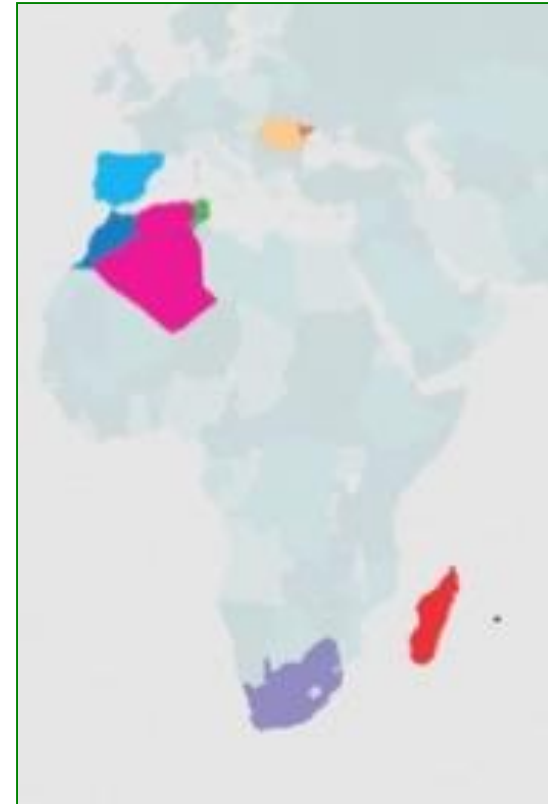
B) Comparison with European countries



Average or undersized situation in France: less developed than UK (above all) and Germany, but quite more than in Italy. Sweden is relatively twice more developed than France in this activity.

B) Offshore in French speaking Africa

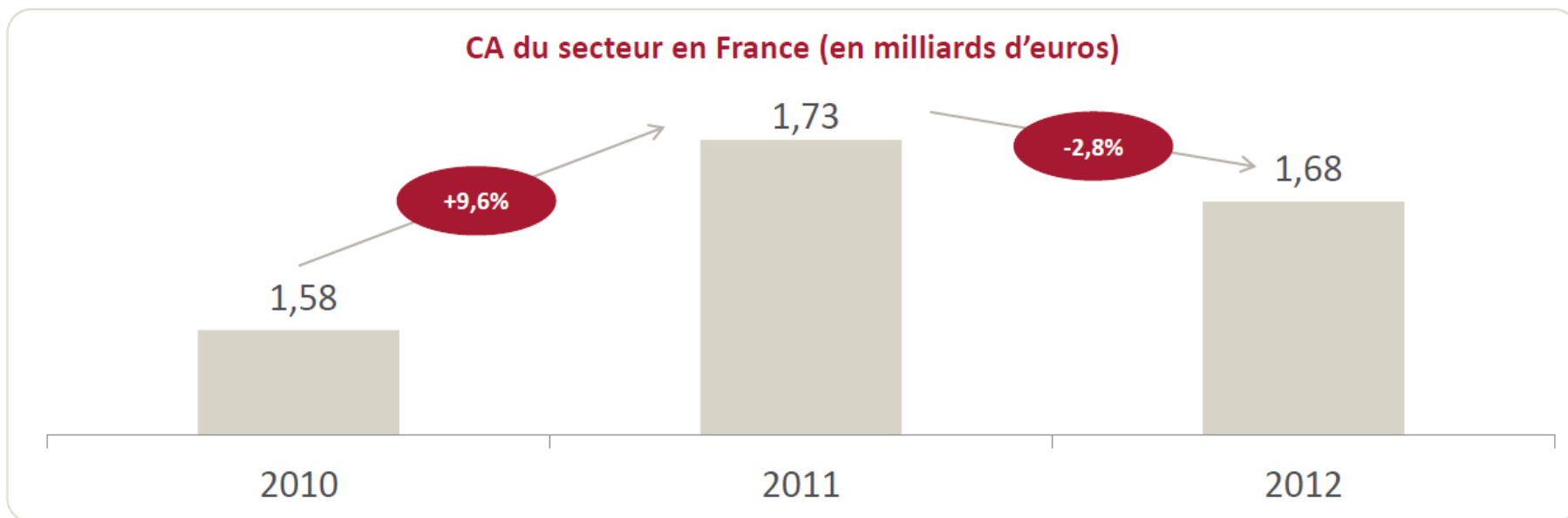
Countries	Percentage
Morocco	40%
Tunisia	23%
Mauritius	18%
Madagascar	7%
Algeria	4%
Spain	3%
Romania	2%
South Africa	1%
Moldavia	1%
India	1%



Senegal is a new destination.

1h of contact with customers would cost 70 € in France “inhouse”,
30 € “onshore outsourced” and 15 € “offshore outsourced”.

business in France decreased considerably in 2012



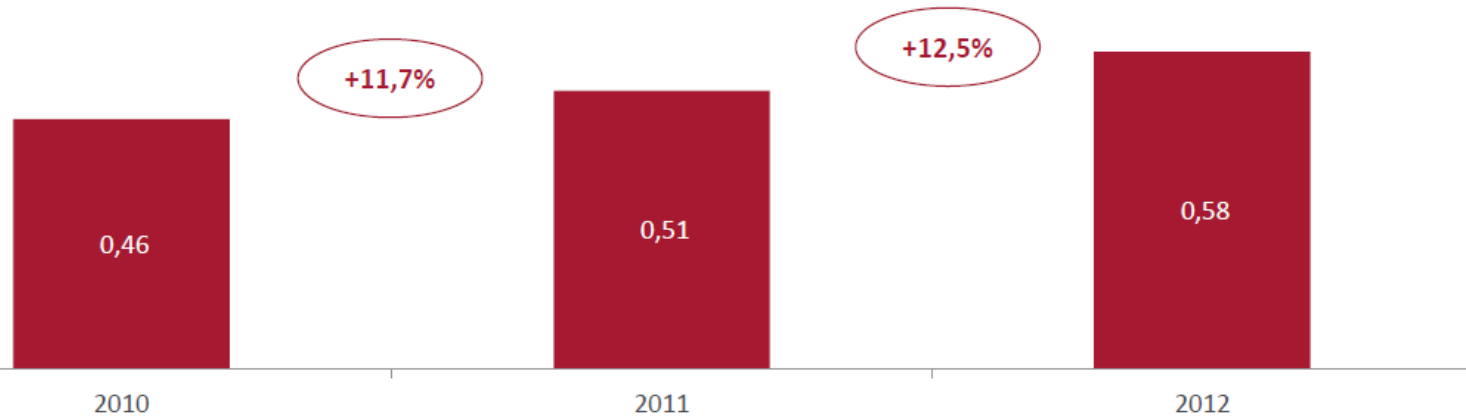
Sources : données de l'étude BearingPoint - SP2C

Points marquants

- Le chiffre d'affaires global 2012 en France est en **baisse de 2,8%** par rapport à l'année précédente (vs 9,6% de croissance de 2010 à 2011)

Offshore is increasing

turnover of offshore in billions €



Sources : données de l'étude BearingPoint - SP2C

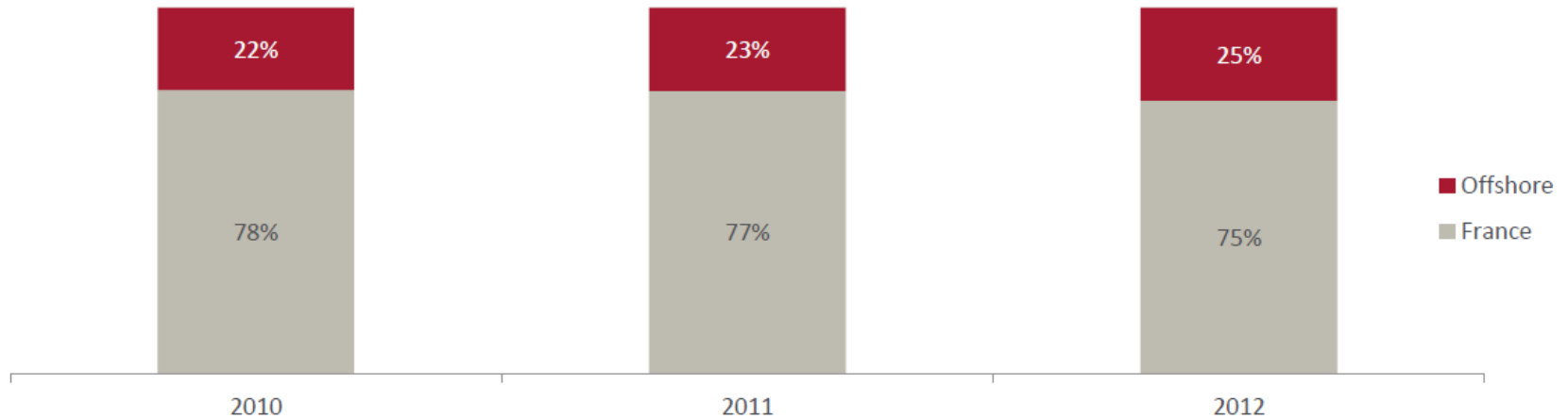
Points marquants

- Le chiffre d'affaires global 2012 du secteur en offshore est en **croissance de 12,5%** par rapport à l'année précédente (vs 11,7% de croissance de 2010 à 2011)

business remains mainly based in France

The relative 25% of offshore are increasing

Localisation du CA



Sources : données de l'étude BearingPoint - SP2C

Points marquants

- La France continue de représenter l'essentiel de l'activité, avec **75% du chiffre d'affaires du secteur en France**, contre 25% pour l'offshore

C) Producer price series

70% of the contracts are paid on a fee base and 30% in hours worked even if the call centers prefer to work and get paid on time .

the call center always recalculate the equivalent hourly rate. There is a difference between **worked time** and **productive time** (about 40mn/h)

Most prices are “tariffs” or “average” absolute prices:

- 1 hour of worked time (inbound/ outbound)
- 1 hour of productive time (helpdesk)
- 1 (inbound or outbound) call
- 1 contact
- 1 contact with success (telemarketing)

And always: **onshore vs. offshore**

Sometimes mention of economic activity of the client (telecommunications, bank , insurances...).

D) Quality adjustment and specific formula

From the point of view of the producer, the onshore and offshore call centres activities are two different “technologies” and so, according to the OECD-Eurostat methodological Guide page 20:

- *location (is) a product determining factor*
- *prices of “same” services provided by an enterprise in two locations should not be averaged but treated as different services*

But, from the point of view of the consumer, they result in the same product, or substitutable products.

We support the consumer view. We assume that the “quality” of the offshore call centre services is only 80% the onshore ones (worse understanding of French or national background).

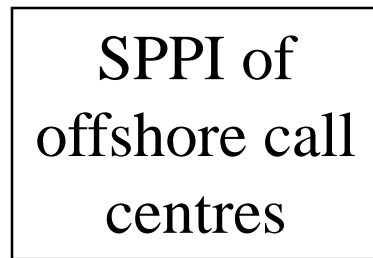
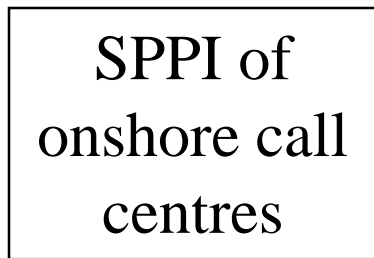
Hence, we compile average prices for each enterprise and each kind of service between onshore and offshore “products”, with offshore prices divided by 0,8 for quality adjustment.

The annual weights are asked by phone, every year.

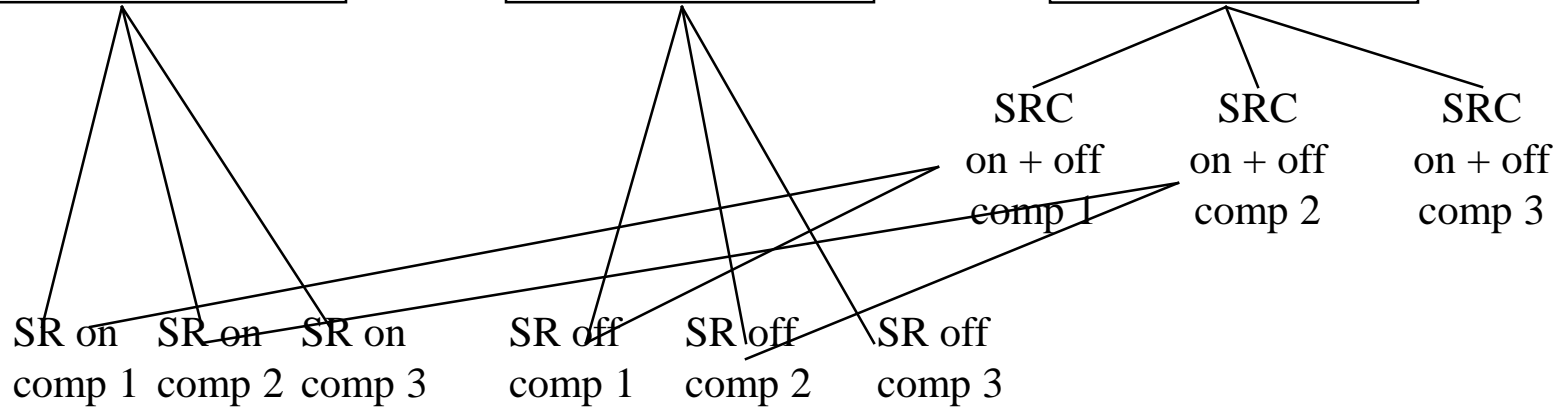
We should improve the formula by a quarterly extrapolation of the relative weights.

D) Aggregation trees

“secondary” aggregation trees



“main” aggregation tree



The “main” aggregation tree leads to SPPI at basic price, under the concepts of NA. It transmits weights from NA and SBS, and imputations. The secondary aggregation trees are compiled afterward, for supplementary information to other users.

D) Dissemination



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French services sell price indices to French businesses (BtoB) - Market price - CPA 82.20 - Call centre services implanted in France - Reference 2010	001664542	Quarter 1 of 2008	Quarter 2 of 2014	Quarterly	2014-08-29
French services sell price indices to French businesses (BtoB) - Market price - CPA 82.20 - Call centre services implanted offshore - Reference 2010	001664543	Quarter 1 of 2008	Quarter 2 of 2014	Quarterly	2014-08-29
French services sell price indices to French businesses - Market prices - BtoB - CPA 82.20 - Customer services - Reference 2010	001688321	Quarter 3 of 2013	Quarter 2 of 2014	Quarterly	2014-08-29
French services sell price indices to French businesses - Market prices - BtoB - CPA 82.20 - Technical assistance - Reference 2010	001688322	Quarter 3 of 2013	Quarter 2 of 2014	Quarterly	2014-08-29
French services sell price indices to French businesses - Market prices - BtoB - CPA 82.20 - Telemarketing, telesales and others - Reference 2010	001688323	Quarter 3 of 2013	Quarter 2 of 2014	Quarterly	2014-08-29

Onshore,
offshore +
by kind of
service

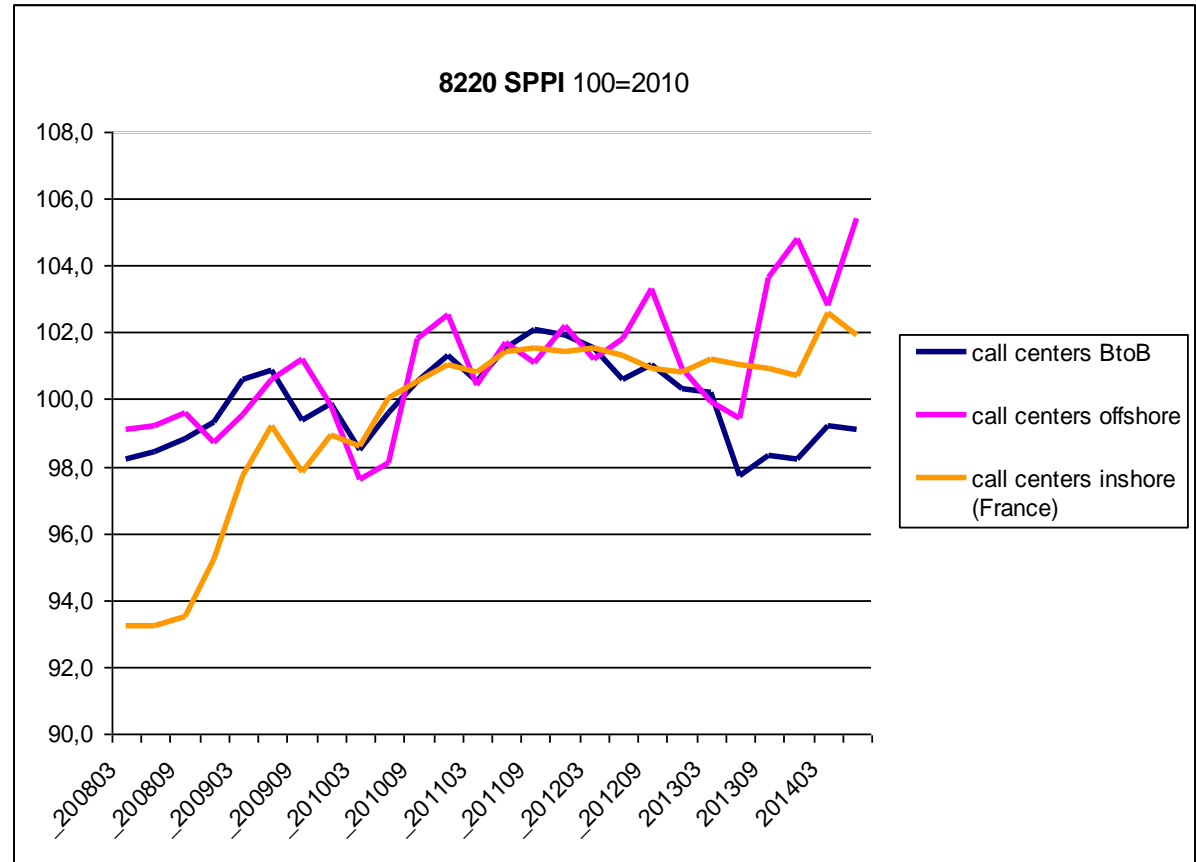


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2014

D) Dissemination (2)

The “total” price
onshore +
offshore
decreases more
than each one,
which translates
the increasing
part of offshore
call centres.



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Thank you for your attention Questions?



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