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RESEARCH STUDY ON CALL CENTRES IN MALTA & GOZO

Final Report

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Executive Summary

This study focuses on the Call Centre sector in Malta. A Call Centre is a centralized office used for the purpose of receiving and transmitting a large volume of requests, mainly by telephone. Types of calls are often divided into **Outbound & Inbound**. Inbound calls are calls that are initiated by the customer to obtain information, report a malfunction or ask for help. This is substantially different from outbound calls where the agent initiates the call to a customer mostly with the aim to sell a product or a service to that customer.

This research study focuses on the Call Centre sector and the employment situation in these centres set up in recent years in Malta & Gozo. The overall aim of the research is to understand the current state of the sector and to define the sector in terms of employment and skills required. This is to be done also with the view of determining whether the sector is experiencing any shortages in terms of labour and skill supply.

The methodology used is based on gathering information from three key main sources. An interview was carried out with the person at Malta Enterprise in charge of providing support to businesses wanting to set up a Call Centre in Malta. Interviews were also carried out with employers of Call Centres. Finally, a telephone survey with job seekers interested in finding employment in the Call Centre sector was carried out.

The main overall findings of the study are the following:

- The Call Centre sector has grown steadily in the past three years, particularly with the setting up of the HSBC Call Centre which employs over 500 people;
- There have been changes in the type of services in the Call Centres. Some have closed down their international contracts and downsized. Others are moving away from telesales which is dying. There is potential and growth in those small Call Centres which offer technical support to both the local and foreign market;
- Call Centre employers feel that the sector will keep on growing in the future, particularly in those services related to technical support. If there is saturation, this will be the result of the limited labour supply that a small country of 400,00 inhabitants can provide, unless Malta manages to attract workers to the sector from other EU member states;
- Local job seekers lack the language skills to work in services which require the knowledge of foreign languages, and this cannot be achieved through training;
- Local job seekers lack the native English accent which Call Centres require, mainly for telesales for the British market;
- There is the possibility for local job seekers to try and find employment in technical services in banking and IT. However, there seems to be a great need for training in communications and other skills and attributes required for the job;

- There is good potential for training to provide job seekers with the skills and attributes to find employment in Call Centres tailored for the local market. However, the potential number of posts is only part of the Call Centre sector and ETC should be aware of this in order to avoid massive training for this sector;
- There seems to be a misconception among job seekers on the conditions of work of a Call Centre Agent. Many confuse the Call Centre agent with that of a telephone operator. The Call Centre Agent job is more demanding, requires more communication skills, is target oriented and can be stressful;
- There is a mismatch between job seekers at ETC and Call Centre agents for foreign speaking clients or the British market in telesales. Job seekers lack the language skills required for these jobs. The level of spoken English of a good percentage of job seekers is also probably not good enough to work for the British market;
- There is a mismatch between job seekers and technical support Call Centre Agents. Current job seekers are limited in the technical knowledge that they have. However, with support and training, those who have potential can make it. ETC is to review profiles of job seekers to identify those who really have potential to take up such posts.
- There is a limited mismatch between job seekers and Call Centre Agents for the local sector. Training by ETC can help job seekers to obtain employment in the Call Centre sector. This can be made up for through training at ETC;
- Employers feel that many of the job seekers sent by ETC do not have the required skills and attributes to work in Call Centres. They strongly lack communication skills and ETC should invest in helping these people to develop their employment skills but also on a personal level;
- Employers believe that EURES can help the sector by helping them attract workers from other EU member states and who possess the required language skills which are not available in the local labour market.

Recommendations

Recommendations put forward are the following:

- It is a good exercise to monitor changes in the Call Centre sector. This is a fast changing and competitive sector. As the employers themselves have stated, this degree of uncertainty makes it a sector at risk and very volatile. ETC should continue to monitor the sector through an analysis of the engagement and termination forms in order to be aware of changes in the sector and size the investment training according to the demands in the sector;
- ETC should seek to develop stronger ties with employers of Call Centres as well as with Malta Enterprise to monitor the labour skill needs in the sector as they change, and to cater for providing the potential labour skills supply in the best possible way;
- ETC needs to explain better to job seekers what the job of a Call Centre Agent entails, what work conditions exist and what the salary scales are. It is useless to have many job seekers wanting to work office hours when the sector mainly uses shift work. It is also to be made clear that the job of a Call Centre Agent is much more demanding than some job seekers tend to think. It is useless to train people to work in a sector which then does not fit their expectations. This is to be done before investing so much money in training people who would not opt for the job even if they are eventually offered one;
- ETC needs to profile job seekers wanting to work in Call Centres to identify what language and technical knowledge they may possess and which would help them find work;
- Training offered by ETC and other entities to work in Call Centres should be tailored to meet the local sector demands better. This can be achieved through stronger ties with employers in the sector who can also offer on-the-job training as well as indicate the specific generic skills that job seekers need to develop;

The Eures Office has an important role to play in the Call Centre sector. This is the case due to the significant number of foreign EU nationals that are currently employed in the sector and the growing range of language skills required. EURES can help the sector in various ways:

- It can work to have closer ties with Malta Enterprise in order to help it understand that it can be crucial in supporting new companies setting up their business in Malta to find the required workers not only from the local labour force, but also through mobility from within the European labour market;

- EURES has a great role that it can play in helping local Call Centres in their search for workers with language skills from other EU member states. EURES can help employers make up for bottlenecks that employers can experience, particularly with respect to workers with specific language skills. It can also help employers learn more about the potential supply of workers from the European labour market which would allow them to take on new ventures and opportunities which will be possible only with the influx of foreign workers.

These recommendations provide direction toward which ETC may work to provide both an adequate local labour supply as well as help employers tap the European labour market when the skills required cannot be found locally. Ensuring a good supply of workers can help Call Centres grow and expand, increasing their contribution to the local economy.

1.0 Introduction

This study focuses on the Call Centre sector in Malta and the employment challenges and opportunities that one can find in this fast growing and fast changing sector of the labour market. Call Centres are the result of developments and organisational changes in the workplace in terms of ICT and work typology. The Call Centre explosion is the result of a fundamental re-organisation and re-configuration of the processes and locations of the customer interface¹. In other words, Call Centres now make up part of the customer service of companies, and which are provided either in-house or else out-sourced to other companies. The focus of this study is on outsourced Call Centres.

Among the first to offer Call Centre services were banks such as Girobank and the Bank of Scotland who started to offer remote banking 24-hour services in insurance and banking all the year round to their customers. The Royal Bank of Scotland Direct Line was established in 1988. The Midland's Bank's First Direct set up in 1989 revolutionised the provision of financial services².

The Call Centre sector has since grown as it expanded into other areas of customer services beyond that provided by banks. It has also experienced the globalisation of services as a number of Call Centres were set up in India, leading to the closure of those that had been established in the United Kingdom. The first company to open a Call Centre in India was HSBC, with a number of other companies from the United Kingdom, but also from the United States and Australia following suit³. In recent years, however, as costs in India are on the increase and the British market is getting tired of the Indian accent, other countries have become competitive with Call Centres moving away from India. Malta is one of the destinations attracting such companies, with HSBC being one of the biggest examples of Call Centres on the island. Malta has recognised its potential in attracting foreign companies in this sector and government investment through the work of Malta Enterprise is working to attract such companies to Malta.

1.1 Background Information on Call Centres

The first step in the study involves an understanding of the Call Centre sector. It is important to understand the structure and work in Call Centres in order to study what labour skills are needed.

¹ Bain, P, Watson A, Mulvey G., Taylor P. & Gall G., (2001), Taylorism , Targets and Quantity-Quality Dichotomy in Call Centres, Paper presented at the 19th International Labour Process Conference Royal Holloway College, University of London, 26-28 March 2001.

² Calleja, K., Call Centres in Malta: An exploration into the HRM practices, Unpublished dissertation in fulfilment of the degree M.Sc in Human Resource Management, University of Stratclyde, U.K.

³ Taylor P. & Bain P, (2004), Call Centre Offshoring to India: The Revenge of History?, *Labour & Industry*, 14, 3, 15-35 as cited by Calleja, K., Call Centres in Malta: An exploration into the HRM practices, Unpublished dissertation in fulfilment of the degree M.Sc in Human Resource Management, University of Stratclyde, U.K.

1.1.1 Defining the Call Centre

A Call Centre is a centralized office used for the purpose of receiving and transmitting a large volume of requests, mainly by telephone. A Call Centre is usually operated by a company to administer incoming product support or information inquiries from consumers. Call Centres can also do outgoing calls for telemarketing, clientele, as well as debt collection. In addition to a Call Centre, collective handling of letters, faxes, and e-mails at one location can also be present. This is known as a contact centre⁴.

Types of calls are often divided into **Outbound & Inbound**. Inbound calls are calls that are initiated by the customer to obtain information, report a malfunction or ask for help. This is substantially different from outbound calls where the agent initiates the call to a customer mostly with the aim to sell a product or a service to that customer.

A Call Centre is often operated through an extensive open workspace for Call Centre Agents, with work stations that include a computer for each agent, a telephone set/headset connected to a telecom switch, and one or more supervisor stations. A Call Centre can be independently operated or networked with other additional centres, often linked to a corporate computer network, including mainframes, microcomputers and LANs. With increasing technological advances, the voice and data pathways into the centre are linked through a set of new technologies called computer telephony integration (CTI).



Fig. 1.1: Photo of workstations in a Call Centre

Most major businesses use Call Centres to interact with their customers. Examples include utility companies, mail order catalogue firms, and customer support for computer hardware and software. Some businesses even service internal functions through Call Centres. Examples of this include help desks and sales support.

The centralisation of call management aims to improve a company's operations and reduce costs, while providing a standardised, streamlined, uniform service to consumers. To accommodate large customer bases, large warehouses are often converted to office space to host all Call Centre operations under one roof.

⁴ http://en.wikipedia.org/wiki/Call_centre

In reviewing literature on Call Centres Calleja⁵ highlights how work in Call Centres has been described within two different perspectives: the pessimistic view; and the optimistic view. In the pessimistic view, working in Call Centres is considered as poorly paid, of low status and a dead-end job. Work is of a routine nature and is highly controlled and monitored by management. She quotes descriptions used such as: 'electronic sweatshops' and 'dark satanic mills'. Within the optimistic view, Calleja describes how jobs in Call Centres can be interesting and challenging where the agents' skills are appreciated and acknowledged. However much tailored the service becomes, there still remain instances where agents can use their own discretion.

1.1.2 Models of services offered in Call Centres

Calleja⁶ also reviews the types of models of service offered by Call Centres as identified in literature. She identifies three main models:

- **Spread of mass production:** In this model, industrial techniques have been used to minimise costs and reduce the need for human labour. The result is standardised work minimising skill requirements and discretion of agents, limiting learning to carrying out repetitive instructions and tasks. Motivation for work is based on piece rate pay systems, fear of job loss and/or commission basis;
- **Professional service model:** This model is based on providing a quality service to customers. In this case, technology is used to enhance and support human labour rather than to replace it. The agents carry out specialized work which requires them to use their discretion in order to provide a personalised service. Although such service tends to be more expensive, it builds a sense of customer-supplier trust which leads customers to be ready to pay more for the better service. In many cases, the services offered by such Call Centres tends to be very specialised which is rare to find as well as valuable for the company commissioning the service;
- **Mass customization model:** This model falls between the two extremes just described. This model tries to find the best balance between a quality service and cost-effectiveness. This is mainly achieved through strategies which promote high involvement by staff through incentives, higher pay etc. but which still use technology to reduce the need for so much human labour.

It is evident that Call Centres struggle to provide quality service which is cost-effective but which is also customer oriented. This balance is not easy to achieve, particularly when considering the harsh competition that exists in the sector and how contracts can easily be lost to competitors as companies shop around the world for the best service at the cheapest cost.

Call Centres are also target oriented as they strive to reach the targets set in their contracts. Call Centre staff are thus often monitored for quality control, level of

⁵ Calleja, K., (2007), Call Centres in Malta: An exploration into the HRM practices, Unpublished dissertation in fulfilment of the degree M.Sc in Human Resource Management, University of Stratclyde, U.K.

⁶ Calleja, K., (2007), Call Centres in Malta: An exploration into the HRM practices, Unpublished dissertation in fulfilment of the degree M.Sc in Human Resource Management, University of Stratclyde, U.K.

proficiency, and customer service by computer technology that manages, measures and monitors the performance and activities of the workers. Typical contact centre operations focus on the discipline areas of workforce management, queue management, quality monitoring, and reporting. Reporting in a Call Centre can be further broken down into real time reporting and historical reporting. The types of information collected for a group of Call Centre agents can include: agents logged in, agents ready to take calls, agents available to take calls, agents in wrap up mode, average call duration, average call duration including wrap-up time, longest duration agent available, longest duration call in queue, number of calls in queue, number of calls offered, number of calls abandoned, average speed to answer, average speed to abandoned and service level, calculated by the percentage of calls answered in under a certain time period.

Many Call Centres use workforce management software, which is software that uses historical information coupled with projected need to generate automated schedules to meet anticipated staffing level needs.

One of the challenges within Call Centres is attrition, also known as turn-over. Call Centres are characterized with high levels of turn-over. In Call Centres in India, for example, this can be as high as 30% per annum⁷. This is costly when one considers the time spent in the recruiting process as well as the expense in continually training these newly recruited call agents. It also increases costs for Call Centres which are already struggling to keep their competitive edge.

1.1.3 Malta as a Call Centre destination

Malta has many attractions for an international company to base an operation, particularly an off-shoring operation. HSBC has been in Malta since 1999. This has helped provide a fairly good idea about Malta, its culture, its people, its work ethic and its customer services capability. The success experienced by companies opening Call Centres in Malta were the result of Maltese labour supply who were, within a very short period of time, able to show that they possess an aptitude to learn the skills required to run a Call Centre and to give good customer satisfaction.

Malta Enterprise, in promoting the Call Centre and ICT sectors in Malta, highlight a number of advantages and strengths that Malta can offer. It identified these to include:

- English as an official language – accent free and knowledge of colloquialisms;
- Multilingual skills;
- EU member state;
- Central European Time Zone;
- Conveniently located between Europe and Northern Africa/Middle East;
- Size provides an ideal test bed for innovative technology solutions;
- Political and economic stability;
- Highly productive workforce;
- Low employee turnover;
- Low social costs;
- Privacy and security legislation in line with EU;
- Data Protection Act in Force;

⁷ Venkata Subramaniam, L, (2008), Call Centre of the Future, www.itmagz.com, Feb 2008 edition.

- Secure and Pleasant Mediterranean Lifestyle;
- Complete cultural affinity with the West;
- The Climate and Beauty of the Country⁸.

These advantages have been also recognized in the International Market, with the same Malta Enterprise document quoting the World Research Centre to comment on Malta stating that it *'offers foreign businesses a generally secure environment for investment...restructuring and development of physical infrastructure...coupled with the economy's innate cost-competitiveness and the ongoing diversification of income sources, Malta will retain its status as of the World's best small economies'*⁹.

Malta Enterprise has also produced information literature to promote Malta among foreign Call Centre companies interested in setting up business in Malta. This document highlights how Malta Enterprise is focusing on calls that are customized and often require a significant technical input. It puts forward an argument where Malta can offer bespoke services with intelligent solutions to companies outsourcing needs and effective communications which demand highly personalized interaction processes.

The Malta Enterprise brochure on Call Centres¹⁰ highlights the advantages which Malta offers specifically for Call Centres and lists these to include:

- **Cost:** Malta offers cost savings in terms of employee costs and overheads. Direct labour costs are identified to be 25% cheaper than in Western Europe as are office infrastructure. Property costs for purchase and renting are also the cheapest within the EU;
- **Multi-lingual workforce:** The Maltese workforce is defined as highly educated and with high proficiency in English as it is one of the country's official languages. It also offers a well priced workforce with proficiency in other languages such as French, German and Italian. There is also a customized supply of workforce through tailored training courses for Call Centres;
- **Supporting infrastructure:** Malta has good air connections with most European, North African and Middle East destinations. It also has high internet penetration and strong telecommunications infrastructure;
- **Proximity to Europe:** Malta is close to Europe in a physical and cultural way, and particularly with the UK culture. These provide a near shore location that minimises operational risk and allows maximum operational control;
- **Strong business Tradition:** Malta has a diversified and strong industrial and services base with many world class companies operating successfully; and
- **Lifestyle:** Malta offers a stable safe and secure environment with high standard of living at low cost. The Mediterranean climate encourages a very active outdoor social and cultural life.

⁸ Malta Enterprise, (2007), Your Business Case, ICT Report, Malta Enterprise: San Gwann.

⁹ World Market Research Centre – Jan 2006, as quoted by Malta Enterprise, (2007), Your Business Case, ICT Report, Malta Enterprise: San Gwann.

¹⁰ Malta Enterprise, (2006), Malta-An outstanding Choice for Cal Centres, Malta Enterprise: San Gwann

In addition, the brochure highlights how Malta can also offer reliable Telecommunications Infrastructure. Malta has large bandwidth networks providing high capacity communications to and from the island. Networks are completely digital and international connections have been significantly expanded through satellite technology and high capacity fibre-optics linking Malta with Europe. More specifically the brochure quotes Malta to have:

- **International Bandwidth:**
 - Two international gateways via submarine optic fibre cables:
 - Vodafone: capacity of 2.5Gbps, STM-4 (622Mbps). Initially 40Mbps for voice and 90Mbps for data;
 - Maltacom: Capacity of 2.5Gbps, STM-4 (622Mbps) (voice, international private leased circuits over SDH, data)
 - Additional gateways via satellite links and digital microwave link.
 - Additional satellite circuits can be implemented.

- **Local Network:**
 - Extensive, fully digitized optic fibre network coverage across Malta and Gozo;
 - Core network is built around Ericsson AXE switches running state-of-the-art software (currently being further upgraded to the latest soft switches)
 - Network operations centre provides central management and control of the entire network;
 - High levels of network reliability achieved through SDH protection and heavy interlinking;
 - Fibre to the kerb or building is common.

- **Technologies**
 - Private international Leased circuits available;
 - Maltacom subsidiary Datastream offers BusinessNet network:
 - Based on a core optic fibre infrastructure;
 - High level security, resilience and committed bandwidth;
 - Core technology based on ATM switching;
 - Connection totally dedicated to customer (irrespective of level of data transmission)¹¹.

It is to be understood that these specifications were quoted in 2006 and that most probably there have since been further developments and advancements in the services. ICT is a fast changing technology and Malta has always tried to keep up with these developments as much as possible. None the less, Malta remains a highly technological country. With the SMART CITY project, there is surely to be further investment in ICT in the country keeping Malta within the competitive edge of state-of-the-art technologies.

Malta Enterprise is advertising Malta as a nearshore destination for the outsourcing of Call Centre services¹². The services that Malta's Call Centres can offer to clients include a long list of possible services: both inbound and outbound. These services include:

¹¹ Malta Enterprise, (2006), Malta-An outstanding Choice for Cal Centres, Malta Enterprise: San Gwann

¹² Ibid.

Inbound Services

- Virtual reception services
- Customer relationship management
- Virtual Personal Assistant
- Mail-order lines
- Campaign evaluation
- Comprehensive reporting
- Donation Lines
- Internet Response
- Data Capture
- Store locator
- Customer help lines
- E-commerce
- Information line
- Telephone Order lines
- Disaster recovery

Outbound services

- Survey and opinion polls
- Telesales
- Lead generation
- Appointment-setting
- Mailshot follow-up
- Market research
- Welcome calls
- Database-building
- List cleaning/mining
- Customer relationship management
- Sales leads follow up
- Direct sales
- Event building
- Information gathering
- Enhancement and analysis¹³

Furthermore, Malta Enterprise has financial incentives specifically aimed at those companies wanting to set up Call Centres in Malta. Malta Enterprise is enabled by the Malta Enterprise Act (ME Act) to support the development of enterprise in Malta. The set of incentives for the promotion and expansion of industry and the development of innovative enterprises are aimed for foreign direct investors and local enterprises demonstrating commitment towards growth and increase in value added and employment. Enterprises engaged in manufacturing, ICT development activities, Call Centres, Healthcare, Pharmaceuticals, Biotechnology, among others, may benefit from these incentives.

The incentives are subdivided into six (6) separate themes, namely:

- **Investment Aid:** Companies engaged in specific activities can benefit from tax credits on capital investment and job creation;
- **SME Development:** Grants targeting the creation and development of innovative start-ups, and the development of forward looking small and medium-sized enterprises;
- **R&D and Innovation:** Various incentives are offered to stimulate innovative enterprises to engage in research & development.
- **Access to Finance:** Companies may be assisted through loan guarantees, soft loans, loan interest subsidies or royalty financing in the case of highly innovative projects;
- **Enterprise Support:** Assistance to businesses to support them in developing their international competitiveness, improving their processes and networking with other businesses; and

¹³ Malta Enterprise, (2006), Malta-An outstanding Choice for Call Centres, Malta Enterprise: San Gwann.

- **Employment and Training:** These incentives are administered by the Employment & Training Corporation. Enterprises are supported in recruiting new employees and training their staff.

With respect to Call Centres specifically, the sector has been identified as a priority sector which qualifies companies interested in setting up market in Malta to quality under the Business Promotion Act and it is advertised that such companies may be eligible for reduced rates of income tax, loan grants, investment tax credits, provision of premises as well as assistance for training of employees.

1.2 Methodology used in research

The European Employment Services (EURES) within ETC has for the past years been involved in providing information, advice and recruitment/placement services to EU citizens wanting to work in the local labour market. EURES Malta has regularly organised seminars, exhibitions/fairs, meetings with organisations related to the local business community, and carried out various promotional campaigns, in order to attain its goals. EURES Malta also offers various services to foreigners who wish to work in Malta.

A number of local EURES Advisors have been appointed following specialised training in this field, and who operate in direct collaboration with approximately 700 EURES Advisors across Europe.

EURES Malta has been working to provide its services in various ways and to both workers and employers. In the case of workers, EURES provides information to Maltese nationals wanting to go and work abroad. It provides information about jobs available, websites and contacts for jobs, information about living conditions in any other EU country, information about social security, health services, education etc. EURES also offers similar service to EU nationals interested in and looking for work in Malta. It works to provide information and support about living in Malta, which offices to consult for further information etc.

EURES has also provided information and support to employers. In this case it may be employers from other EU member states wishing to recruit workers from Malta, or else Maltese employers wishing to employ workers from other EU member states. This service aims to help employers in their business enterprise by helping them make up for any worker shortage by recruiting from within the EU labour market, as well as supporting the mobility of workers.

1.2.1 Aims and Objectives of the study

Call centres often require the recruitment of personnel with knowledge of languages. Many times this knowledge of a language also requires that an individual speaks with a good accent and can deal with native speakers. Requests for language skills often do not only require the good knowledge of English, but also of other languages such as French, German and other European languages. The local market may not always be able to provide the labour supply with such range of language skills required. Mobility of workers from the EU member states may be a possible solution to overcome bottlenecks in labour supply that employers may experience.

This research study focuses on the Call Centre sector and the employment situation in these centres set up in recent years in Malta & Gozo. The overall aim of the research is to understand the current state of the sector and to define the sector in terms of employment and skills required. This is to be done also with the view of determining whether the sector is experiencing any shortages in terms of labour and skill supply.

In researching the Call Centre sector, a number of specific objectives have been set. The specific objectives of this project were the following:

- To determine the size and type of employment within call centre companies;
- To determine the type of skills and qualifications held by employees working with call centre companies;
- To determine the type of working conditions of employees working with call centre companies;
- To measure and describe the demand for employment and kind of skills required currently and in the near future by call centre companies;
- To determine the amount of jobseekers that wish to work with call centre companies and the skills they hold;
- To determine whether there is a mismatch between labour/skill demand and supply in the call centre sector, the main reasons behind such mismatches, and how companies or jobseekers are facing such a challenge;
- To determine whether any measures or strategies are being taken up to tackle mismatches, if any, in labour/skill demand and supply;
- To determine whether companies would consider job mobility as one of the solutions to resolve labour market shortage in the sector and what is their opinion on the matter;

A number of results were to be achieved by the study as stipulated by the EURES office: The outcomes of the research study were to include the following:

- A detailed description of the call centre sector in terms of size and nature of employment as well as skills and qualifications held by employees working in the sector;
- A detailed description of labour demand and supply and skills demand and supply of the call centre sector and whether there are any mismatches;
- A detailed description of measures being taken up in favour of call centre employment and whether they are tackling effectively any labour and skills shortages;
- An assessment of whether job mobility can be considered as a solution to solving labour and skills shortages in the call centre sector;
- A set of recommendations on what should be improved in solving labour and skills shortages, if any, in the call centre sector based on the findings of the study.

1.2.2 Specific Research Methodology adopted

In order to undertake this study it was believed that to obtain a full understanding of the call centre sector it was necessary to consult all the key players involved. The three main sources of information included:

- **Public entities, mainly ETC and Malta Enterprise.** Malta Enterprise, as has already been highlighted, has specific schemes for attracting companies wanting to set up call centres to bring their business to Malta. Consequently Malta Enterprise is among the first to be in contact with foreign companies interested in setting up their business in Malta. Malta Enterprise will thus have knowledge of the degree of interest by foreign companies wanting to set up call centres in Malta, as well as the degree of readiness in terms of labour supply in this sector. ETC also holds records about call centres such as: requests for recruitment; engagement forms submitted; as well as the number of employers registered as call centres. Malta Enterprise and ETC thus can provide data which would help build an understanding of the call centre sector in Malta;
- **Employers:** Those setting up Call Centres are in the best position to provide insight of the sector. They are aware of the skills that they need their workforce to possess, as well as the type of shortages that exist in the local labour market. Employers thus can provide a direct view of the sector in terms of skills required and skills shortages;
- **Job seekers:** Those wishing to work in the sector need to possess the range of skills and competences required in call centres. A survey with job seekers wishing to work in Call Centres can thus allow researchers to study if these jobseekers possess the skills for jobs within this sector as well as identify those skills and competences which many job seekers wanting to work as Call Centre Agents do not possess.

The study was conducted by carrying out the following research exercises. These can be divided into three main aspects: collecting information from government entities about Call Centres; carrying out a qualitative study among employers running Call Centres; and a telephone survey among job seekers registered at ETC, and who have expressed an interest in working within the Call Centre sector.

1.2.2.1 Data collection and consultation with public entities

This part of the study involved talking to public entities that could provide information about the call centre sector. As already indicated, the two public entities which could provide information were Malta Enterprise and the Employment and Training Corporation (ETC). This part of the research involved collecting relevant data as well as carrying out an interview. With respect to Malta Enterprise, the person responsible to deal with companies interested in setting up Call Centres in Malta was identified and an in-depth interview carried out to understand the Call Centre sector. This part of the study helped the researchers to achieve the following aims:

- To determine the size and type of employment within the call centre companies; and
- To measure and describe the demand for employment and kind of skills required currently and in the near future by call centre companies.

This interview not only served to help the researchers to learn more about the sector but also to have enough background for designing and preparing the research tools (interview schedule and telephone survey) for the other parts of the study. The interview carried out with the person at Malta Enterprise helped to understand the following factors with respect to Call Centres:

- ***Nature of ownership of local Call Centres:*** This relates to whether the companies set up are a joint venture between foreign and local companies or if they are wholly local companies;
- ***Nature and type of services offered by local Call Centres:*** These questions focused on enquiring whether the existing call centres were all in the same sector of services or whether the market was diversified. The person at Malta Enterprise holds an overall view of the sector due to her position and role and her input was helpful;
- ***The degree of interest by other companies to set up Call Centres:*** These questions probed the degree of interest by foreign companies in the near and mid-term future. These questions served to get a glimpse of the possible opportunities and challenges that Malta may have in terms of labour supply;
- ***Information about employment opportunities and conditions:*** A number of questions focused on employment. Information about language and other skills often requested by companies setting up their business in Malta, salary scales, gender segregation in the sector etc. were included;
- ***Difficulties encountered by companies setting up Call Centres in Malta:*** Malta Enterprise is among the first to be in contact with companies setting up Call Centres in Malta. ME will be the first to know about problems and difficulties that companies experience in its role of providing support. The interview also aimed to help identify any problems that new companies encounter in recruiting workers when setting up their business in Malta.

The questions set for the interview with the person at Malta Enterprise can be found in Annex 1 at the end of the document.

In addition, information was provided by the Employment and Training Corporation (ETC). This information was in the form of data about employment and turn over of workers that could be traced from the engagement and termination forms received by ETC during the past twelve years (due to the first Call Centre being traced back to 1996). This data allowed the researchers to map the number of jobs created by the Call Centre sector, the job types (full/part-time), the rate of growth, as well as what attrition it experiences.

In addition, the researchers have also conducted web searches to find literature on Call Centres as well as to identify any provision of training for work in Call Centres for the local labour market.

1.2.2.2 Study among companies operating in the sector

This part of the study involved a qualitative study among employers running Call Centres in Malta. This part of the study enabled the researchers to identify the types of skills employers require, the shortages that they were experiencing, as well as the employers' view with respect to job mobility of workers across Europe with workers from other EU member states coming to Malta to work in call centres.

More specifically, the aims of this part of the study were:

- To determine the size and type of employment within the Call Centre companies;
- To determine the type of skills and qualifications held by employees working within Call Centre companies;
- To determine the type of working conditions of employees working with Call Centre companies;
- To measure and describe the demand for employment and kind of skills required currently and in the near future by call centre companies; and
- To determine whether companies would consider job mobility as one of the solutions to resolve market shortage in the sector and what is their opinion on the matter.

The interview questions drawn up aimed to obtain a comprehensive view of the Call Centres activities, the different types of employment levels they offer, the qualifications, skills and competences that they require of workers, problems that they encounter in recruiting and keeping their workers as well as prospects of growth in the short, medium and long-term. More specifically, the type of information to be obtained included:

- **Details about the company:** The first part of the interview gathered information about the company. It requested information such as the size of the company, type of ownership, balance of employees in terms of gender and age, as well as the balance between Maltese and foreign workers;
- **Reasons for setting up of Call Centre:** This set of questions probed information about the reasons for which the company was set up, what was attractive about setting it up in Malta, what financial and labour supply advantages Malta offered, what problems they encountered when setting it up, as well as information on projections for growth and/or diversification in the short, medium and long term;
- **Type of employment:** This set of questions focused on the type of jobs within call centres. A description of the different jobs, the qualifications, skills and attributes required for each was also requested. The rest of the section focused on the age of new recruits and the reason for which foreign nationals are recruited;
- **Working conditions of Employees:** This section focused on the working conditions offered by Call Centres. Questions probed information about whether jobs were full or part-time, options of reduced hours, flexibility of work, shift work, work on weekdays and holidays, contract conditions, rate of pay, opportunities for advancement, as well as on-the job training and other types of incentives;

- **Matching labour skills/demand and supply:** This section focused on whether the employers were planning to recruit in the short/medium and long-term, what qualifications and skills they were looking for, what turn-over of staff do they experience, and whether Maltese people provided an adequate labour supply, and if not, what were those attributes that job seekers lacked. The employers were asked what challenges they were facing and whether they had used government entities to help them face these challenges;
- **Job mobility:** This last section focused on the recruitment of foreign nationals, whether they had a number of foreign applicants, whether they ever used the EURES services and if they thought that EURES could help them find foreign workers willing to work in Malta. On a final note, employers were asked if they thought that it was worth training Maltese people to work in Call Centres or if it was better to scout foreign nationals to work in this sector.

The interview schedule with all the questions set to employers can be found in Annex 2 at the end of the document.

1.2.2.3 Telephone Survey among job seekers

The third part of the study involved a quantitative study among jobseekers registering at the Employment and Training Corporation and whose occupational preference was listed as working as a Call Centre Agent in Call Centres. This study was designed to provide insight of the degree to which the skills and qualifications of these job seekers matched those required by employers within the sector. It also made it possible to identify the training requirements which could help make up for these skill shortages.

More specifically, this part of the study allowed the researchers to:

- determine the amount of job seekers that wish to work with call centre companies and the skills they hold;
- Determine whether there is a mismatch between labour/skill demand and supply in the call centre sector, the main reasons behind such mismatches, and how companies or jobseekers are facing such a challenge.

The survey used was divided into the following sections:

- **Personal Details:** The first part of the study focused on the respondents' profile. Questions set gathered information about the age bracket, gender, and status.
- **Educational Profile:** This part of the survey asked respondents to give details about the highest level of school attended and qualifications attained. They were to give details of the qualifications obtained at SEC, Intermediate and Advanced level as well as any other type of qualification. Qualifications in ICT, mainly the ECDL was also requested;
- **Employment profile:** This part of the survey asked the respondents about their employment history, mainly how long they have been out of work, if they had any other work before, what this work was, and why they had lost their previous employment;

- **Personal Attributes:** In this section the individuals were asked to rate their capabilities/personal attributes. They had to state how good they were at listening to people, talking to people, to answer the phone, to sit down for a long time as well as to work in a noisy environment.
- **ICT Skills:** The respondents were asked to rate their capabilities in a number of basic ICT skills. The skills included were: general use of computers, surfing on the internet, answering emails, using the programme WORD, and using the programme EXCEL;
- **Language skills:** This part of the study focused specifically on the respondents' language skills. They were requested to rate their capabilities in the different languages in terms of reading, writing, listening/understanding, and talking;
- **Working conditions:** This part of the survey asked the respondents about a number of working conditions and whether they would be ready to work under these conditions. The specific examples considered were definite/indefinite contract, part/full-time work, office hours, shift work, work on weekends and public holidays, flexible hours. They were also asked if they needed childcare, as well as how important it was for them to have work that is close to their place of residence, salary offered, and flexibility in working hours;
- **History in Call Centre employment:** In this part respondents were asked if they had already applied to work in call centres, if they had been called up for an interview, and if not chosen, what was the reason given. They were also asked to indicate what methods they had used to look for work;
- **Training history:** The last part of the survey focused on training history and training needs. They were asked if they had already done any training for work in call centres, or to learn languages, customer care as well as in ICT.

The information gathered from the survey with job seekers helped to identify whether the persons looking for work in this sector actually have the skills and competences needed to find employment in the Call Centre sector. The survey used can be found in Annex 3 at the end of the document.

1.2.3 Data Collection

The data was collected according to the different tools developed. In the case of the preliminary study, the person at Malta Enterprise was identified, contacted by phone and a request for a face-to-face interview made. The interview was held on Malta Enterprise premises.

In the case of the ETC data, a request was made by the researchers about the potential possible data that ETC could provide with respect to call centres. In this case ETC was able to supply data including:

- Date of first engagement form by call centre employers;
- Number of employees per Call Centre registered every year since 1996; and
- Number of engagement/terminations per Call Centre per year.

In addition, brochures produced by Malta Enterprise as well as information about training courses from ETC and MCAST were also collected.

The qualitative study with employers within the Call Centre involved carrying out the in-depth interviews with five of the main Call Centres on the island. A total of 8 Call Centres exist and the largest entities were identified. The human resource manager was contacted in each case and an interview requested. Most of these interviews took about 2 hours to complete.

The telephone survey was conducted over the phone (hence telephone survey). The contact numbers were supplied by ETC from its list of registered unemployed. In order to ensure that the right group was surveyed, the respondents were first asked if they were looking for work, and if they were looking for work particularly in Call Centres. In fact, it was found that from the list supplied, some telephone numbers were wrong, a number of respondents had already found work or were not longer interested in working in Call Centres. A total sample of 175 job seekers were eventually surveyed, all looking for work in Call Centres.

1.3 Conclusion

This chapter has provided background information on Call Centres, a description of the aims and objectives of the study as well as the methodology and research tools used to study the different aspects of the Call Centre sector. The next section will present the results obtained from the analysis of the data gathered.

2.0 Results

This chapter includes the analysis of the data collected in the study. The data will be analysed in order to provide a description of the Call Centre sector, the type of activities they are involved in, the number and types of jobs that they offer, the qualifications, skills and attributes of workers in the sector, rate of turn-over as well as prospects for growth of the sector in the short, medium and long-term. The data will also provide a profile of the skills, qualifications and attributes of those job seekers wanting to work in the call centre sector in order to see if there is any labour match or mismatch and what can be done to overcome gaps.

With respect to EURES, the need for foreign workers is also considered and the potential role that EURES can play in helping Call Centres make up for any labour shortages in the sector by recruiting EU nationals is explored.

2.1 Describing the Call Centre sector

The first step in understanding the Call Centre sector is to look at its history and how it has evolved in recent years. A first glimpse can be achieved through the employment history.

ETC currently has 8 Call Centres registered employers. These eight Call Centres include:

- Telepage Ltd (Dial-it)
- Worldwide Telecommunications;
- Availacall Ltd;
- 24 contact Centres Ltd.
- HSBC Bank Ltd.
- CentreCom Ltd
- QGEN Ltd.
- Cruise Answers Ltd.

However, there appears to be more. The Malta Enterprise person responsible for attracting Call Centres mentioned a total of 12 Call Centres, including companies such as Corporate English, Fraser English and Besedo. In addition, this list does not include other similar companies such as the gaming sector.

2.1.1 Historical Development of Call Centres

The first engagement form by Call Centres with ETC (as supplied by ETC) was registered as early as 1994 by Telepage Ltd. which was then a company belonging to Maltacom. There was little growth during the 1990s. There was growth mainly in the past three years when there was massive expansion in the sector, particularly in 2006 with the setting up of three main Call Centres, and a new one in each of 2007 and 2008.

The table 2.1 below gives the date of the first recruitment of an engagement form for each of the Call Centres set up.

Table 2.1: First Engagement Form for the different Call Centres in Malta¹⁴

Call Centre	Date of first Engagement form
TELEPAGE LTD (DIAL IT)	8 th March 1994
WORLDWIDE COMMUNICATIONS LTD	1 st July 1999
AVAILACALL LTD	18 th August 2005
24 CONTACT CENTRES LTD	1 st July 2006
HSBC BANK PLC (MALTA BRANCH)	28 th July 2006
CENTRECOM LTD	8 th January 2006
QGEN LIMITED	23 rd April 2007
CRUISE ANSWERS GOZO LTD	21 st April 2008

Call Centres set up in Malta were of different sizes. If one looks at the size of employees of the Call Centres in the year they were set up, these can be divided into two main groups: the large Call Centres such as Telepage Ltd. and HSBC who recruited 64 and 227 employees on being set up. One then finds smaller sized Call Centres ranging from 3 to 24 employees in total. These small Call Centres seem to have been set up with small investment and activity with the chance to see whether there is potential for further growth in the sector. (See table 2.2)

Table 2.2: Number of Employees in year Call Centres were set up

EMP NAME	Number of Employees	as at ..
TELEPAGE LTD (DIAL IT)	64	31/12/1995
WORLDWIDE COMMUNICATIONS LTD	13	31/12/1999
AVAILACALL LTD	24	31/12/2005
24 CONTACT CENTRES LTD	17	31/12/2006
HSBC BANK PLC (MALTA BRANCH)	227	31/12/2006
CENTRECOM LTD	10	31/12/2006
QGEN LIMITED	14	31/12/2007
CRUISE ANSWERS GOZO LTD	3	01/08/2008

In order to understand how Call Centres have changed and potentially grown these past ten years, it is also important to see how they have changed in terms of number of employees as well as the number of full-time and part-time staff that they recruited in recent years. This exercise can provide a picture of the total number of jobs that were generated in the sector as well as how the sector has changed overall.

¹⁴ Tables are compiled from data provided by ETC.

The Call Centre Sector has grown both in number of employees but also in full-time and part-time jobs generated.

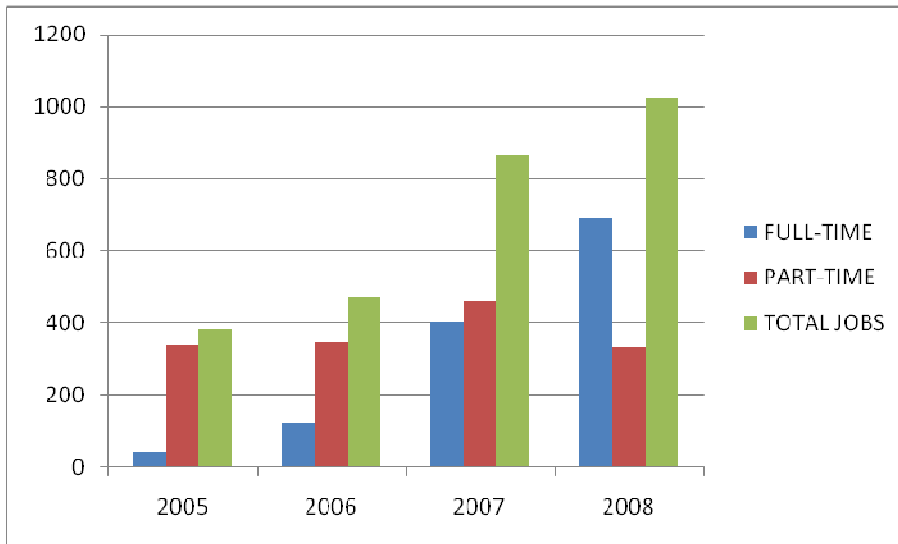


Figure 2.1: Growth of Jobs in Call Centre sector 2005-08

There are two main trends of growth that have been registered in the sector in recent years. The overall trend is that jobs in the Call Centre sector have grown steadily from 340 in 2005 to more than double that value in 2008 at 1023 jobs in less than three years. This in itself makes the sector a fast growing one. How much this growth can be sustained is a different issue and it is only time which will show which types of Call Centres will flourish and which will eventually cease to be competitive and die down.

In addition, there has also been a change in trend in the type of job held by workers in the sector. Whereas in the past, the majority of workers were on part-time basis, this being the case up to 2005, the trend has now changed. The current situation is that there is now a majority of full-time workers rather than part-time. This is also another measure of growth of the sector as full-timers will provide longer working hours than part-time workers and reflect a more economically active sector.

Growth in 2007 has been mainly due to a number of Call Centres opening up in Malta. One massive contributor was HSBC which employed over 200 people to work in its Call Centre. In the case of 2008, growth has been mainly the result of expansion, particularly in the case of the HSBC Bank Call Centre which doubled its number of employees. In the rest of the Call Centres, some have down sized, while others have grown. This shows that this sector is subject to change and size of companies may vary, often depending on how many contracts they manage or do not manage to win. Overall, as many of the employers have themselves highlighted, the Call Centre sector is a high risk sector which may require a company to undergo quick downsizing or expansion depending on the number of contracts won or lost.

The size of Call Centres has changed, some have grown, others downsized, making it a high risk sector.

The table below shows the number of employees in each of the Call Centres over the past years, and helps in understanding which Call Centres have grown and which have downsized during this period.

Table 2.3 Number of employees in the different Call Centres 2005-08 period

EMP NAME (2005)	FULL	PART	TOTAL
TELEPAGE LTD	44	331	375
WORLDWIDE COMMUNICATIONS LTD	0	9	9
TOTAL	44	340	384
EMP NAME (2006)	FULL	PART	TOTAL
TELEPAGE LTD	67	329	396
WORLDWIDE COMMUNICATIONS LTD	0	4	4
AVAILACALL LTD	55	15	70
CENTRECOM LTD	1	0	1
TOTAL	123	348	471
EMP NAME (2007)	FULL	PART	TOTAL
TELEPAGE LTD	120	355	475
WORLDWIDE COMMUNICATIONS LTD	0	4	4
AVAILACALL LTD	26	26	52
24 CONTACT CENTRES LTD	17	12	29
HSBC BANK PLC (MALTA BRANCH)	212	43	255
CENTRECOM LTD	29	17	46
QGEN LIMITED	1	4	5
TOTAL	405	461	866
EMP NAME (2008)	FULL	PART	TOTAL
TELEPAGE LTD	98	165	263
WORLDWIDE COMMUNICATIONS LTD	0	4	4
AVAILACALL LTD	12	14	26
24 CONTACT CENTRES LTD	40	19	59
HSBC BANK PLC (MALTA BRANCH)	473	61	534
CENTRECOM LTD	58	60	118
QGEN LIMITED	5	10	15
CRUISE ANSWERS GOZO LTD	4	0	4
TOTAL	690	333	1023

These changes can be further understood by considering the changes in employment for each of the Call Centres separately. This allows insight into how each Call Centre has changed in recent years and how each one has contributed to the sector.

Telepage Ltd.

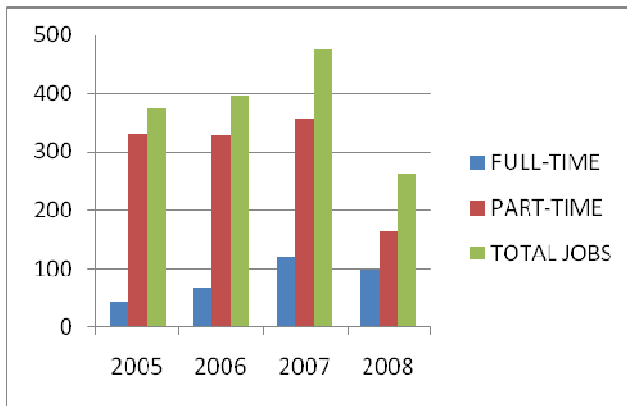


Figure 2.2: Number of jobs per year for Telepage Ltd.

In the case of Telepage, the company has grown steadily between 2005 and 2007, after which it has downsized in both its part-time and full-time jobs. This could have occurred due to limited or losing contracts which in the Call Centre business are very competitive to win and it is difficult to predict the market. In fact, this company has closed its international contracts and now focuses on its internal customer service as well as other local business services. Downsizing was mainly due to the company's decision to move out of the international market.

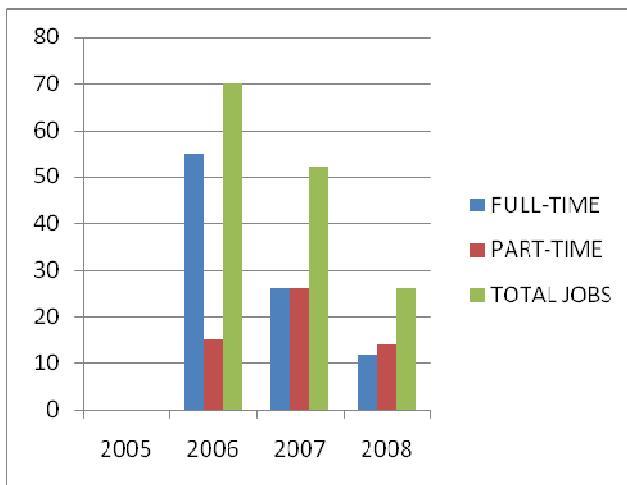


Figure 2.3 Number of jobs per year for Availacall Ltd.

In the case of Avialacall Ltd, a similar downsizing has been experienced with the company becoming smaller with every year and the number of employees going down from around 70 to under 30 over a matter of 3 years.

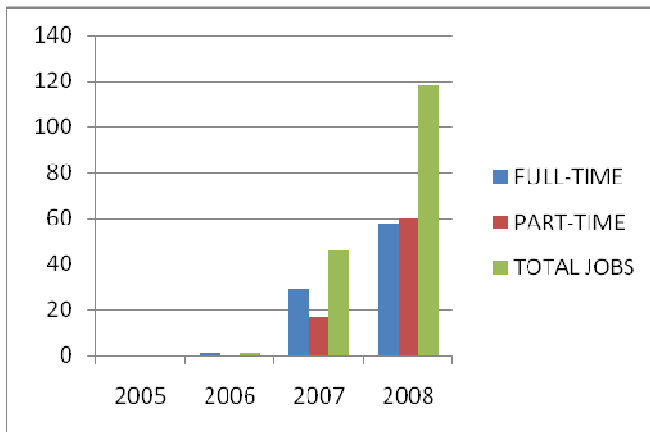


Figure 2.4 Number of jobs per year for CentreCom Ltd.

CentreCom Ltd has experienced substantial growth. This is, however, a particular Call Centre since it is a subsidiary of Airmalta and the Call Centre has taken up the work which was previously done by the Airline's offices across Europe. The Call Centre, however, is also currently serving two other airlines and is aiming at offering its services to other airlines to ensure growth and expansion.

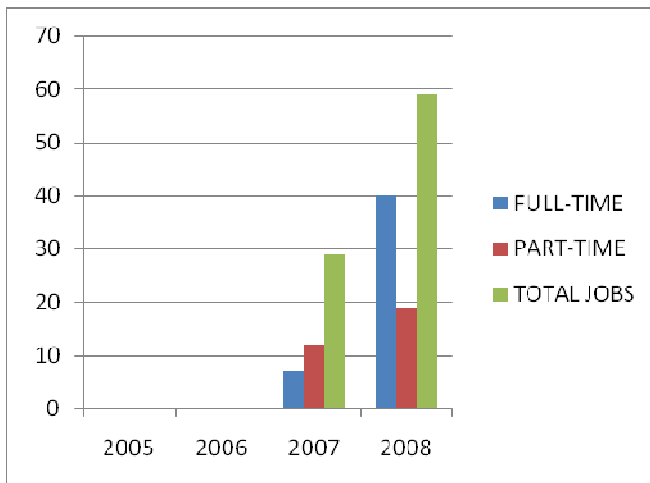


Figure 2.5 Number of jobs per year for 24Contact Centres Ltd.

24 Contact Centres has grown since it was set up. This particular Call Centre offers a number of Inbound and Outbound services which range from telesales for the UK market to IT support and customer service, as well as market research¹⁵. The greatest increase in this company has been in terms of full-time employment which has more than doubled in one year.

¹⁵ Information extracted from http://24contactcentres.com/index.php?option=com_content&task=view&id=55&Itemid=71

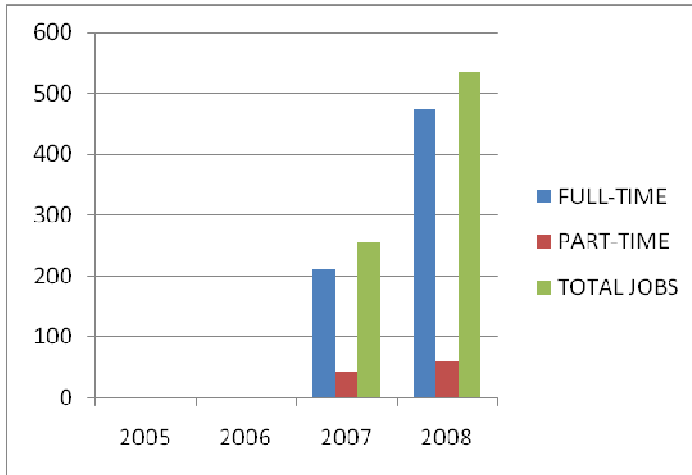


Figure 2.6: Number of jobs for HSBC Bank.

The HSBC bank has grown a lot in one year with its total number of staff doubling in one year. The Call Centre in this case provides telephone customer service to UK HSBC bank customers¹⁶.

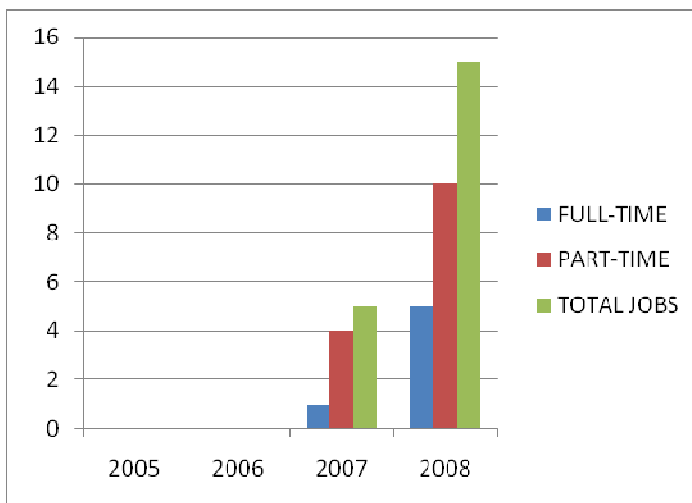


Figure 2.7 Number of jobs for QGEN Ltd.

QGEN Ltd. is a new company set up last year in 2007. Its Call Centre offers customer service in financial services to clients in the British market¹⁷. Although its total number of employees has increased, they still remain small. They have thus shown a steady growth and reflect potential for increasing the number of workers in this sector.

It is thus difficult to state whether the sector is actually growing or not, and if there is potential for growth in the future. From the statistics supplied by ETC, the recent massive increase in jobs has been mainly the result of HSBC's expansion. Some of the other Call Centres have grown while others have downsized. Some companies have gone out of the international market, others are moving away from telesales

¹⁶ Information extracted from http://en.wikipedia.org/wiki/HSBC_Bank_Malta

¹⁷ Information extracted from <http://www.qgengroup.com/aboutus1.html>

and are focusing more on the local market. On the other hand, some Call Centres for foreign customers are flourishing and growing steadily each year. As one of the employers put it, Call Centres are at the mercy of companies and contracts which may expire. Malta is experiencing a lot of competition not only from India, but also from South Africa as well as the Eastern European block and so this makes it even harder for them to determine whether they will grow or become smaller in the future.

2.1.2 Malta as a choice for setting up a Call Centre

The Call Centres in Malta vary, not only in size, but also in the services and sector that they operate in. The range of activities of the Call Centres in Malta can be listed to include the following activities:

- **Telesales for the local and British Market:** This activity includes outbound calls which try to sell products and/or services. Sales can be either for the local market, but also for the British market;
- **Customer Service in ICT support:** Call centres offer support to INBOUND callers who need customer support with respect to ICT related problems. The Call Centre agents help callers to solve any problems that they are encountering;
- **Customer Service in financial services:** Call Centres offer customer support to clients of financial companies with respect to their financial problems and requests;
- **Customer Services in flight ticketing:** Call Centres offer customer service and offer ticketing information and ticketing for flight travel;
- **Other forms of customer service:** Call Centres may also offer customer service depending on the company from which they have obtained a contract to offer customer service; and
- **Market research:** Call Centres can also be involved in carrying out market research through their call centre agents.

Ownership of Call Centres varies. Some are totally foreign owned, some are joint ventures between local and foreign companies, while others have local ownership only.

Employers interviewed were asked to identify what were those factors which made Malta an attractive place to open Call Centres. Among the main factors mentioned were:

- **Language skills:** Employers stated that Malta can provide a good number of workers with a good enough command of the English language to be able to work in Call Centres. Since many of the clients of Call Centres are British, then this often fulfils the needs of language skills required. In addition, Malta also has a good percentage of French and German speaking people who can also work in Call Centres;

- **Labour costs:** The salary costs of personnel working in local Call Centres are relatively low and are cheaper than many other European countries. This makes setting up Call Centres in Malta cost-effective;
- **Good supply of workforce:** The local labour market offers a good supply of workers. This is possible both in terms of personnel with good command of the English language, but also in the supply of a number of native English speakers due to the significant number of British people resident in Malta. This allows Call Centres to deal with the high personnel turn-over that they experience;
- **Political and Economic Stability:** This was mentioned particularly by an employer providing services to foreign customers. Malta offers a much more political and economic stability compared to other countries such as India, and foreign investors appreciate this;
- **Malta as an EU member state:** One employer stated that the foreign investors as well as the companies which contract work to them prefer Malta as it is an EU member state rather than a country which is outside Europe;
- **Good telecommunications network:** The companies stated that the good telecommunications network that Malta enjoys lets them carry out their work efficiently and this is considered as a plus for foreign investors wanting to set up Call Centres in Malta.

None the less, employers of Call Centres have also stated that they have experienced difficulties when setting up their business. The difficulties identified included:

- **Expense in investment in infrastructure:** One of the things that Call Centres have to invest in is the technological infrastructure which needs to be in place to enable Call Centre Agents to carry out their work. This heavy investment is financially demanding on a newly set up business;
- **Difficulty in finding the right premises for the Call Centre:** One particular Call Centre highlighted how they had problems in finding the right premises to set up their Call Centre. This was due to wanting to find a central position but which is also not too expensive. Finding the right place at the right price was quite a challenge;
- **Great demand in recruitment process:** Call Centre employers explained how they had to go through a heavy recruiting exercise when setting up the Call Centre and how this created a great burden as they had to go through the many applicants;
- **Great investment in training of staff:** All Call Centres need to provide intensive initial training to their personnel. When setting up the Call Centre they had to train a large amount of staff at one go and this placed great demands on both financial as well as labour demand;
- **Some specific skills shortages experienced:** Some of the Call Centres experienced difficulties in finding the required personnel, particularly when looking for workers who were fluent in the French and the German language.

This created problems as they had difficulties in finding the necessary number of Call Agents;

- **Demands by clients:** Call Centres stated it was often the case that their clients (companies to whom they offer their Call Service) would want the service to be set up and running in the shortest time possible. This means that Call Centres need to be able to develop their existing infrastructure as well as find the required personnel and train them in the shortest time-span possible. They stated that this is a great challenge as it determines their competitiveness in the Call Centre sector.

2.1.3 Describing the workforce within the Call Centre Sector

Similar structures were identified in the different Call Centres reviewed. Call centres usually have the majority of the workforce being **Call Centre Agents**. The Call Centre Agents may have different position titles due to the nature of the work that they do. So one finds agents called: customer service representatives; technical support agents; helpdesk agents; telesales agents; and market researchers, depending on their role. All, however, are involved in answering the phone and being in direct contact with customers. In some cases, some agents are involved in answering emails rather than phones. The range of activities that Call Centre Agents are involved in mentioned by employers include:

- Answering incoming calls;
- Doing outgoing calls;
- Trying to solve queries;
- Stick to SLA (Service Level Agreement) as stipulated in the Call Centre's clients' contract. Many times they have to ensure that they are above the 95% performance set out in contracts;
- Try and sell products and services (telesales);
- Use the centre's software package to do the administration related to the Call Centre activities;
- Assist customers with banking requirements;
- Make reservations;

Obviously Call Centre Agents will not be involved in all the above activities in one single Call Centre as some are related to the type of service that the Call Centre offers. However, they illustrate the possible types of responsibilities that Call Centre agents can be engaged in.

Due to the repetitive and solitary nature of the job, a number of Call Centre Agents are put into teams and each team has a **Team Leader**. It also makes it easier for the Call Centre management to monitor the productivity of the Call Centre Agents. The Team Leader is responsible for a number of Call Centre Agents, motivating and overseeing their work in order to ensure that they reach the set targets, either in terms of the number of sales made, number of telephone calls taken, and number of problems tackled etc. The Team Leader is also responsible for tackling any work or personal issues that may arise within the team. Among the responsibilities mentioned by employers, Team Leaders' work involves:

- Reporting to the floor manager/Call Centre manager;
- Carrying out quality checks;
- Monitoring KPIs (Key Performance indicators);
- Doing the rostering;
- Handling complaints made;
- Supporting the Call Centre Agents; and
- Trouble-shooting any issue which may arise;

Team Leaders are usually responsible for around 10-14 Call Centre Agents. In some Call Centres, one also finds Senior Call Centre Agents. These personnel have more experience and capabilities in their work, and they support other Call Centre Agents and do trouble shooting. It is only when there are problems that Call Centre Agents as well as Seniors cannot solve that the Team Leader is notified.

The team leaders then answer to the floor manager/team manager who would be responsible to oversee the work of a number of teams. Team Leaders are also often involved in solving problems and trouble-shooting any issues that may arise from a number of team leaders.

At a higher level, one then finds management. The different management positions depend on the size of Call Centre. In the case of the larger Call Centres, there will be floor managers, centre managers, sales managers, and floor coordinators. In some cases there may be two levels whereas in the smaller ones there may be just one level.

Parallel to these levels one also finds **Training Coaches** as well as **Quality Control**. Due to the high rate of turn-over and the continual recruitment of new personnel, there is need for training staff to train and prepare new recruits for the job. In addition, there is often also staff in charge of quality control. This personnel listens to calls to monitor the quality of the calls with the aim of identifying any training needs that their Call Centre Agents may need. Among the responsibilities of the trainers, the following were identified:

- Providing the initial training to new recruits;
- Monitoring the quality of the work of Call Centre Agents. This is usually done by listening to calls made and monitoring the quality of the responses provided by the Call Centre Agents;
- Providing ongoing training: This can be done in different ways. It can be done in groups where the trainer provides common training in general skills which the Call Centre Agents need. In other cases training is provided on a one to one case, particularly with Call Centre Agents who may be experiencing difficulty or have been noted to need to improve in the quality of his/her service during the monitoring exercise.



Figure 2.8 Organisational Structure of Call Centres

Gender Patterns of workers in Call Centres

Particular patterns in employment within Call Centres were identified. It appears that there is a tendency to find more female workers in Call Centres. This percentage was quoted by employers interviewed to be around a ratio for 60-70% females compared to 30-40% males. The reasons for this may be either that women tend to be better on the phone due to their better social skills, or else that they find the option of part-time work as well as flexible working hours more attractive. The latter make it more possible for women to find balance between family-work demands.

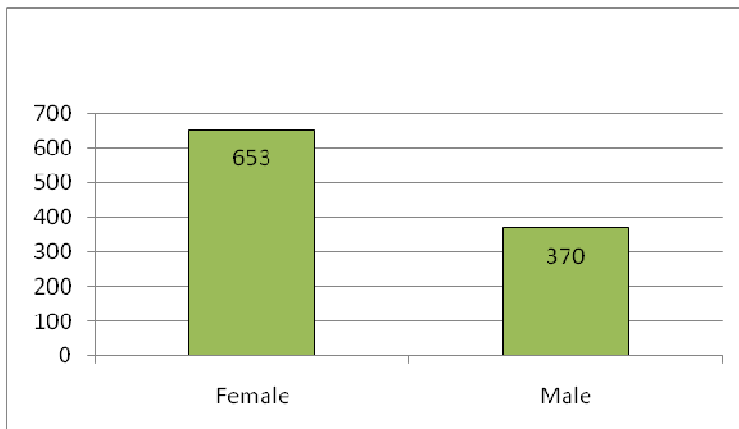


Figure 2.9: Distribution of employees in call Centres across gender¹⁸

There is a gender balance, however, in the higher rungs with both males and females represented in the different levels. The interviews, however revealed that in the case of technical support offered as part of customer service, such as in the case of IT, there tended to be more males.

More women, with the exception of IT services tend to be found as Call Centre Agents.

¹⁸ Values collated from data provided by ETC.

Age patterns of workers in Call Centres

Workers in Call Centres also tend to be overall young persons. Many of the Call Centre employers stated that the majority of their workers tend to be in their 20s, often in their early 20s. However, this does not exclude older workers, as one finds workers over 50 years old too. One particular Call Centre highlighted how they seem to be lacking people who are in their 30s. But overall, the average age remains young.

The table below shows how the majority of the workers are within the 16-20 and 21-25 age bracket.

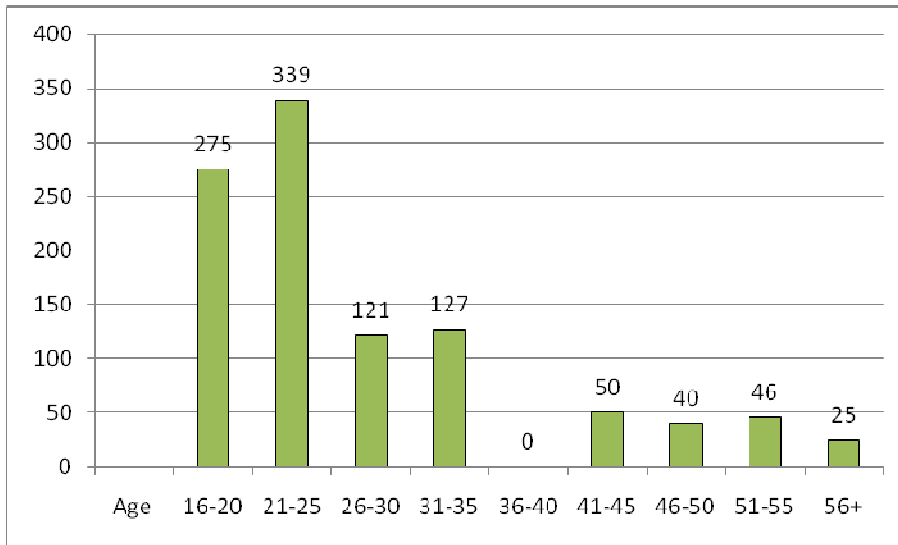


Figure 2.10 : Frequency of age range of workers in Call Centres¹⁹

Nationality Patterns of workers in Call Centres

The percentage of foreign nationals working in Call Centres varies depending on the requirements of the Call Centre. For example, where knowledge of the English language is the only required language skill, the majority of workers are Maltese, and the percentage of foreign nationals is very low. On the other hand, in the case of other Call Centres needing native English speakers or knowledge of other languages there is a higher percentage of foreign nationals. Thus, one particular Call Centre has 70% of its workers who are foreign, many expats. The trend is that those Call Centres which work in the foreign sector tend to recruit foreigners mainly for their language skills in order to make up for lack of labour supply with these skills. Otherwise, Maltese workers tend to supply the demand where English is the only language skill required.

There is a percentage of foreigners in most of the Call Centres, with the percentage being higher where there is demand for foreign language skills besides English.

¹⁹ Values collated from data supplied by ETC.

2.1.4 Working conditions in the Call Centre sector

So far, from the data supplied by ETC, it is evident that one finds a mix of full-time and part-time workers within the Call Centre sector. However, there are a range of work conditions that one can identify within the sector:

- **Type of employment:** One can find both definite and indefinite contracts in Call Centres. Those which offer mainly indefinite contracts tend to require knowledge of two languages. This may be due to the limitation in the labour supply. It is also to be said that many of the Call Centres do not have a long history and so probably opted for definite contracts in order to be able to see how well their business will do. This is why some Call Centres are offering 3-year definite contracts. On discussing the issue one Human Resource manager indicated that they may change to indefinite contracts with time in order to maintain their best workers and the Call Centre would have been firmly established in Malta.
- **Flexibility of Work:** The amount of flexibility varies from one Call Centre to another. However, all Call Centres offer the option between full-time and part-time work. Since many of them offer 24 hour service, this demands that they need to have workers working round the clock. Due to the different demands during the day, the use of part-timers helps to tackle the change in demand. In many of the Call Centres, employers tend to be flexible in the number of hours that part-timers can work per week. However, in many cases, they put a minimum of around 15 hours a week. The hours also need to fit the shift slots. Some Call Centres have 4 hour or 8 hour shifts, in others it can be different. In the case of good workers, employers try to accommodate requests, but tend to draw a line in order not to make the rostering process too complicated and difficult to draw up;
- **Working hours:** Call Centre Agents do not work normal office hours. Due to the 24 hour service which many offer, this implies that many of the Call Centres work with shifts. In the case of telesales, workers tend to work within the acceptable selling times for the country, e.g. for British clients, due to the one hour difference, telesales work from 10.00a.m. to 6.00p.m. Different shift patterns were identified. For example, in one particular Call Centre, there are a number of possible shift times: four different permutations for those working 20 hour part-time work and two permutations for those working 25 hours a week. However, each shift is of a 5 hour period. In the case of full-time shift, a rotation method where the shift hours vary over five weeks is followed. This means that workers are at times required to work in the mornings, at others in the afternoon and also in the evening up to 11.00p.m. In other Call Centres there is more flexibility where the number of hours can vary more but the sessions of shifts are usually fixed at 4 hours, five hours or else 8 hour shifts. At the other extreme, one particular Call Centre is so flexible that it can have students who provide the hours that they can work and the Centre designs their shift rosters round their needs. This makes great demands on the employer but which probably then has a better supply of labour in different hours.
- **Salary:** The salaries within the sector vary but are more or less within similar brackets. A basic Call Centre Agent has a wage of around €10,000-€13,000 gross per annum. In one particular Call Centre foreign workers with specific

language and technical skills can earn more up to around €17,000. The part-time rate is in the range of €4.50-€5.00 per hour. The rate is usually higher for technical people and is at around €6.00 per hour due to their technical expertise;

- **Health insurance:** Very few offer health insurance. In some cases, the company can offer a good rate but the employees opt for it, in others there is no health insurance at all, in some it is only the higher levels that get health insurance. Only one offers health insurance to all its workers;
- **Bonuses:** All the Call Centres offer some form of bonuses to their workers. These vary according to the type of activities. In the case of Call Centre Agents these tend to be performance related. In the case of Telesales these are in the form of commissions on sales made. With the higher levels of responsibility, performance bonuses are more related to the output of the workers;
- **Other perks:** A common practice in Call Centres is that of providing incentives in the form of money allocation to teams depending on their performance. The aim behind such approach is to motivate workers to try harder at selling and at providing a better quality customer service. The better the team's performance, the more money the team gets. This money can be used as the team decides, for a meal out, to buy gadgets etc.;
- **Family-Friendly measures:** Call Centres do not specifically cater to offer family friendly measures. However, in the case of good employees, they may take the trouble to find working hours which would be acceptable to both the employee and employer. However, employers stressed that such demands would always need to fit in with their needs and shift slots. So, the concept of family friendly measures within the Call Centre sector is limited.

There is a variety of work conditions (defenite/indefenite, part-time/full-time work, shift/flexible working hours) in the Call Centre sector.

Family friendly measures are limited although the sector does allow part-time work which may accommodate workers with family demands.

2.1.5 Staff Turn-over/attrition in Call Centre Sector

Many of the employers stated that they experience a significant amount of turn-over of staff. This varied in amount, but many expressed a concern on the turn-over due to the expense in the recruitment and initial training for new employees. Some said that they have a high turn-over. Employers said that turn-over is high practically among Call Centre Agents and not in the higher levels. The more repetitive the job is, the higher is the turn-over. Telesales was identified as that area of service where turn-over is particularly high.

The reason for such high turn-over was related to the monotonous work that Call Centre Agents have as well as the stress related to the targets that they have to reach in order to ensure that contract terms are respected. Employers described how turn-over is less when the work tends to be varied. This is the case, for example with technical support as clients phone in with different problems and difficulties and so

work presents its own challenges and satisfaction. In some other Call Centres, the agents have other work such as administration and in one particular case, in the financial sector, compliance work which agents do usually when call rates are low and agents have time to do other things.

A better idea of the degree of turn-over/attrition that Call Centres experience is obtained by looking at the number of engagement forms and terminations that the individual Call Centres have had in recent years.

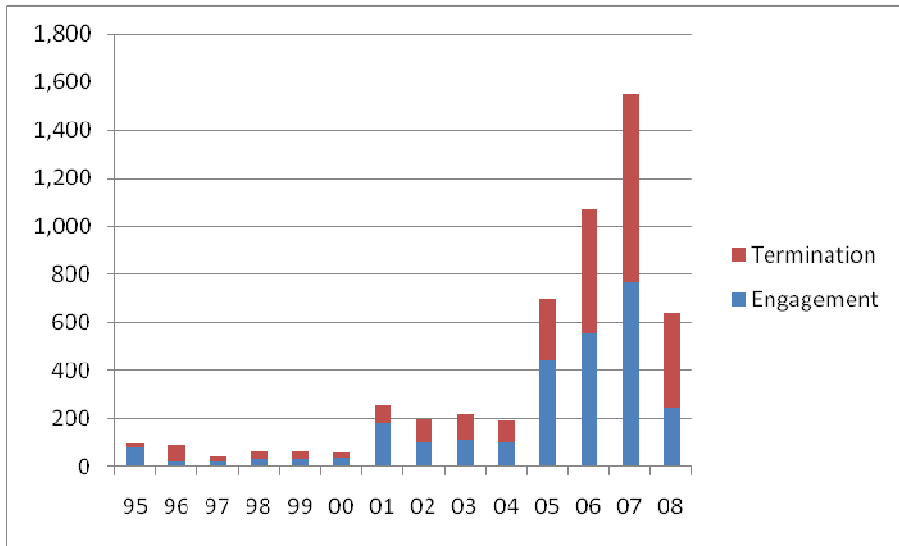


Figure 2.11: Turn-over statistics for Telepage 1995-2008

If one looks at the number of terminations and engagements for Telepage, it can be seen, that there is not much difference between the number of termination and engagement forms that the Call Centre has experienced. The past few years the company has downsized and yet it still has had a number of engagements. This shows that this particular Call Centre experiences a significant amount of attrition.

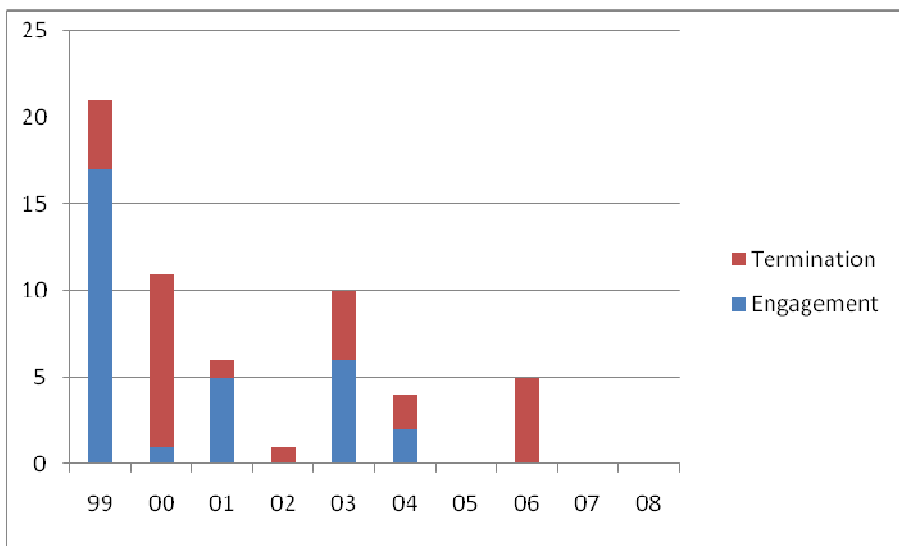


Figure 2.12: Turn-over for Worlwide Communications Ltd. 1999-2008

As a small company, World-wide Communications Ltd has not experienced great turn-over except, maybe in 2003. Although it has also had terminations and engagement, these seem to reflect more the company's growth or downsizing rather than turn-over.

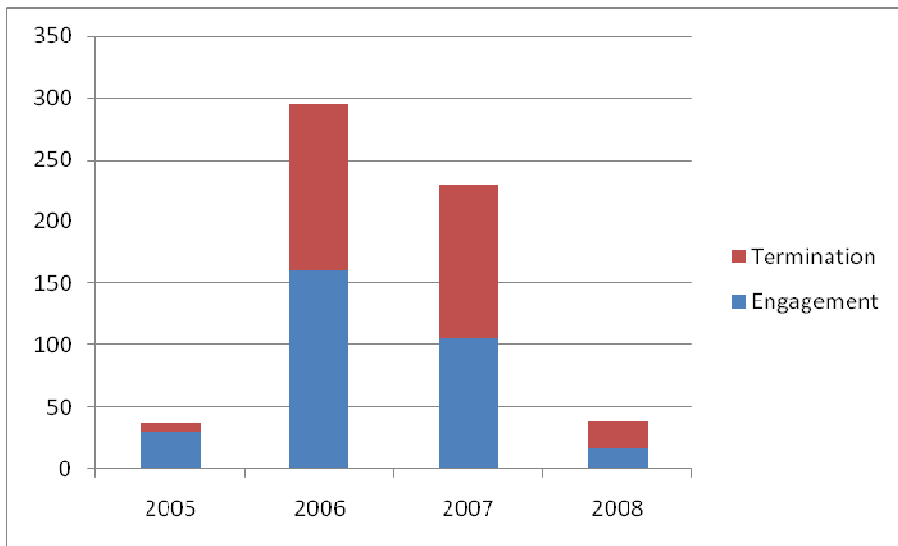


Figure 2.13: Turn-over for Availacall 1999-2008

In the case of Availacall, the company has experienced a great turn-over in 2006 and 2007, with around a change of about 100 employees in these years. This company has now downsized and has had more terminations than engagements in 2007 and 2008, but the values up to half of 2008 are low compared to the previous years.

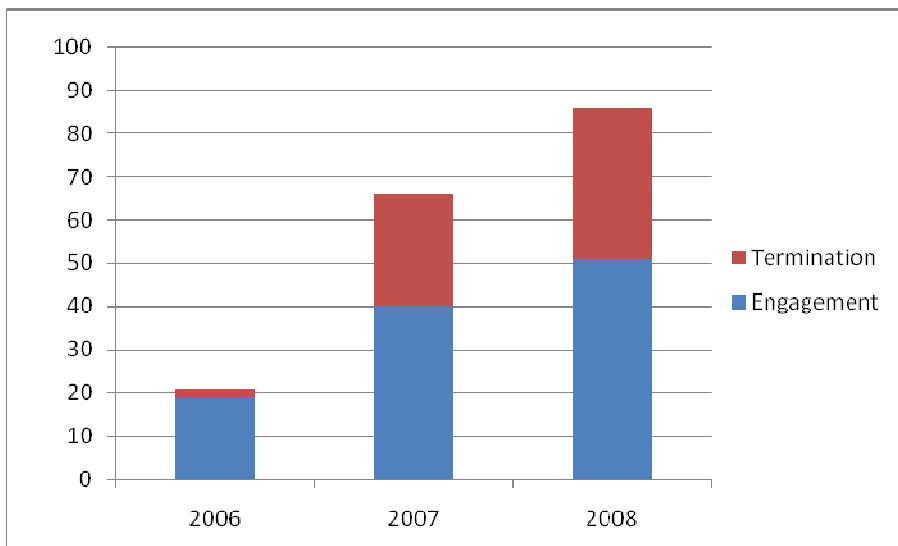


Figure 2.14: Turn-over for 24 contact centres Ltd 2006-2008

24 Contact Centres has experienced a degree of turn-over, with as many as 25 in 2007 and around 35 in 2008 when it has a total of slightly less than 60 employees. This is in the region of 50%. In fact, during the interview, the Human resources manager stated that they are trying to introduce initiatives to achieve retention of employees as the investment in the recruitment and initial training is becoming too

costly and is also a constant struggle for the centre to ensure that it has the required manpower to deliver the service.

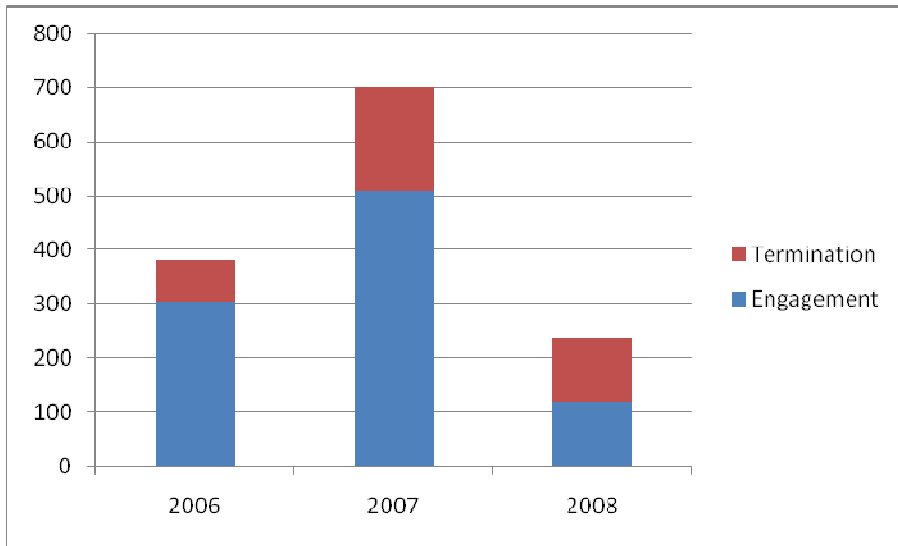


Figure 2.15: Turn-over for HSBC 2006-2008

HSBC has experienced attrition of around 200 employees in 2007 when it was expanding its workforce to around 500. It seems to be high also in 2008 with around 100 up to the month of August. The main reason for losing so many employees is due to many of their workers deciding to continue with their studies and moving on to University. This is mainly due to the young age of many of their employees. It appears that work in Call Centres is seen as a temporary post in the search for a good and more stable employment.

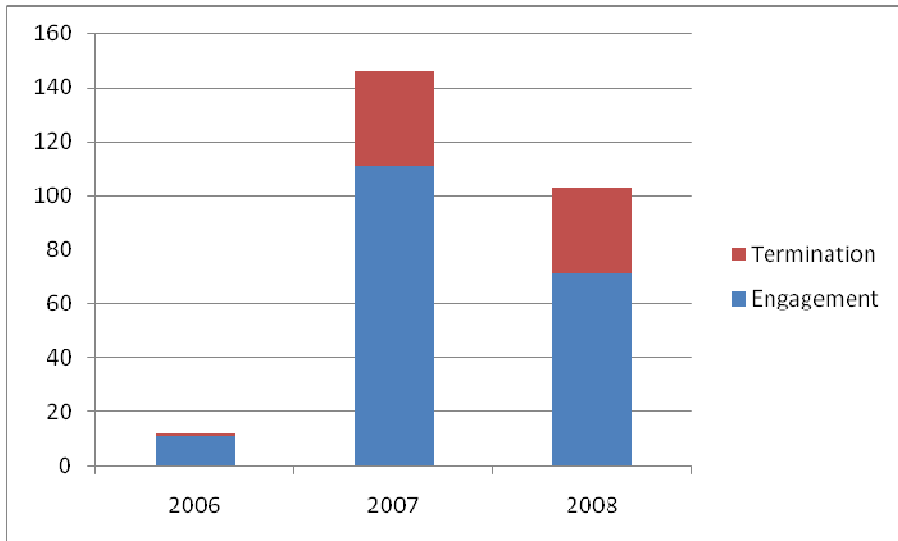


Figure 2.16: Turn-over for Centrecom Ltd. 2006-2008

Centrecom Ltd has expanded in recent years as can be seen from the higher number of engagement forms compared to the terminations. For a company of around 110 employees the turn-over in 2007 amounted to around 25 while in 2008 this has already reached a value of around 15. This is not excessively high when compared to

that experienced by HSBC, even though it is still not insignificant. In fact, for example in the case of foreigners, turn-over is mainly due to employees wanting to relocate themselves back to their home country. In the case of Maltese employees, this occurs mainly when language speakers who are graduates find better job opportunities.

2.2 Describing Demand for Labour Skills

The Call Centre sector faces demands in terms of labour supply. This should be considered in terms of the high attrition rates as well as the potential growth that the sector may experience in the short, medium and long-term.

This section will consider the employers' views of the potential growth of the sector as well as the main labour demands that they face, whether they would consider the option of job mobility of workers, as well as the type of training developed to enhance labour supply in the sector.

2.2.1 Short, Medium and long-term growth of Call Centres

During the interviews, employers as well as the person at Malta Enterprise were asked to comment on the possible potential growth of their company as well as the Call Centre sector. A variety and mixture of answers were given to this question. With respect to **short-term growth**:

- One particular Call Centre stated that it had no intention of increasing its capacity and/or business and so its size was to be maintained constant.
- In the case of the other Call Centres, they stated that growth depends on the level of business coming their way. The employers talked about how their growth depends on whether they manage to secure and keep contracts. This is difficult to foresee with certainty due to the great global competition that exists in the sector.
 - **Telesales:** One particular call centre involved in telesales said that this activity is dying out as it becomes more and more difficult to sell over the phone;
 - **Specialised Customer service:** There is place within the local market for specialised customer services which require special knowledge e.g. in ICT which Maltese people can be competitive in and that these services can survive. In the case of financial services, the local Call Centre sector is growing gradually. However, one Call Centre expressed disappointment in that they had to turn down a contract due to the lack of Spanish speaking supply from the labour force.

Overall there was the opinion that, in the **medium term**, the sector can probably grow further but it will eventually in the **long-term** reach saturation as the labour supply becomes limited. Having said this, the Malta Enterprise representative said that there were as many as six other Call Centres interested in setting up their business in Malta and who were in contact with it. One possible solution which would allow the Call Centre to grow in the long-term is to attract an influx of foreign workers,

but these tend to be more expensive than local workers, thus affecting competitiveness.

Due to the global nature of Call Centre services, the sector can be considered as volatile and can die out as quickly as it has grown. In fact, employers have mentioned a number of limiting factors which may prevent the further growth of Call Centre sectors. These limiting factors mentioned included the following:

- **Limited skills in the local labour market:** There are a limited number of people in the local market who can offer some of the skills required by Call Centres. This comment was made particularly with respect to language skills with respect to languages such as German and French where the supply is limited. There was also a comment by another employer about the lack of labour supply with knowledge of the Spanish language. If it is not possible to attract foreign nationals to work in the local labour market, this lack of skills provision may limit the type of services that Call Centres can offer and consequently their potential growth;
- **Other more competitive economies:** So far Malta has been a good competitor on the market in that it offers a European location at competitive prices compared to Call Centres in India. However, Malta is also experiencing fierce competition from new economies interested in promoting themselves as good locations for Call Centres. Examples mentioned included: South Africa as well as a number of Eastern European countries who can also provide a good supply of workers with language skills at cost-efficient prices;
- **High turn-over of personnel:** All the Call Centres (with the exception of one) interviewed have expressed that they experience a high turn-over of workers. This places a high demand on time spent in the recruitment process as well as in providing initial training of workers. This introduces additional costs as a result of the time spent in the recruiting process as well as the initial training provided to the personnel recruited. This makes the Call Centres less competitive and thus limits their potential growth.

Call Centre employers were asked to provide the type of qualifications, skills and attributes that they require and look for when recruiting people to work. It is to be stated that employers recruit mainly at the Call Centre Agent level, with the posts of Team Leaders and floor managers often being the result of internal promotion.

A common response obtained by most of the Call Centre employers interviewed, was that they do not require any particular qualification from applicants as qualifications provide very little information on how adequate an applicant is for working in a Call Centre or not. They placed more emphasis on skills and personal attributes which they can know more about from the interviewing procedure as well as the applicants' previous work experience.

2.2.2 Skills Employers look for in the current labour supply

This section includes the list of qualifications, skills and attributes required by employers for each of the main categories identified within the Call Centre administrative structure.

1. Call Centre Agents, technical support; helpdesk agent; telesales agent; and market researchers

Qualifications

In this case, employers are not that interested in what qualifications job seekers possess. There was only one exception where one employer stated that they insisted on an Advanced level of education, preferably in commerce due to the nature of the Call Centre's activity which is in financial services. One other particular employer used to require a school leaving certificate /O Level in Mathematics and English. However, they do not ask for these qualifications anymore as they did not serve as good discriminating indicators when recruiting personnel. So overall, employers are not '*believers of qualifications*' and would be ready to recruit people without qualifications but with the required skills and attributes;

Skills

Employers look for a number of basic skills when recruiting people to work in Call Centres. These skills can be listed to include the following:

- **Language skills.** Employers look for good command of a language. In some, it is only a good command of the English language. They want to have personnel who can speak English fluently and can understand it well. In some particular cases employers look for people who have a native accent. This is usually in the telesales sector and less so in the case of customer service and support where success in helping clients is more important than talking to a native English person. Some employers are looking for people who have a number of language skills, this being a good command of other languages than English. The languages that are particularly in demand are French, German and Spanish. Again, to employers a good command is not a matter of qualifications but proficiency in understanding and talking the language well enough to be able to talk to and help clients;
- **ICT skills:** Many of the Call Centre agents will need to use ICT programmes when dealing with clients. This requires that personnel have a level of competence in using ICT, enough to be able to be trained in how to use the programmes installed within the call centre. However, none of the employers mentioned the need for applicants to possess their ECDL;
- **Verbal skills:** One may know how to speak a language well but will still not be capable of sustaining good conversations, particularly with people who either do not wish to buy the product that you want to sell or else to try and help people who have phoned up with a problem and require support. Personnel thus need to know how to talk to people, by sympathetic, not be over-talkative, and to be time efficient. These are verbal skills that not everybody possesses and employers seek to identify those applicants who have these skills when recruiting;
- **Customer service skills:** One of the particular skills that Call Centre Agents would require is customer skills. These refer to the way that Call Centre Agents listen and talk to clients, how they react to requests made etc. Some people are better than others in dealing with people and can provide the same service but in a much nicer way. Such disposition is very important in the Call Centre sector and so employers try to identify those who have such skills from the start at the recruiting stage;

- **Problem-Solving Skills:** These skills are usually required for Call Centre Agents offering customer care or support. Many times Call Centre Agents are faced with callers who phone in with problems. The permutations of the different problems that may arise can be many. Call Centre Agents need to possess problem solving skills which would enable them to sort out their callers' problems efficiently in the shortest time possible. Problem-solving skills are thus skills which employers look out for when recruiting personnel to work in their Call Centres;
- **Specific technical skills:** These are skills related to the area in which the Call Centres provide customer service. For example, if the Call Centre is providing customer service in terms of IT support, then it is important for the Call Centre Agents to have the necessary IT background to be able to understand the problems coming in as well as be able to provide solutions based on their knowledge. In the case of financial services, the Call Centre Agents are required to have knowledge of financial issues as well as knowledge of the jargon and technical language used in the sector. Therefore, in such cases, the technical knowledge of applicants becomes important in the recruiting process;
- **Typing:** One particular employer stated that it requires that applicants have good typing skills since they need to use the computer as part of their work responsibilities. Knowledge of typing would ensure that work is done proficiently and quickly. Applicants thus need to know how to type on a keyboard;
- **Basic level of Literacy:** Part of the Call Centre Agents' work involves a degree of writing (even if on pc). It is thus essential for workers to have basic literacy knowledge. Particular reference was made to spelling which was considered as essential to be chosen for the job.

Attributes: Employers also look for a number of particular attributes when recruiting Call Centre Agents and which they know make good employees. A number of attributes were mentioned and these were listed to include:

- **Well mannered:** Employers look for personnel who are overall well mannered in their behaviour but more importantly over the phone. In fact, many times the first step in the recruitment process involves a telephone interview where employers test how applicants talk over the phone. Call Centre Agents are the contact persons with clients and so it is imperative that they sound well mannered in the way they address and converse with callers;
- **Confident:** Whether Call Centre Agents are selling merchandise or services, or else trying to solve problems as part of their customer service, it is always important for Call Centre Agents to sound confident. It is undesirable to have somebody sounding unsure in such circumstances. In addition the person also needs to actually be confident as one needs to have confidence to be able to take the large number of failures that is usually experienced in telesales as well as to be able to face clients with problems who may be anxious and/or even in a bad disposition;

- **Have initiative:** However much Call Centres try to make the work standardised and repetitive, the Call Centre Agent will often come across situations where s/he has to be able to use his/her initiative to either convince a caller to buy a product or else to try and find a solution for a client. These situations require a degree of initiative from the Call Centre Agent where a person with initiative would be able to deal with customers much better and with greater success;
- **Motivation:** Call Centre Agents need to be motivated people. Whether they are selling products or providing customer care, they need to be motivated in providing the best possible delivery. They have to have the motivation to try and find solutions to problems, and to persist with trying to sell in the face of many rejections. Motivation is thus an important quality which employers in the Call Centre sector value;
- **Target oriented:** Whatever the work done by the Call Centre Agents (Inbound/outbound, telesales/customer service/ticketing etc.) they always work within set targets. Since Call Centres depend on contracts from companies which outsource their customer service, they need to stick to standards and targets as set in the contracts. Employers need to ensure that their Call Centre agents are aware of and stick to the targets stated in these contracts. Employers thus need to have target oriented people who are ready to work harder in order to reach the targets set;
- **Persuasion skills:** One particular employer stated that s/he also looks for persuasion skills, this is particularly so in the area of Telesales. Call Centre agents with an ability to convince will manage to sell more than others with less persuasion ability;
- **Interpersonal skills:** Even if only dealing with clients over the phone, Call Centre Agents are still dealing with people and thus also need to have the ability to reach out and communicate effectively with people. Talking to people over the phone thus requires a degree of interpersonal skills. Unfortunately there are people who are not good to talk to people and would not make good Call Centre Agents. Employers thus look out for these attributes when recruiting personnel.

One particular employer said that they actually carry out a psychometric test with applicants in order to see if there is a profile match between the applicant and the role of a Call Centre Agent.

It is evident that Call Centre Agents need to be smart people who are hard working and like to help people. This is not a combination that is easy to find. However, many employers actually tend to look more for potential rather than for a ready made Call Centre Agent. This is the reason for which the initial training of such Agents is quite long and can be as long as six weeks in duration.

2. Team Leaders

Team Leaders are in the majority of the cases promoted internally from within the Call Centre Agents within the company. Internal promotion is preferred as this means that the Team Leaders are already familiar with the way the Call Centre works and so initial training would be minimal. In such case, the individual's qualifications are not really of any relevance. However, when employers come to decide who from the Call

Centre Agents are to be promoted to Team Leaders, they tend to look for specific skills and attributes:

Skills

- **Leadership skills:** Team Leaders need to have leadership skills as they are required to motivate and push the Call Centre agents such that they perform at their best. A person who is positive and can inspire fellow workers by providing adequate direction and lines of action would make a good Team Leader;
- **Ability to motivate:** Due to the strong target oriented environment in which the Call Centres operate, it is important for the Team Leaders to be able to motivate workers to do their work in the best possible way. The way to motivate people is an important skill;
- **Ability to tackle people problems:** A Team Leader needs to manage people and consequently there will surely be at some time problems relating to inter-relationships. Team Leaders need to have the skill to sort out such problems in the smoothest way possible in order to avoid problems which may effect the Call Centre's performance;
- **Ability to solve problems that arise:** Team Leaders are required to deal with problems which may arise within the team. Team Leaders thus need to have very good problem-solving skills which enable them to sort out any possible difficulties efficiently in the shortest time possible;
- **Experience of Call Centre environment:** Team Leaders need to understand well how a Call Centre works and what are the most important aspects to keep an eye on. This experience gives Team Leaders skills which enable them to carry out their duties efficiently.

Attributes

- **Is team oriented:** If one is to lead a team, one needs to know how to work within a team and how to keep a team working together. Some people can be very good to do work on their own, but are then uncomfortable working with others. Team leaders need to be those types of people who like to work with others;
- **Has a leadership personality:** Some people are leaders in the way they act and behave. This means that they have a positive disposition to lead others. This is an attribute which employers appreciate and look for in Team Leaders.

3. Trainers

Trainers many times are recruited from within the company and as in the case of the Team leaders, are not appointed on the basis of their qualifications, but mainly on the basis of their skills and ability to train, as well as their experience. More specifically, the skills and attributes that employers look for are:

Skills

- **Ability to teach:** Coaches need to be able to show and teach others how the work is done. Some people are better than others in doing this. Due to the newness of the sector, employers have resorted to using their own employees to identify those who are to be responsible for training. One of the things that

they look for in their trainers is the ability (with or without training) to help others learn how to do their work better;

- **Able to provide direction:** Trainers need to be able to understand the arising challenges that Call Centre Agents are facing and to identify the new training needs that exist. The trainers thus should know how to provide direction in terms of training within the Call Centre;
- **Good communication skills:** Training other people is not easy as not everybody is naturally conducive to learning new things. This requires that the trainers know how to deal with people and their behaviour during the learning process;

Attributes

- **A positive personality:** Teaching others to do a good job requires that the trainer inspires as much as possible the trainees. It is thus important for the trainer to have a positive personality as this will help him/her perform his/her duties better and more effectively;
- **Can get messages across:** Some people have a natural gift of being able to communicate with others in a simple and direct way, making it easier for learning to take place. Employers thus look for individuals who have the knack of explaining things in simple understandable ways.

4. Management

In the case of management, these were present at the beginning when the Call Centre was set up and so did not really go through a specific recruitment process. In many cases they are people who were of trust or crucial to the successful setting up of the Call Centre.

2.2.3 Employers' views on labour supply

Employers were asked to comment on the current labour supply and whether they do manage to find enough workers with the required skills as they require. The employers' responses varied according to the type of workers necessary:

- **For the local market:** In the case of the local market where the main skills required involve knowledge of the English language as well as communication skills, employers stated that they have enough supply. Having said this, they also pointed out that many job seekers, particularly those sent by ETC, tend to fare badly in the interview stage and the level of the knowledge of the English language as well as the communication skills possessed are very weak in many of the applicants;
- **For the technical market:** Employers stated that there tends to be supply. In the case of ICT, MCAST graduates tend to fit in terms of technical background. The problem in such cases, however, tends to be the salary demands of job seekers where salary aspirations tend to be greater than those which employers can offer;

- **For Call Centre Agents with English accent:** Due to the small demand of Call Centre Agents which need to be native English speakers, the number of expats who live in Malta tend to provide a large enough labour supply for such posts;
- **For Call Centre Agents with specific language skills:** Employers tend to have a degree of difficulty in finding workers with knowledge of some particular languages. In the case of Italian, it is not difficult. There seem to be enough French speakers for the current need but this may not be enough should the Call Centre sector increase. On the other hand, there was a particular shortage of Spanish speakers. Some employers also stated that should they need scandinavian speakers for new contracts, that the supply of native speakers may be limited.

Thus the overall view is that if there is any shortage, this tends to be mainly in labour skills where there is the need of specific languages.

2.2.4 Employers' Views on Training for work in Call Centres

All the Call Centre employers interviewed stated that they provide inhouse training due to the specific activities within the centre. Training is usually intensive on initial employment but is also ongoing. This implies that there is no real need for prior training for work in Call Centres.

Initial inhouse training is usually quite long and can be as much as 6 weeks long. During this period, new recruits learn about the specific service that they are to work on e.g. in banking the financial knowledge, in IT the types of common questions received etc. They also learn selling techniques in the case of Telesales. There is also intensive training in social and communications skills where new recruits are taught how to answer a phone, how to deal with clients in specific situations, carry out simulated phone calls as well as job shadow a Call Centre Agent to experience how the work is done. Towards the end of the training, they are allowed to do some work but this is monitored, many times using the buddy system, also known as coaching.

However, training is also ongoing. Due to the high targets that Call Centres need to adhere to, quality staff are continually monitoring phonecalls and providing training and assistance, many times tailored to individual needs. There are also group courses which target either new products that the Call Centre is starting to offer. This is usually carried out on obtaining a new contract. There is also often training in soft skills which are so important for the job.

Training Outside the Call Centres

During interviews, both the person at Malta Enterprise as well as the employers stated that they are aware of the initiatives in providing training to job seekers in order to provide a flow of labour supply. There was an overall view that there was an effort to provide training needed within the labour market by MCAST as well as by ETC. However, employers agreed that whatever training provided, there will always be the need for intensive initial inhouse training. This argument was made due to the very specific sectors which the call centres work in. Employers were also unhappy with the type of job seekers often sent by ETC. This was mainly due to the lack of

skills, particularly language as well as communication skills, of many of the job seekers.

Training Courses offering training for work in Call Centres

There exist training courses, offered by ETC as well as MCAST for the job of a Call Centre Agent. These courses are free or funded by the European Social Fund.

ETC Course: Call Centre Agent

The training course at the ETC states that its aim is to enable the trainee to demonstrate ability in performing good customer care skills and telephone techniques in a Call Centre Agent position.

The course is divided into a number of aspects, these including:

- Introduction;
- English pronunciation and Conversation;
- Telephone techniques;
- Customer Care;
- Call Centre Technology

To be eligible to follow the course applicants need to be aged 16 years and over, and must have a good standard of spoken English. The duration of the course is 60 hours. Those who complete the course will be provided with a Certificate of Achievement.

MCAST Course for Call Centre Agents²⁰

This course is financed by the European Social Fund (ESF). The course includes aspects related to work in Call Centres. The training provided is focused on five areas. It has the first part focusing on introducing the Call Centre environment, its facilities and main activities. One other area targets customer service with particular reference to dealing with customers usually encountered in a Call Centre; Communication skills of particular importance to communication over the phone; ICT skills that one requires to use technology and ICT packages used in Call Centres as well as the concept of quality assurance and target specifications that clients usually require from Call Centres. The aspects targeted in each of these five areas are included below:

1. Call handling Operations & Skills:
 - Welcome & Induction;
 - Features of Training programme, facilities & contact centre;
 - Core Services; and
 - Head Sets & Use.
2. Customer Service:
 - Contact Centre Context - Customer Service Specifications;
 - Participant Expectations;
 - Importance of Customer Care;
 - Customer Profiling;
 - Customer Relationship;
 - Dealing with Difficult Customers - Objection Handling; and

²⁰ Information supplied by HR manager of 24Contact centre who is involved in the programme to be run soon.

- Hands on Activities/ Role Play.
3. Communication Skills:
 - Communication Techniques;
 - Customer Interactions Rapport Building;
 - Live Call Handling Experience;
 - Importance of Clarity;
 - Cold Calling Skills;
 - Live Call Listening; and
 - Hands on Activities/ Role Play.
 4. ICT Skills:
 - Computer Infrastructure Setup in a Contact Centre;
 - Information Systems at a Contact Centre;
 - Working with Operating Systems;
 - Support Applications & Features; and
 - Hands on Activities/ Role Play.
 5. Quality Assurance:
 - Contact Centre Context - Typical Client requirements/ Contracted Specifications; and
 - Hands on Activities/ Role Play;

In the interviews, employers were asked if the existing training provided by ETC helps them have better prepared recruits. The reactions were various. Some said that they tend to be remote from the actual on-the-job demands and thus are useless and worthless. Others acknowledged that training in soft skills and other general aspects helps applicants to understand what the job entails. However, the agreement was that in the case of language skills, since high proficiency is required, it did not make sense to try and develop these language skills through training as the level of proficiency required is too high.

Most of the training for work in Call Centres is done inhouse and is ongoing due to the specific nature of the work.

Employers do not feel that training courses can help much since Call Centres require specific language skills which training courses cannot achieve.

2.2.5 Job Mobility and potential role of EURES in Call Centre Sector

Employers were asked a number of questions with respect to the employment of foreign nationals. First of all, it is to be noted that practically all Call Centres, to different degrees have a number of foreign nationals in their employment. Employers have no particular preference for foreign nationals over the local supply when there is a supply of the same skills from both Maltese and other nationals.

Need for worker mobility in Call Centre sector

Employers have stated that they needed to employ foreign nationals, particularly, due to the shortage of the local supply of fluent speakers in a number of languages, mainly French and German. They also expressed an interest to know if there was potential to attract other language speaking workers, such as Finnish, Scandinavian as well as Spanish with the intention of possibly also tapping opportunities in that market. There is also preference to employ expats who live in Malta but are native English Speakers. These workers help employers provide fluent English speakers with an English accent for the British market which is particular on not talking to 'foreigners' due to the massive number of Call Centres set up in India. In this respect, foreign workers in the Call Centre sector are not in competition with the local supply, but rather make up for the shortage that may exist in the local market.

Employers also recognise that if the Call Centre sector in Malta continues to grow, there will quickly be saturation in the local labour supply. However, Call Centres consider attracting foreign workers to come to work in Call Centres in Malta as one possible solution which would allow them to overcome existing shortages as well as to tap other markets which with the local supply would not otherwise be possible. Thus, there is potential in also investing in attracting EU nationals to come and work in Malta.

Employers consider the employment of EU nationals as crucial for further growth of the Call Centre sector in Malta.

Knowledge of EURES activities

Employers, were also asked whether they knew of the existence of the EURES office and what it can offer. Some of the employers interviewed knew of it, some did not. In one case one employer had used the services of the EURES office of another country in order to attract foreign speaking workers and had managed to have applicants.

Those employers who need to employ workers from other countries in the EU were very interested in getting to know more about the services and support that EURES can offer. Three out of the five Call Centres interviewed in fact asked to be contacted by the EURES office as they would appreciate help and support to find the labour supply for potential growth. This shows that the EURES office can contribute to the Call Centre sector to help it grow as it taps the European labour market.

These three Call Centres were very interested in advertising their calls for vacancies on the EURES website. There is definitely a role that EURES can play with respect to supporting this sector.

EURES has role in helping Call CENTRES tap the EU labour market.

2.3 Current typology of labour supply

The analysis has up to this point focused on what employers within the Call Centre sector require and experience as well as data provided by ETC. It has been established that due to the growth that this sector has experienced as well as the high turn-over that there is, there is always the need to recruit people to work in Call

Centres. Likewise, ETC has a number of job seekers who have expressed an interest in looking for work as a Call Centre Agent.

This section involves the analysis of the responses obtained in the telephone survey carried out with job seekers interested in working as Call Centre Agents. The analysis will provide insight into whether these job seekers possess the required qualifications, skills and attributes that employers are looking for.

The total list of job seekers interested in working in Call Centres supplied by ETC amounted to around 250 persons. In the process of phoning these people, a number stated that they had found other employment since while others stated that they were no longer interested in working in the sector. The total number of 175 respondents eventually surveyed thus represent most of the job seekers who have registered an interest in the job of a Call Centre Agent.

The description of the survey sample thus also more or less gives the description of the type of job seekers and their background.

2.3.1 Personal Characteristics

Table 2.4: Age Distribution of job Seekers Surveyed

Age Range	Frequency No.	Percentage %
16-25	39	22.3
26-35	38	21.7
36-45	41	23.4
46-55	49	28.0
more than 55	8	4.6
Total	175	100.0

There is more or less an equal distribution of job seekers across the different age ranges. This contrasts with the relatively young majority of workers in the sector. However, as many employers have stated, they do have a number of workers of a certain age, and age is not considered in the recruiting process.

Table 2.5: Gender Distribution of Respondents

Gender	Frequency No.	Percentage %
Male	59	33.7
Female	116	66.3
Total	175	100.0

As is the case in the Call Centre sector, there is a majority of females who are interested in finding a job as a Call Centre Agent. In fact, the ratio of percentages between males and females is quite similar as some employers quoted a ratio of 2/3

females to 1/3 males overall with the exception of the technical customer service which tends to be male dominated.

Table 2.6: Frequency of Respondents' Status

Status	Frequency	Percent
Single	97	55.4
married	53	30.3
separated	25	14.3
Total	175	100.0

The status of half of the respondents is single. This may reflect a trend where most of the persons looking for job in call centres tend to be single due to the perceived long hours due to the shift work as well as work on Sundays and holidays that the job demands.

2.3.2 Educational Background

Table 2.7: Highest Level of Education Attended

Level of Education attended	Frequency No.	Percentage %
Primary	11	6.3
Secondary	146	83.4
general post-secondary	10	5.7
vocational post-secondary	7	4.0
Refused to give information	1	0.6
Total	175	100

Most of the respondents have attended only up to secondary education. In fact these amount to 83.4%. There are less than 10% of job seekers who have attend some type of education at post-secondary level.

Table 2.8: Highest level of qualifications of job seekers

Qualifications held	Frequency No.	Percentage %
No qualifications	99	56.5
O level	68	38.9
Advanced/Intermediate	5	2.9
Vocational qualification	2	1.1
University qualification	1	0.6
Total	175	100

About half of the respondents do not have any qualifications. The rest mainly have an O level standard of education. This shows that the educational background of these job seekers is poor. However, as indicated by many of the employers, qualifications are not usually good indicators of whether one can make a good Call Centre Agent or not. This means that the job seekers' limitations in qualifications so far should not hinder them from obtaining a job position in the Call Centre sector.

No statistical significance of qualifications across gender or highest level of school attended was obtained. This means that there is no difference in the range of educational background and qualifications between males and females. In this case, they are few for both genders.

Table 2.9 Percentage of Respondents with SEC Level Standard Qualifications

Qualification subject	Frequency	Percentage ²¹
	No.	%
Maths	28	16.0
English	50	28.8
Maltese	50	28.8
Physics	12	6.9
Italian	39	22.3
French	12	6.9
I.T.	2	1.1

Most of the job seekers do not have any particular qualifications.

The number of job seekers with a SEC Level standard qualification are few. Only one fourth of the job seekers have a SEC Level in a key subject such as English and Maltese, and to a slightly lower percentage Italian. This, however amounts only to 50 job seekers out of the total of 175. Respondents had other SEC qualifications in subjects such as Religion, Social Studies, Environmental Studies, English Literature etc. but the numbers remain few.

2.3.3 Employment history

The respondents were asked to indicate how long they had been looking for work. The frequencies obtained are shown in Table 2.10 overleaf.

Half of the respondents have been out of work for more than 2 years. Others have been out of work for less and are more or less equally distributed in the period of 2 months up to 2 years.

²¹ Percentage for each subject has been calculated from the total cohort. However, there may be the same person who has more than one O Level.

Table 2.10: Frequency of Length of Time Looking for Work

Time looking for work	Frequency No.	Percentage %
Less than 1 month	3	1.7
2-6 months	20	11.4
6 months – 1 year	26	14.9
1 – 2 years	29	16.6
More than 2 years	97	55.4
Total	175	100.0

Table 2.11: Frequency of Respondents who already have had Work Experience

Previous work experience	Frequency	Percent
Yes	148	84.6
No	27	15.4
Total	175	100

The majority of the respondents had worked before and it was only in the case of 27 respondents who were looking for their first job. However, from their work experience it was only one respondent who had worked in a Call Centre before.

When one looks at the types of employment that many of the respondents held before, many come from the recent closure of many factories with the job of machine operator being one of the most common jobs. High on the list was also that of salesperson. However, overall, the types of jobs that were previously held were all of elementary level or else as machine operators. This shows which job categories tend to be at higher risk of becoming unemployed.

From the responses obtained, many of the job seekers have had one job in the past. One can see that among them there is a good percentage of workers who had worked for a significant number of years as machine operators in factories which have recently closed down. Due to the significant job loss in the manufacturing sector, these job seekers are unable to find similar jobs of machine operators and are now trying to find work in other sectors. The Call Centre sector is one of these new emerging sectors which can provide new job avenues to these people who have been laid off work.

Table 2.12: Reasons for which Respondents had Lost Job

Reasons for which previous job was lost	Frequency	Percent
Lost job or sent off	39	39.4
I stopped my temporary work	17	17.2
I wanted to take care of my family	11	11.1
Sickness	13	13.1
Training	5	5.0
Early retirement	2	2.0
Other	12	12.2
Total	99	100.0

From the table it can be seen that from those who were ready to say why they had lost their job, there are about 40% who were laid off. These were mainly cases of machine operators whose factory closed or else cases of salesgirls where the shop closed. The other reasons given were completion of contracts for temporary work or else a decision not to continue working due to family responsibilities.

2.3.4 ICT Skills possessed by respondents

The job seekers' ICT skills were captured in different ways. They were asked if they have the ECDL qualification. They were also asked to rate their ICT capability in the use of particular basic computer programmes.

Table 2.13: Frequency of possession of ECDL

	Frequency No.	Percentage %
Respondents wit ECDL	81	46.3
Respondents without ECDL	94	53.7
Total	175	100.0

A little less than half of the respondents possess an ECDL qualification. This is quite positive although the percentage should be higher. Although none of the employers actually mentioned that applicants should possess an ECDL, this qualification can give an indication to employers of the degree of ICT skills job seekers possess.

Nearly half of the job seekers possess an ECDL qualification.

Table 2.14: Level of ECDL obtained by respondents

Module of ECDL Qualification	Frequency No.	Percentage %
Module 1	5	6.3
Module 2	1	1.2
Module 4	1	1.2
Up to Module 7	74	91.3
Total	81	100

From those who have an ECDL qualification, the majority possess a qualification in most of the modules. This means that those who have invested in obtaining ICT qualifications have gone through the whole ECDL process.

Specific ICT Skills

Although the ECDL is quite a good indicator of the ICT skills that a person possesses, respondents were asked to rate their personal ICT competence in specific tasks, these being: general use of the computer; surfing the internet; sending emails; use of WORD; and use of EXCEL.

Table 2.15: Frequency of respondents' declared proficiency in the use of computers

Proficiency in the use of computer	Frequency	Percent
Very good	66	37.7
Quite good	33	18.9
Not so much	19	10.9
A little	29	16.5
Nothing	28	16.0
Total	175	100.0

The percentage respondents who declared that they have very good proficiency in the use of the computer is close to the percentage who have ECDL qualifications. Overall, there are around 60% of the job seekers with good enough ICT proficiency. This means that there is room for these job seekers to improve on their ICT competences through training. There are 16% who have stated that they knew nothing. It is very important for this group of job seekers to be helped to become ICT literate as this will strongly limit their chances of being employed in a Call Centre.

Job seekers still feel a degree of uncertainty in their ICT skills and competences.

Table 2.16: Frequency of respondents' declared proficiency in surfing the internet

Proficiency level	Frequency	Percent
Very good	79	45.2
Quite well	24	13.7
Not so much	12	6.9
A little	23	13.1
Nothing	37	21.1
Total	175	100.0

A similar percentage stated they are proficient in surfing the internet, this amounting to around 60% of the respondents.

Table 2.17: Frequency of respondents' declared proficiency in sending emails

Proficiency level	Frequency	Percent
Very well	76	43.4
Quite well	19	10.9
Not so much	17	9.7
A little	14	8.0
Nothing	49	28.0
Total	175	100.0

It is only about half of the respondents who know how to send an email. There is also consistently, one quarter of the respondents who appear to have no exposure to computers. Work in Call Centres often requires the use of technology and inputting data in software packages designed to keep track of orders followed or other administration. There is thus acute need of training in ICT for some of these job seekers.

Table 2.18: Frequency of respondents' declared proficiency in using WORD

Proficiency level	Frequency	Percent
Very well	51	29.1
Quite well	27	15.4
Not so much	27	15.4
A little	24	13.7
Nothing	46	26.4
Total	175	100.0

It appears that those who have some exposure to ICT and have gained basic proficiency have invested in their ECDL qualification. This is because yet again the percentage of job seekers who declared that they have a good standard of proficiency in the use of the program WORD was a little above 40%. There is also the consistent 26% who declared that they have no proficiency.

Table 2.19: Frequency of respondents' declared proficiency in using EXCEL

Proficiency level	Frequency	Percent
Very well	46	26.3
Quite well	18	10.3
Not so much	26	14.9
A little	32	18.3
Nothing	53	30.2
Total	175	100.0

The percentage of respondents competent in the use of the program EXCEL is less and falls slightly to lower than 40%. The rest need to have further training to improve their skills in the use of this program.

2.3.5 Language skills

Due to the need to use different languages in Call Centre work, job seekers were asked to rate their proficiency in the different languages. The main languages: English, Maltese, French, German, Spanish and Italian were included. For each language, respondents had to rate their proficiency in speaking, understanding, reading and writing.

Maltese

The majority of the job seekers stated that they have a good command of spoken Maltese language. In fact, 95.4% rated their knowledge of the spoken Maltese language at 1 which is the highest level proficiency. 5 job seekers rated their knowledge of Maltese at 5, which is no knowledge. This is probably because these job seekers were probably not Maltese citizens.

Table 2.20: Level of Proficiency in Maltese

Level of Proficiency	Speaking		Understanding		Reading		Writing	
	No.	%	No.	%	No.	%	No.	%
1	167	95.4	168	96.0	156	89.2	155	88.6
2	2	1.1	2	1.1	8	4.6	4	2.4
3	1	0.6	1	0.6	4	2.4	6	3.3
4	0	0	4	2.4	4	2.4	6	3.3
5	5	2.8	0	0	4	2.4	4	2.4
Total	175	100.0	175	100.0	175	100.0	175	100.0

1 – Very good, 5 - No knowledge

The level of understanding of the Maltese language was also rated high. This reflected the situation where the majority of the job seekers are native Maltese speakers. More or less the same trend as level of spoken Maltese was obtained.

The level of reading in Maltese is slightly less than the level declared for speaking and understanding. This may reflect the situation where some of the respondents may have problems with literacy, particularly if it has been some time since they have practised their writing skills for some time. The trend is similar for writing.

English Proficiency

Table 2.21: Level of Proficiency in English

Level of Proficiency	Speaking		Understanding		Reading		Writing	
	No.	%	No.	%	No.	%	No.	%
1	155	88.5	107	61.1	89	50.9	98	56.0
2	4	2.3	41	23.4	57	32.6	41	23.4
3	8	4.6	16	9.1	12	6.9	13	7.4
4	7	4.0	4	2.3	4	2.3	9	5.1
5	1	0.6	0	0	1	.6	1	.6
Did not respond	0	0	7	4.0	12	6.9	13	7.4
Total	175	100.0	175	100	175	100.0	175	100.0

1 – Very good, 5-no knowledge

Most of the job seekers rated their level of spoken English quite high with 88.5% rating their proficiency at 1. It is to be noted that only one quarter of the cohort actually posses a SEC qualification in English, this ranging from grades 1-7. Thus, even though many have rated it at 1, the respondents may have had a different standard in mind when rating their proficiency. Since no standard measurement of level was used as a benchmark, one would need to consider the ratings given with caution.

In fact, the ratings go down when it comes to understanding English, with a number of respondents rating their language proficiency at 2 rather than 1. However, this is still high and if correctly rated, would definitely allow the job seekers to work in Call Centres requiring English speaking Call Centre Agents. However, once again, the rating given cannot be considered as accurate since respondents may have different levels of standards and proficiency in language may fall when talking about understanding technical language such as in IT.

The level of proficiency in reading English falls further when respondents were asked to rate the level of their reading capability. A number of job seekers refused to answer, leading one to probably assume that these persons may be illiterate and did not want to state to be so.

The lowest ratings were obtained in the level of proficiency in writing. In fact, only a little more than half of the job seekers rated their level of writing to be at level 1. And even so, one wonders whether these job seekers can write with few spelling mistakes as the rating of 1 would imply. So again, overall, the respondents' rating on the proficiency of the English language has to be considered with caution.

French

There are very few job seekers who have proficiency in speaking the French language. In fact, this amounts to only 6 respondents if one considers those who have rated their proficiency at levels 1 and 2. French is not a commonly spoken language in Malta and this is thus to be expected. In fact, 163 of the respondents did not even bother to provide a rating which means that they have no knowledge of the language at all.

Table 2.22: Level of Proficiency in French

Level of Proficiency	Speaking		Understanding		Reading		Writing	
	No.	%	No.	%	No.	%	No.	%
1	3	1.7	1	.6	1	.6	1	0.6
2	3	1.7	3	1.7	0	0	0	0.0
3	4	2.3	3	1.7	4	2.3	4	2.3
4	1	.6	1	.6	3	1.7	3	1.7
5	1	.6	2	1.1	0	0	0	0.0
No response	163	93.1	165	94.3	167	95.4	167	95.4
	175	100.0	175	100.0	175	100.0	175	100.0

1 – Very good, 5-no knowledge

The level of understanding of the French language is even lower with the number stating a degree of proficiency at 1 and 2 falling down to just 4. The potential number of job seekers who can take up positions as Call Centre Agents requiring another language skill, such as French is thus very low.

The few existing French speaking job seekers do not feel at all confident in reading the language. Although this may not be that important for a Call Centre Agent, it shows that the proficiency of the potential few is also not that great.

The situation for written French is just as bad with only one person stating that s/he is very proficient. This is probably the case of either a French native speaker or somebody who has come from another country where French is spoken much more.

German

The job seekers wanting to work in Call Centres do not have any knowledge or proficiency in the German language. In fact there were practically only two persons who stated that they have some level of proficiency in speaking, understanding, reading or writing a language.

Table 2.23: Level of Proficiency in speaking German

Level of Proficiency	Speaking		Understanding		Reading		Writing	
	No.	%	No.	%	No.	%	No.	%
1	0	0.0	0	0.0	0	0.0	0	0.0
2	1	0.6	1	0.6	0	0.0	0	0.0
3	0	0.0	1	0.6	1	0.6	1	0.6
4	1	0.6	0	0.0	0	0.0	0	0.0
5	0	0.0	3	1.7	2	1.1	2	1.1
Refused to answer	172	98.3	172	98.3	172	98.3	172	98.3
Total	175	100.0	175	100.0	175	100.0	175	100.0

1 – Very good, 5-no knowledge

Italian

The proficiency in the Italian language is better than that for French and German. In fact employers said that they do not experience any great difficulties in recruiting personnel with proficiency in the Italian language. There are in fact 19 persons who feel that they are very proficient in all the aspects of the language. There are also a good percentage who can understand and read Italian, but less when it comes to speaking the language. Employers look for proficiency mainly in speaking a language. This means that there are less job seekers with the required language skills with respect to Italian. This said, again there is the issue of the standards job seekers were using in rating their own abilities. Call Centre employers require high speaking proficiency and this goes beyond basic speaking abilities.

Table 2.24: Level of Proficiency in Italian

Level of Proficiency	Speaking		Understanding		Reading		Writing	
	No.	%	No.	%	No.	%	No.	%
1	3	1.7	19	10.9	19	10.9	19	10.9
2	17	9.7	41	23.4	41	23.4	33	18.9
3	37	21.2	13	7.4	13	7.4	17	9.7
4	25	14.3	8	4.6	8	4.6	9	5.1
5	17	9.7	5	2.9	5	2.9	7	4.0
Refused to answer	76	43.4	89	50.8	89	50.8	90	51.4
Total	175	100.0	175	100.0	175	100.0	175	100.0

1 – Very good, 5-No knowledge

Job seekers have limited language skills in a second foreign language.

2.3.6 Attributes good for work in Call Centres

Call Centre Agents also need to possess a number of attributes, mainly related to interpersonal skills. This is due to their direct contact with customers and are therefore the face of many companies from which the Call Centre would have obtained a contract. Since employers give value to particular attributes that applicants have during the recruitment process, it is important for job seekers to possess some of these attributes in order to be successful in finding work.

Table 2.25: Rating in being good in listening to people

Level of Proficiency	Frequency No.	Percentage %
Very good	139	79.4
Good	33	18.9
Not so much	1	0.6
A little	2	1.1
Not at all	0	0
Total	175	100.0

When asked if they were good at listening to people, a good majority rated their abilities at the highest level 1. It was only 3 job seekers who did not rate themselves as good listeners. This means that many of the job seekers are aware that Call Centre Agents need to listen to people on the phone for a long time, with often having repetitive requests or tasks, listening to the same things and sounding concerned and interested each time.

Table 2.26: Rating in being good in listening to people with problems or difficulties

Level of Proficiency	Frequency No.	Percentage %
Very good	134	76.6
Good	38	21.7
Not so much	1	0.6
A little	2	1.1
Not at all	0	0
Total	175	100.0

Practically an identical pattern in response was obtained when the job seekers were asked if they like to listen to the problems of others. This is usually the case with Call Centre Agents involved in customer service where many times it is customers in difficulty who phone in to obtain support. This requires that Call Centre agents are used to dealing with people who are concerned, in distress and even possibly angry and irritated.

Table 2.27: Rating in being good at talking to people on the phone

Level of Proficiency	Frequency No.	Percentage %
Very good	93	53.1
Good	68	38.9
Not so much	10	5.7
A little	3	1.7
Not at all	1	0.6
Total	175	100.0

Fewer job seekers rated themselves at very good at talking to people. However, there were more who rated themselves as good. This rating needs to be considered with a degree of caution. This is said because in the process of collection of data, a significant number of the respondents seemed to confuse the job of a Call Centre Agent with that of Telephone Operator. This latter job requires different talking skills over the phone where Call Centre agents need to be more courteous and polite in their tone of voice and the way that they address and deal with clients than the typical telephone operator. This means that the rating given by the responses may not necessarily provide relevant information about the job seekers' adaptability to work as Call Centre Agents.

Table 2.28: Rating in being good to sit down for long hours

Level of Proficiency	Frequency No.	Percentage %
Very good	63	36.0
Good	54	30.9
Not so much	43	24.6
A little	15	8.5
Not at all	0	0
Total	175	100.0

The work of a Call Centre agent requires the individual to sit for a long time working at the phone. This requires that the individual is capable of staying still for a long time. It is also known that some people may suffer from back problems when they sit for long periods of time. In fact, it can be seen that there is about one third of the job seekers who do not seem to like to sit down for long time spans as they chose the options 'not so much' and 'a little'. This shows how a significant percentage may not be able or ready to work in a Call Centre due to the nature of the job which requires workers to sit down for long periods.

Respondents have rated their attributes very highly. There is doubt as to how much job seekers understand what the job of a Call Centre Agent actually entails.

Table 2.29: Rating in being able to work in a noisy environment

Level of Proficiency	Frequency No.	Percentage %
Very good	63	36.0
Good	12	6.9
Not so much	52	29.7
A little	42	24.0
Not at all	6	3.4
Total	175	100.0

There are about 60% of the job seekers who would not like to work in a noisy environment. This, however, may not be such a great problem as researchers visiting Call Centres noted that the ones in Malta are not that noisy.

2.4.7 Type of work conditions job seekers are looking for

Job seekers were also requested to indicate if they would accept a job offer if they are offered particular conditions of work in terms of contract type, working hours, flexibility, salary etc. This exercise will make it possible to see if the job seekers' expectations can be satisfied by what is usually offered in the Call Centre sector.

Table 2.30: Frequency of respondents accepting definite contract

Response	Frequency	Percent
Yes	69	39.4
No	102	58.3
Refused to answer	4	2.3
Total	175	100.0

A good number of job seekers would not work if they are offered a definite contract. This amounts to about two thirds of the job seekers. Understandably, a good majority would accept a job with an indefinite contract, this amounting to 88%. Those who have said no may have in mind a part-time rather than a full-time job.

Table 2.31: Frequency of respondents accepting indefinite contract

Response	Frequency	Percent
Yes	154	88.0
No	21	12.0
Total	175	100.0

The majority of the job seekers are willing to accept a job, whether it is part-time or full-time. The response is higher, as expected, in the case of full-time work. Since there is the possibility for both part-time and full-time work then job seekers do well to keep any opportunity of work open.

Table 2.32: Frequency of respondents accepting part-time work

Response	Part-time Work		Full-time Work	
	Frequency	Percent	Frequency	Percent
Yes	151	86.3	168	96.0
No	24	13.7	7	4.0
Total	175	100.0	175	100.0

The majority of job seekers would like to work office hours. This can be observed from the high percentage of respondents saying yes when asked if they would accept to work office hours. It also supports the impression that maybe job seekers tend to confuse the work of the Call Centre Agent to that of a Telephone Operator.

Table 2.33: Frequency of respondents accepting to work office hours

Response	Frequency	Percent
Yes	170	97.1
No	5	2.9
Total	175	100.0

The majority of the job seekers, however, do not wish to work shift work. This percentage amounts to three quarters of the job seekers. This is particularly problematic since Call Centres usually work on shift hours. Even if they can offer times of work which are similar to office hours, they would still need to have personnel working outside office hours. Employers may opt not to recruit job seekers who would object to working shift hours.

Table 2.34: Frequency of respondents accepting to work shift hours

Response	Shift hours		Work in the evenings		Work on weekends	
	No.	%	No.	%	No.	%
Yes	45	25.7	41	23.4	55	31.4
No	130	74.3	134	76.6	120	68.6
Total	175	100.0	175	100.0	175	100.0

A similar response rate was obtained from job seekers when asked if they were ready to work in the evening. Many Call Centres need to have workers on duty up to times as late as 10.00p.m. and in the case of the customer service offering 24 hour service, there will also be requests for workers to work over the night. Here there is a significant mismatch between working hours that job seekers are expecting and those usually offered by Call Centres.

Job seekers do not seem to realise that most Call Centres do not have office hours but shifts.

Likewise, three fourths of the job seekers do not wish to work on weekends and holidays. It appears that many of the job seekers are looking for normal office hours with a Monday to Friday job. This is not the trend, unfortunately in Call Centres and it is important for job seekers to realise this.

Table 2.35: Frequency of respondents accepting to work flexible hours

Response	Frequency	Percent
Yes	162	92.6
No	13	7.4
Total	175	100.0

On the other hand, job seekers are ready to work flexible hours. It seems that as long as the hours are favourable to them, then it is acceptable to work. In the interviews, employers have expressed a disposition to try and accommodate the workers' preferences but have also expressed the need to put limits on the amount of flexibility as otherwise the rostering task would become too difficult to handle. So while there is room for negotiating hours of work with some of the employers, job seekers have to understand that they will need to accept working hours which may not be normal working hours and which are also not the most convenient to them.

Table 2.36: Frequency of respondents accepting to work in a noisy environment

Response	Frequency	Percent
Yes	80	45.7
No	84	48.0
Don't know	11	6.3
Total	175	100.0

There was distribution of responses with respect to whether job seekers would be willing to work in a noisy environment or not. This is not really that problematic since on visiting some of the Call Centres, the level of noise varies and it was also quiet in the case of some.

Table 2.37: Frequency of respondents needing childcare

Response	Frequency	Percent
Yes	3	1.7
No	172	98.3
Total	175	100.0

Only three job seekers stated that they need child care. This means that child care is not a problem with the supply of workers for Call Centres. In fact, in rating the importance of child-care when accepting a job, only one person stated that child-care was considered as important. Thus there is no particular need for any strategy to provide child-care services to help workers, mainly women, to go to work.

Table 2.38: Importance of Provision of Childcare

Rating	Frequency	Percent
1	1	0.6
2	0	0.0
3	1	0.6
4	20	11.4
5	155	87.4
Total	169	96.6

There is no need for provision of childcare for those wanting to work in Call Centres.

Table 2.39: Importance of Distance of Work from Home

Rating	Frequency	Percent
1	93	53.1
2	54	30.9
3	22	12.6
4	2	1.1
5	4	2.3
Total	175	100

Many of the job seekers want to have their work close to their place of residence. This is considered as very important to half of the persons surveyed. It was also considered quite important by another 31.6%. This limits very much the work possibilities of job seekers as they raise their expectations and the opportunities to find what they want would be very few, hence the reason for which they do not manage to find work.

Table 2.40: Importance of salary offered for job

Rating	Frequency	Percent
1	154	90.1
2	10	5.8
3	7	4.1
4	0	0
5	0	0
Total	171	100

The salary offered for the job is very important to nearly all the job seekers. This is to a certain degree understandable. Since, as will be seen further on, job seekers have

more or less a realistic expectation of what to expect in terms of salary, the emphasis on value of salary would not limit work opportunities that much.

Table 2.41: Importance of Work hours

Rating	Frequency	Percent
1	113	66.1
2	31	18.1
3	20	11.7
4	0	0
5	7	4.1
Total	171	100

Working hours are, however, a problem, as two thirds of the respondents consider working hours very important and another one quarter as important. In view of the majority of the job seekers wanting to work office hours and no shifts, evening or holidays and weekends, this makes it difficult for them to find a job within the Call Centre sector. Unless job seekers realize that the demands within Call Centres are different to those of office hours, their chances of finding the job they want is minimal. There is thus a great need to help job seekers to reflect on the opportunities available and to learn to accept that they would have to work in difficult hours.

Table 2.42: Importance of option to choose working hours

Rating	Frequency	Percent
1	118	69.8
2	37	21.9
3	11	6.5
4	0	0
5	3	1.8
Total	169	100

Most of the job seekers like the idea that they can have a say in choosing what working hours to have. However, if they stick to their preference for office hours, this may be problematic as Call Centres also need to have workers in evenings, nights and weekends. Employers may give up on recruiting workers who are not ready to fulfill their specific time requirements.

Job seekers tend to be too choosy and demanding when it comes to accept job offers. This reduces their opportunities of work significantly.

Table 2.43: Declared preferred gross monthly salary

Preferred wage	Frequency	Percent
minimum wage	3	1.7
400 euro	1	0.6
500 euro	3	1.7
600 euro	10	5.7
700 euro	30	17.1
800 euro	36	20.6
900 euro	51	29.1
1000 euro	31	17.7
1100 euro	1	0.6
1200 euro	1	0.6
Didn't know	8	4.6
Total	175	100.0

The majority of job seekers are looking for a monthly gross salary in the range of €700 - €1000. This amounts to a range of €8600 - € 12,000 gross per annum. This falls within the salary range which is usually provided by employers to Call Centre Agents. This shows that job seekers have the correct salary expectations with respect to the job that they would like to do.

2.3.8 Previous Attempts at finding work in Call Centres

42.3% have already applied to work in a Call Centre. This shows that nearly half of the respondents really do want to work in the Call Centre sector as they have taken the initiative to submit applications with the employers available.

Table 2.44: Frequency of respondents who have already applied to work in Call Centres

Response	Frequency	Percent
Yes	74	42.3
No	101	57.7
Total	175	100.0

The majority of job seekers have, however, so far mainly only submitted just one application form to work in Call Centres. Although the Call Centre sector in Malta is small, even with their limited language skills, job seekers can put in a greater effort and apply with at least two or three Call Centres.

A number of job seekers have already applied to work in Call Centres but without success.

Table 2.45: Number of applications submitted by job seekers

Response	Frequency	Percent
1	57	77.0
2	9	12.1
3	4	5.4
4	3	4.1
5	1	1.4
Total	74	100.0

There were 43 instances when job seekers were granted an interview following an application for a job. The majority of them were granted an interview only once. This is mainly because many of the respondents have only applied to work at a Call Centre once.

Table 2.46: Number of times respondents have been called for an interview

Response	Frequency	Percent
1	39	90.6
2	2	4.7
3	2	4.7
4	0	0
5	0	0
Total	43	100.0

In many of the cases, the job seekers never received an official response as a result of their interview. From the few who did get a reason for not being chosen, these were: lack of experience, lack of qualifications and lack of language skills. In very few occasions did the job seekers not like the conditions offered. Unfortunately such lack of explanation does not help job seekers to learn how to improve and prepare themselves better for interviews in the future and increase their chance of getting a job offer.

Table 2.47: Reasons for not being chosen

Reasons given	Frequency	Percent
Never sent to me	33	55.9
I do not have the experience	6	10.2
I did not have the necessary qualifications	11	18.6
I did not have the necessary language skills	2	3.4
I did not want to accept the conditions offered	3	5.1
Some other reason	4	6.8
Total	59	100

Most of the job seekers use ETC to know about opportunities to apply for work. This is the preferred method by nearly half of the job seekers. The next most common way to look for work is through newspaper adverts, where a little more than one third of the job seekers scan newspapers looking for job vacancies. A little less than one third use the internet to look for jobs, possibly that of ETC. Otherwise, the remaining possible strategies remain uncommon. This shows the crucial role that ETC plays in helping job seekers to identify what job vacancies exist and where they can apply for work.

Table 2.48: Methods used to look for work

Methods used to look for work	Frequency	Percentage
Wait for notification from ETC	91	52.0
Went straight to the employer	4	2.3
Used a private recruiting agency	1	0.6
Asked friends and family	5	2.9
Looked for adverts in newspapers	61	34.8
Looked for posts on the internet	40	22.9
Other methods	2	1.1
Total respondents	175	N/A

* Percentages are worked out of 175 as respondents could have ticked more than one option.

ETC is the main source of identifying job vacancies by job seekers.

2.3.9 Training Aspects

Job seekers were asked about training that they have received and which is related to the Call Centre sector. They were thus asked to indicate what training they have done for work specifically in Call Centres, in customer care, in languages and in ICT.

Only one fourth of the job seekers interested in working in Call Centres have received training to work specifically in the Call Centre sector. This means that there are still many job seekers who would benefit from receiving training and that the training does not automatically lead to a job offer.

Table 2.49: Frequency of whether respondents ever received training relevant to work in Call Centres

Response	Frequency	Percentage %
Yes	47	26.9
No	128	73.1
Total	175	100.0

Only one quarter of the job seekers followed courses offered by ETC for work in Call Centres. This shows that some job seekers have attended and made use of the

training provided by ETC. Some also mentioned other ETC courses such as Customer Care, telephone skills etc.

Table 2.50: Type of Courses attended

Course attended	Frequency No.	Percentage %
No course	131	74.8
Call Centre course – ETC	35	20.0
Customer Care – ETC	4	2.2
Equal skills – ETC	1	0.6
Motivation Course – ETC	1	0.6
Telephone Operator – ETC	1	0.6
Telephone Skills – ETC	1	0.6
call centre course (other)	1	0.6
Total	175	100.0

Only 5 of the job seekers declared that they ever received training in learning languages. Since the majority of job seekers do not have very strong language skills, this is problematic as they are not in a position even to apply for work with Call Centres which require fluent knowledge of two foreign languages.

Table 2.51: Frequency of Training in Languages

Response	Frequency	Percentage %
Yes	5	2.9
No	170	97.1
Total	175	100.0

From the handful of job seekers who have followed language courses, these amount to courses in English, Italian and Spanish. They also seem to be basic language courses which would not be enough to increase proficiency for use to work in Call Centres.

Table 2.52: Language Studies followed by job seekers

	Frequency	Percentage
No course taken	171	97.7
English - 3- prim	1	0.6
Italian	2	1.1
Spanish	1	0.6
Total	175	100.0

Overall, job seekers are willing to attend training courses in order to increase their chances of finding work.

A higher percentage of job seekers stated that they had followed a course in customer service. This amounts to a total of 29 job seekers that is 16.6%. This percentage is still small and there is room for more training to be provided in this aspect.

Table 2.53: Frequency of respondents who have followed course in customer service

Response	Frequency No.	Percentage %
Yes	29	16.6
No	146	83.4
Total	175	100.0

On a good note, the majority of job seekers are willing to follow a course in customer care. This amounts to 94.3%, probably including also among them those who have already followed the course but would still benefit from further training. ETC should note such interest and take initiative to provide these job seekers with more training which may help job seekers increase their employability.

Table 2.54: Respondents willingness to follow Course in Customer Care

Response	Frequency No.	Percentage %
Yes	164	93.7
No	11	6.3
Total	175	100.0

Half of the respondents stated that they have followed training in ICT. This explains the 50% of job seekers having the ECDL qualification. ICT skills are required for work in the Call Centre sector and it shows how ETC has been providing training and support in this key competence.

Table 2.55: Respondents' previous training in ICT

Response	Frequency No.	Percentage %
Yes	94	53.7
No	81	46.3
Total	175	100.0

Job seekers are also keen to receive further training in ICT. This again shows the job seekers' willingness to improve their ICT skills, even if they already possess the ECDL qualification. This shows that maybe proficiency in ICT goes beyond the ECDL qualification, and that job seekers would like to have more practice in order to keep updated with the new programs and technologies.

Table 2.56: Job seekers' willingness to follow courses in ICT

Response	Frequency	Percentage %
Yes	162	92.6
No	13	7.4
Total	175	100.0

Finally, respondents were asked to give a reason for which they would like to work in a Call Centre. The reasons given were various. However, there were a number of reasons which were more common than others. The most common reason given was that they want to find work. It is possible that due to the great expansion of the Call Centre sector, many job seekers identify it as the sector which is most promising in enabling them to find a job. One quarter chose to try and find work as a call Centre Agent because they like the nature of the work. A good number identified it as a job which is not hard. They probably associate it with an easy job as one needs to sit down all the time and does not need to carry heavy things around. This may be a misconception as the work of a Call Centre Agent has its own hardships which may not be physical, but more psychological as one does a very repetitive job. This response may also have been generated by the job seekers' misconception that the work of a Call Centre agent is similar to that of a Telephone Operator.

Table 2.57: Reasons for which job seekers want to Work in Call Centres

Reason	Frequency No.	Percentage * %
To find work	55	31.4
I like it	37	21.1
I like to help people	6	3.4
It is not a hard job	35	20.0
It is interesting	12	6.9
I want to do something different	6	3.4
I like to work on the computer	1	5.7
I like to talk to people	5	2.9
No particular reason	18	10.3

* Respondents could have provided more than one reason

2.4 Match/mismatch between job seekers' skills and Employers' expectations

Having looked at the employers' expectations as well as the qualifications, skills and attributes of the job seekers, it is now possible to ask whether there is any mismatch between the supply and demand in the sector. This question is difficult to tackle. First of all, all recruitment takes place mainly at the Call Centre Agent level, after which

there is the possibility of advancement due to internal promotion. From the interviews with employers it appears that they look for different types of Call Centre agents when recruiting, depending on the service and sector that they are operating in. These different types of Call Centre agents can be divided into the following categories:

- **Call Centre agents with foreign language skills.** This usually is the case of Call Centres where the service is provided to foreign clients. In such cases it is important for Call Centre Agents to have fluency in at least two foreign languages. This thus requires knowledge at least of English and one of either French, German, Spanish, and even possibly Scandinavian languages;
- **Call Centre Agents with a good English accent:** There are a number of Call Centres which have services offered to the British market. In such cases, it is not enough for the Call Centre agent to know how to speak English fluently, but it is also important that s/he possess a good accent. Many times Call Centres tend to opt for native speakers;
- **Call Centre Agents offering technical Support:** In such circumstances, the Call Centre agent needs to have fluent English but not necessarily a good English accent. However, the Call Centre agent needs to also have some knowledge in the areas in which the Call Centre offer technical support. This is mainly the case for IT support, but not specifically required for the banking sector;
- **Call Centre Agents for the local market:** There are a number of Call Centres which focus on the local market in that they mainly require Call Centre agents to have good command of the Maltese and English language as well as the skills and attributes which are required to provide a good service;

The question now is whether there are any mismatches between supply and demand. The greatest difficulty that employers find when recruiting is mainly that of finding people with language skills to do the job. In fact, one particular employer stated that he turned down an opportunity because he could not tap Spanish speaking workers. So, yes, there is a difficulty of supply in this area of skills. In addition, the job seekers registering with ETC certainly do not match these requirements. Fluent knowledge of a language is not easy to develop and so it can be considered too high a target to try and train the existing job seekers in specific languages. This mismatch cannot be achieved through training, but can be tackled through the work of the EURES office which can help employers to attract foreign speaking workers to Malta.

In the case of Call Centre agents with a good English accent, the existing mismatch is less. However, if one were probably to profile the speaking fluency and accent of the current job seekers to identify those with possible potential, these would be few. So, again, in this case, the mismatch would be hard to achieve through training and the option of attracting more native English speaking workers to Malta would be a better direction to take.

In the case of technical support, it varies on whether this is in the IT or the banking sector. In the case of IT support, if the job seekers do not have any qualifications such as MCAST diploma in IT or something similar it would be difficult to train people. However, if there are job seekers who are personally interested in IT and are

consequently knowledgeable in the subject, with training, these can potentially fulfill the supply required. In the case of the banking sector, there is greater potential for training to help job seekers to be successful. However, from the employers' comments, many times applicants sent by ETC tend to be of poor quality, usually with respect to manners, communication skills and other attributes required of Call Centre agents. So a mismatch also exists in this case, but it is much less than in the other type of Call Centre agents. Thus it is here that ETC has a great potential in trying to help the best quality of job seekers to develop those skills and attributes that are so important for Call Centre Agents to possess.

The case of Call Centre Agents for the local market presents the smallest mismatch. It is still to be recognised that the quality of many of the job seekers in the survey is not great. However, if they are willing to train and improve, they may provide a supply of good candidates to work in the sector. So here, there is a strong case where training for work of a Call Centre agent has a good probability of success. Having said this, it has also to be recognised that the number of jobs available for work only in the local market is just part of the whole Call Centre sector and is also one where growth is possibly the most limited. So it would not be wise to invest in mass training for this type of job, even if there tends to be a degree of turn-over of staff.

So overall, yes, there is a mismatch between what employers are looking for and job seekers registering with ETC. The most that ETC can do is to help those with potential, either because they have some technical knowledge, or because they are really willing to improve their skills and attributes by offering specific training. However, ETC also needs to be aware that the possible opportunities are not as much as the rate at which the sector has grown in recent years due to the type of workers that employers tend to look for in some particular services that they offer.

There is a mismatch between job seekers at ETC and Call Centre agents for foreign speaking clients or the British market in telesales.

There is a mismatch between job seekers and Technical support Call Centre agents.

There is a limited mismatch between job seekers and Call Centre Agents for the local sector. Training by ETC can help job seekers to obtain employment in the Call Centre sector.

2.6 Overall Conclusions

This research has studied the Call Centre sector in Malta, its growth history, its potential, as well as the potential labour supply which is needed to sustain the success of this sector.

The main overall findings of the study are the following:

- The Call Centre sector has grown steadily in the past three years overall, particularly with the setting up of the HSBC Call Centre which employs over 500 people;

- There have been changes in the type of services in the Call Centres. Some have closed down their international contracts and downsized. Others are moving away from telesales which is dying. There is potential and growth in those small Call Centres which offer technical support to both the local and foreign market;
- Call Centres feel that the sector will keep on growing in the future, particularly in those services related to the technical support. If there is saturation, this will be the result of the limited labour supply that a small country of 400,00 inhabitants can supply, unless Malta manages to attract workers to the sector from other EU member states;
- Local job seekers lack the language skills to work in Call Centres which require the knowledge of languages, and this cannot be achieved through training;
- Local job seekers lack the English accent which Call Centres require, mainly for telesales for the British market;
- There is possibility for local job seekers to try and find employment in technical services in banking and IT. However, there seems to be a great need for training in communications and other skills and attributes required for the job;
- There is good potential for training to provide job seekers with the skills and attributes to find employment in Call Centres tailored for the local market. However, the potential number of posts is only part of the Call Centre sector and ETC should be aware of this in order to avoid massive training for this sector;
- There seems to be a misconception among job seekers on the type of work of a Call Centres agent. Many confuse the Call Centre agent with that of a telephone operator. The Call Centre agent job is more demanding, requires more communication skills, is target oriented and can be stressful;
- There is a mismatch between job seekers at ETC and Call Centre agents for foreign speaking clients or the British market in telesales. Job seekers lack the language skills required for these jobs. The level of spoken English of a good percentage of job seekers is also probably not good enough to work for the British market;
- There is a mismatch between job seekers and Technical support Call Centre agents. Current job seekers are limited in the technical knowledge that they have. However, with support and training, those who have potential can make it. ETC is to review profiles of job seekers to identify those who really have potential to take up such posts.
- There is a limited mismatch between job seekers and Call Centre Agents for the local sector. Training by ETC can help job seekers to obtain employment in the Call Centre sector. This can be made up through training at ETC;
- Employers feel that many of the job seekers sent by ETC do not have the required skills and attributes to work in Call Centres. They strongly lack

communication skills and ETC should invest in helping these people to develop their employment skills but also on a personal level;

- Employers believe that EURES can help the sector by helping them attract workers from other EU member states and who possess the required language skills which are not available in the local labour market.

This study has provided a detailed description of what the Call Centre sector involves, the activities it includes and the opportunities, challenges and threats that it faces. It has also described the type of jobs that the sector has created and the qualifications, skills and attributes required from workers.

The study has also shown how Call Centres are a sector which needs a supply of both local and foreign workers. This makes it important for the EURES office to be able to use its channels and network to attract worker mobility in order to allow these companies to grow, expand and contribute to the growth of the local economy.

Annex I
Interview questions with Malta Enterprise Personnel

List of Interview questions: Malta Enterprise Personnel

1. How many call centres have so far been established in Malta?
2. How many with the help of Malta Enterprise?
3. How have these companies decided to come to Malta? Were there any particular reasons?
4. How many have expressed interest in setting up a call centre in Malta this last year?
5. Are these call centres from a particular sector e.g. banking or are there call centres for various sectors? Which are these sectors?
6. If yes, is there a particular sector which is attracted to Malta more than the others?
7. How do foreign companies become interested in the possibility of setting up a call centre in Malta? (How do they get to know about Malta?)
8. What are those aspects which attract companies to come to Malta?
9. Do you know how many jobs have been generated by call centres in recent years? (or last year)
10. What types of jobs have been created by call centres? Can you describe what these jobs involved? (A description for each type of job)
11. What type of skills did employers look for, for the different job types in call centres? (list skills for each different job types)
12. What type of qualifications did they demand for the different job types? (list qualifications for each job type)
13. What type of personal attributes did they look for in the people that they wanted to recruit? (list attributes for the different job types)
14. What type of working conditions did they offer (e.g. salary, working hours, bonuses)?
15. Did they offer flexible working hours?
16. Did call centres offer jobs which attract also women, particularly those with family demands?
17. Do you think that the call centre sector will continue to grow
 - a. In the short term (coming months)?
 - b. Medium term (next 2 years)?
 - c. Longer term (beyond 2 years)?
18. Has ME made any predictions about how many jobs can be created by call centres in the coming year? longer term?
19. If yes how many jobs will be created next year and in the longer term?
20. What types of jobs will be created?
21. What skills will be required for each kind of job?
22. What qualifications will be required for each job?

23. What personal attributes will be required for each job?
24. What working conditions will be offered?
25. Do employers setting up call centres experience difficulties in recruiting personnel? Do they experience it for all job types or for particular jobs more than for others? What are the main reasons behind such difficulties?
26. Has Malta Enterprise taken steps to work with ETC to help
 - a. find the required personnel?
 - b. provide adequate training to prepare people wanting to work in call centres?
27. What is your opinion on collaboration between ME and ETC to provide better job matching in the local job market?
28. Do you have any suggestions on how to tackle labour and skill shortages in the call centre sector?
29. What is your opinion about human resource training in the call centre sector? What kind of training is required by the sector?
30. Do employers operating in the call centre sector show interest in hiring people from abroad to work with their companies? Is this interest large or small? For specific or all jobs?
31. Are there any specific reasons why employers are interested or not interested to hire people from abroad?
32. Has ME worked with EURES such that it can attract personnel from other EU member states than Malta?
33. If yes, how, when and in what way?
34. If not, do you think that EURES would be a good service that would help employers find the required personnel?

Annex II
Interview questions with Call Centre Employers

Interview Questions with employers in call centre sectors

EMPLOYER DETAILS:

1. Size of Company (no. of employees): _____
2. Sector in which the call centre operates/description of activity within call centre: _____
3. When was the call centre set up?
4. What is the balance of employees in terms of gender (how many male, how many females?)
5. Is there a gender segregation in that females tend to have certain jobs and males others or is there a balanced distribution of gender across the different job types?
6. How many of the workers are Maltese and how many foreigners?
7. Is there job segregation in that foreigners tend to go for certain jobs and Maltese for others?
8. What is the distribution of age of the employees working in your call centre?

Repeated question.

CALL CENTRE SECTOR

9. What were the main reasons for which it was decided to set up the call centre in Malta?
10. What is attractive about Malta for setting up call centres?
11. What advantages does Malta offer in terms of:
 - a. Financial incentives/costs?
 - b. Work force supply?
12. What difficulties did you encounter when setting up the call centre?
13. Do you think that the call centre sector in Malta will grow in the short, medium and long term?
14. Do you think that there are limiting factors which would not allow the call centre sector to grow?
15. If you think so, what are these factors?

TYPE OF EMPLOYMENT WITHIN CALL CENTRES

16. What types of jobs are there within your call centre?
17. Can you list each of the job categories within your call centre and the size of each category?
18. Can you describe the tasks and responsibilities for each of these different job tasks identified?
19. For each job type identified, what type of qualifications do the employees hold? (specify for each job type)

20. For each job type, what types of skills do the employees hold? (specify for each category)
21. For each job type, what personal attributes do the employees have?(Specify for each category)
22. Is there any age bracket/gender specific to each job category?
23. Are there any EU nationals recruited in certain categories? If yes, in which categories?
24. What were the main reasons for recruiting foreigners?
25. Do foreign employees have different qualities than their Maltese counterparts i.e. qualifications, skills, attributes?

WORKING CONDITIONS OF EMPLOYEES

26. What type of employment do employees have: part-time, full-time, both, other arrangement? Specify for each job type.
27. How flexible are the jobs in terms of full-time. Part-time employment in terms of number of hours of work?
28. What type of job hours do employees have? (Office hours, shift etc.)
29. Is there work on weekends and public holidays?
30. Is there the possibility for employees to negotiate the number of hours of work and the times at which they work?
31. What is the wage bracket for employees in each job type?
32. What type of contract do employees have i.e. fixed, indefinite other type of contract?
33. Do employees have other arrangements tied to their working conditions i.e. family friendly measures, telework, childcare centres, etc...?
34. Are there opportunities for employees to progress within the call centre structure?
35. Do you offer :
 - a. Health insurance?
 - b. Performance bonus?
 - c. Any other perk/allowances to your employees?
36. Do you offer any on-the-job training? If so what type and in what way?
37. Do you offer incentives (financial, time off) to support off the job training?

MATCHING LABOUR/SKILL DEMAND AND SUPPLY

38. Do you think that you will need to recruit more personnel in the short/medium/long term?
39. If you intend to recruit, in what job categories are there vacancies and how many in the short/medium/long term?

40. What qualifications are you/will be requesting for each job category?
41. What skills do you require for each job category?
42. What personal attributes will you be requesting for each job category?
43. How is the turnover of staff in your company?
44. If there is high turn-over, in which jobs does this occur?
45. What do you think is the reason for the high/low turnover in your company?
46. Do you have problems finding adequate people to recruit?
47. Do you think that there are enough Maltese people with the required skills in the labour market to satisfy demand for call centre staff?
48. If you have difficulties, do you think that this is the case of:
 - a. Applicants not having the required qualifications;
 - b. Applicants not having the required skills;
 - c. Applicants having too high expectations with respect to salary;
 - d. Applicants not liking the working hours which the job demands;
 - e. Is there any other issue?
49. How is your company facing such challenges? What strategies, if any, is your company adopting to overcome such challenges?
50. Has your company sought assistance from other entities to overcome such challenges? What kind of assistance did you seek and how was this experience?
51. Do you require any assistance from other entities, such as government, employer or trade union associations, or other entities that could help you overcome these challenges? If, yes what kind of assistance would you require?
52. Do you think that there is a need to introduce training that targets skills for call centres specifically?
53. Do you think that ETC or other entities can provide training to job seekers which would reduce any existing mismatch in supply and demand?

JOB MOBILITY

54. What is your opinion on recruiting foreign nationals within the call centre sector?
55. Do you usually have job applicants from other EU countries than Malta?
56. Which competences and skills do these other EU nationals usually have more than Maltese citizens?
57. Do you know what EURES is, and if so did you ever use it?
58. Did you ever have applicants from other EU member states which knew about the job via EURES?

59. Would you think that recruiting EU citizens other than Maltese can be a solution to any lack of supply, or would it be better to train Maltese people?
60. Would you consider advertising job vacancies on a European level via EURES?
61. Is there any specific strategy that you would suggest in order to reduce any mismatch that could exist between labour/skill supply and demand in the call centre sector?

Annex III
Questionnaire used for the Telephone Survey

Survey bit-telefon ma min qed ifittex ix-xogħol

Biex wiehed jipparteċipa f'dan l-istharriġ, irid jirrispondi iva lill-ewwel żewġ mistoqsijiet:

Inti qed tfittex xogħol? Iva

Inti qed tfittex xogħol f'call centre? Iva

DETTALJI TA MIN QED JIRRISPONDI

1. **Eta'**

<input type="checkbox"/>	16-25
<input type="checkbox"/>	26-35
<input type="checkbox"/>	36-45
<input type="checkbox"/>	46-55
<input type="checkbox"/>	Iżjed minn 55.

2. Sess Raġel mara

3. Fejn toqgħod? _____

4. X'inhu l-stat tiegħek?

<input type="checkbox"/>	Xebba/Ġuvni
<input type="checkbox"/>	Mizzewġa/mizzewwieg
<input type="checkbox"/>	Separata/separat
<input type="checkbox"/>	Armla/armel
<input type="checkbox"/>	Divorzjata/divorzjat

5. Sa liema livell ta' skola mort?

<input type="checkbox"/>	Primarja
<input type="checkbox"/>	Sekondarja
<input type="checkbox"/>	Post-sekondarja ġenerali
<input type="checkbox"/>	Post-sekondarja vokazzjonali
<input type="checkbox"/>	Universita'

6. X'inhu l-ghola kwalifika tiegħek?

<input type="checkbox"/>	M'għandi l-ebda kwalifika
<input type="checkbox"/>	SEC/O level
<input type="checkbox"/>	Advanced level/Intermediate
<input type="checkbox"/>	Kwalifika Vokazzjonal
<input type="checkbox"/>	Kwalifika mill-Universita'

7. Jekk għandek kwalifiki SEC/O level, tista tindika f'liema suġġett u liema marka?

	1/A	2	3/B	4	5/C	6/D	7/E
Maths							
English							
Maltese							
Physics							
Italian							
French							
I.T.							

8. Jekk għandek kwalifiki Intermediate tista tindika f'liema suġġett u liema marka?

	A	B	C	D	E

9. Jekk għandek kwalifiki 'Advanced Level' tista tindika fliema suġġett u liema marka?

	A	B	C	D	E

10. Għandek ECDL? Iva Le

11. Jekk iva, X'modules għamilt?

1 2 3 4 5 6 7

12. Jekk għandek xi kwalifika oħra tista tgħidli x'inhuma?

Suġġett Livell (certificate, diploma etc...) Entita`

13. Kemm ilek tfittexx xogħol?

- | | |
|--------------------------|---------------------|
| <input type="checkbox"/> | Inqas minn xahar |
| <input type="checkbox"/> | Bejn 2- 6 xhur |
| <input type="checkbox"/> | Bejn 6 xhur u sena |
| <input type="checkbox"/> | Bejn sena u sentejn |
| <input type="checkbox"/> | Izjed minn sentejn |

14. Qatt hdimt? Iva

15. a. Jekk iva, ma` min kont taħdem? b. X`kien xogħolok? c. Kemm domt taħdem fih?

1a. _____ b. _____ c. _____

2a. _____ b. _____ c. _____

3a. _____ b. _____ c. _____

4a. _____ b. _____ c. _____

5a. _____ b. _____ c. _____

16. X`kienet ir-raġuni li waqft taħdem/qatt ma hdimt?

- | | |
|--------------------------|-----------------------------|
| <input type="checkbox"/> | Tkeċċajt jew ġejt issensjat |
| <input type="checkbox"/> | Temmejt impieg temporanju |
| <input type="checkbox"/> | Ridt nieħu hsieb il-familja |
| <input type="checkbox"/> | Mard jew dizabilita` |
| <input type="checkbox"/> | Skola jew taħrig |
| <input type="checkbox"/> | Irtirajt qabel iż-żmien |
| <input type="checkbox"/> | Xi raġuna oħra _____ |

HILIET TA' L-INDIVIDWU

17. Kemm tqis li int tajjed f' dawn l'aspetti li se nsemmilek?

a. Nisma lin-nies:

Tajjed hafna tajjed insomma ftit xejn

b. Nitkellem ma' nies li għandhom problema u jixtiequ nformazzjoni:

Tajjed hafna tajjed insomma ftit xejn

c. Inwieġeb it-telefon u nitkellem ma nies li ma nafx:

Tajjed hafna tajjed insomma ftit xejn

d. Noqgħod bil-qieghda għal hin twil:

Tajjed hafna tajjed insomma ftit xejn

e. Naħdem f'ambjent fejn hemm hafna storbu ta' nies f'daqqa:

Tajjed hafna tajjed insomma ftit xejn

18. Tista Tgħidli kemm taf:

a. Tuża l-computer?

hafna mhux hażin insomma ftit xejn

b. Tmur fuq l-internet?

hafna mhux hażin insomma ftit xejn

c. Tibgħat emails?

hafna mhux hażin insomma ftit xejn

d. Tuża l-programm WORD?

hafna mhux hażin insomma ftit xejn

e. Tuża l-programm EXCEL?

hafna mhux hażin insomma ftit xejn

19. Indika, minn 1 sa 5 (1-tajjeb hafna, 5-xejn) kemm taf f'dawn il-lingwi?

	Titkellem?	Tifhem meta jkellmuk?	Taqra?	Tikteb?
Malti				
Ingliz				
Franciz				
Ġermaniz				
Spanjol				
Lingwa oħra ----- -----				

KUNDIZZJONIJIET TA' XOGHOL

Int esprimejt ix-xewqa li ssib xogħol f'Call Centres:

20. Taċċetta xogħol definit (b'kuntratt għal żmien definit)? Iva Le
21. Taċċetta xogħol indefinit? Iva Le
22. Taċċetta jekk joffrulek taħdem part-time? Iva Le
23. Taċċetta jekk joffrulek xogħol full-time? Iva Le
24. Taċċetta li taħdem:
- a. Hinijiet ta' Uffiċċju (8a.m.-5p.m.) Iva Le
- b. Xogħol li għandu shift? Iva Le
- c. Xogħol fejn trid taħdem fil-ghaxija? Iva Le
- d. Xogħol fejn trid taħdem fil-weekends? Iva Le

e. Li joffrilek l-opportunita' li taħdem ħinijiet fejn hu iżjed aħjar għalik u jista' joffrih min iħaddem? Iva Le

f. F'ambjent fejn ikun hemm ħafna storbu ta' nies jirkellmu? Iva Le

25. Ikollok bżonn ta' servizz ta' 'childcare'? Iva Le

26. Kemm huma mportanti minn 1-5 dawn l'aspetti meta tigi biex taċċetta xogħol? (1- l-iżjed importanti, 5-l-inqas importanti)

	1 L-iżjed Importanti	2	3	4	5 L-inqas importanti
Li huwa qrib fejn toqgħod					
Kemm qed joffri paga					
Il-ħinijiet ta' xogħol					
Jekk joffrix ċans li tagħzel l-aħjar ħinijiet biex tidhol taħdem					
Jekk joffrix childcare					

27. X'inhil-inqas paga li lest taċċetta fix-xahar (qabel ma thallas sigurta' soċjali u taxxa)?

Paga Minima	<input type="checkbox"/>	€900 fix-xahar	<input type="checkbox"/>
€400 fix-xahar	<input type="checkbox"/>	€1000 fix-xahar	<input type="checkbox"/>
€500 fix-xahar	<input type="checkbox"/>	€1100 fix-xahar	<input type="checkbox"/>
€600 fix-xahar	<input type="checkbox"/>	€1200 fix-xahar	<input type="checkbox"/>
€700 fix-xahar	<input type="checkbox"/>	€1300 fix-xahar	<input type="checkbox"/>
€800 fix-xahar	<input type="checkbox"/>	Iżjed minn €1300 fix-xahar	<input type="checkbox"/>

28. Qatt applikajt biex taħdem go Call Centre s'issa? Iva Le

29. Jekk Iva, kemm 'il darba applikajt?
- | | | | |
|---|--------------------------|-----|--------------------------|
| 1 | <input type="checkbox"/> | 4 | <input type="checkbox"/> |
| 2 | <input type="checkbox"/> | 5 | <input type="checkbox"/> |
| 3 | <input type="checkbox"/> | > 5 | <input type="checkbox"/> |

30. Kemm 'il darba għajtulek għal intervista?
- | | | | |
|---|--------------------------|-----|--------------------------|
| 1 | <input type="checkbox"/> | 4 | <input type="checkbox"/> |
| 2 | <input type="checkbox"/> | 5 | <input type="checkbox"/> |
| 3 | <input type="checkbox"/> | > 5 | <input type="checkbox"/> |

31. X'kienu r-raġunijiet għal xhiex m'għażlukx?
- | | |
|--------------------------|--|
| <input type="checkbox"/> | Qatt ma bagħtu għalija |
| <input type="checkbox"/> | M'għandix esperjenza |
| <input type="checkbox"/> | Ma kellekx il-kwalifiki li kienu qed jitolbu |
| <input type="checkbox"/> | Hasbu li ma kellekx il-personalita' biex tagħmel dan ix-xogħol |
| <input type="checkbox"/> | Ma kellekx hiliet ta' lingwa li kienu qed jitolbu |
| <input type="checkbox"/> | Ma ridx taççetta l-kundizzjonijiet li kienu qed joffru |
| <input type="checkbox"/> | Xi raġuni oħra(semmi) _____ |

32. X'metodi uzajt sabiex tfittex xogħol f'Call Centre?
- | | |
|--------------------------|---|
| <input type="checkbox"/> | Nistenna xogħolijiet minghand l-ETC |
| <input type="checkbox"/> | Applikajt direttament għand l-employer |
| <input type="checkbox"/> | Applikajt ma` agenzija tax-xogħol privata |
| <input type="checkbox"/> | Saqsejt lill-hbieb, qraba |
| <input type="checkbox"/> | Infittex fil-gazzetti |
| <input type="checkbox"/> | Infittex fl-internet |
| <input type="checkbox"/> | Metodi oħra: _____ |

ASPETTI TA' TAHRIĠ

33. Qatt segwejt korsijiet li għandhom x'jaqsmu ma xogħol f'call centres?
Iva Le
34. Jekk irrispondejt iva, x'kienu dawn il-korsijiet u fejn segwejthom
- | | |
|------------|-------------|
| Kors _____ | Post: _____ |
| Kors _____ | Post: _____ |
| Kors _____ | Post: _____ |
| Kors _____ | Post: _____ |

35. Qatt segwejt (minndu kbirt) taħriġ fil-lingwi?

Iva Le

36. Jekk Iva, Liema Lingwi, liema livell u fejn?

Lingwa _____ Livell _____ Fejn _____

Lingwa _____ Livell _____ Fejn _____

Lingwa _____ Livell _____ Fejn _____

37. Qatt segwejt taħriġ fil 'customer care'?

Iva Le

38. Lest issegwi taħriġ biex tkun tista' taħdem f'call centres?

Iva Le

39. Qatt segwejt taħriġ fil-computer?

Iva Le

40. Lest li ssegwi taħriġ fil-computer biex tkun tista' taħdem f'call Centres?

Iva Le

41. Għalfejn esprimejt interess biex taħdem f'call centre?
