



# 2012中国呼叫中心产业分析

秦克旋

中国电子商会呼叫中心与客户关系管理专业委员会 (CNCCA) 副理事长

CTI论坛 ([www.ctiforum.com](http://www.ctiforum.com)) 总经理

2012.3.21 北京

2012.3.29 上海



**CHANGE  
AHEAD**

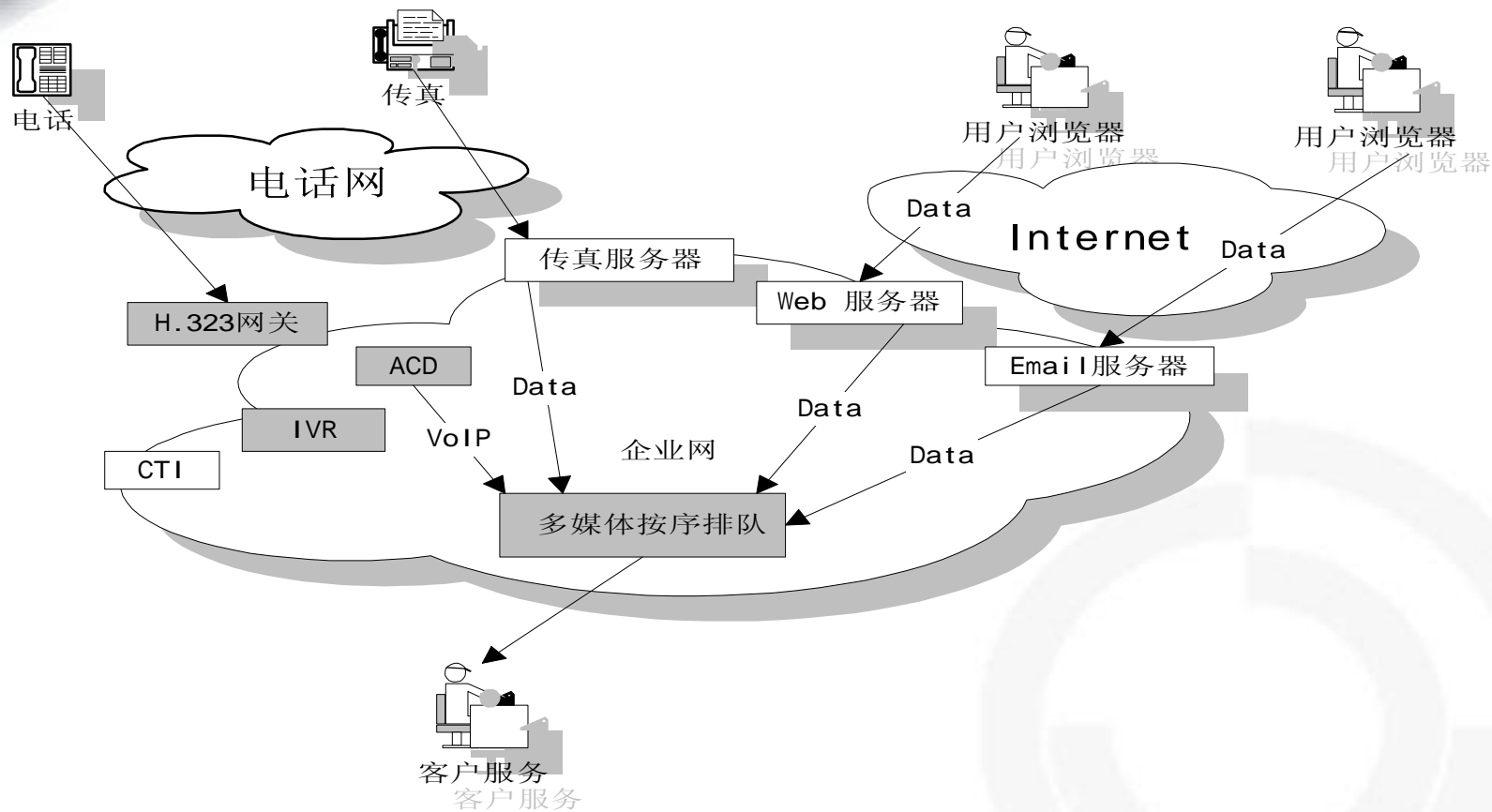
永远不变的是：变化



# 技术



秦克旋：《现代呼叫中心发展趋势》--通讯世界，1999年07期



多媒体呼叫中心

A close-up photograph of a hand reaching out from the left side of the frame towards a small, white, fluffy cloud in a clear blue sky. The hand is positioned as if it is about to touch or hold the cloud. The lighting is bright, suggesting a sunny day.

计算风起 “云”  
涌...



电路交换



包交换

语音网络



数据网络

单一媒体(语音)



多媒体

呼叫中心



互动中心



H.323            SIP（会话发起协议）

自建            外包、Hosting Service（托管）、租赁

单一媒体（语音）       多媒体（移动互联网、社交媒体）

呼叫中心            企业融合通讯应用平台（云计算）

# 云计算参考架构





昨天



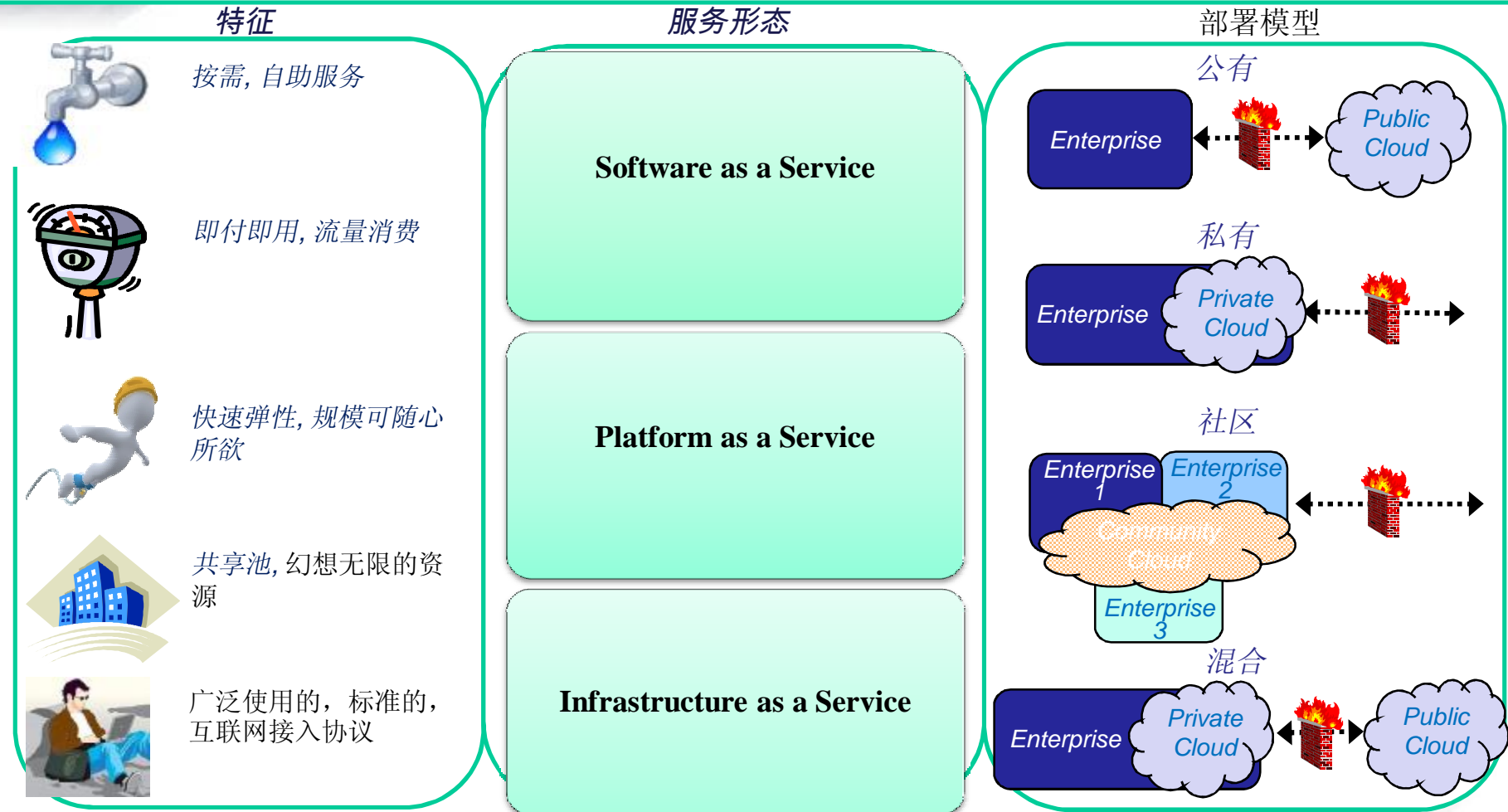
今天

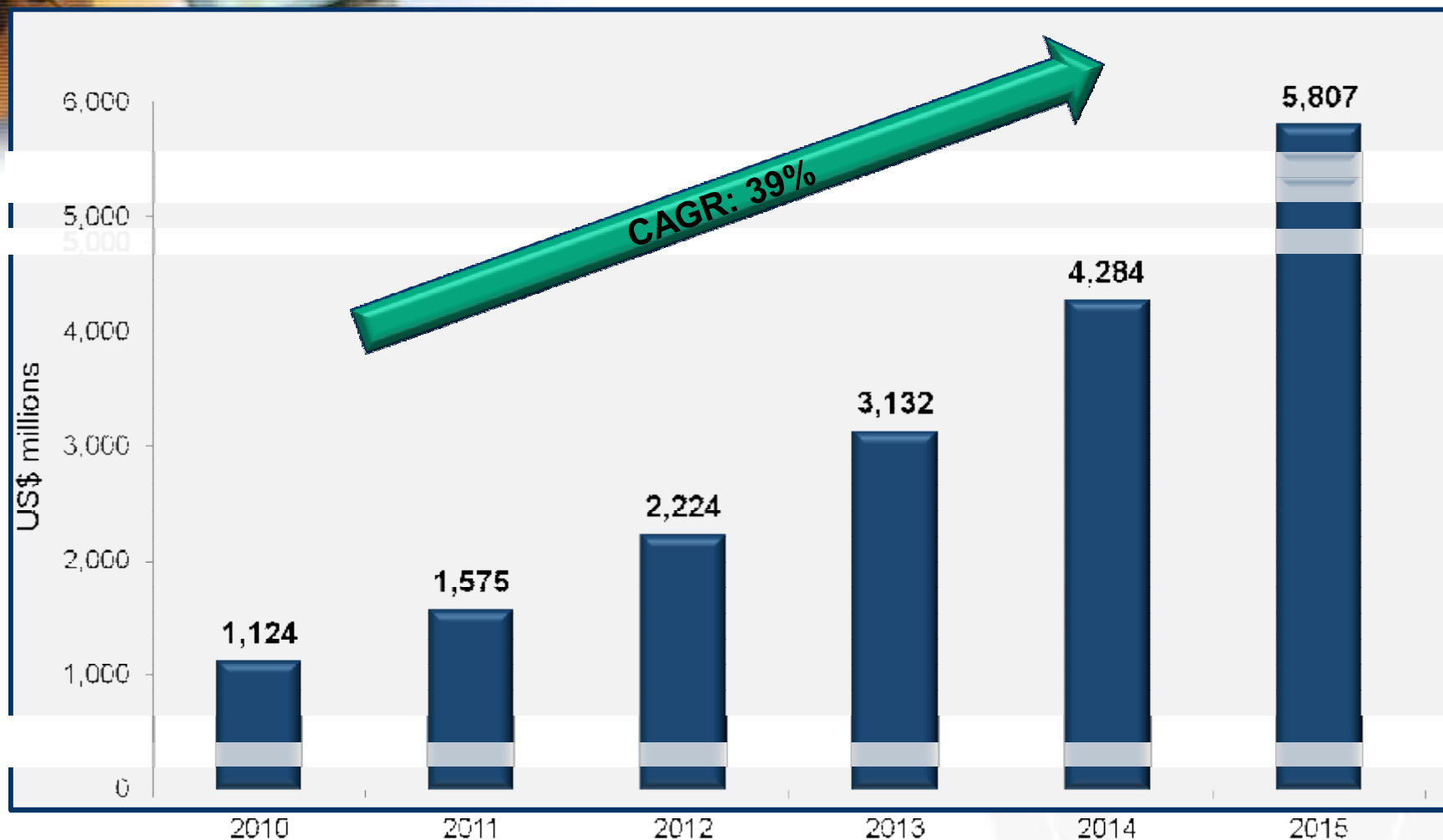


Source: Frost & Sullivan Analysis

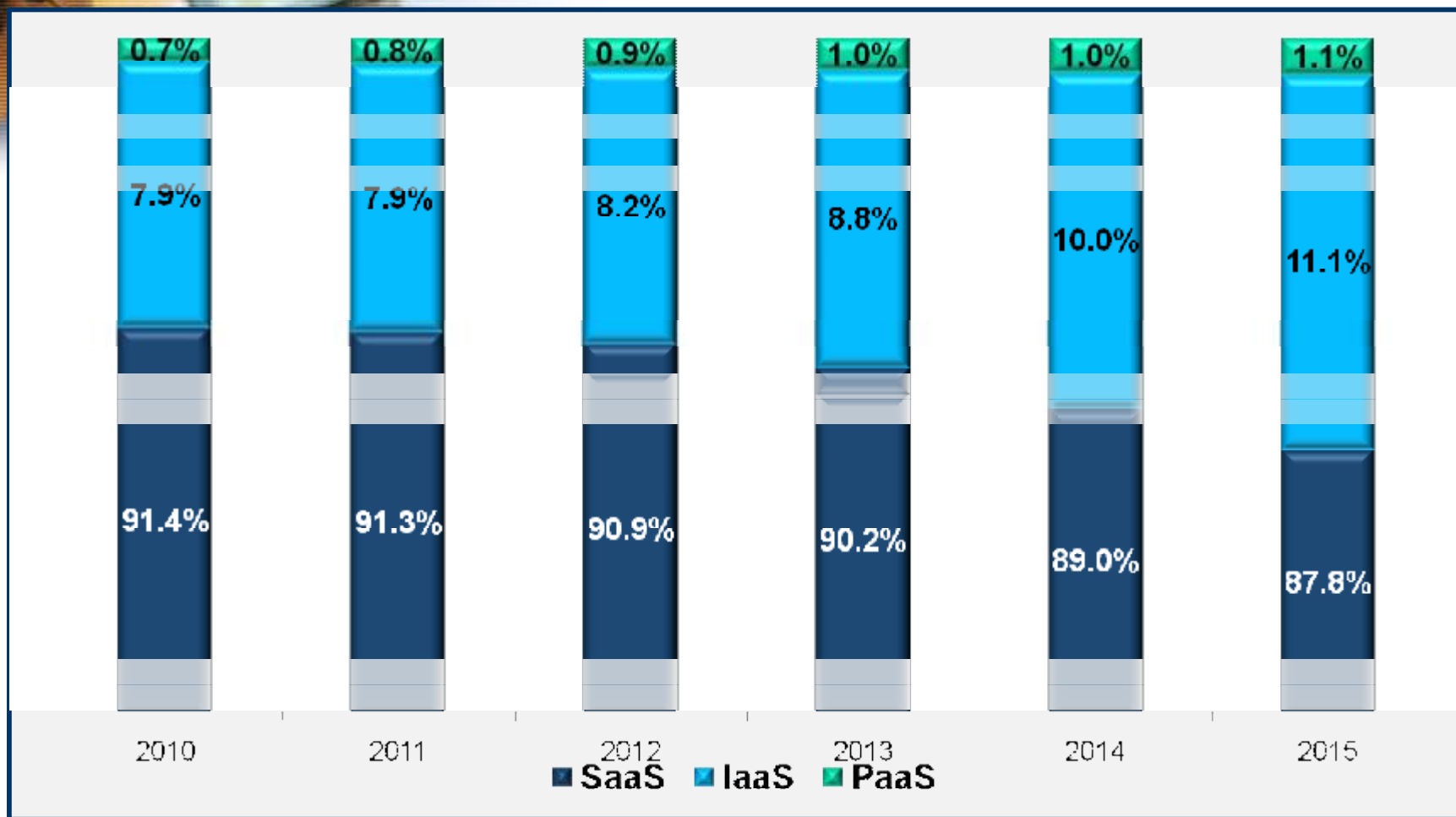
# 新技术 - 云计算

计算、内存和i/o资源池，应用或操作环境以及似乎无限延展的可扩充性，提供的一种服务网络，无论是私人的还是公共的



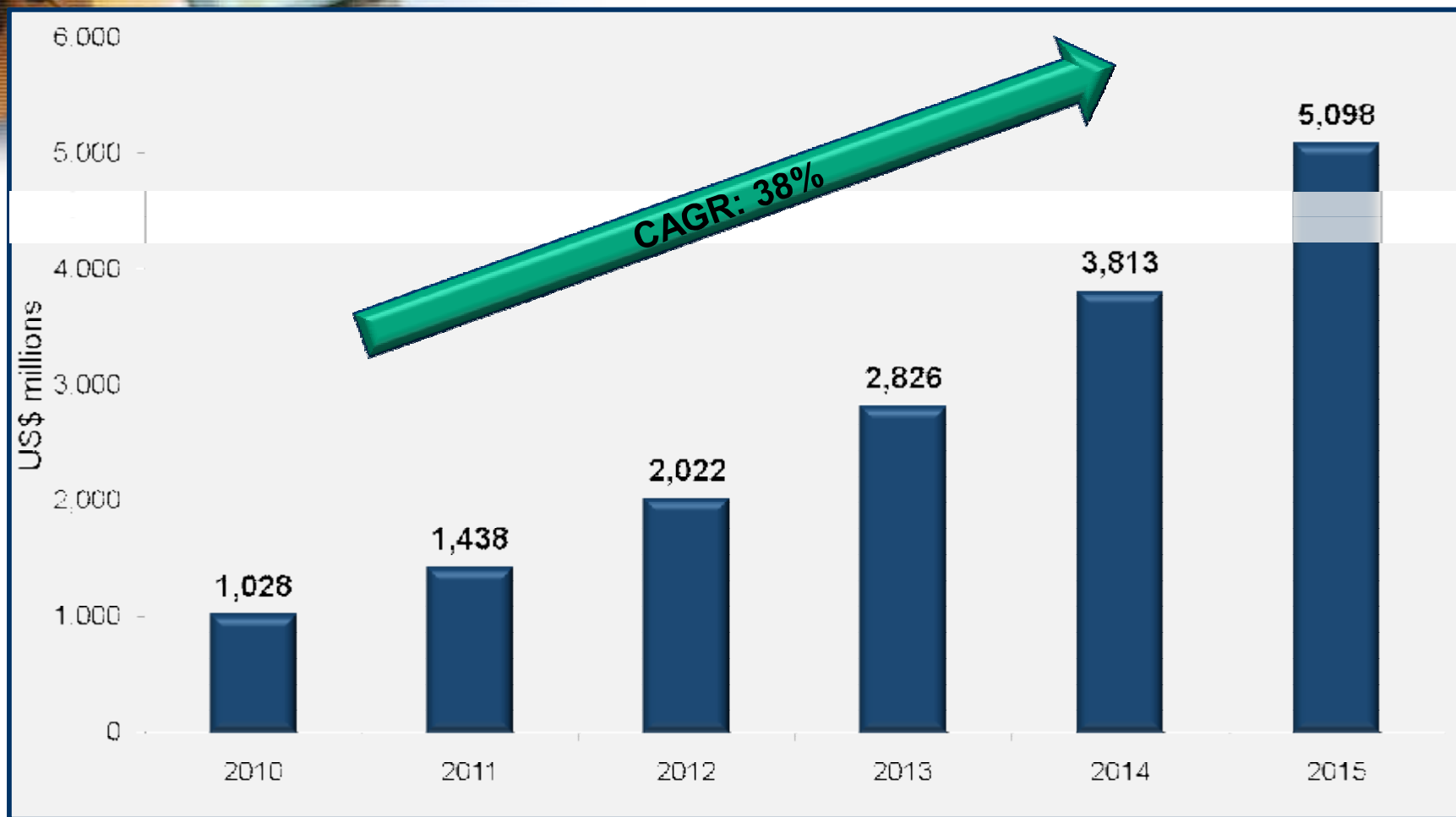


Source: Frost & Sullivan Analysis



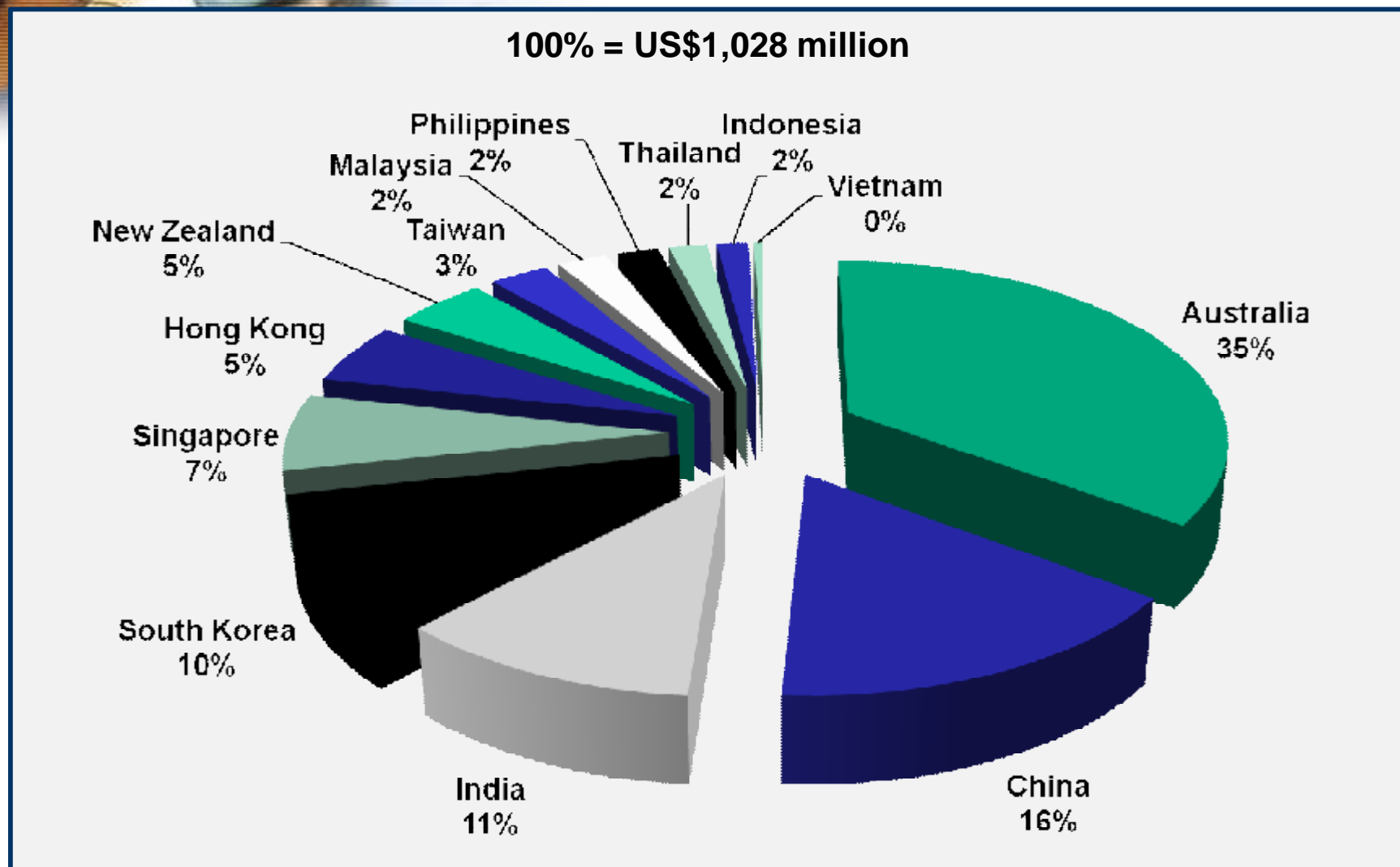
While all three segments are expected to demonstrate strong growth, IaaS and PaaS will grow at a faster pace to account for a greater share of the market.

Source: Frost & Sullivan Analysis

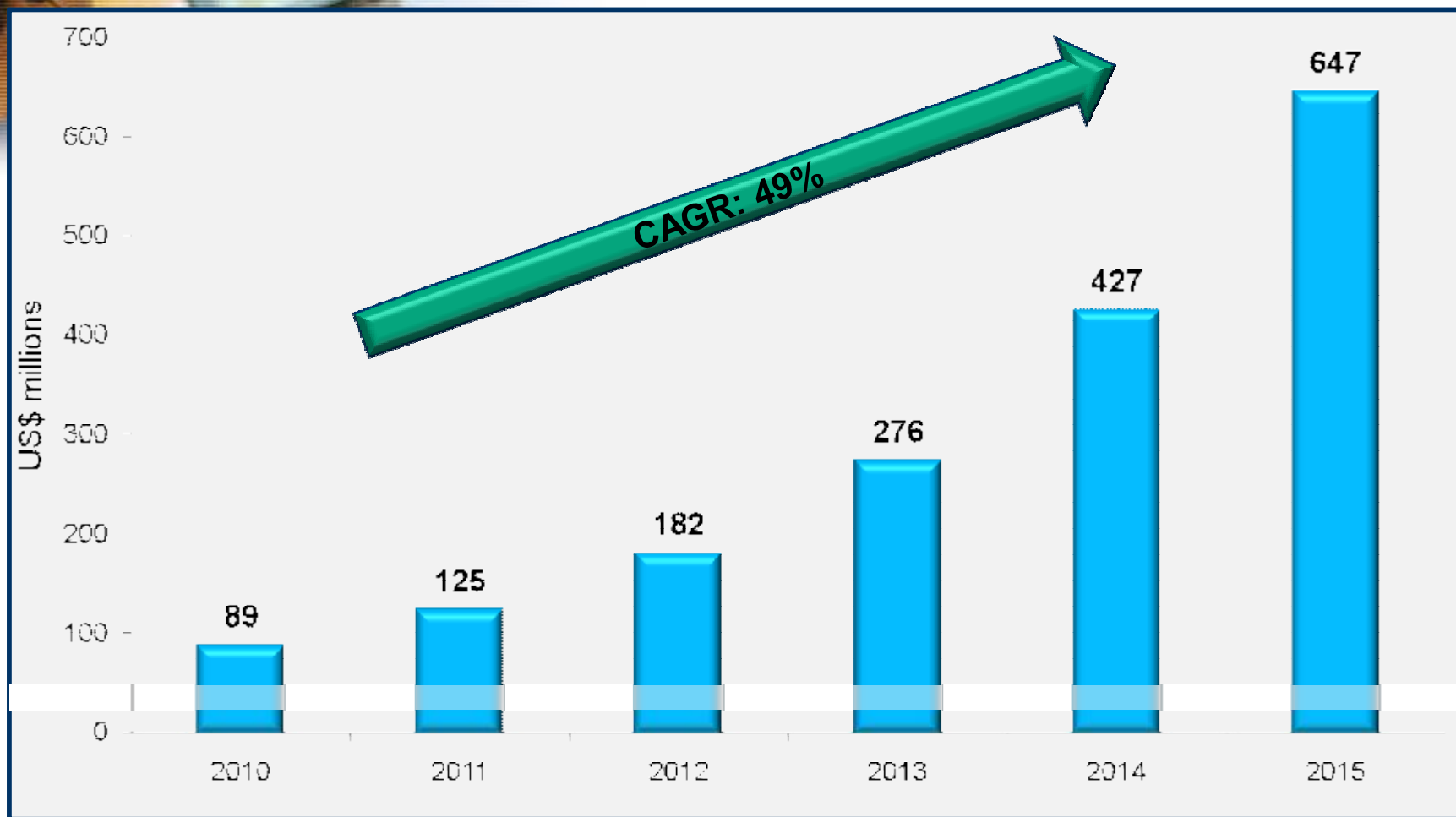


**APEJ SaaS market is expected to grow at 38% for the 2010-2015 period.**

Source: Frost & Sullivan Analysis

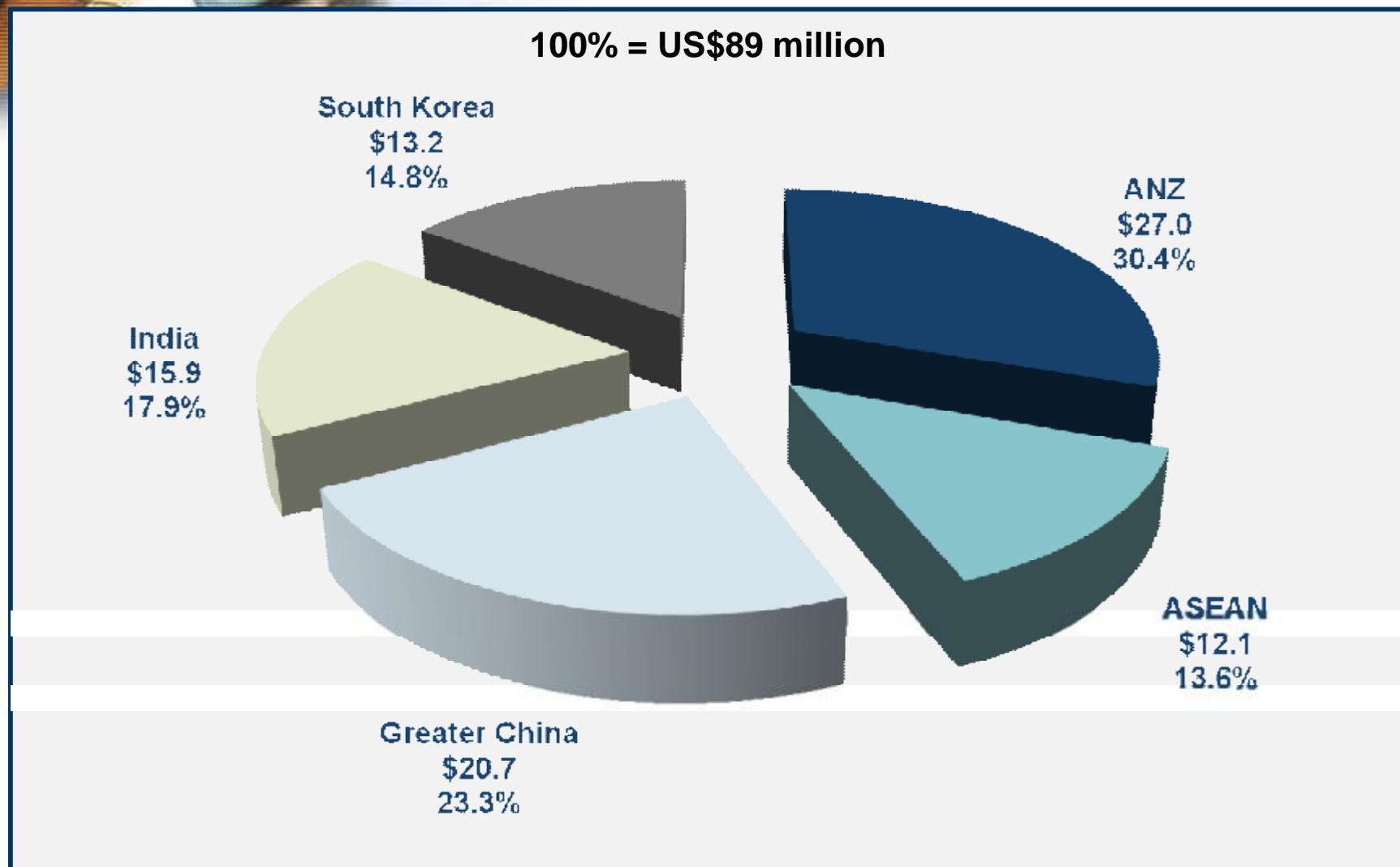


Source: Frost & Sullivan Analysis



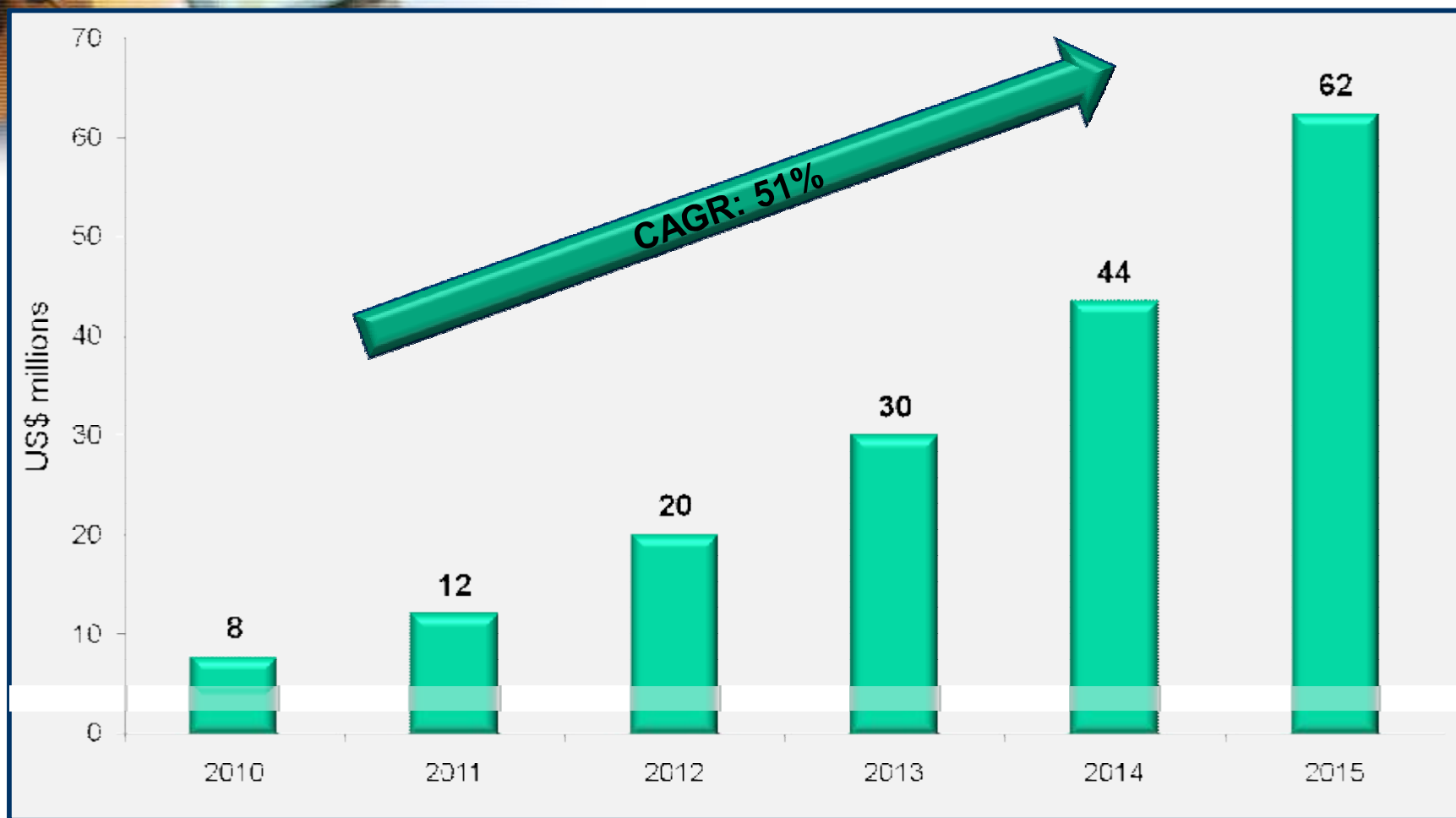
APEJ IaaS market is expected to grow at 49% for the 2010-2015 period.

Source: Frost & Sullivan Analysis



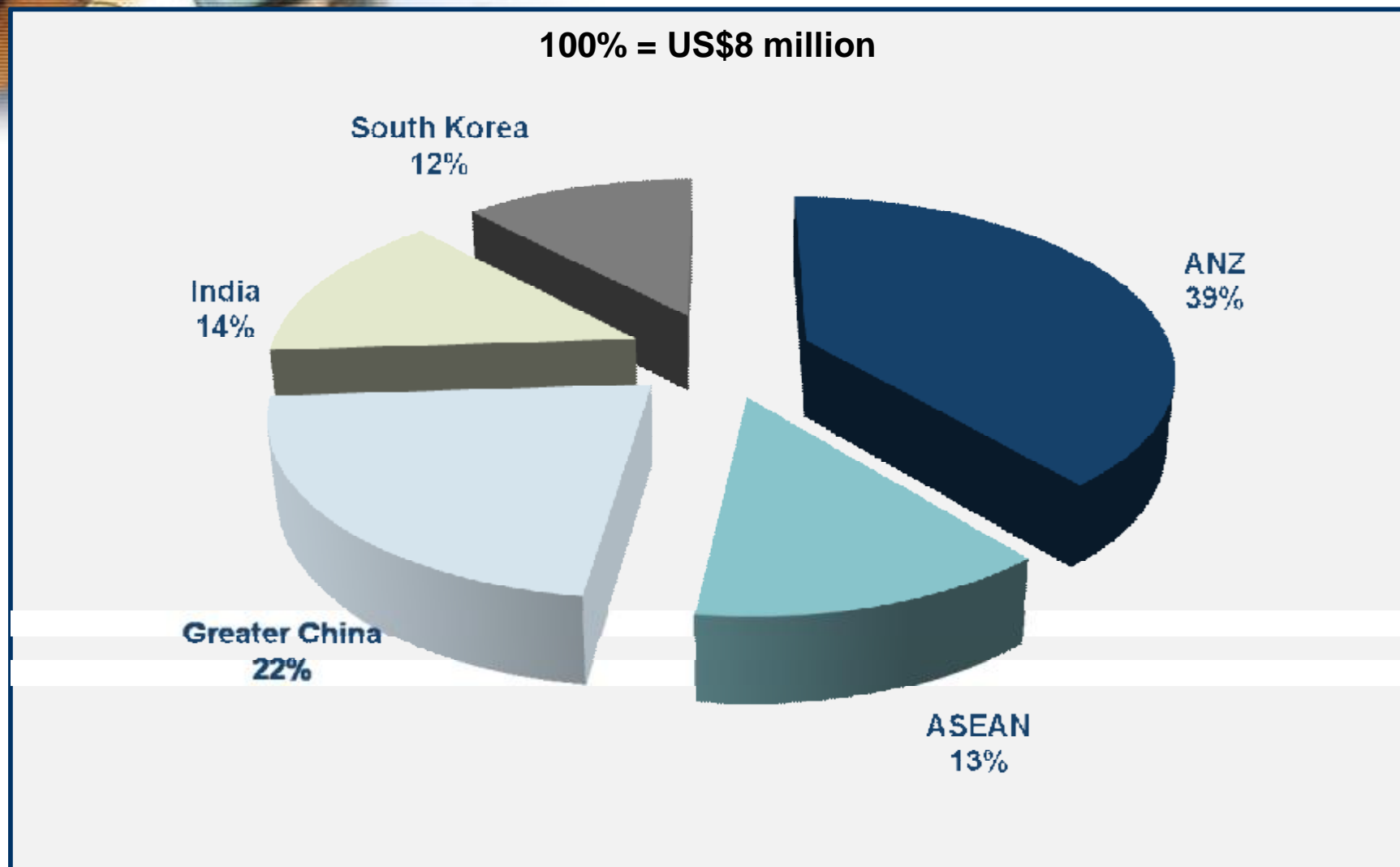
Source: Frost & Sullivan Analysis





**APEJ PaaS market is expected to grow at 51% for the 2010-2015 period.**

Source: Frost & Sullivan Analysis



Source: Frost & Sullivan Analysis



# 模式



## 呼叫中心的运营模式

- 在呼叫中心行业里，一直以来都存在自建、外包、托管及设备租赁等多种运营模式。
- 
- 自建呼叫中心指的是企业投资建设呼叫中心的目的在于利用呼叫中心来开展自身业务，从始至终与其他机构无关。
- 
- 多种外包形式。场地、设备、人员、管理。
- 
- 呼叫中心托管服务，顾名思义就是企业把呼叫中心系统交给专业公司来建设和管理。而企业自身把稀缺的人力和财力资源集中到核心业务上，有关呼叫中心的建设、维护、升级改进等工作都由提供呼叫中心托管服务的专业公司来负责。
- 
- 呼叫中心设备租赁业务是指企业全部或部分租用第三方提供的呼叫中心系统设备及应用软件来构建呼叫中心，此呼叫中心设在客户方，租赁方按租赁时间付费给出租方，当合同结束时，租赁行为解除。

外包、托管、租赁代表着未来的方向



## 客户关系领域里的新商业模式

1. 即付即用-按需
2. 共同创造价值
3. 自助服务



## Contact Center in the Cloud

- Close to 100,000 contact center seats on a hosted platform in Asia Pacific
- Contact Center in the Cloud is gaining strong interest, and growing at a CAGR of over 20% in the next 5 years
- Flexibility, Scalability, Peak Demand, Cost and Remote Agents are key drivers for CC in the Cloud
- More than 30 service provider offering hosted contact center services in Asia Pacific





# 发展



## 市场总览

§中国呼叫中心市场趋势( 销售额 06-2011年)

年份	销售额 (百万美元)	销售额增长率 (%)
2006	186.3	-
2007	215.1	15.4
2008	253.6	17.9
2009	304.6	20.1
2010	368.2	20.9
2011	448.5	21.8

复合增长率 (2006-2011): 19.2%

数据来源: Frost & Sullivan(中国), CTIForum 2007年





## 市场总览

§表5.1:呼叫中心应用软件市场: 趋势预测 (销售额 06-2011年)

年份	销售额 (百万美元)	销售额增长率 (%)
2006	124.3	-
2007	144.7	16.4
2008	172.5	19.2
2009	210.3	21.9
2010	259.5	23.4
2011	325.3	25.3

复合增长率 (2006-2011): 21.2%

数据来源: Frost & Sullivan(中国), CTIForum 2007年

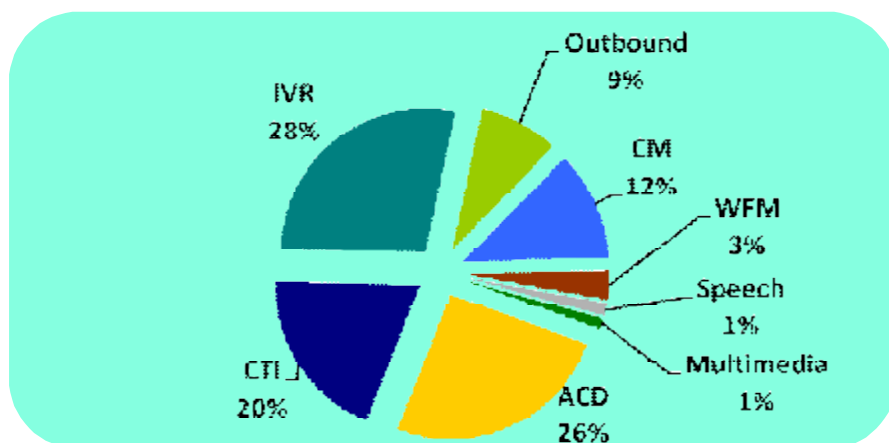
# China – All Products Market

## Market Engineering Measurement Analysis

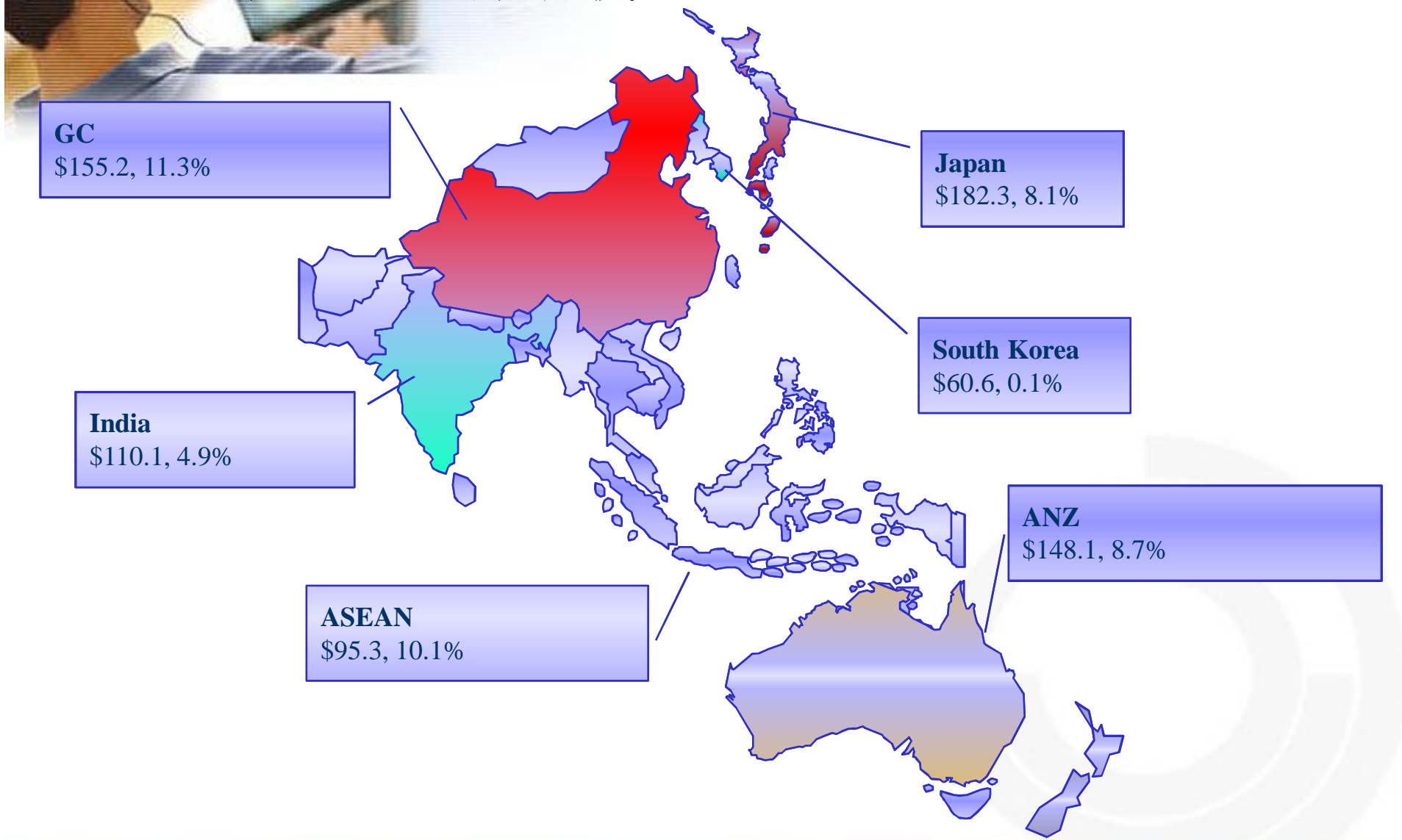
Measurement Name	Measurement	Trend
Market age	Growth	-
Revenues (2009)	\$102.7 million	Increasing
Potential revenues (2016)	\$226.4 million	Decreasing
Market Growth Rate (09/08)	-4.7	Increasing
CAGR (2009-2016)	9.9	Decreasing
Saturation (current/potential)	45.4	Stable
Price range	\$2,500to \$8,000	Decreasing
Price sensitivity	High	Stable
Market Concentration	45%	Stable

## Key Market Trends

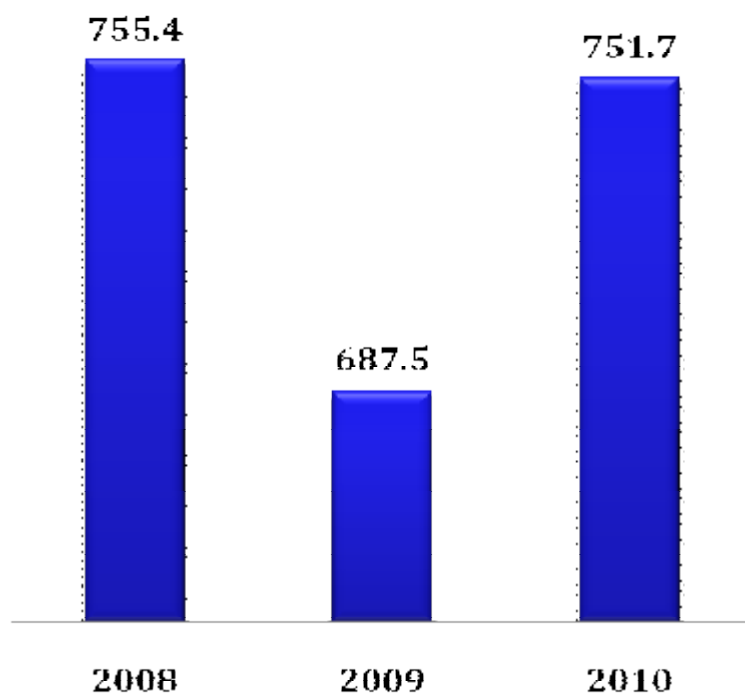
	Trends
Major Market Trends	<ul style="list-style-type: none"> <li>•The Chinese Contact Center Application market has witnessed a negative year-on-year growth of 4.3 per cent in 2009, mainly due to the conservative spending behavior by most enterprises, especially SMEs.</li> <li>•Outsourcing has seen the growing trend in terms of seats numbers and human resource training.</li> <li>•Government has shown its increasing attention on the regulatory work in this industry in order to streamline the supply and demand chain in call center area.</li> <li>•Competitive landscape started to be in favor of local vendors with the strong and dynamic service delivery capability of customization development.</li> </ul>
Technology Trends	<ul style="list-style-type: none"> <li>•Driven by the cost-saving theme of 2009, IPCC has gained pivotal attention in China market.</li> <li>•The technology of IPCC tends to be mature for both global and local vendors.</li> </ul>
Pricing Trends	<ul style="list-style-type: none"> <li>•There is no doubt that the price is declining in the overall market. However, more worrying signs came from the global vendors with the price dropping above 20 per cent in the end-users in 2009.</li> <li>•In the long term, the list price is expected to keep declining, especially for some advanced technologies.</li> </ul>



# 亚太地区2010年呼叫中心应用市场规模\$751.7 million

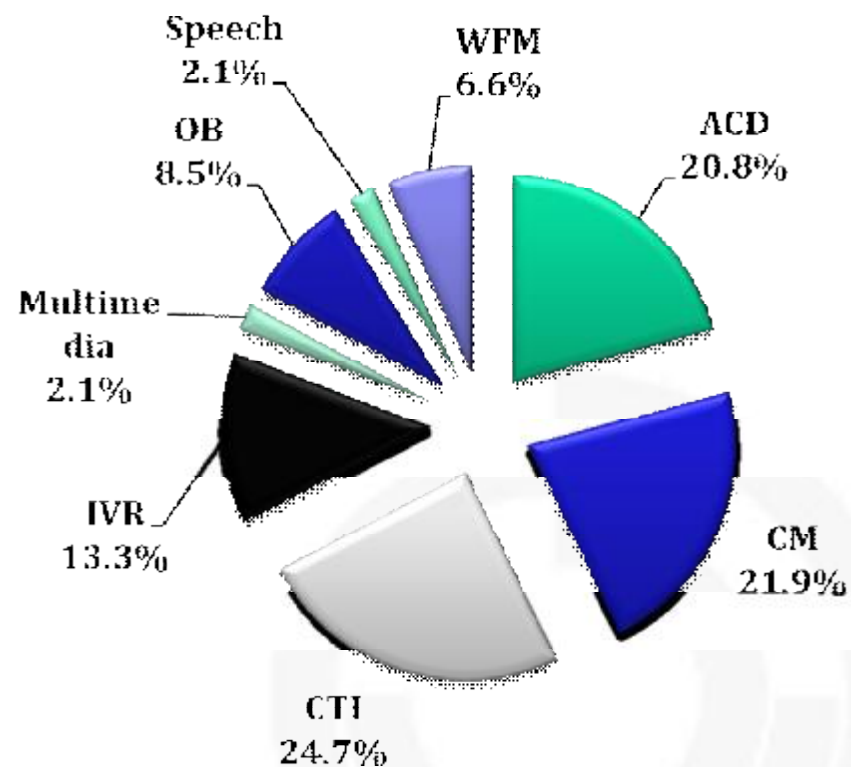


Contact Center Applications Market: (Asia Pacific), 2008 - 2010



Note: All figures are rounded; the base year is 2010.  
Source: Frost & Sullivan

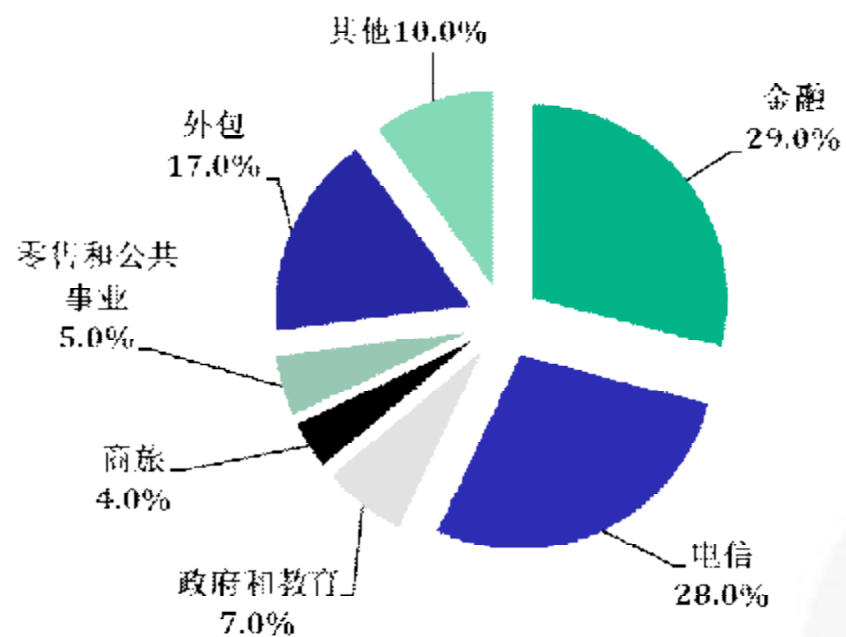
Contact Center Applications Market: CC Application Opportunity (Asia Pacific), 2010



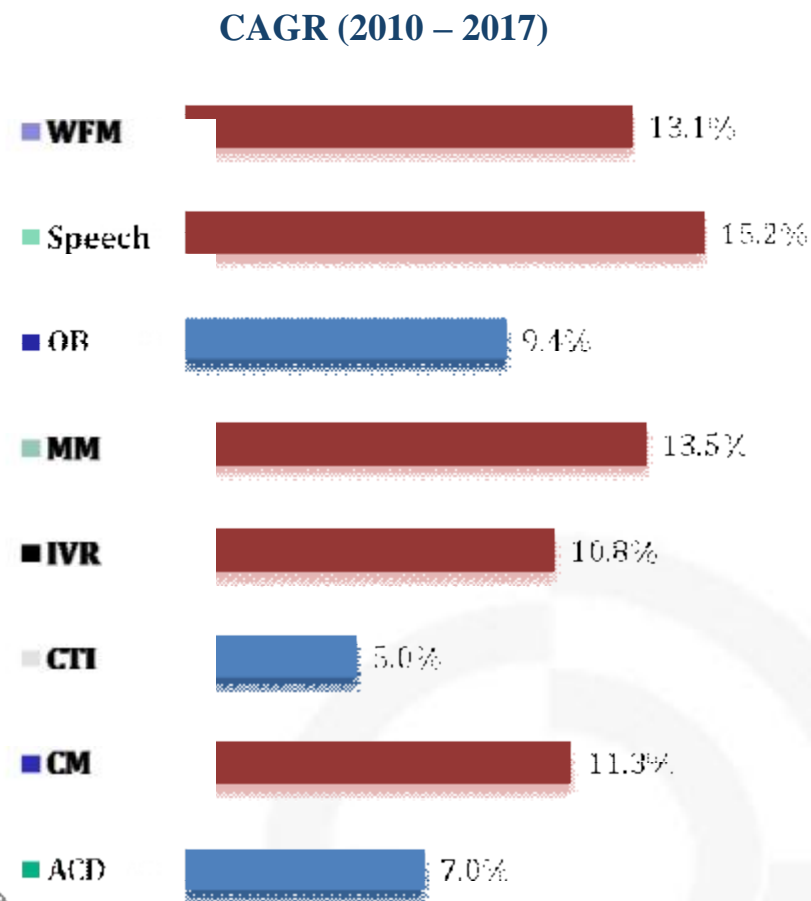
Note: All figures are rounded; the base year is 2010.  
Source: Frost & Sullivan



### Contact Center Applications Market: Opportunity by Verticals (Asia Pacific), 2010



Note: All figures are rounded; the base year is 2010.  
Source: Frost & Sullivan

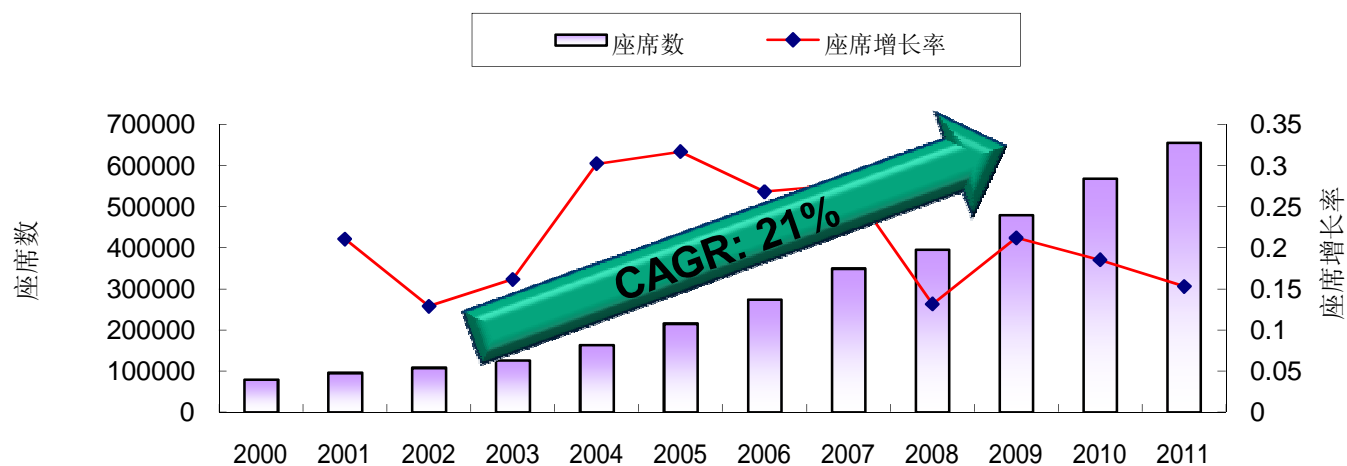


Note: No Services included in revenue

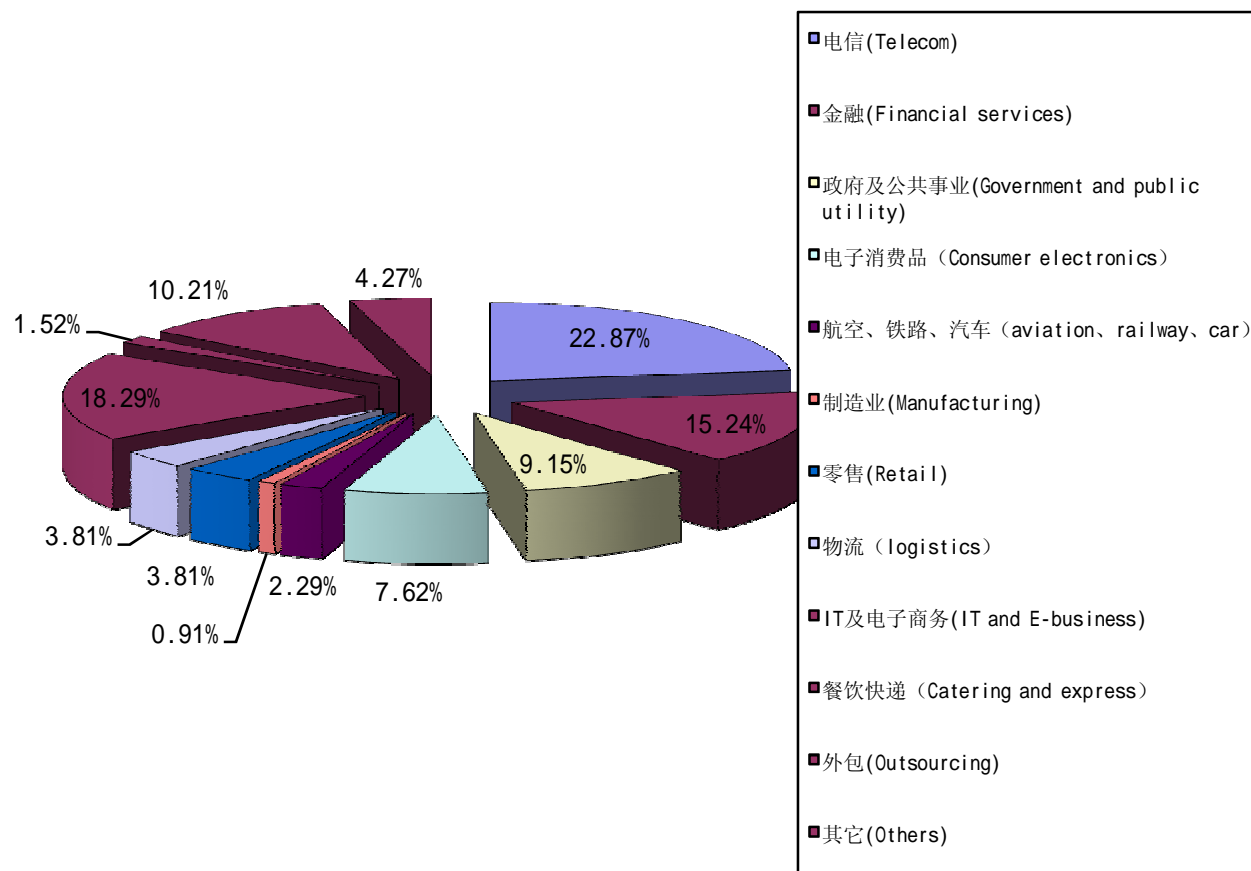
Note: All figures are rounded; the base year is 2010.  
Source: Frost & Sullivan

截止2011年底，65.6万座席

2000-2011年中国呼叫中心市场规模(座席数)



2011年中国呼叫中心市场总体状况（垂直市场）分布（按座席）  
Status of China Call Center Market in 2009 (Vertical Market, Seat Number)







## 发展预测

	中国	香港	台湾	新加坡	澳大利亚	美国
每万人座席拥有数	5.04	17	25	35	80	100以上
中国完全达到这些国家水平时中国所拥有的座席规模	65.6万	221万	325万	455万	1040万	1300万

数据来源: CTIForum.com 2011年6月



谢 谢!

