

SEIZING THE TIME? UNION RECRUITMENT POTENTIAL IN SCOTTISH CALL CENTRES

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1. INTRODUCTION

Predictions that employment in call centres in the European Union would grow to 1.8 million by 2002, with over half a million in the UK alone (2.3% of the working population), are likely to be confirmed, if not exceeded (Datamonitor 1998). However, this pattern of growth is far from uniform, as expansion has been, and continues to be, most marked in particular countries and regions. It is not the aim of this article to examine the complex locational factors that have resulted in existing patterns of spatial distribution (Bristow 2000; Mital 1996 and 1999; Taylor and Bain 1997), but it is necessary to acknowledge that Scotland is a key area of call centre concentration in both UK and European contexts. While it is no easy task to calculate precisely the number of call centres and aggregate employment figures - given both the expansion of existing operations and the start-up of new facilities - our research suggests a total Scottish labour force of around 46,000, working in 220 separate call centres at the end of 2000 (Bain and Taylor 1999; Taylor and Bain 1997, 2001b). These figures are based on exhaustive research conducted for our 1997 and 2001 surveys, supplemented by an additional

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audit conducted in 1999, and combined with evidence from media reports (the latter figures confirmed, where possible, by the companies themselves and investment agencies).

Given the scale of this employment, it is no longer necessary to argue, as we were compelled to only two or three years ago, that call centres are neither economically marginal nor ephemeral. Then, the perception of many, including some trade unionists, was that call centres were transient phenomena. Now, even the most sceptical recognise that call centres represent an economy-wide, re-ordering of customer service operations and that they have established a widespread and lasting presence. Thus, in terms of union policy, there can be no justification for failing to devote serious resources to recruitment and organising activity.

However, newer misconceptions threaten to replace the old. Some ill-considered predictions surfaced, asserting that the growth of the internet and the rise of e-commerce would lead to the displacement of the call centre and to massive job losses (**Financial Times**, 10 August 2000). Undeniably, there has been an increase in the number of customers conducting on-line transactions via the internet, but this has led, not to the demise of the call centre, but to the emergence of customer contact centres in which organisations seek to integrate these operations (Parle 1999; Neff 2000). In these 'one stop' centres, telephone-based service takes place alongside internet, email and fax transactions. While the precise effects that these developments will have on employment levels is unclear, even before the crash of the dot.com companies none of the serious research suggested that job losses would result in call centres in the medium-term (the next 3-5 years) at least (Datamonitor 1999).

It is impossible to predict what will happen in the longer-term to employment levels but, of course, a serious economic downturn would inevitably bring about restructuring in call centres and every other area of business activity. Nor is the call centre 'sector' immune from closures and redundancies, as the 2,000 workers abruptly laid off by First Line in South Wales in June 2000 will testify (BBC Wales 8 June 2000). Almost simultaneously, a decision was taken by British Airways to terminate its operations located in the University of Strathclyde, utilising student labour (**Herald** 7 June 2000). The announcement (**Herald** 25 August 2001) by telecommunications company, One-to-One, that they were putting 'on hold' their planned 1,000-job Dundee call centre project may be the harbinger of further cutbacks in that sector. Whilst further closures and redundancies will undoubtedly take place - as a consequence of over-expansion, the failure of demand to reach expected

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levels, or because of strategic decisions taken to rationalise existing facilities - the overall trajectory of expansion is set to continue. An important factor in stimulating that growth is the government's aims for revolutionising 'customer' communications in the public sector. In this respect, it is important to acknowledge the driving forces of competitive advantage and cost-cutting which have lain behind decisions to establish call centres, whether through centralising existing front-office functions, or by setting up entirely new operations.

As we have argued elsewhere, there still lingers a popular (mis)conception that call centres are intrinsically inhospitable territory for trade unions (Bain and Taylor 2000a). Superficially, there might appear to be some foundation for this belief, as a feature of call centre employment is the composition of the workforce - exclusively white-collar, around two-thirds female, and one-third part-time. Since all these groups, historically, have lower unionisation rates compared to male, manual and full-time workers (Waddington and Whitston 1995, p. 171), low levels of trade union membership and activity might be expected. The relative youth of the call centre workforce overall - for example, 69% of employees were under the age of 35 in our 1997 survey (Taylor and Bain 1997, p. 3) - might also be seen to militate against recruitment in the low-union-density, private-services sector. To that seemingly unfavourable profile could be added the widely recognised factor of high labour turnover (or 'churn') experienced in much of the sector, and which could also be seen as a barrier to achieving a stable membership base.

An awareness of these characteristics, combined with a general pessimism regarding the prospects for collective organisation, may have influenced some commentators, who have either ignored or downplayed the role of trade unions and the possibilities of employee resistance. For some, call centre employees display the attitudes associated with the 'Thatcher's children' stereotype - individualised in outlook and displaying indifference, if not outright hostility, to trade unionism. One contributor to a seminar at the London School of Economics, in March 1999, asserted that young call centre operators should be seen as members of a 'Generation X'¹. Moreover, headline-grabbing depictions, likening call centres to electronic prisons in which 'supervisory power has been rendered perfect' (Ferne and Metcalf

¹ Wallace, C. when speaking to her paper *'The Sacrificial Strategy: A Multiple Case Analysis of Service Management'*, claimed that young call centre workers were part of a nihilistic, blank generation for whom trade unionism is irrelevant.

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1998, p. 9), hardly suggest favourable conditions for either union recruitment or enduring workplace-based organisation.

This article, firstly, discusses evidence of the scale of union presence in call centres in Scotland. While the extent of union organisation in both Scottish and UK call centres is more widespread than commonly accepted, and certainly confounds the impressionistic pessimism described above, there undoubtedly remains considerable scope for recruitment and organising activity. Union density can be increased in many workplaces where recognition already exists through the process of what Heery et al (2000, p. 46) describe as 'in-fill' recruitment. Further, given the implementation, from June 2000, of clauses in the Employment Relations Act governing recognition, the recruitment of '50% plus 1' of the workforce into union membership has become particularly important in those call centres where there is a union presence, but recognition has been refused. Also, there are many call centres in Scotland which have remained union-free, but which offer significant recruitment potential.

Secondly, the article focuses on some of the obstacles to union recruitment and, whilst acknowledging the difficulties, describes ways in which these have been overcome. Thirdly, by drawing on findings from a UK-wide survey of attitudes to work and trade unions in the financial sector, we show that call centres can be fertile ground for recruitment campaigns. Fourthly, on the basis of evidence from many workers, a central conclusion is that, in order to make significant organising advances, unions need to develop new bargaining agendas which attempt to address the intensity, pace and repetitiveness of much call centre work. Fifthly, we present evidence from two case studies (Excell Multimedia and *Mediaco*²), where unions have conducted contrastingly successful recruitment activities in an environment of persistent hostility from the employer. While there are still significant problems in these call centres, these experiences suggest that if unions can organise there, then they can do so anywhere.

In conclusion, we argue that as the union recognition clauses in the Employment Relations Act come into force, if the dangers of 'turf wars', inter-union rivalry and damaging 'beauty contests' are to be avoided, agreed

² When discussing union recruitment activities in adversarial circumstances, we will generally use an italicised pseudonym for the company, e.g. *Mediaco*, *Audioco*. An exception to this will be the case of *Excell Multimedia*, which was widely reported and is in the public domain.

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supervisory roles for the Trades Union Congress (TUC) and the Scottish TUC have never been more necessary.

2. UNION PRESENCE IN SCOTLAND

The pattern of trade union presence in Scottish call centres differs little from the rest of Britain as a consequence, particularly, of agreements made at national (i.e. UK) level. Thus, recognition is widespread in particular sectors, and there are similarities in the ways in which union organisation was established and developed in BT, the former public utilities, and also in the finance, travel and public sectors (IRS 1998). In many of these cases, unions were able to extend existing recognition agreements with employers to the newly established call centre operations of the parent company. Illustrations of this process are numerous, but the case of Thomas Cook is noteworthy. This company operates four centres in the UK, two in Scotland, with Larbert having opened in 1997. Here, the existing recognition agreement with the Transport and Salaried Staff Association (TSSA) dates from the period when Thomas Cook was owned by British Rail and before the company became independent. According to the TSSA officer responsible for the Larbert operation, 'the primary new arrangements that were needed were established locally', on the basis of continuation of the existing, long-standing agreement (interview, 22 June 2000).

In some cases, unions have been able to get in 'on the ground floor' by using their influence in existing bargaining arrangements with the parent company to negotiate terms and conditions prior to the establishment of a new call centre. Examples include the banking union's (now UNIFI) actions at First Direct and at TSB Phonebank (FSDSF 1998). Reflecting a more recent trend, a number of unionised companies have signed formal partnership agreements, 'particularly in companies which are attempting to bring about a major transformation of long-standing terms and conditions' (IDS 1998). These organisations appear to have made the calculation that it is preferable to gain union co-operation, through partnership, than to exclude them and risk open conflict. In the finance sector, this kind of agreement has been signed by Scottish Widows and the Manufacturing Science and Finance union (MSF) (Gall 1999). However, partnership deals are not restricted to companies with pre-existing agreements. In February 2000, the General Municipal and Boilermakers (GMB), the union which perhaps has embraced 'partnership' more fully than any other, signed an agreement with *Audioco*, who operate call centres on behalf of a broadcasting organisation. The GMB pointed out that *Audioco* already recognised the Public and Commercial

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Services union (PCS) in other outsourced operations and, as the officer responsible for the agreement explained, 'It was hard for them to argue against their own words' (interview 9 June 2000). However, a major weakness in the agreement at *Audioco* has been the exclusion of the union from pay negotiations.

The judgement that 'the balance between unionised and non-unionised call centres is split fairly evenly' (IDS 1998) seems confirmed by the evidence from Scotland, but it is only a minority of individual companies which recognise unions. The fact that some of the biggest organisations do so (e.g. British Telecom, British Airways) means that a majority of individual call centres report recognition. In 1997, we calculated that just over half of all employees worked in call centres where a union or a staff association was present, with a further 13.5% covered by some form of staff consultative committee. In approximately one-third of responding call centres, there were no representative arrangements whatsoever (Taylor and Bain 1997, p. 15). Obviously, both unionised and non-union call centres have been established since 1997, but the evidence of recent arrivals would suggest that there have been more of the latter (e.g. Cap Gemini, Teletech, Response Handling, Morgan Stanley, TSC for One-To-One), thus reducing union penetration and density in Scottish call centres. Whilst not a definitive calculation, in 1999, it was possible to identify 60-plus Scottish call centres in which a union or staff association was known to be present (Bain and Taylor 1999).

Inevitably, union density varies considerably. In certain call centres, with long-standing agreements and strong workplace organisation, membership levels are in excess of 75%. For example, the British Airways call centre in Glasgow is reported to have a union density of over 80% (interview 15 June 2000), as has British Gas at Granton. At the same time, there were locations (e.g. Thomas Cook) where, despite recognition, density levels stood, at one time, at around a third. Considering union presence across all sectors, there are evident strengths and weaknesses, as we concluded in our study of financial sector call centres:

On the credit side, the evidence of relatively high workplace densities challenges popularly held assumptions that call centres remain union-free. However, on the debit side, it is clear that many call centre workers are not union members and, thus, there is considerable scope for increasing membership.
(Taylor and Bain 2000, p. 11)

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Finally, there are the many non-unionised call centres, a situation mainly due to employer hostility to recognition. In a sense, these operations fall into two categories; on the one hand are those where particular unions are making determined recruitment efforts, with a view to gaining recognition; on the other, those where no serious recruitment activity is currently underway, perhaps because of a previous lack of success. Non-recognised operations include big call centre employers like Kwik-Fit Insurance, BSKyB, IBM, Direct Line, Thus and Excell (now Vertex), and a range of medium-sized (but growing) operations like Teletech, Telecom Service Centres and the Student Loans Company. A host of the smaller operations are also union-free, while non-BT telecommunications and general outsourcing call centres - growing significantly in both numbers and employment levels - are characterised by the virtual exclusion of unions. Of course, especially following the implementation of the Employment Relations Act, some of the call centres listed above have become the subject of ongoing organising activity at various stages of development and with contrasting levels of success, but there is certainly no shortage of centres for interested unions to target.

3. OVERCOMING OBSTACLES TO RECRUITMENT

In many cases where unions have long-standing agreements, their representatives are permitted to address new call centre employees during induction, for example, at Abbey National (FSDSF minutes 1998). Whilst of considerable benefit to unions, this facility does not guarantee high membership levels and, even in those call centres where employers adopt a benign attitude towards unions, obstacles to recruitment remain. Of course, these difficulties are magnified where companies have vigorously opposed any union presence, and where the parent company may well have a long record of antipathy towards any form of collective organisation. Although these barriers to recruitment and organisation are formidable, they are far from insuperable.

However, unions engaged in organising call centres in recent times could not but be influenced by the general legacy of the prolonged erosion in membership and combativity of British trades-unionism. Although official figures for 1999 showed a net increase for the second year in succession, total UK membership stood at 7.9 million, compared 'with 10.4 million in 1989 and a peak of 13.2 million in 1979' (Certification Officer Annual Report 2001, p. 20)

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In addition, there are impediments arising out of conditions specific to call centres. Firstly, the nature and organisation of work combines to pressure employees to remain continuously engaged in handling calls at their workstations. Inevitably, this creates difficulties for union activists and representatives when they wish to communicate with existing or potential members. To maintain a company's desired customer contact levels, employees' breaks are often staggered, presenting additional communication problems. The sheer complexity of shift systems, which often include '24-7' operations, contributes further to tendencies towards workforce fragmentation. Problems related to employer hostility have been exacerbated at certain out-of-town, greenfield locations, and in multi-tenanted office buildings, where access can be difficult. And, as many union officers and workplace activists report, there is a particular difficulty created by high labour turnover. Recruitment activity has often been a 'painting the Forth bridge' activity, in that as soon as one campaign is finished, another has to start, and continuous effort is required to replenish constantly departing members. Turnover is often highest in those call centres where the conditions of employment are poorest, and the need for union representation is greatest.

At the same time, union recruiters have adopted a variety of tactics to attract new members in hostile call centre environments, both in Scotland and across Britain generally (Financial Sector Unions 18 February 1999). Where union presence is weak and management's attitude towards the workforce is frequently punitive, representatives have been able to establish the legitimacy of the union by defending employees facing disciplinary charges. A series of interviews with union representatives, conducted for our financial sector unions' survey, highlighted the importance of this basic solidaristic activity (Taylor and Bain 2000, 2001a). In one call centre, reps reported that no fewer than three-quarters of the staff faced disciplinary action at the same time for failing to meet targets. A sharp focus on potential members was commonplace and, in some cases, entailed logistically sophisticated exercises. Various methods were employed to make the union appear legitimate, including adapting company logos to make leaflets appear more 'official'. In some instances, union activists were able to use the company intranet to e-mail messages to both members and non-members. One rep reported how the union had adopted a philosophy of 'sticking our nose in everywhere' and, as a result, had succeeded in negotiating a relaxation of the company's stringent dress code.

Health and safety representatives have capitalised on opportunities presented in the course of carrying out workplace inspections and audits to contact non-members and publicise union activity. The importance of health and safety

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issues in call centres should not be underestimated³, as union actions in relation to the many concerns have strengthened credibility and encouraged recruitment. At a TUC 'Health on the Line' seminar (16 June 2000), delegates reported how such issues had been incorporated into organising strategies. In one workplace, where many chairs were damaged and unsafe, the union successfully campaigned for new seats. One graduate of the TUC Organising Academy stressed the importance of involving workers, and argued that surveys - of both members and non-members - could be used not only to create a sense of identification with the union, but also to back up cases to take to management where problems existed. In a (non-recognised) Glasgow call centre, where workers regularly experienced uncomfortable temperatures, union reps organised thermometer readings to be taken at regular intervals in order to convince a reluctant management that a real problem existed.

There can be no doubt that the most significant factor in realising the potential for recruitment in the most hostile environments lies in the ability to gain a toehold – a union presence centred on perhaps one individual, or a few key individuals. The extent to which these members are supported, encouraged and given resources by the union can be the key to success. The history of unionisation records many examples where a tiny core of activists have been able, in the context of changed conditions in the workplace or the wider legal and political environment, to bring many more workers into union membership and activity (Beynon 1973; Stephenson 1996). Sometimes, call centre workers with a trade union background can be central to these initiatives. A GMB official described how one individual had kept up her membership when she got a job in a call centre,

Rather than the traditional way of standing outside with leaflets, one of the interested people in particular became a sort of Trojan horse. She would draw up lists of names and addresses of those who might be interested. I then wrote to every single one individually, keeping them up-to-date with what the GMB was doing.
(interview, 9 June 2000)

³ *In November 1999, the Health and Safety Executive announced that it was initiating an investigation into health and safety issues because of the uniqueness of the call centre environment. See LAC 94/1, **Initial Advice Regarding Call Centre Working Practices.***

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Recent developments at Barclaycall further illustrate the importance of union support for small groups of activists when faced with management obstruction. The company vigorously opposed unionisation of their call centres in Sunderland, Salford and Coventry, despite both an active campaign dating back to 1994 and recognition at Barclaycard. In early 1999, however, the company shifted its stance in favour of a partnership approach and, for the first time, granted the union access to these sites (FSDSF 1999). In April 2000, UNIFI recorded a spectacular victory when, in a ballot organised by the Electoral Reform Society in anticipation of the Employment Relations Act, 72% of the workforce across the three sites participated, and voted 89% in favour of union representation. Publicising successes such as this are clearly most useful for unions as they campaign in non-union operations. Unions organise on a UK basis, and the problems facing call centre workers are not defined by geography, and so examples of success can be generalised across industrial sector, region and country.

4. FERTILE SOIL: ATTITUDES TO TRADE UNIONS

Research findings in this, and the following, section come from a survey of the experiences and attitudes of union (and some non-union) members working in six financial sector call centres, one located in Scotland. Between December 1998 and March 1999, a questionnaire was piloted and then distributed through workplace representatives in all but one of the establishments. A response rate of 27% was attained on a distribution of 1,300 questionnaires⁴. Employers in five of the six call centres recognised unions at the time of the survey. Therefore, whilst the significance of the findings might be seen to apply most to unionised (or partly unionised) workplaces, the survey provides important insights into the attitudes of call centre workers generally.

The survey provides no evidence to support those who assert that call centre employees belong to a blank generation, indifferent or hostile to trade unionism. Firstly, when the composition of the workforce and the extent of union membership is analysed, there appears to be an interesting polarity. These are predominantly female workforces made up, on the one hand, of many younger workers with little, if any, employment history and who, if

⁴ For detail of the methodology employed, see Taylor, P. and Bain, P. (2000) **Trade Unions and Call Centres**, published by the MSF/Financial Sector Unions, or the full report available from the authors.

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they join the union, do so for the first time. On the other hand, there are sizeable cohorts of more experienced workers with past union membership, and 38% of those surveyed had been members in a previous job. Even allowing for the fact that the 'past member' ratio for these six financial sector locations may be higher than for many other call centres, some former union members are likely to be found in all but the smallest operations. Of course, we cannot mechanically attribute to them a higher degree of trade union consciousness or activism, but it does mean that unions are unlikely to be starting the process of recruitment from a base of zero. So, in most call centres, there are workers who have at least some understanding of trades-unionism, and it is mistaken to view the workforce as composed exclusively of employees new to union membership.

Nor are young workers 'individualised' to the extent that unions are irrelevant to them. There is evidence from respondents' comments, and from follow-up interviews, that some younger workers do initially display a reluctance to join or identify with the union. However, in every centre, union reps reported how this should not be regarded as a permanent state of affairs, as young workers tended to join, with their friends and colleagues following, when they were confronted with problems at work. In fact, the attitudes of the call centre employees surveyed are many miles removed from the 'Generation X' stereotype. The survey reveals a powerful commitment to the unions, and a strong desire to strengthen organisation.

This can be best seen in the full and varied suggestions made by respondents about ways in which the unions could improve recruitment (Table 1). The widespread response – from almost two-thirds of our sample - is significant in itself, but it also shows that the workers surveyed do not believe that non-members are unsympathetic to the union, but rather see them as being open to approaches which might convince them of the benefits of membership.

Table 1

What things should the union do to increase recruitment	%
Advertise/publicise successes, improve awareness of advantages/reasons for being a member etc	58
More involvement, be approachable/available, more meetings in work/outside, surgeries etc	32
More/better communication, more	28

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information/noticeboards/posters/roadshows/mail/e-mails	
Make an impact, be more vociferous/less compromised, be more effective with management etc.	19
More reps, reps more facilities, permanent reps in canteens, reps at team meetings etc.	17
Decrease subscriptions/introductory subs for new members	15
Ask more people, target new starts/induction	7.2
Improve pay, conditions, contracts	5.4
Get recognised/continue to push for recognition	4.5

N=222

58% of respondents thought that the union should advertise more effectively and take every opportunity to publicise successes, emphasising the benefits of membership and outlining the reasons why non-members should join. Those surveyed made many concrete suggestions as to how the union could make itself more visible and have a higher profile. The evidence also suggests that improvements in the ways unions organise at workplace level could boost membership. Almost one-third wanted greater involvement between unions and members, suggesting more meetings both inside and outside the call centre. A further 17% made specific points about workplace representatives - not only did some believe the unions would benefit from having more reps, but they also thought that they should have more facilities and be more readily available. One other significant finding is that almost one in five (19%) believed that the union could increase membership by being more assertive and less compromised with management.

Nor do non-members, in general, display anti-union attitudes, as can be seen from Table 2. Of the various reasons given for not joining, the most frequently cited was the cost of subscriptions, closely followed by a perception that the union was largely ineffective. At the same time, it appears that lack of engagement by the union with potential members is also an issue; 16% of non-members said they had not joined either because they had not been approached or because they did not know enough about the union. When we add those who said that they were too lazy, or that they had not got round to joining, it is clear there are significant numbers who might join if approached and a serious case was put to them.

Table 2

Non-members reasons for not joining the union

	%
Costs too high, subs, too expensive, not worth it	25
Will not make a difference, union not effective, don't take a stand	23
Not been approached, don't know enough about it	16
Can't be bothered, laziness, not getting round to it	11
Union not recognised	11
Unions too invasive/left after strike/don't believe in unions	6.8
I am going to join/thinking about it	4.5
Agency staff don't matter	2.3

N=44

The data also reveals that as many as 41% of non-members stated that they would be encouraged to join if the union were seen to be more active, successful and involved the members to a greater degree. This suggests that, for some, the barrier of what are perceived to be expensive subscriptions would be overcome if the union were seen to be more effective. From this limited evidence, the prospects for union recruitment, in call centres where a membership base has already been established, would appear to be good. It is also worth noting that only a very small number declared themselves to be opposed to unions on grounds of principle. It is simply not the case that there is a substantial bulwark of anti-union attitudes in these call centres.

Further, as we have demonstrated elsewhere (Taylor and Bain 2000, p. 15), call centre workers join unions for mainly collective reasons. The findings from this survey are similar to those of other researchers who have found that the views of workers in new and expanding sectors do not differ substantially from those in areas of traditional union membership (Waddington and Whitston 1997). Collective reasons remain overwhelmingly important when people join unions, while the provision of individual services is seen as being of little significance.

5. FERTILE SOIL: THE LABOUR PROCESS AND NEW BARGAINING AGENDAS

Before examining employee attitudes, it is necessary to make a number of observations regarding work organisation and the labour process. Firstly, it is important to acknowledge that call centres are far from uniform in their operations. Differences exist in relation to a number of variables: size, industrial sector, market, call complexity and cycle time, nature of operations (inbound, outbound or combined), the configuration of telephone and computer technological integration, the effectiveness of representative institutions (including trade unions), and management style and priorities (Bain and Taylor 2000a, p. 7; Taylor and Bain 1997). Most significant are differences in work organisation and call complexity, particularly the crucial distinction that can be drawn between quantity and quality (Hutchinson et al 2000, p. 66; Taylor and Bain 1999, p. 109).

Whilst recognising that the labour process is composed of common defining characteristics, it is possible to construct a model of forms of organisation and complexity, ranging from the simple and quantitative to the complex and qualitative. At one extreme are relatively simple and straightforward calls, which require standard agent responses to customer queries or requests, and which may be scripted. These types of calls are invariably subject to relatively tight call-handling times and control mechanisms, based on strict statistical measurements. At the other extreme are calls where the nature of customer interaction is more complex and unpredictable and agents, of necessity, respond more flexibly. Call times are more relaxed, and while temporal measurements might still apply, other criteria, emphasising the quality of the agent's service to the customer, are also important. The contrasting characteristics of quantity and quality are dichotomised in Table 3. (Taylor and Bain 2001a)⁵.

Table 3

Ideal Characteristics of Quantity/Quality

Quantity

Quality

⁵ For a fuller elaboration of the distinctions between quality and quantity, see our article, 'Trade Unions, Workers Rights and the Frontier of Control in UK Call Centres', in *Economic and Industrial Democracy*, 22:1, February 2001.

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Simple customer interaction	Complex customer interaction
Routinisation	Individualisation/customisation
Targets hard	Targets soft
Strict script adherence	Flexible or no scripts
Tight call handling times	Relaxed call handling times
Tight 'wrap-up times'	Customer satisfaction a priority
High percentage of time on-phone/ready	Possibility of off-phone task completion
Statistics driven	Statistics modified by quality criteria
Volume	Value

While it may be possible to locate an entire call centre at either the quantity or quality end of the spectrum, it is not unusual for this distinction to apply within individual call centres between different sections of the business. However, it would be mistaken to assume that call centre operations are distributed equally along the spectrum, and our extensive research of the sector indicates that the majority of operations lie at the quantitative end. For example, in our 1997 survey of developments in Scotland, we found clear evidence attesting to the prevalence of quantitative measurement (Taylor and Bain 1997, p. 21). Over three-quarters of call centres monitored the length of calls, with a large percentage imposing target call handling times; almost three-quarters assessed adherence to set procedures, and almost two-thirds adherence to scripts. Thus, the labour process and task organisation represent 'significant developments in the Taylorisation of white-collar work' (Taylor and Bain 1999, p. 109).

Despite some differences, the call centre labour process in general is experienced as intensive, pressurised and frequently stressful by operators in the financial sector survey. Of the respondents, 23% stated that they were 'very pressurised' at work on a normal day, while 61% were 'quite pressurised'. Identifying those aspects of work which contribute most to these feelings is important for unions as they address the issues which concern call centre workers. Table 4 lists these sources of pressure in order of importance.

Table 4

Importance of aspects of work in contributing to feeling pressurised

Aspect of Job	'A great deal' and 'to some extent' combined %
Targets	88
Not enough time between calls	61
Difficult customers	58
Repetitiveness of calls I make/take	50
Breaks not long enough	44
Too few breaks	43
Pressure from a supervisor	39
Having my calls taped	38
Always having to 'smile down the phone'	34
Monotony of the job	32
Having to keep to a script	27
Computer monitoring	27
Need to make bonus	26
Not given enough information to do the job	25

By far the greatest concern was perceived to be the requirement to continuously achieve targets, with as many as 60% of respondents saying that this contributed 'a great deal' to the pressure of work. In the financial sector, as competitive pressures have intensified, there is evidence that earlier traditions of servicing the customer have been displaced by the imperative to achieve sales targets (Bain and Taylor 2000b). However, all the available evidence indicates that the compulsion to meet targets is a widespread feature of call centres in Scotland (and throughout Britain), irrespective of the particular industry or sector in which they are located. The real significance of the 'difficult customer' factor lies in the way that lengthy, problematic calls increase call handling times, adversely affecting operators' statistics, and undermining their ability to achieve the targets imposed.

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It is evident also that the distinctive characteristics of the call centre labour process, which we have described as resembling 'an assembly line in the head', are perceived as pressures by operators. The impact of a long succession of calls, the lack of time between calls or breaks from the phone, and the repetition and monotony of tasks can be seen in Table 4. Breaks are clearly an important issue, and employees perceive both the infrequency and the brevity of breaks as significant sources of pressure. Taking all these together, it is clear that many call centre operators view the daily experience of work as routinised and intensive. At the same time, many workers also regard the mechanisms of surveillance and monitoring as contributing to the pressures of the job. For example, over one-third believed that having their calls taped contributed to feeling pressurised, while more than a quarter felt similarly about computer monitoring and the need to keep to a script. To these 'Taylorist' elements, one might add the pressures arising from direct supervisory intervention, and from having to perform 'emotional labour'. More than one-third reported that 'always having to smile down the phone' contributed 'a great deal' or 'to some extent' to feeling pressurised.

This brief examination of the survey evidence demonstrates that many workers have deep concerns stemming from the ways that work is structured and organised in call centres. The responses to additional questions also revealed that they felt management was failing to alleviate these pressures, presenting opportunities for union intervention. Over a range of issues – targets, length and frequency of breaks, job rotation, variation of tasks – unions can present a strong case to management. Similarly, in terms of call monitoring, scripting and surveillance mechanisms, it is open to unions to challenge abuses when they occur - for example, when the espoused policy of monitoring for 'coaching purposes' becomes, in practice, a disciplinary exercise. When asked what the unions' priorities should be for the immediate future, almost one in five workers surveyed said that they wished to see targets and 'the stats' pressures reduced. To date, issues emerging from the nature of call centre work have been perceived to lie outside the bargaining agenda. This research suggests strongly that, as a matter of priority, the effective representation of members would seem to depend on the incorporation of these issues.

This is not to suggest that the 'traditional' bargaining agenda of pay, hours, holidays, etc. has diminished in importance. Negotiating decent pay increases was seen as the most important area of union activity, with 60% stating that pay should be a main priority. However, the conventional and new bargaining agendas do not stand in conflict to each other. The workers surveyed wish to see continued improvements in pay and conditions at the

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same time as the unions take up negotiations over a range of issues relating particularly to the pace, intensity and often relentless nature of call centre work.

In identifying the issues of greatest significance, it is, of course, impossible to be completely prescriptive for each workplace. In addition to these demonstrably important concerns, the evidence shows that, in different call centres, one or more of a multiplicity of grievances and discontents matter to employees. Health and safety issues, changing shift patterns, inflexibility of holiday arrangements, lack of career and promotion prospects, the failure to make temporary positions permanent, sickness absence policies, and inadequate training, have all been identified as key concerns in particular call centres. In this sense, each call centre will have its own specific profile of issues which matter to the workforce, and unions need to be sensitive in responding to them. Nor should issues of particular concern to women, who constitute the majority of the workforce, be seen as marginal or an 'add-on'. Changes in shift patterns at short notice, for example, can disrupt laboriously constructed family support arrangements.

In summary, the survey evidence highlighted those areas of greatest concern to call centre operators. Problems which arise directly from the experience of the call centre labour process, and items which may be regarded as part of a more traditional approach, combine to suggest the need for the unions to develop wide-ranging and relevant bargaining and recruitment agendas.

6. CASE STUDY 1: TAKING THE FIRST STEPS – *MEDIACO*

Mediaco's call centres are amongst the biggest in Scotland, employing several thousand workers across their sites. That there are now significant numbers of BECTU members in these locations is no mean achievement, given the company's historical antagonism to trade unions. Initial requests by the union for meetings with *Mediaco's* human resource managers were made as far back as 1997, but received no response. Following this rebuff, specific recruitment literature was prepared for *Mediaco* workers, and the first leafleting activity commenced at the sites. Initial contact was far from promising, as the union's Scottish organiser explained:

There certainly was a fair bit of apathy at one of the sites, because management had warned people off about trade unions, and some people's attitude was 'There's thousands of us here and it'll never work.' At the other site, people were saying 'Good on you, it's about time, we

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need to do something', although there was a basic fear that management would sack people if they stood up.
(interview, 10 March 2000)

BECTU took the decision not to continue with sustained activity at this stage - although the process of gathering information on working conditions and issues of importance in the workplace went on - but to resume the campaign once the details of the Employment Relations Act were clear. This was based on the belief that having the right to statutory recognition would make a considerable difference to recruitment. In early 1999, the campaign was resumed, and faced the problem of overcoming the logistical difficulties of leaflet distribution:

A team of us would visit over a period of a few days at different times and at weekends, trying to cover the various shifts as they came in and out. That's how you do the leafleting, and each time it's thousands.
(interview, 10 March 2000)

As a result of this activity, membership forms were returned and contacts established which involved 'an awful lot of work, meeting people in hotels in surrounding towns and villages'. Developing these clusters of union members and supporters was a time-consuming business, but confirmed that there were no short cuts to recruiting success. However, there is no question that the experience of call centre work, combined with management style, pushed a number of employees in the direction of the union:

There are people coming forward saying 'I've been here for five, six or seven years and yes, it's good to have the money, and yes, it's good to have a job, but I'm fed up with seeing people treated the way they are being, so I am quite happy to take my chances'. It's good when you get those kind of people coming forward, because they can come to represent other workers.
(interview, 10 March 2000)

However, BECTU has been at pains to protect individuals and to ensure that no one was left exposed. For example, any distribution of leaflets internally is preceded by tactical discussion on the advisability of such activity.

Activists report that recruitment successes are also attributable to the particular issues the union has been emphasising. For example, BECTU has stressed the difference that the union could make in promoting fairness in the workplace - averting a situation of frequent disciplinaries and with effective

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representation for workers - as a sort of 'personal insurance policy'. Simultaneously, the union's literature stressed the terms of the Employment Relations Act and how recognition could be achieved. Following enactment of the recognition clauses of the ERA in June 2000, BECTU stepped up its recruitment activity. Whilst union organisers acknowledged that achieving requisite levels of membership would take many months, perhaps years, there was a determination to continue to build on their encouraging progress to date. The preferred option for BECTU would be automatic recognition, with more than 50% of the workforce in membership, but there is an understanding that, realistically, a recognition ballot may have to be invoked. However, whatever the outcome, the union has already made significant advances in these call centres.

7. CASE STUDY 2: ORGANISING IN ADVERSITY - FROM EXCELL TO VERTEX

This brief account of organising efforts at the Excell Multimedia outsourcing call centre in Glasgow scarcely does justice to the rich lessons which could be drawn from a fuller analysis⁶. The company is one of eight operating under the umbrella of a US-based telecommunications multinational, providing 'a wide variety of call handling solutions as well as call center management, training and consulting services' (Excell Global Services 1998, p. 1). In the UK, Excell concentrated largely on the telephone sector on an outsourced basis, operating call centres which dealt with inquiries and emergency calls. At their Glasgow centre, established in April 1995 (a second opened in 1999), they employed agents on seven separate, 24-hour, 365 days a year services. The contract was awarded by Cable and Wireless, and entailed operating directory inquiries, 999 emergency services, and international operations, on behalf of twelve cable and mobile phone companies.

The bare bones of the case are that, in September 1998, there was no trade union presence at Excell. By February 1999, at least 100 of the then 350 agents had joined the Communication Workers Union (CWU). On 31 March 2000, Cable and Wireless terminated the contract with Excell, who were replaced by another outsourcing company (Vertex). By that time, a

⁶ *The authors are currently engaged on a detailed study of developments at Excell, which will form part of a wider project.*

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significantly larger and more experienced union membership base had been established.

The wider significance of these developments should not be underestimated, for the anti-union stance adopted by Excell throughout their global operations led to vigorous opposition by the UK management to union organisation. In the course of a sustained campaign to build membership and, ultimately, to secure recognition, a number of activists were dismissed by Excell, although this failed to halt organising activity. There can be no doubt either that in the course of highlighting, in the public interest, serious problems both with the operation of Excell's customer services, and in relation to the conditions of employment, the union activists' campaign contributed to Cable and Wireless' decision to seek an alternative service provider.

There was no single reason why the organising efforts of, initially, a small group of employees proved successful, although widespread dissatisfaction over pay and conditions proved a significant factor. At the end of 1998, agents' starting hourly pay was as little as £3.91, with a maximum of £4.47 after six months. Breaks were short and strictly controlled, and a bonus system promised much but delivered little, with payments jeopardised if workers were five minutes late over a three-month period. In a highly monitored environment, workers were subject to strict controls and were expected to be on the phones for 97% of their working day. Health and safety problems were rife, exacerbated by a draconian management style. The potential for collective organisation lay in these multiple grievances and discontents, but were realised through the commitment, tactical awareness and confidence of a small group of employees who joined the CWU and acted as a collective leadership in the unionisation campaign.

However, the catalyst for broadening union recruitment was managerial malpractice in relation to the quality of service delivery. For several months, workers had complained to management over errors in the '999' service customer database. Appalled by the potential threat to human life, spurred by complaints from the emergency authorities, and faced with continuing managerial inaction, these employees took a series of initiatives aimed at compelling Excell to remedy the situation. Evidence was presented to Ofcom, to the consumer magazine **Which**, and extensive media coverage was eventually achieved. Both the local MP (and later the MSP), the STUC, and a number of trade unions gave support to this public interest campaign. There is no doubt that these activities established the prestige, legitimacy and authority of both trades-unionism in general and, in personal terms, the leaders of the campaign.

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Yet there was no 'Chinese wall' between concerns over service quality and more traditional union issues. The company's overall drive to minimise costs was seen to link the failings in database integrity with the poor pay and conditions. Consequently, the campaign over emergency services spilled over into union demands over pay (where parity with Excell workers in Birmingham, doing exactly the same job, was an important mobilising issue). Increasingly, union members were able to 'come out', and act as representatives for fellow workers facing disciplinary action. Their standing up to management encouraged a growing confidence amongst wider layers of workers, who could see that managerial authority could be successfully challenged. Throughout 1999, the union developed a network of embryonic representatives, who took responsibility for different teams and shifts, enabling literature to be circulated clandestinely and recruitment to be conducted in a systematic fashion. By March 1999, the 'coming out' process was complete as activists now leafleted the workplace from the outside, and submitted the names of union representatives to management. Of considerable importance, also, in this period, was the integration of the Excell members more fully into the structure of the CWU and, some time later, of the creation of a sub-branch specifically for non-BT call centre workers.

Over many months, CWU branch and national officials contacted Excell, requesting meetings in an attempt to negotiate over a range of matters but, on each occasion, they were ignored by management. Workers continued to join the CWU, but Excell provides a classic case of having to recruit constantly simply in order to sustain membership levels, as turnover was astronomical, reputedly in excess of 100% per annum. However, there is no question that knowledge of the clauses proposed in the Employment Relations Act spurred on the activists, as it offered the prospect of a clear goal. If over half the workforce joined the union, then this most hostile of employers would have to grant recognition.

However, the opportunity to put Excell to the test was forestalled by events. In February 2000, Excell, apparently acting under direction from senior management in the USA, dismissed two leading activists for allegedly appearing on a Channel Four News report which exposed working conditions in the company. Once again, a support campaign developed, including local politicians, the STUC and the CWU. It is impossible to state definitely that the various campaigns to expose the nature of Excell's policies and practice contributed to the decision taken by Cable and Wireless to terminate the contract. However, it is difficult to conclude that they played no part in Vertex taking over the provision of services from 1 April 2000.

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Although there is no question that the Vertex takeover amounted to a significant victory for the CWU, and for all unions organising in Scottish call centres, there can be no room for triumphalism. Vertex recognises UNISON at their call centre in Bolton but, in the main, working conditions have not changed to a marked extent in the Glasgow operations. Of course, there is a possibility that the continuing negotiations between the CWU nationally and Vertex will eventually lead to union recognition. However, the best guarantee of this outcome would seem to be through the hard grind of actual recruitment, building the membership to a point where automatic recognition could be secured.

Many lessons can be drawn from this case study, but we will confine ourselves to a few. Firstly, it is legitimate to state that if a substantial union presence can be built in the extremely hostile environment of Excell, then unions are capable of recruiting in any unorganised call centre. Secondly, that relative success depended on the resilience of workplace activists in sustaining efforts over many months, and small incremental gains in membership have to be nurtured and encouraged. Thirdly, the process of 'coming out' as union members requires courage and sound tactical judgement as to timing. Fourthly, the appeal of the union to potential members depends upon the ability to articulate the real concerns of workers, many of whom are coming to trades unionism for the first time. Finally, the degree of support given to activists in these sorts of conditions by the union concerned, and by the wider movement, can be critical in achieving longer-term success.

CONCLUSIONS

There is some evidence of a changing industrial relations climate, prompted, in part, by employers' anticipation of, and response to, the Employment Relations Act. Of 63 unions (representing 79% of total UK membership) who participated in a survey early in 2001, nearly half reported an increase in the number of recognition cases they had pursued in the previous year compared to 1997 (Labour Research July 2001). However, there are also reservations about the efficacy of the ERA (Logan 2001), and the depth of pro-union attitudes amongst layers of workers, as the ballot at Barclaycall clearly demonstrates, is perhaps a factor of even greater significance. Furthermore, the resistance of certain call centre employers to concede union recognition is unlikely to evaporate overnight. In these circumstances, the best guarantee of success is the commitment of unions to sustaining recruitment campaigns to a point where the majority of the workforce is won to membership. As we have

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argued, there are good grounds for unions to be optimistic when the recruitment potential in call centres in Scotland, and across Britain as a whole, is considered. In call centres where unions are already recognised, there is considerable scope for increasing membership and establishing strong workplace-based trades-unionism. Without trivialising the obstacles where recognition has yet to be won, the potential clearly exists to make serious gains.

As we have demonstrated, call centre workers are not part of some imagined blank generation, hostile to the appeal of trade unions. Those who are not members can be won through an organising approach which stresses – but goes beyond – the benefits of conventional union agendas and collective bargaining. Given the particular characteristics of the call centre labour process, unions seeking to recruit and organise need to develop policy responses which address employees' widespread perception of work as intense, pressurised and stressful.

Realising that potential will depend also on the willingness and ability of unions to share the lessons of success (and setbacks). If this is to happen to the overall benefit of the trade union movement, then recruiting activities have to take place in an environment of mutual trust. Therefore, the already agreed mediating role of the STUC (and TUC), to be enacted when unions register an interest in recruiting in particular call centres, could be crucial. Any division created by inter-union rivalry and the dangers of 'beauty contests' could lead to missed opportunities, and the sacrifice of a rich potential for union growth.

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