



# РосБизнесКонсалтинг

RBC.RESEARCH / CONSULTING DEPARTMENT

## RUSSIAN CALL CENTER OUTSOURCING MARKET: MOVING FURTHER INTO THE REGIONS

**Analytical Review**

The 8<sup>TH</sup> edition



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Moscow, 2012

## ANNOTATION

The report "Russian Call Center Outsourcing Market - 2012" deals with the integrated research of the market of call centers (contact centers, context centers) that provide outsourcing services in Russia. This marketing research has been conducted for the eighth time and *may be interesting both for the market players (contact centers) and the customers that are using outsourced call center services.*

The report "Russian Call Center Outsourcing Market - 2012" ranks the leading contact centers by their market share, inbound and outbound traffic and number of agents' workplaces. It also contains information on the volume of the Russian market of outsourced call center services, the revenue of the largest contact centers, the total number of available as well as in-use operators' places, and physical locations for the major outsourcing call centers.

Separate sections are concerned with the personnel policy, an analysis of outsourced call center fees and the key providers of CPC (call processing center) systems. The report contains profiles of Russian developers of solutions for call centers.

As part of the marketing research "Russian Call Center Outsourcing Market - 2012" the analysts of RBC.research held a survey among the visitors of the RBC web-site, where the number of respondents exceeded 6,300 people. The goal of the survey was to study the preferences of people who contact, customer care/directory services and the specifics of their behavior. The survey results made it possible to determine the communication channels that callers use most often to contact call-center operators; the maximum waiting time in queue that does not irritate the caller; the relevance of dialect or accent in the speech of the call center operator; the caller's readiness to pay for a rapid connection with a call-center operator; the reasons why the caller may terminate the call prematurely; what the caller prefers to listen to while waiting for a connection with a call center operator; and the readiness of the caller to use a "return call" service.

The marketing research "Russian Call Center Outsourcing Market - 2012" was carried out in May-July 2012. Report was translated in October 2012.

The research methods included: questionnaire survey of the market participants, inspection of agents' places, interviews with industry experts, polling of contact center callers, data analysis, and desk studies.

The eighth edition

The report volume: 65 pages.

The report contains 27 tables and 49 graphs and diagrams.

The report language: English, Russian.

(The report is provided as a PDF file).

**More details about  
RBC.research:  
[www.research.rbc.ru](http://www.research.rbc.ru)**



Project Manager: Stanislav V. Mirin, Cand. Sc.

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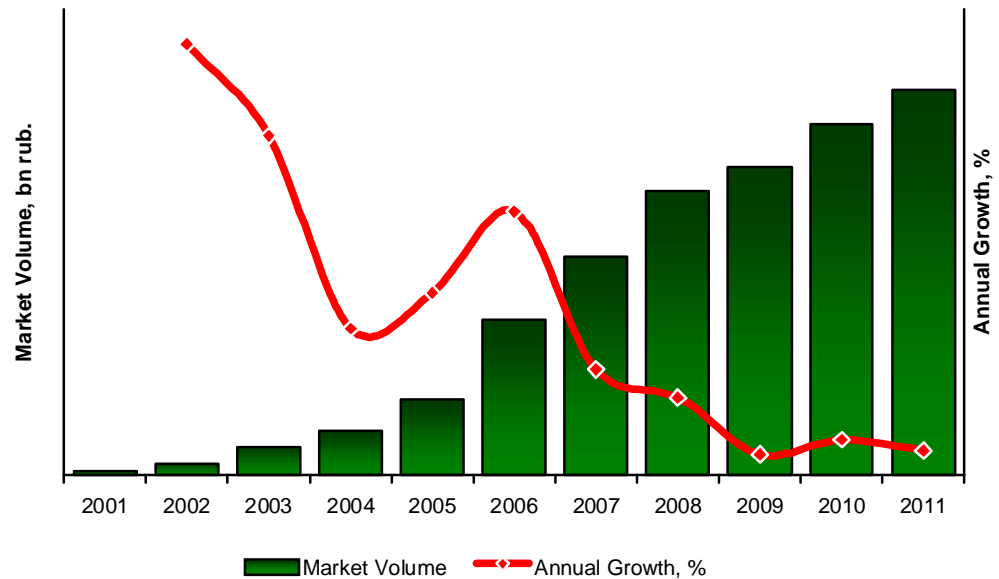
# RUSSIAN MARKET OF CONTACT CENTER SERVICES

## Market Size and Key Players in the Market of Outsourced Call Centers

### Market size and the number of operator's places

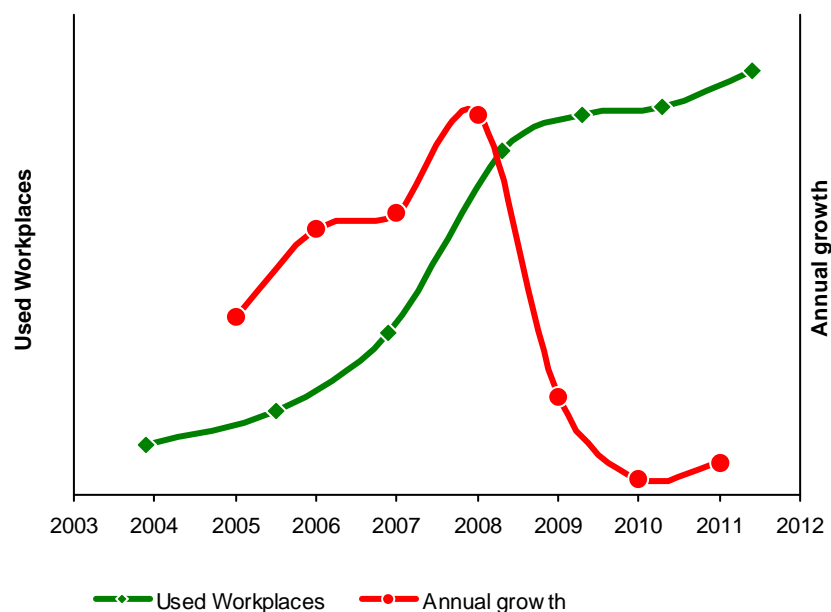
According to the estimate of RBC.research, the market of outsourcing call center services in Russia in 2011 grew by 9.7% and reached ...

### Call Centers Outsourcing Market in Russia (2001-2011)



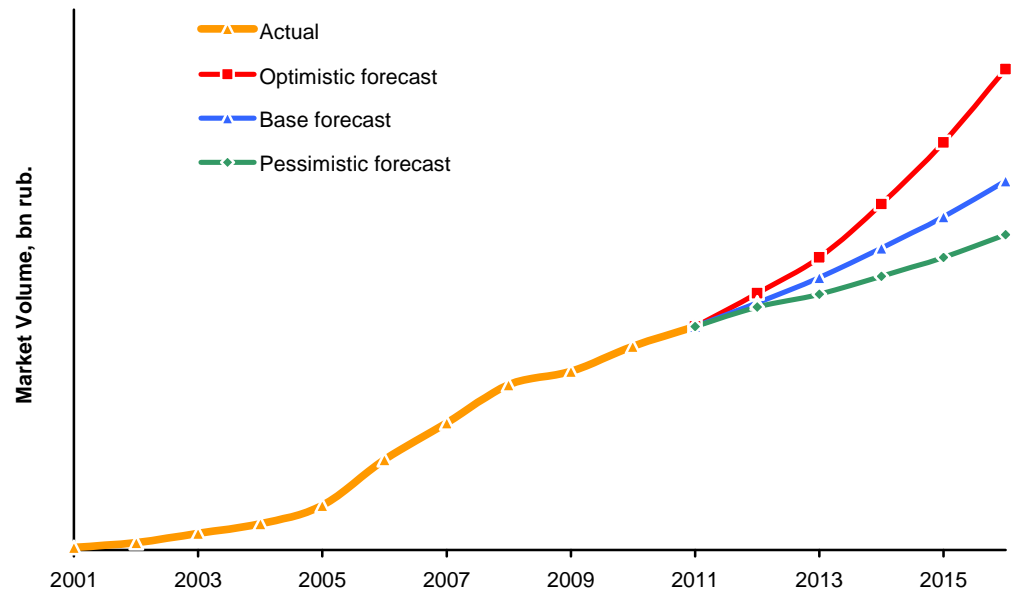
Source: RBC.research

### Used Workplaces in Outsourced Call Centers and Their Growth Rates, 2004-2012



Source: estimate by RBC.research

### Expected Development of Call Center Outsourcing Market in Russia in 2012-2015

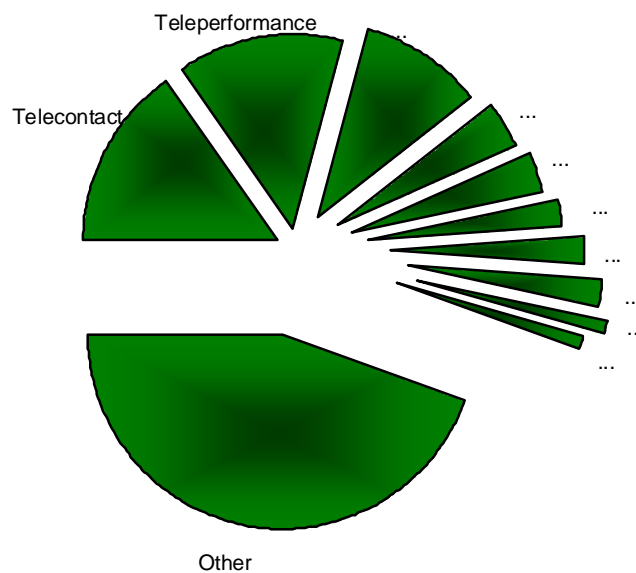


Source: RBC.research

### Market Leaders

Six Russian largest outsourced call centers still have over 50% of the market.

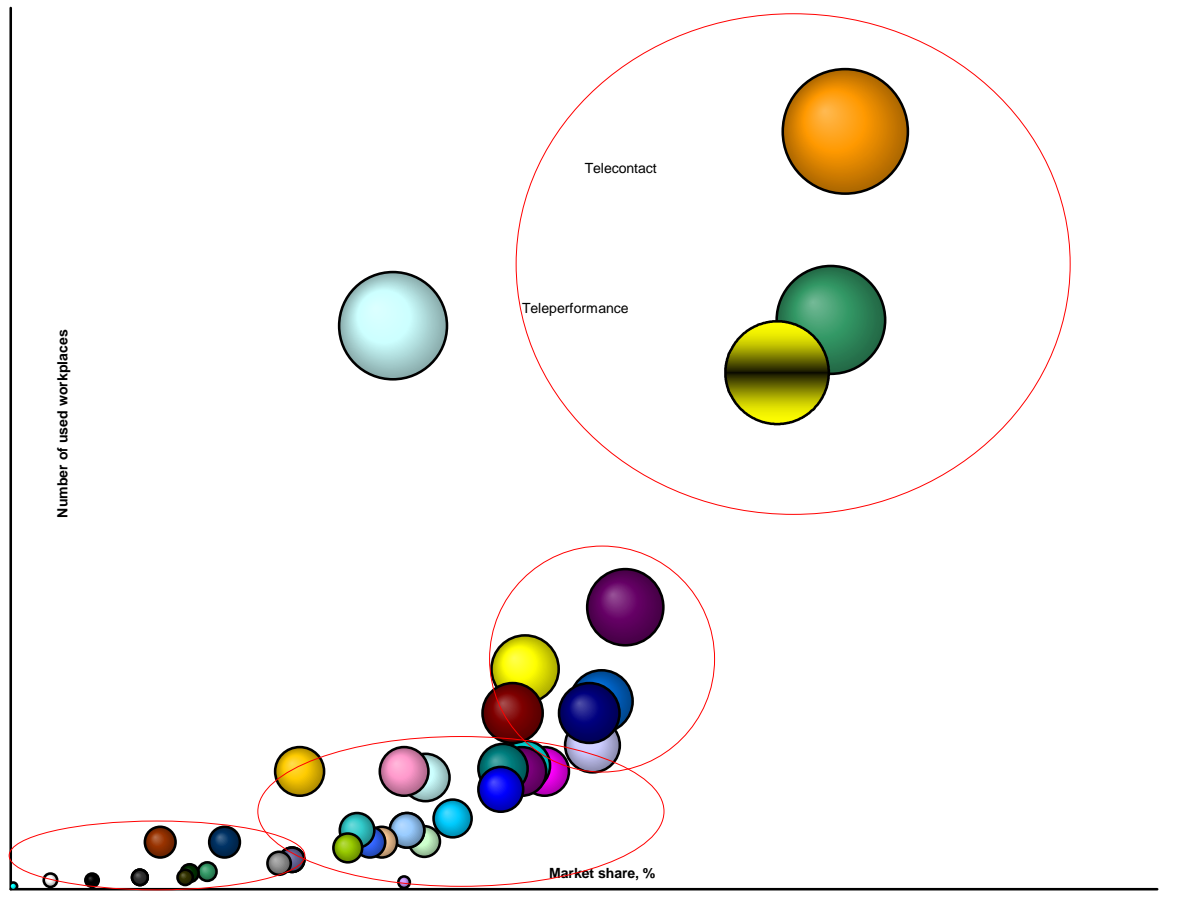
#### Market Shares of Call Centers by Income from Outsourcing Services, 2011



Source: RBC.research



## Segmentation of Russian Call Centers by Market Share



Source: RBC.research

## RESULTS OF SURVEY ON THE RBC WEB-SITE

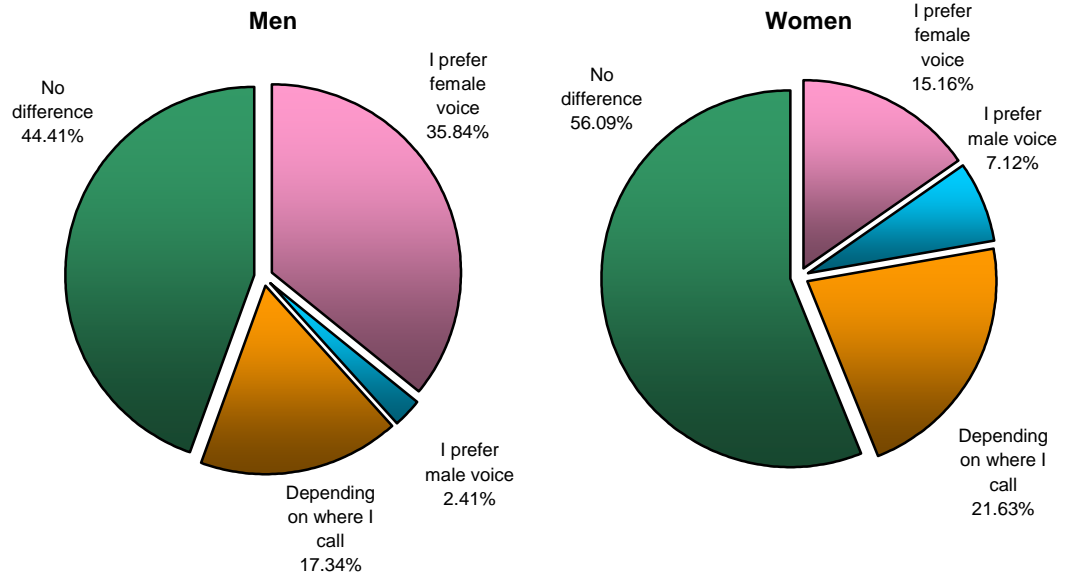
### Voice of Call Center Operator

The call center operator greatly influences the client's first impression. The goal of our survey was to find out subscribers' preferences when they call to a call center.

The survey conducted on the RBC's web site made it possible to ascertain that for the majority of the respondents, when they call a customer care/directory service, the operator's voice has no difference. Male respondents more often prefer female voice than women: 35.84% of men prefer to hear female voice and only 2.41% – male voice. The percentage of female respondents who prefer to hear female voice is 15.16%, male voice – 7.12%.

For the greater part of the respondents, when they contact a call center, the consultant's sex makes no difference. Those respondents who prefer a particular consultant's sex specified that when they contact a bank or another financial institution, a telephone company, an airline, a travel agency, a medical or a pharmaceutical advisory service they prefer to hear female voice, while male voice is more preferable for technical support from an Internet provider and for legal advice.

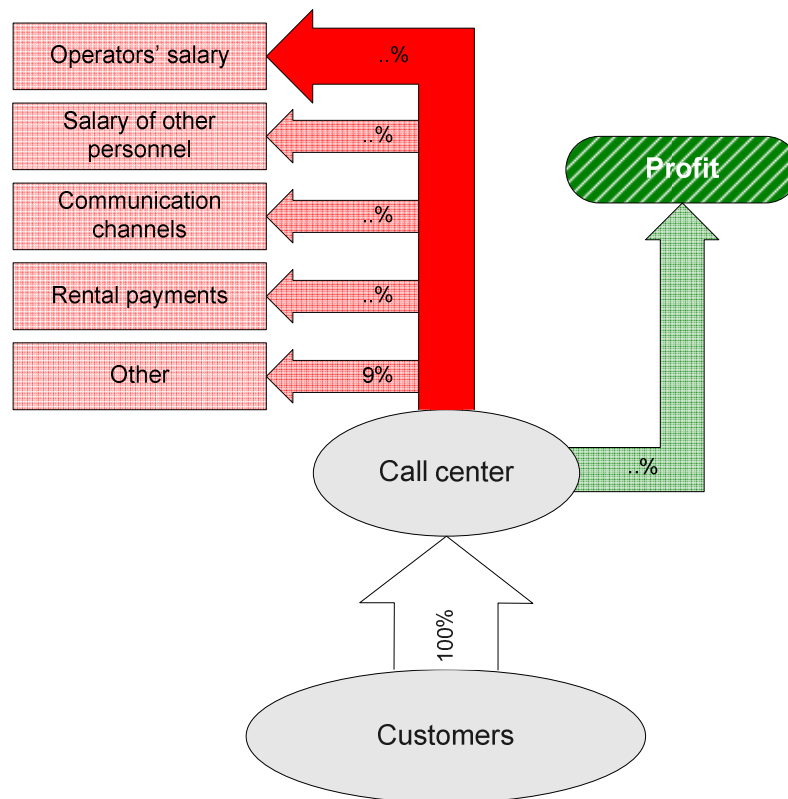
**Survey Results: Subscribers' Preference in Respect of Call Center Operator's Voice, 2011, % of the respondents**



Source: RBC.research

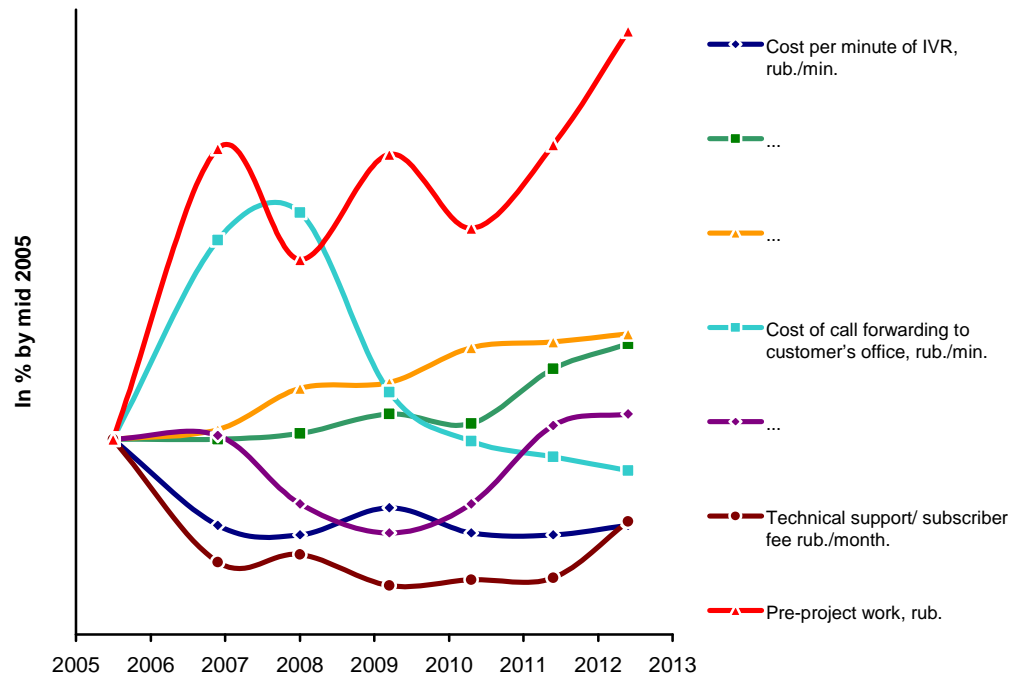
**FINANCIAL FLOWS AND COST OF SERVICES**

**Indicative Diagram of Financial Flows in Call Center Market**



Source: RBC.research, the diagram is based on averaged data from 23 outsourced call centers, profit share – expert estimate, survey of 2012

### Cost of Call Center Services (Weighted by Number of Operator's Places)



Source: RBC.research

## STAFF POLICY OF OUTSOURCED CALL CENTERS

### Salary Level of Call Center Employees

Position	Average monthly salary (after taxes, net ) (for all call centers)	Average monthly salary (after taxes, net ) (for 3 largest call centers)
New operator	...	...
Experienced operator	...	...
Supervisor	...	...
Call Center Manager	...	...

Source: RBC.research, call centers data, 2012

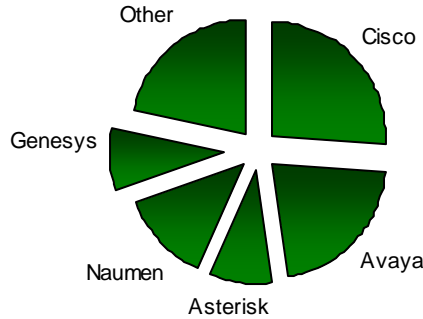
### Ratio of Average Monthly Salaries of Call Center Employees in Moscow and in Provinces

Position	Moscow, rub.	Provinces, rub.	Ratio of regional call center salary to the Moscow one, %
New operator	...	...	...
Experienced operator	...	...	...
Supervisor	...	...	...
Call Center Manager	...	...	...

Source: RBC.research, call centers data, 2012

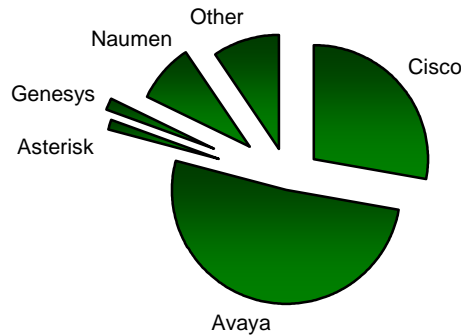
# KEY VENDORS OF EQUIPMENT FOR CALL PROCESSING CENTERS

## Usage of Equipment from Different Manufacturers in Outsourced call centers, 2012



Source: RBC.research, call centers data, 2012

## Shares of Manufacturers by Number of Installed Workplaces, 2012



Source: RBC.research, call centers data, 2012

## Total Number of Call Center Solutions Implemented in Russia

Vendor	Forte-IT	NAUMEN	Oktell	Infinity, Infinity TAXI	PROTEY
<b>In total during entire company's life, number of call centers</b>	...	...	...	...	...
Of which more than 1,000 workplaces					
from 500 to 999					
from 250 to 499					
from 100 to 249					
from 50 to 99					
from 20 to 49					
less than 20 workplaces					
<i>Number of installed agent's workplaces</i>					

Source: RBC.research, vendors data, 2012