

Taking Calls to Newcastle: The Regional Implications of the Growth in Call Centres

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RICHARDSON R., BELT V. and MARSHALL N. (2000) Taking calls to Newcastle: the regional implications of the growth in call centres, *Reg. Studies* 34, 357–369. The growth of white-collar jobs in call centres has been a significant feature of the last decade. Local and regional economic development agencies have sought to attract call centres because they are a source of new jobs, and help to ameliorate the decline in employment, especially in the manufacturing sector. This paper examines the work provided in call centres, based on a case study of North East England. Call centres are characterized by a narrow range of occupations and skills, and the work regime in them is intense. The majority of the jobs are taken by women. An assessment of the long term sustainability of call centre work also highlights threats to employment from technical developments in the industry. Nevertheless, there is some evidence of limited improvements taking place in training and work practices in call centres.

Call centres Technical change Regions Jobs

RICHARDSON R., BELT V. et MARSHALL N. (2000) Faisant appel à Newcastle: les retombées régionales de la croissance des centres d'appel, *Reg. Studies* 34, 357–369. La croissance du nombre des employés de bureau dans les centres d'appel constitue un trait majeur des dernières dix années. Les agences de développement économique locaux et régionaux ont cherché à séduire les centres d'appel parce qu'elles représentent un vivier de nouveaux emplois et aident à freiner le déclin de l'emploi, surtout dans l'industrie. A partir d'une étude de cas réalisée dans le nord-est d'Angleterre, cet article examine le travail disponible au sein des centres d'appel. Ces derniers se caractérisent par des catégories socio-professionnelles et des compétences peu diverses dont les cadences sont soutenues. La plupart des emplois sont occupés par des femmes. Un bilan de la pérennité du travail dans les centres d'appel met l'accent sur les menaces pour l'emploi qui résultent des avancées techniques dans cette industrie. Cependant, il y a des preuves qui démontrent que les centres d'appel font des progrès limités dans les domaines de la formation et des pratiques sur le lieu de travail.

Centres d'appel Avancées techniques Régions
Emplois

RICHARDSON R., BELT V. und MARSHALL N. (2000) Anruf für Newcastle: Die Rolle der Anrufzentralen in der regionalen wirtschaftlichen Entwicklung im Nordosten Englands, *Reg. Studies* 34, 357–369. Die zunehmende Beschäftigung von Angestellten in Anrufzentralen hat sich als bezeichnender Zug des letzten Jahrzehnts erwiesen. Wirtschaftszentrum haben sich am Ort und auf regionaler Ebene bemüht, Anrufzentralen anzulocken, weil sie eine Quelle neuer Arbeitsplätze darstellen, und dazu beitragen, den Rückgang an Erwerbsstellen wettzumachen, besonders im herstellenden Sektor. Auf eine Studie des Falles Nordostengland gestützt, untersucht dieser Aufsatz die Erwerbsstellen, die Anrufzentralen anbieten. Charakteristisch für Anrufzentralen ist der beschränkte Arbeitsbereich und entsprechend geringe Fächerung der Fähigkeiten, während ihre Werksordnung intensive Konzentration verlagen. Stellen werden in der Mehrzahl der Fälle an Frauen vergeben. Eine Beurteilung der langfristigen Dauerhaftigkeit der Erwerbsstellen in Anrufzentralen beleuchtet auch ihre Bedrohung durch technische Entwicklung innerhalb der Industrie. Nichtsdestoweniger gibt es Anzeichen, daß in Anrufzentralen begrenzte Verbesserungen in Ausbildung und Arbeitsverfahren stattfinden.

Anrufzentralen Technischer Wandel Regionen
Erwerbsstellen

INTRODUCTION

[I]f you look at the jobs being created [in the region] they are service jobs, not manufacturing. Over half of them are in call centres, and call centres could be located on the Moon for the amount of good they do the regional economy (Hugh Morgan-Williams, Chairman of North CBI, *Newcastle Journal*, 1998).

[C]all centres have been likened to battery farms. Over 150 years ago, Jeremy Bentham put forward the design for the ideal prison, the Panopticon, and FOUCAULT (1977) used this composition as a metaphor for the coming workplace . . . for call centres, Bentham's Panopticon was truly the vision of the future and these organizations are the very epitome of what Foucault had in mind (FERNIE and METCALF, 1997, p. 3).

Call centres are offices established by organizations to deliver services remotely over the phone, replacing the need for face-to-face interaction with customers (RICHARDSON, 1994). Staff or 'agents' spend their working hours seated at their desks in constant contact with customers, making or receiving telephone calls and processing information using computer terminals. Examples of some of the most common types of services provided via call centres include telephone banking, computer 'helpdesks', travel booking and information lines. A number of call centres combine such customer service functions with selling, or 'telesales'.

It is difficult to estimate precisely the numbers of workers currently employed in call centres in Europe, but it is clear that significant growth is occurring in call centre employment. Although there were very few call centres in existence a decade ago, they are now taken for granted in many countries as a major channel of communication between companies and their customers. One reputable report by DATAMONITOR, 1998, has estimated that 1% of the European working population will be employed in call centres by the year 2000.

This paper examines the implications of the growth of call centres for employment and skills based on a case study of the North East of England. Call centre growth and decentralization to regions like the North East of England has attracted considerable interest in both the academic and policy communities. Local economic development organizations have sought to attract footloose call centre employment by a variety of financial incentives (RICHARDSON, 1998). However, as the quotes above indicate there is considerable concern about the likely impact of call centres on the local economy. These concerns are that:

1. Call centres are a new, and particularly effective, manifestation of the increasingly capital intensive 'industrialization' of service sector work (THURLOW, 1989) and work performed in them is highly intensive and routine
2. Production in call centres is highly specialized and associated with a fine division of labour; this being the case, it is suggested call centres often host only a limited range of occupations
3. Call centre technology allows an enhanced level of electronic surveillance in white-collar work that increases the opportunity for detailed control and discipline of the workers
4. The combination in call centres of Taylorist fragmentation of work and flat organizational structures is argued to restrict opportunities for career progression
5. Since many call centres are geographically mobile they have few links with the local area, and in theory at least, can seek out even cheaper locations in order to achieve further reductions in the costs of production

6. Finally, and perhaps most importantly, it is argued many call centre jobs are in danger of technological displacement over the longer term.

This paper assesses these concerns about call centre employment and its local impact. Despite the recent growth of research on call centres (TAYLOR, 1998; KNIGHTS and MCCABE, 1998; TAYLOR and BAIN, 1999a, 1999b), our knowledge of the nature of call centre jobs and the impact of call centres on local economies is still rather sketchy, and is the subject of considerable media speculation (see, for example, BECKETT, 1998; TURNER, 1998; SALTER, 1999). This paper aims to contribute to academic debate, based on an extensive programme of research conducted by the Centre for Urban and Regional Development Studies (CURDS), which has examined the organization, employment and locational aspects of call centres, during the period 1992 to 1999.

RESEARCH METHODOLOGY

This paper examines the call centre 'industry' in the North East of England. It is based on a body of evidence gathered from research on call centres carried out by CURDS between 1996 and 1999.¹ The research included a telephone survey of 38 call centres in the North East, undertaken in early 1998, which elicited 32 usable responses (RICHARDSON, 1998). The survey collected information on numbers employed, workforce composition and staff in all of the export-orientated call centres in the region with over 10 employees at the time of the survey. In addition, the research involved 30 face-to-face interviews with call centre managers and personnel managers in 20 of these call centres. The interviews focused on work organization, skills and locational decision making, and involved call centres in a range of industry sectors, including financial services, telecommunications, software, the utilities and transport (*ibid.*). Call centres in the public sector have also been studied and interviews carried out with managers at the Contributions Agency, the Department of Social Security, National Savings and NHS Direct (ARUP/CURDS, 1998; MARSHALL *et al.*, 1999).

The paper also draws on the results of a detailed study of the nature of work and employment for women in financial services, computer services and outsourced or 'third party' call centres in the UK, Ireland and the Netherlands (BELT *et al.*, 1999).² This project involved four case studies of call centres based in the North East of England. The case study organizations were selected to include examples of 'good practice' in the employment of women (in terms of training, working conditions and career opportunities), and were chosen after thorough research of documentary evidence and interviews with industry representatives. Each of the case studies involved semi-structured, face-to-face interviews with the call centre manager and at least two

supervisors, as well as group interviews with call centre agents (each involving 6–10 agents). Where possible the agent interviewees consisted of staff who volunteered to take part in the interviews, although in some of the call centres it must be stressed that managers and supervisors selected the staff to be interviewed. This meant that a particularly careful approach was taken both during the interviews and when interpreting the results.

Group interviews were selected as the preferred method for interviewing the agents because of the well documented advantages of this approach when collecting data on experiences, beliefs and attitudes, and its emphasis on *group* interaction (see for example HOLBROOK, 1996; MORGAN, 1997). Group interviews were also undertaken because of the particular problems involved in interviewing call centre employees. Agents are highly aware of the fact that their work is carefully monitored. This situation means that there is a danger that interviewees may view the interviewing process as merely another monitoring exercise. In this context, it was felt that the group interview would be more likely to set the agents at ease and generate dialogue than the traditional one-to-one interview situation. In addition, it has also been argued that group based research allows the interaction of the participants whilst minimizing the influence of the researcher, which can result in 'novel or unexpected insights which may not be generated via other methodologies' (HOLBROOK, 1996, p. 136). Indeed, group interviews proved highly successful in this research, and produced rich data on the experiences of employees, which is used in this paper to reflect upon the nature of call centre work and the skills employed by call centre agents.

In addition to the specific pieces of research outlined above, we are also able to draw on a broad understanding of the call centre 'industry' developed over a number of years. Research into call centres has been carried out at CURDS since 1992, and over this time we have built up a considerable amount of industry knowledge and contacts.³ Our early research on call centres, as well as examining the call centre industry in the North East (RICHARDSON and MARSHALL, 1996) also concentrated on the UK financial sector, where a number of the earliest European call centres were concentrated (RICHARDSON, 1994; MARSHALL and RICHARDSON, 1996). This later broadened into a wider comparative study of European call centres (RICHARDSON, 1997). Overall, these studies have involved over 100 interviews with managers and senior decision makers in around 80 organizations, as well as interviews with senior managers in telecommunications companies, property developers, inward investment agencies and local economic development authorities. Extensive documentary evidence has also been collected, including specialist industry literature, trades association and trades union publications.

CALL CENTRES AND REGIONAL EMPLOYMENT

Information and communications technologies and space

[Information and communications technologies] allow for the increased tradability of service activities, particularly those which have been most constrained by the geographical proximity of production and consumption. By bringing in a space or time/storage dimension, information technology(ies) ... make possible the separation of production from consumption in an increasing number of such activities. (FREEMAN and SOETE, 1994, p. 91)

This study of call centres needs to be understood in the wider context of research on the spatial impact of the growing use of information and communications technology (ICT) in society (see for example HEPWORTH, 1989; CASTELLS, 1996; GRAHAM and MARVIN, 1996; HUWS *et al.*, 1999). The increased flexibility offered by ICTs appears to be opening up new possibilities for both the organization and location of work. Businesses are changing their organizational structures, taking advantage of technologies that allow information to be transferred instantaneously through electronic networks. Many enterprises are becoming more complex, decentralized and network-orientated.

Call centres represent one of a number of ways in which the 'space shrinking' character of information and communications technologies offers opportunities for business in geographically remote areas to overcome the 'friction of distance', and to move *relatively* closer to central areas, thereby participating in new ways in trade (LEYSHON, 1995). For example, ICTs can help firms to expand their geographical reach, possibly allowing firms in peripheral areas to enter new markets. Firms also use ICTs to exploit spatial variations in factors of production more effectively and to locate their functions more efficiently. What is special about call centres, over and above the fact that they are expanding rapidly, is that they extend ICTs further into the customer interface. In a variety of services supplying consumer markets, the buyer and seller of the service can be physically separate, and production takes place at a distance from the consumer of the service (RICHARDSON, 1994). This creates opportunities to extend contrasts in the spatial division of labour *between* regions into locally-orientated consumer services. In call centres the need for face-to-face contact between customer and supplier is reduced by the redesign of the service, which is repackaged in a routine standardized form, and delivered to a large extent automatically using computer software and hardware (MARSHALL and RICHARDSON, 1996). So, for example, in retail banking the service is centralized in a call centre, rather than provided via an extensive branch network, because it provides economies of scale and offers opportunities to reduce costs by closing a number of branch offices. The call centre is, to some extent, spatially mobile, its location depending initially

on the availability of the appropriate telecommunications infrastructure. However, as we will argue later, once telecommunications facilities have been provided, the availability and quality of labour is also highly significant.

The growth of call centres

The expansion of call centres in the UK began in the financial sector. Here Direct Line and First Direct were established in 1986 and 1989 respectively, initially to provide motor insurance and retail banking, but have since expanded into a wide range of personal financial services, and have been followed by a host of competitors (MARSHALL and RICHARDSON, 1996). However, call centres are a rapidly growing phenomenon in a number of industries, including travel and transport, computers, marketing, distribution and logistics, hotels, telecommunications, retailing, the utilities and, latterly, in some areas of government services (e.g. NHS Direct). Third party firms, such as The Merchants Group and SITEL, which specialize in providing call centre services for other firms are also becoming increasingly common. Most call centres still service only national markets. There is, however, a growing pan-European call centre sub-sector, particularly in areas such as computing, hotels and travel.

It is clear from the foregoing that the call centre 'industry' is not an industry in the traditional sense of the word. Rather, call centres host a range of activities that take place in a number of industries. As a result it is difficult to estimate the precise rate of growth in the number of call centres, or in call centre employment, as they do not fit neatly into the Standard Industrial Classification (SIC). This, together with the relatively recent appearance of call centres, means that official data are not available. However, there are now a number of studies from consultants showing impressive growth rates in teleservices, the numbers of call centres and levels of employment (e.g. HENLEY CENTRE 1995; DATAMONITOR, 1996, 1998; MITIAL, 1997, 1998).⁴ From being almost unknown at the beginning of the 1990s there were estimated to be around 12,000 call centres in Europe by 1998, hosting around half a million agent positions.⁵ European growth is expected to continue into the next millennium, though the percentage rate of growth is expected to slow (Fig. 1). It is anticipated that, whereas in 1997 there were an estimated 40,000 net new agent positions in the UK, by the year 2000 the figure will be closer to 20,000 (DATAMONITOR, 1998). The UK has the most mature call centre industry in Europe, hosting around half of all agent positions in 1996, though the gap between the UK and other countries is likely to diminish over the next few years (DATAMONITOR, 1996; MITIAL, 1998).

The growth in call centre employment does not necessarily signal an overall growth of employment.

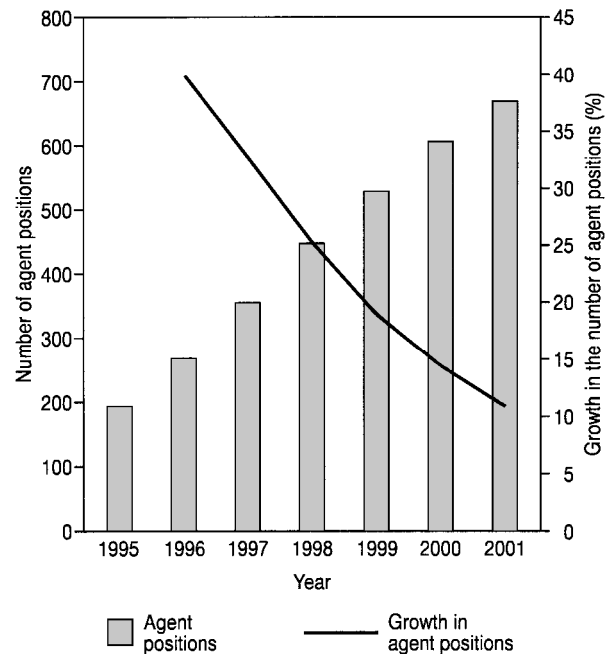


Fig. 1. Growth (and anticipated growth) of call centre agent positions in west European markets, 1995–2001

Source: DATAMONITOR, 1996.

Many of these jobs will displace other existing ones, notably in branch networks in banking and insurance. Our interview evidence suggests that the economies of scale gained through call centres will actually mean significantly fewer people will be required to serve the same number of customers (RICHARDSON and MARSHALL, 1999). However, this negative impact will be ameliorated by an initial burst of intense competition as firms set out to capture tele-consumers through setting up call centres. Any growth in economic activity that call centres generate through delivering services more conveniently may also help. Whether or not call centres result in an overall decline in employment, it is clear that certain regions that can attract or create call centres can gain additional jobs. We now turn to one such region, the North East of England.

CALL CENTRES IN NORTH EAST ENGLAND

Much has been made by local economic development agencies and the media of the North East's position as a call centre location. A recent survey of call centres across the UK (MITIAL, 1998), however, places the North East mid-table for call centre employment. The survey suggests that of 121,000 active agent positions nationally,⁶ only around 6% (7,260) are in the North East (Fig. 2). However, even if these figures are correct they suggest a degree of specialism in the region, given that the percentage of the total UK workforce employed in the North East stands at just below 5%.

A telephone survey of 38 export-oriented call centres

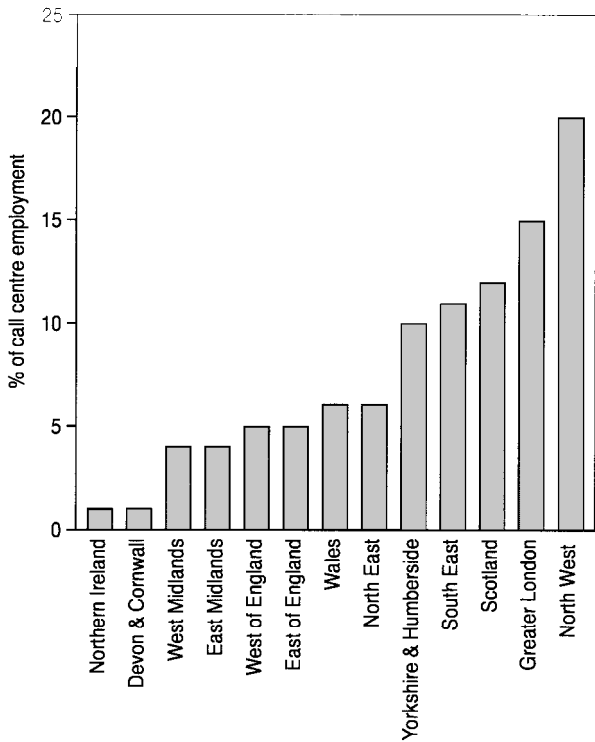


Fig. 2. Call centre employment by region, 1998 (% of UK)
 Source: The Mitial Group, cited in *Financial Times*, 1998.

based in the North East was undertaken by the authors in early 1998 (Table 1). Export-orientated call centres were chosen as those most likely to add to regional jobs, and less likely to displace local employment. Our survey used a different measure to the MITIAL survey, being concerned to gauge the number of full-time equivalent employees (FTEs) in the region's call centres. The CURDS survey elicited 32 useable responses. These 32 call centres employed around 8,390 FTEs. On average 25% of staff were part-time and so the total numbers employed in these centres amounts to around 10,500. The authors estimate that the other call centres that did not provide useable figures employed a further 300 or so staff at the time of survey.

At that time employment in the North East appeared likely to continue to grow due to the gradual expansion of established centres. Both management interviews and telephone surveys pointed to this likelihood, though respondents were often cagey about giving precise forecasts. A number of new centres had been established at the time of our survey, but which were not fully operational, for example, Avco and SSL. New call centres have also been announced since the survey, including Barclaycall (Doxford Park), EDS (Bracken Hill), Churchill Insurance (Stockton on Tees) and Orange (Darlington and North Tyneside). Based on publicly announced employment targets and estimates drawn from interviews, we anticipate, conservatively, that a further 3,000 people will be employed in call centres in the region by 2000.

Table 1. Urban location of export-oriented call centres based in North East England, 1998

Company	Location	Sector
National Savings	Durham	Government Services
Eagle Star Direct	Newcastle City Centre	Financial Services
Rail Direct	Newcastle City Centre	Travel
Newcastle Direct	Newcastle City Centre	Financial Services
GNER	Newcastle City Centre	Travel
Going Places	Newcastle and Sunderland	Travel
Matrixx		
Marketing	Newcastle City Centre	Third party specialist
EAGA	Newcastle City Centre	Energy
AA Insurance	Newcastle Business Park	Financial services
Thistle Comms	Newcastle Business Park	Telecommunications
British Airways	Newcastle Business Park	Travel
Northern Rock	Newcastle, Regent Centre	Financial services
Sage	Newcastle, Benton Park Road	Computer software services
BT (in-bound)	Newcastle, Gateshead, Sunderland, Darlington, Middlesborough,	Telecommunications
Avco	Sunderland, Doxford Park	Financial services
Axciom	Sunderland, Doxford Park	Third party specialist
SSL	Sunderland, Doxford Park	Third party specialist
London Electric	Sunderland, Doxford Park	Energy
One-to-One	Sunderland, Doxford Park	Telecommunications
Royal & Sun Alliance	Sunderland, Doxford Park	Financial services
Littlewoods	Sunderland	Retail
BT (out-bound)	North Tyneside, Gosforth Business Park	Telecommunications
Abbey National	Stockton, Teesdale BP	Financial services
Barclaycard	Stockton, Teesdale BP	Financial services
Starpak	Hartlepool	Computer support
RAC Insurance	Darlington	Financial services
Hutchinson		
Telecom	Darlington	Telecommunications
Arnott Insurance	Fencehouses	Financial services
NatWest	Gateshead, Team Valley	Financial services
Topline	Gateshead, Vance Business Park	Third party specialist
Mailcom	Gateshead, Follingsby Park	Third party specialist
Child Benefits Agency	Washington	Government services
Vodafone	Washington	Telecommunications
Transco	Killingworth Town Centre	Energy

Source: CURDS research.

On average, around 70% of call centre agents in the North East are female, though this proportion appears to be declining over time as more young men enter the industry. Early work by the authors (RICHARDSON, 1994; RICHARDSON and MARSHALL, 1996;

MARSHALL and RICHARDSON, 1996) suggested that first movers in the call centre industry in the UK, such as First Direct, aimed to build a predominantly part-time workforce to save costs and promote flexibility. Some recent evidence suggests that call centres have moved away from this model. MITIAL, 1998, for example, suggest that 70% of call centre agents are currently employed on a full-time basis. The Mitial evidence is supported by recent interviews in the North East region which suggest that in most firms only a quarter of agents are employed on a part-time basis, though there are particular operations, notably a BT call centre which overwhelmingly offers part-time work. There are a number of reasons why the attitude to part-time work may have changed. First, in the more buoyant labour market conditions of the latter 1990s, fewer people may be prepared to undertake these jobs on a part-time basis. Second, agent turnover tends to be very high in the call centre industry, and this may lead employers to offer more hours in order to retain staff. Third, training costs and other human capital investment can make it more cost effective to employ agents on a full-time basis. However, whether this shift towards full-time work in the North East will be maintained is an open question. Scottish evidence suggests that call centre firms in that region expect a significant increase in the numbers of part-time staff in the immediate future (TAYLOR and BAIN, 1999a).

The retail financial services and telecommunications industries have the most call centres in the North East. Of the 38 call centres listed Table 1, 11 (29%) are in financial services. In addition two of the more recently announced inward investments (Barclays and Churchill) are in this sector. This finding is unsurprising as the majority of studies show that financial services have been in the vanguard of teleservices (e.g. HENLEY CENTRE, 1995; DATAMONITOR, 1996, 1998; MARSHALL and RICHARDSON, 1996; MITIAL, 1997; 1998). The second most important industry is telecommunications, with 10 call centres (26%). The third best represented sector is third party call centres, centres that undertake work on behalf of other firms. Energy, and travel, transport and tourism, and government services also have a presence.

In terms of employment, the telecommunications sector was the largest, providing around 37% of (FTE) jobs. BT was the main employer, but Hutchinson Orange and One-to-One were also significant. Financial services were the second largest employer, with around 27% of FTEs. These figures underestimate the role of financial services as an employer, however, as three firms from this sector did not provide figures. This, combined with new announcements since our survey (notably Barclay's intention to create 2,000 jobs at Doxford), suggest financial services will shortly become the single largest call centre employer in the region.

Although the region has a reasonably broad range of call centres, it has a number of weaknesses. First, it has

few 'higher-order' call centres. There are only two centres involved in computer services, which tend to offer more skilled and better-paid employment than many other sectors (though they still have their share of routine tasks). This partly reflects the region's failure to develop or attract firms in this sector in the past. There are only three firms that employ a significant proportion of multilingual staff, and the region has made little headway in attracting or developing pan-European call centres, due to the fact that the region is less well endowed than locations close to the capital in terms of language skills. This again means the region tends to miss out on another potential source of more highly-skilled jobs with higher salaries.

Second, call centres in the region are predominantly externally-owned and controlled (Table 1). This is hardly surprising given the region's general over-reliance on inward investment. The reasons given by these firms for locating in the North East indicate that on most locational factors the region does not have a clear cut competitive advantage as a call centre location compared to other areas. Managers indicated the presence of relatively advanced telecommunications is a basic requirement for a call centre location. The region is not more advanced than other urban regions in the UK in this regard, though it is notable that telecommunications infrastructure was built ahead of demand at Newcastle Business Park and at Doxford Park, both of which have attracted significant call centre employment. Sunderland Teleport has also recently been opened to provide an alternative option to fixed-link communications for call centres and other tenants. The timely availability of land, and high specification buildings at reduced cost were also regarded as important. A number of firms have benefited from a position in an Enterprise Zone, as well as training grants, but most respondents suggested that such incentives were an added bonus rather than a main driver behind locational choice.

The availability of a sufficient pool of quality labour at a lower cost than other regions is the most important factor behind the location of call centres in the North East. Most managers mentioned the low cost of call centre agents in the North East relative to other regions. This evidence is confirmed by information collected by Income Data Services, who consistently place the North East among the regions with the lowest wage rates for call centre agents and supervisors (INCOME DATA SERVICES, 1997, 1998). For example, in the most recent INCOME DATA SERVICES, 1998, survey, in the North East the mid-point for customer service advisor (agents) salaries ranges from £8,500–12,300 p.a., compared to £10,300–14,100 p.a. in Scotland, £11,000–14,100 p.a. in the West Midlands and £14,200–17,000 p.a. in Greater London.

Third, only a small number of local firms have used call centres to geographically extend their market. Positive examples include Northern Rock, the New-

castle Building Society, the insurer Arnotts, and the (briefly locally-controlled) utility Northern Electric and Gas. Perhaps most interesting is the case of Sage, a locally founded provider of accountancy software packages, which has grown from a start-up to a multi-national organization, and remains headquartered in the region. A key element in the company's growth strategy has been the provision of technical support via the telephone, from a call centre in Newcastle. Sage also undertakes sales from the call centre, though the company also continues to use specialist dealers. The development of teleservices through the successful integration of call centre technology into these businesses has resulted in increased employment (or employment retention) through the creation of call centre jobs.

Fourth, the call centre industry is geographically concentrated at only a few sites, mainly within urban centres. Three sites, in particular, Newcastle City Centre, Newcastle Business Park and the rest of the Quayside, and Doxford Park, on the outskirts of Sunderland, host 42% of the call centres (and Doxford will host another of the newly announced arrivals). As a result, many communities miss out on call centre development. It also raises the potential for local labour market shortages, as competition for labour intensifies. There is some limited evidence that call centres are moving down the urban hierarchy in the region. Towards the end of 1998 it was announced that two call centres were to open at a new Business Park (with Enterprise Zone status) at Peterlee, close to the former East Durham coal field.

Fifth, though there is a burgeoning call centre support 'industry' developing nationally, providing training, software development and a range of business services to call centres, there appears to be few support businesses based in the North East. For example, of the 114 call centre support businesses advertising at a major 'industry' conference in 1997, none had an address in the North East. There is no evidence that the lack of local suppliers poses a problem for call centre operation in the region, because businesses can call on expertise from elsewhere. However, the region is undoubtedly missing out on some of the employment multiplier effects associated with the growth of the call centre 'industry'.

WORK, SKILLS AND TRAINING

What can the North East of England and other regions expect from call centres in terms of work, skills and training? A recent study suggests that call centres are the 'new sweatshops' of the service economy (FERNIE and METCALF, 1997). Similarly, JARMAN *et al.*, 1998, p. 2, have observed that call centres are primarily driven by a logic of 'rationalisation and routinisation of human interactions'. Reports from within the industry itself and trades unions have highlighted the downside of

call centre work (e.g. REARDON, 1996; CALCOM/AUSTIN KNIGHT, 1997; HOOK, 1997; UNISON, 1998; ROYAL NATIONAL INSTITUTE FOR THE DEAF/TRADES UNION CONGRESS (RNID/TUC), 1999). Health concerns have been expressed, including tension, sleeplessness, headaches, eye-strain, repetitive strain injury (RSI), voice loss, hearing problems and burn-out. Other problems include low pay, repetitiveness of work and consequent boredom, and unsociable hours. This amounts to considerable concern about the implications of the growth of call centres for the character of work.

The organization of call centre work

Call centres are certainly at the forefront of the trend towards increased automation and surveillance of office work. At the heart of the call centre is the automated call distribution system (ACDS). The ACDS receives customer calls and automatically routes them to the appropriate agent, in line with a set of programmed instructions. The ACDS is connected to a range of databases, in what is known as Computer Telephony Integration (CTI). With CTI, not only is the call automatically transmitted to the agent, but so too are the records of the customer, often along with a flashing message instructing the agent to try and sell a particular product during the call, based on a computer generated individual customer profile.

Each agent has targets to meet, often linked to performance-related pay. Targets can include numbers of calls taken, the time spent on each call and the amount of time spent between one call and another. So although the agent can, in theory, log out of the system at will, the pressure is to keep taking calls. The agent's performance is also closely monitored via the ACDS. Each team supervisor has a monitor that is linked to the ACDS and to all agents in their team. Senior supervisors and the call centre manager have a screen-based overview of the call centre. The monitor lists every agent's name on the screen, and shows the time taken on his or her present activity. The number of agents logged in, the number of calls in the queue and length of time the oldest call has been waiting is also recorded. Thus, the supervisor can be aware of what the agent is doing at any moment of the working day. The computer screen also allows the supervisor to see if a call is taking more than the prescribed time. The 'timer displays' adjacent to each agent's name flash at a predetermined threshold of average call time. When an agent's box flashes, the supervisor can listen in to determine why the call is so lengthy. The supervisor can also listen in to any call, and this is done on a regular basis, to assess the agent's performance.

ACDS produces up to 200 sets of statistics. These statistics are used to build an accurate picture of call patterns. This, in turn, allows management to create work rotas around actual work flows. The system is

designed to ensure that sufficient agents can be employed at peak call times, and that there are no idle agents sitting around when calls are slow. Thus, time at work should be working time. Of course, although the system is designed to ensure close control over the work process, total control cannot be achieved. As a number of authors point out (LAMMONT, 1999; TAYLOR and BAIN, 1999a), workers can, through a variety of forms of resistance, find ways around management controls.

The nature of call centre work

Interviews in the North East of England show that the main problems experienced by agents are the intensity of the work, the limited and repetitive nature of the job, and the strain of dealing with customers all day. As one agent put it:

It's a case of getting through as many calls as you possibly can ... sometimes you haven't always got the time to spend on each call ... So at the end of the day they check how many calls you have per hour, how long you've been on the phone, how long you've been logged in, its all figures and they want the best they possibly can at the end of the day (female call centre agent).

This situation led to frustration at 'being on the phone all day every day', which agents find repetitive, stressful and tiring (this was particularly the case for those working in financial services). Some agents also talked about the lack of stimulation involved in the job, and the need to 'stretch your mind'. In fact, agents seemed well aware of the similarities between the call centre environment and the factory assembly line.

These conditions of employment are reflected in high levels of staff turnover, with rates in the 20–30% bracket not uncommon (CALCOM/AUSTIN KNIGHT, 1997). A recent study by Tyneside TEC suggested that staff turnover rates on Tyneside varied between 8% and 35% with an average turnover of 20% (TYNESIDE TEC, 1998). Not all this turnover, however, is due to frustration with call centre employment *per se*. Some can be attributed to job-hopping amongst call centres by staff in search of better terms and conditions. In addition, many people take on call centre jobs as a short-term option, students being a case in point.

Rather than alter the organization of work to make it more varied, call centre managers use the range of surveillance and control strategies discussed in the previous section to ensure that agents 'stick at the job'. Many staff clearly found these oppressive and stressful:

When I first came here ... I was like a small child, they were watching me ... I think most call centres are like that and that's why there's such a high turnover of staff at most call centres because people just get fed up with it, the pressure (female call centre agent).

Other agents, however, accepted the heavy monitoring as 'all part of the job'. In fact some agents seemed to

'prefer' their calls being recorded or listened to because it proved that they were doing their job properly, and this protected them from customer complaints.

Call centre managers also use techniques such as 'team working' to offset some of the negative aspects of the work. A great deal of emphasis is placed on building up a strong 'team spirit' and a good 'esprit-de-corps', and this is often the key role of the call centre supervisor or team leader. There is considerable evidence that this strategy has been a success. Most, though not all call centres, were described as 'sociable' and 'very friendly places' with a good social life.

On another positive note, environmental and ergonomic conditions provided for the workforce in the majority of call centres are also far in advance of those present in many traditional offices, never mind those suffered in industries generally associated with 'sweatshops'.

Skills and career progression

Despite the fact that call centres are technologically intensive working environments, most call centre employers do not require their staff to possess in-depth technological knowledge or qualifications. The exception to this is in technical support roles in information technology (IT) call centres, although we were only aware of two such call centres in the North East at the time of our survey. The IT skills routinely used by agents in other call centres are keyboard skills and/or the ability to operate the company's database. Call centre employers do, however, require their employees to possess a number of what are often labelled 'soft skills'. These include 'communications skills', 'customer service skills' and 'team working'. The managers we interviewed also emphasized that call centre agents should possess a specific set of personal characteristics or qualities, including patience, tolerance, empathy, motivation, commitment and the ability to work well under pressure. Employers overwhelmingly regard these soft skills and personal qualities to be more important than the possession of any technical skills or formal qualifications.

The managers we interviewed were keen to emphasize that soft skills are valued because of the particular nature of call centre work. It was frequently claimed that agents are required to not only deliver a service, but also convey the 'aesthetic' of an organization to the customer over the telephone. Call centre work is similar to other interactive service sector occupations in which the identities, appearances and even emotions of workers are vitally important elements in service delivery, becoming a part of the 'product' that is 'sold' to the customer (LEIDNER, 1991; LASH and URRY, 1994; MACDONALD and SIRIANNI, 1996). As we have already seen, however, call centre workers must possess the ability to perform this 'front-line' work whilst working under often extremely pressurized

working conditions. As a consequence, call centre employers seek staff that have customer service skills combined with motivation and resilience:

We tend to look for someone who recognizes customer service, we're looking for someone with a little bit of 'oomph', a little bit of get up and go. We tend to be very fast-moving so we're looking for people with a bit of pace, who can deal with a bit of pressure, because we recognize that it is a case of you complete a call and then in about ten seconds you could have another, so we need someone who can deal with that (male call centre manager).

As a consequence of the demands placed on call centre staff, training is a key element in call centre culture, though as in all industries, one must separate the rhetoric from the reality in this respect. Introductory training for agents in call centres varies considerably from as little as one day to six weeks, and tends to be supplemented with on-the-job training. It would appear from our interviews with managers, supervisors and agents that introductory training is generally more structured and systematic in call centres than in traditional organizations employing large numbers of clerical workers, although it tends to be very product-orientated. Most call centres also provide on-going training for their agents, again centred on product knowledge and customer service.

Call centre work clearly requires a number of skills associated with customer handling and working to targets that are increasingly important in the service economy, and which are potentially transferable both between call centres and other areas of service work. In this sense, call centres have brought a new set of skills into the region. However, it should be stressed that these skills carry neither high social status nor high financial reward. This is undoubtedly at least in part due to the fact that call centre work is female-dominated. As feminist theorists have long argued, the concept of skill is profoundly gendered, and the work that women have traditionally done has not historically been acknowledged as 'skilled' (PHILLIPS and TAYLOR, 1980; CROMPTON and JONES, 1984; MCNEIL, 1987). In addition, the intensive, standardized nature of most call centre work makes it difficult for agents to further develop their competences and abilities. Most call centre agents follow computerized scripts of some form that control the content of the telephone conversation and the order of its constituent parts, allowing them only restricted room for manoeuvre. It is this lack of autonomy, coupled with the pressure of dealing with customers all day and meeting challenging call targets, that leads to 'burn out' and high staff turnover. It should be noted, however, this phenomenon is not exclusive to call centres, and that similar trends towards work intensification and standardization can also be found in other areas of clerical work (WEBSTER, 1996).

For those employees who do want to build a career in the call centre industry, the opportunities for career development within the region are also limited. Call centres in the North East, in common with those elsewhere, have a limited hierarchical structure with only three to four levels, usually agent, team leader, supervisor and manager. There tend to be only a small number of supervisory and managerial positions available within call centres, and the bulk of the staff are employed as agents. Some companies have introduced extra tiers or 'agent levels' into the organization, for example 'senior agent' positions, as a way of motivating staff and preparing them for promotion, but this practice does not appear to be widespread. In addition, the fact that the companies with call centres in the North East have few other sites in the region also means that there is limited room for career progression out of the call centre environment into positions elsewhere in the company. As a consequence, beyond supervisory and call centre management level, individuals are likely to be promoted outside of the region if they wish to stay with the same organization.

THE SUSTAINABILITY OF CALL CENTRE EMPLOYMENT

A key question when considering the potential of call centres to contribute to regional employment is that of long term sustainability. There are two threats to continued longer-term employment growth: competition from other places; and, more importantly in the longer run, the evolution of the industry.

The North East region has done relatively well in attracting inward investment in call centres. Competition to attract mobile investment is, however, increasing. Development agencies and local authorities in the North East, together with the Leeds area, and the central belt of Scotland, particularly Glasgow, have been in the forefront of developing policies to attract call centres in the UK (MITIAL, 1997; RICHARDSON, 1998), but other agencies are now responding. The region will have to continue to ensure a good supply of labour and land, and also to create innovative support mechanisms to support the industry if it wishes to retain or enhance its position. This may be more difficult once Enterprise Zone status ends. Competition may not only be confined to the UK, but may also come from the Republic of Ireland, and perhaps further afield. Evidence from the US suggests that some service work has followed manufacturing and migrated off-shore to lower cost locations in the developing world as a result of the growth of new technologies (e.g. PEARSON and MITTER, 1993; HOWLAND, 1996). The main focus of such studies tends to be data entry and software development activities, but examples of 'telemarketing' work going off-shore can also be found (WILSON, 1994, 1995).

We are not aware, however, of any examples of Euro-

pean call centres relocating off-shore yet, though there are a number of 'follow-the-sun' operations, where out-of-hours European calls go elsewhere but where work also flows into Europe at other times (RICHARDSON, 1999). Indeed there is some evidence of a reverse process with European call centres incorporating work from less-developed parts of the world. Holiday Inn in Amsterdam, for example, covers customers in the Middle-East and Africa, in addition to European customers. This is not to say that call centres will not go off-shore from Europe, but there are a number of barriers to such work going offshore which do not always apply to, say, data processing tasks. These barriers can be characterized as technology-cost barriers, regulatory barriers, organizational and commercial barriers, linguistic barriers and cultural barriers.

Further developments in technology are a greater threat to call centre employment. These technologies may be divided into two groups, though there is considerable overlap. The first group are those technologies that are already used in call centres on a regular basis, including ACDS, CTI, Predictive Dialling (PD) and Interactive Voice Response (IVR) Systems. The impact of these technologies will be evolutionary rather than revolutionary. Their increasing sophistication could impact on numbers employed in call centres, though as they also make call centres a more cost effective distribution route they could also increase numbers employed at the expense of other delivery channels.

A closer look at two of these technologies will give an indication of how they may impact on employment growth. PD involves programming a database of customers into a computer which then 'telephones' them, via multiple-dialling, in a predetermined order. If a number is engaged or rings a certain number of times without answer the computer moves on to the next number. If a call is answered by the customer, the call is transferred automatically to a waiting agent, together with a screen-based record of the customer and a prompt as to what the agent should say. This technology is used in areas such as marketing, sales and debt collection. The effect is to reduce the amount of time the agent has in contact with the customer, though it also removes the tedium of dialling and obtaining wrong numbers. Producers of PD dialling technologies claim productivity increases of over 200% relative to conventional dialling. This increased productivity suggests that though outbound call centres are likely to grow, the employment created by that growth may not be as great as has been assumed.

IVR has perhaps the greatest potential to destroy jobs in in-bound call centres. IVR systems are typically used to help guide consumers through complex tree routing systems to access basic information and to place orders. IVR is likely to take over more and more activities. The agent will not disappear completely and will usually remain an option for the customer, but fewer staff will be required in areas such as information provi-

sion and ordering. QVC, the home-shopping channel, now takes 40% of its orders through IVR in its US and German operations and the proportion of UK customers responding in this way is increasing rapidly (ARUP/CURDS, 1998). However, the customer care function in the call centre is likely to continue to be handled by human agents. There would need to be a significant change in consumer culture in the UK and Europe before it will be acceptable for firms to offer only an IVR service to handle complaints and enquiries. Human agents will also be valued for their capacity to add value to an enquiry by selling add-on products in a way in which at present machines cannot. However, IVR will be used to 'stream' customer service calls and this may also impact on employment.

The second group of technologies are those that are usually associated with e-commerce, the Internet, intranets, and digital TV. By furthering the role of customer self service, these interactive media have the potential to make redundant many call centre operations. For these technologies to replace call centre operators two things are required: investment by firms that currently rely on call centres to service customers; and investment by consumers. In Europe investment at the production end is starting to happen. Investment on the consumer side is less certain. Nevertheless, in the longer term, it seems likely that these technologies will play a significant role in commerce. In the UK, firms are now starting to challenge telephone-based services using the Internet, particularly in areas such as banking and insurance.

It is likely that the new media and the telephone will work in parallel for some time to come. Recent research suggests that some firms see the Internet and telephone-based customers as different markets, with Internet customers being more up-market and involving 'relationship selling', where the firm attempts to build a long term relationship with the customer, rather than one-off product sales (ARUP/CURDS, 1998). However, other firms suggest that it is more appropriate for lower grade transactions such as car and home insurance, and that costs can be saved by replacing telephone-based transactions with web-based ones. Some organizations have already introduced the Internet as part of their service mix in the US, often linked to a call centre with consumers able to visit a Web-page and then click a button to connect with an agent. In some cases there is also a video link to an agent. This use of the Internet can enhance the role of call centres and may well be used in tandem with call centres for some time to come. In the longer run, however, it is likely to undermine those call centres that currently carry out lower level tasks.

CONCLUSIONS

This paper has assessed some of the implications of the growth of call centres for regional employment and

skills, drawing on evidence from the North East of England. The paper shows that call centres can create significant numbers of jobs, with approximately 11,000 staff employed in call centres in the North East of England in 1998. Call centres are present in a large number of sectors, and the skills developed in them are easily transferable between firms. Thus, the successful attraction of a few firms to the region creates a pool of labour that can, in turn, attract other firms. Another advantage, at least in the short term, and during a period of rapid industry growth, is that this transferability of skills is likely to mean the price labour can command increases, thus contributing to an increase in regional income. Over time, of course, wage inflation, which may be increased by the concentration of the industry in a small number of locations, may have a negative effect, given the mobile nature of the industry and its wide choice of locations, at least at the bottom end of the skills continuum. Questions, of course, must be asked as to whether call centres merely divert labour from other parts of the regional economy or even enhance rationalization in branch networks serving the customer. This may be so, but in a period of significant downsizing in staple areas of white collar employment such as national and local government, retail financial services and the utilities, call centres provide additional jobs which could be easily lost to other regions.

The new jobs created by call centre operations are not, of course, capable of replacing the male manufacturing jobs, which have been lost in recent years. They are of a different type and, so far, employ women rather than men. This does not seem to us to make these jobs somehow less worthwhile, as one of the quotations at the beginning of the paper appears to suggest. In the first place, services are now the main employer in advanced economies and the attraction and development of service job opportunities will be required for economic growth, even during periods when manufacturing employment is healthy. Second, call centre jobs create opportunities for women to (re)enter the labour market at a time of increasing female participation in the workforce.

There are a number of problems, however, with over-reliance on call centres as a source of employment growth. The jobs involve a restricted range of skills, and the skills involved do not have a particularly high social status. This is due in part to the fact that call centre work is female-dominated. The work in call centres is highly controlled. Lack of employee autonomy, when taken together with the intense, repetitive and stressful nature of the work leads to staff 'burn out' and high rates of staff turnover. There is a trend for call centres to operate in the evening, overnight and at weekends, without compensatory remuneration for employees for the anti-social hours worked. Furthermore, there are limited opportunities for career development for most staff. In addition, in the North East at least, there is little evidence of dynamic benefits,

such as the creation of support industries and other entrepreneurial spin-offs. There must also be some concern about the failure of the North East region to develop or attract call centres in areas such as IT, and also about the low number of pan-European call centres, both of which often offer better paid employment. Lower order activity call centres are also in the forefront of the trend towards part-time and more flexible working. There are also grounds for concern as to how permanent such jobs will be. New technologies such as voice response systems are already replacing some human operators. If truly user-friendly multimedia technology emerges many more jobs will disappear.

On the other hand, our research shows the picture is more complex than the popular image that call centres are simply the 'sweatshops' of the service economy. The environmental and ergonomic conditions provided for the workforce in the majority of call centres are far in advance of those present in many traditional offices. Though work pressures are certainly intense and the work often very stressful, employees who move from non-call centre jobs in the same organization, perhaps from a branch network, frequently comment positively on the call centre as a workplace, making the point that their previous work environment was also becoming increasingly stressful. Call centres are often described as open, exciting and friendly places in which to work. However, it is also the case that call centre employees complain that their role is undervalued and deemed to be of low status by both other parts of the organization and by the wider community.

It is important to emphasize that there are considerable variations between companies in the nature of the call centre work they offer, and 'best practice' companies have introduced a variety of practices to ameliorate some of the negative aspects of the work. For example, some have introduced extra tiers into organizational hierarchies as a means of motivating staff and preparing them for future promotion. Others seek to give employees a break from the telephone, allowing them to carry out other paper-based tasks. Performance-related pay based on individual performance is becoming less prevalent, although it is still the norm in sales-orientated call centres. These variations in organizational structure and working practices may indicate that there is some potential for regions to upgrade the quality of their call centre employment.

NOTES

1. This research consists of two projects funded by the European Commission: *Teleregions*, which examined the skill requirements of firms in the North East of England; and *Flexible Work Practices and Communications Technology*. The paper also draws on two further projects: *Changing Work Practices in the Service Sector* funded

- by the UK DETR, and Building a Call Centre Industry in North East England funded by the Northern Development Company.
2. This project was entitled Work Opportunities for Women in the Information Society: Call Centre Teleworking, and was funded by the European Commission.
 3. One of the authors has worked closely with the regional development agency on call centre strategy and has sat on the Call Centre Industry Forum in the region.
 4. There are a number of problems in using this type of unofficial data, including questions of consistency of methodology within and across series, and the figures reported in this section of the paper should be seen as indicative of rates of growth rather than reflecting precise rates of growth.
 5. It has become common in the call centre industry to gauge the size of a call centre by the number of 'active agent positions'. This refers to the number of workstations occupied from 8 a.m. to 5 p.m.. As many call centres operate 12-hour working days, and in some cases 24-hour days, with a number of shifts, and also commonly employ around 25% of staff on a part-time basis, agent positions will generally underestimate the numbers of people employed in a given call centre, assuming that it is working to capacity.
 6. See DATAMONITOR, 1998, figures which suggest 162,600 agent positions. Datamonitor includes all centres employing 10 agents and above, Mital only those employing more than 20 agents and above.

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