Numi | OFFICE OF THE CTO

INTERNAL

The German Call Center Market

A structural read on employment, sites, buildings, remote work, offshoring and AI across an industry that is shrinking in place while nobody agrees on how big it is.

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A NOTE ON THE BRIEF

You asked for the DACH market. You then narrowed it to Germany only, and I agree with that call: Austria and Switzerland have no authoritative recent census. The Swiss association's own published headcount ranges from 20,000 to 32,000 depending on which page you read, and the most-cited Austrian figure turns out to belong to a different trade association entirely. Writing those chapters would have meant padding the document with numbers I could not stand behind. What I found on both is preserved in Appendix C so the work is not lost.

METHOD

How to read this document

Every number in here carries the year it was measured, not the year I wrote it down. That is the single most important thing about this report, and it is the thing most market reports on this sector get wrong.

The vintage rule

You asked for "today as date". The document is dated 14 November 2026. But the best German data on this industry is not from 2026. The Bundesagentur für Arbeit sector sheets are `Stand Feb 2025`. The official wage medians are `2023`. The industry ranking that everyone quotes closed its data collection on 1 September 2026 and has not published. So every figure here is tagged with its own vintage. Where a number is 2023, it says 2023.

This matters because the industry is moving fast enough that a two-year-old number is a different claim from a current one. An employment figure from June 2024 predates the Vodafone and Telefónica announcements entirely.

Confidence levels

`Official`	Bundesagentur für Arbeit, Statistisches Bundesamt, Bundesnetzagentur, Mindestlohnkommission. Take as given.
`Surveyed`	Named study, known sample size, known publisher. Trend-Studie Contact Center 2026 at n=399 is the main one. Directionally reliable, self-selection bias likely.
`Trade`	Association estimates and trade press. The CCV's 520,000 to 560,000 range sits here. Useful, not auditable.
`Vendor`	A number an interested party published about itself or its market. Quoted where it is the only source, always attributed.

What I did not do

- I did not average conflicting sources into a single clean number. Where sources disagree by a factor of four, that disagreement is the finding.
- I did not construct a bottom-up site census. Nobody has one and the published counts (896 versus "almost 6,000") differ by a factor of six because they define "a call center" differently.
- I did not use paywalled industry databases. Everything here is open-source and re-checkable, with URLs in Appendix A.
- I did not include anything about Numi's product. You said this one is for you.

> THE ONE THING TO CARRY OUT OF THIS DOCUMENT
>
> German call center employment is falling, the cost floor under it is rising on a legislated schedule, and the operators are responding by moving seats out of the country rather than by automating them. The AI story is real but it is three to five years behind the narrative. The displacement happening right now is geographic, not technological.

EXECUTIVE SUMMARY

Fifteen findings

01 **The sector has no agreed size, and the gap is a factor of four.** The Bundesagentur counts roughly 127,000 dialogue-marketing specialists (2023). The industry association counts 520,000 to 560,000 (2025/26). Both are correct. They are answering different questions. See Part I.

02 **Employment has fallen for eight consecutive quarters.** Global call center employment sits 5.3% below its December 2023 peak (Revelio Labs, Oct 2026), after more than a decade of growth. The German regional series confirm the direction.

03 **Where we have clean German data, the decline is steep.** Brandenburg lost 27.4% of its call center jobs between 2020 and 2024. Berlin lost 8.6% over the same window (BA, Stand Feb 2025).

04 **Labour demand has collapsed faster than headcount.** In Berlin, registered vacancies in dialogue-marketing occupations fell 70.6% from 2021 to 2025 while the unemployed count rose 25.7%. The Bundesagentur's own verdict: no occupation in this field currently has a good employment outlook.

05 **The training pipeline is dying twice as fast as the industry.** Indexed to 2019, Brandenburg employment stood at 69% by 2023 and apprenticeships at 45%. In Berlin, 94% versus 49%. Operators stopped building their own supply before they stopped hiring.

06 **The cost floor rises on a legislated schedule nobody can negotiate with.** Minimum wage went to EUR 13.90 on 1 Jan 2026 and goes to EUR 14.60 on 1 Jan 2027. That is 13.9% over two calendar years, against flat volumes. The coalition target is EUR 15.

07 **This is the most psychologically damaging common job in the German economy.** Call centers record 43.1 psychological sick notes per 100 employees against an all-occupation average of 15.0 (AOK, 2025 data published 2026). Nearly three times the norm.

08 **Nothing is being built, with three exceptions, and they are leases not buildings.** The only new German floorspace I could document in 2025 and 2026 is Avedo taking 3,500 sqm in Dresden on a ten-year lease, Avedo taking the Sheridan Tower in Augsburg, and D+S europe standing up Gera with about 90 people. Compare that to the last expansion cycle, when Teleperformance put EUR 3.8m into a purpose-built 3,000 sqm Mönchengladbach site for 400 FTE (2016).

09 **The closure ledger for 2026 alone runs to roughly 4,100 roles.** Vodafone Germany 2,300 (announced 9 Nov 2026), Telefónica 1,100, Otto 480, IKEA Rostock 279, plus the TP Senftenberg closure which nobody has quantified publicly.

10 **Vodafone named AI explicitly, five days before this report.** 2,300 roles, 19% of a roughly 12,000-person German workforce, over two financial years, with customer service called out as a primary target and the TOBi assistant named as the replacement mechanism.

11 **Telefónica is not closing its centers, it is selling them.** Bremen (180) and Rostock (240) transfer to TP in January 2027 pending antitrust clearance. Ver.di's characterisation, reported in the regional press, is "death by instalments". Watch whether TP still has those sites in 2029.

12 **The German-language seat has a credible 50 to 70 percent cheaper alternative, and it is not Eastern Europe any more.** Turkey holds 11,000 to 13,000 German-speaking agents at EUR 1,200 to 1,700 per month (Apr 2026), and the operators there say Poland, Romania and Bulgaria have priced themselves out.

13 **The building question is half-dead because the work already left the building.** gevekom runs 2,500 people and 2,700 seats across 14 locations in seven countries with 100% home office (Jan 2026). That is the operating model the industry is converging on, and it does not need a new building anywhere.

14 **Voice is not dying inside the contact center, whatever the telephony statistics say.** Phone is offered by essentially 100% of contact centers and accounts for more than half of all contact volume at 66% of them, essentially unchanged over two years despite LLM voicebots (n=399, Jan 2026). Digital channels remain in low single digits by volume.

15 **Agentic AI is at 12% production deployment, and the entry price for the leading voice platform is EUR 100,000 a year.** Chatbots are at 49% but the VIER CEO's own view is that most of those are rule-based, not AI. The adoption curve is real and it is early.

THE UNCOMFORTABLE ONE

Every structural force in this report points the same way: fewer German seats, lower-paid elsewhere, with technology used to justify decisions that cost pressure was already forcing. An operator cutting 19% of its workforce and naming AI is doing two things at once, and only one of them is a technology decision.

AT A GLANCE

The numbers that matter

127k
Dialogue-marketing specialists, official count
BA · 2023

520–560k
Call center workers, broad definition
CCV · 2025/26

EUR 3.5bn
German outsourced call center revenue
Statista · 2025e

−5.3%
Global call center employment vs Dec 2023 peak
Revelio · Oct 2026

−27.4%
Brandenburg call center jobs, 2020 to 2024
BA · Feb 2025

−70.6%
Berlin vacancies in the occupation, 2021 to 2025
BA · Feb 2025

EUR 2,596
Median gross monthly, Germany, Dialogmarketing
Entgeltatlas · 2023

+13.9%
Statutory minimum wage, Jan 2025 to Jan 2027
MLK · Jun 2025

43.1
Psych sick notes per 100 staff vs 15.0 average
AOK · 2025

66%
of contact centers where phone is >50% of volume
Trend-Studie · Jan 2026

12%
with agentic AI in productive use
Trend-Studie · Jan 2026

~4,100
German service roles announced cut in 2026
This report · Nov 2026

Documented German floorspace added, 2025 to 2026

Avedo, Dresden-Dobritz	3,500 sqm	Ten-year lease, from 1 Jul 2025
Avedo München, Augsburg	n/d	Sheridan Tower, 2025
D+S europe, Gera	~90 staff	Hainstraße 10, in build-up
hello.de, Bremen	up to 1,000 sqm	Capacity extension

That is the entire documented German build list. Against it: four announced cut programmes totalling roughly 4,100 roles.

Part I

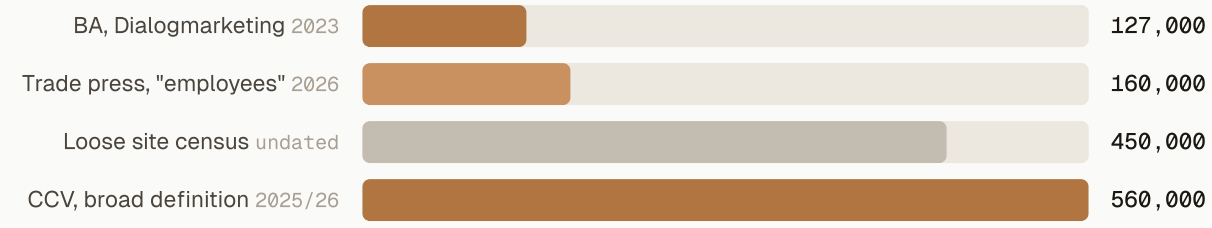
How big is it, and why four credible sources disagree by a factor of four

Before anything else can be said about this market, the sizing has to be sorted out. The published numbers range from 127,000 to 560,000 people and from 896 to almost 6,000 sites. None of the sources is lying. They are measuring different things, and the differences are load-bearing.

I.1

The four numbers

Ask how many people work in German call centers and you get four answers, each from a source with a reason to be believed.



Range spans 4.4x. Absolute headcounts, bars from zero, scaled to the maximum.

What each one is actually counting

SOURCE	FIGURE	WHAT IT COUNTS
Bundesagentur für Arbeit 2023	127,000	People whose *occupation code* is Dialogmarketing (KldB 9212). Occupation-based, so it catches a call center agent wherever they sit, but only if their role is coded that way. Misses service staff coded as sales, admin or insurance clerks.
WZ 822 / 82.20 classification	n/p	Firms whose *main business* is providing call center services to third parties. This is the outsourcing industry and nothing else. An in-house service team inside an insurer is classified under insurance. No national series was publicly retrievable; regional sheets exist.
Trade press 2026	~160,000	Usually a reconstruction of WZ 822 employment with no stated method. Treat as the order of magnitude of the outsourcing industry, not a measurement.
CCV 2025/26	520–560,000	Everyone doing call-center work anywhere in the economy, in-house teams included. This is a job-function estimate, not a register count. The association represents roughly 300 member companies covering about half the jobs by its own reckoning.

> WHY THE GAP IS THE FINDING
>
> The 127,000 is the industry. The 560,000 is the function. Roughly four out of every five people doing contact center work in Germany do it inside a company that does not think of itself as a call center business. Any read of this market that only looks at the BPO vendors is looking at 23% of it.

I.2

The site count is worse

Headcount disagrees by 4x. Site counts disagree by more than 6x, and here the sources are not even measuring the same kind of object.

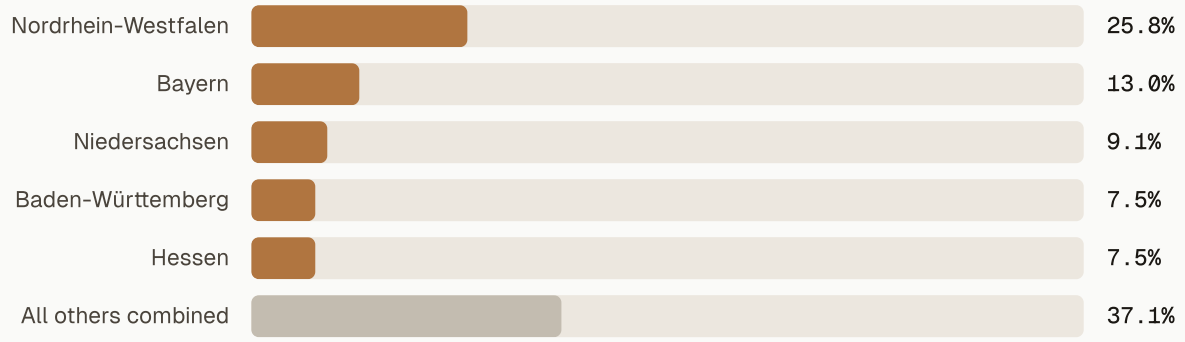
THE 896 COUNT

Derived from CCV-adjacent sources. Distributed across nearly all federal states, concentrated in North Rhine-Westphalia (206), Bavaria (148) and Baden-Württemberg (90). This reads like a count of *operating sites of identifiable call center businesses*, which would make it roughly consistent with the 127,000 to 160,000 headcount figure (around 140 to 180 people per site).

THE "ALMOST 6,000" COUNT

Appears in market-overview content alongside a 450,000 headcount. 450,000 over 6,000 sites gives 75 people per site, which is plausible only if you are counting every in-house service desk of more than a handful of people as "a call center". That is a defensible definition. It is just not the same definition.

Where the sites are



Share of call center locations by federal state, on a 0 to 100 percent axis. Source: trade compilation, undated.

The concentration is the opposite of what the cost logic would predict. NRW and Bavaria are expensive labour markets. The reason they dominate is proximity to clients: the decision-makers who buy outsourced service sit in Düsseldorf, Cologne, Munich and Frankfurt, and the sales relationship still rewards being nearby. The low-cost eastern sites exist, but they are satellites, not the centre of gravity.

> PRACTICAL CONSEQUENCE
>
> If you want to find the operators, go to NRW. If you want to find the sites under cost pressure, go east. Brandenburg lost 27.4% of its call center employment in four years while NRW remained the single largest cluster. The pain is not distributed evenly and the eastern sites absorb it first.

I.3

Revenue

The German outsourced call center market is worth roughly EUR 3.5 billion a year. That is a small number for an industry that employs this many people, and the smallness is the point.

EUR 3,483m
Forecast German call center industry revenue
Statista · 2025e

~EUR 27k
Revenue per head, at 127,000 heads
Derived

EUR 25–45
Quoted hourly rate, dedicated agent, Germany
Vendor · undated

What the revenue-per-head number tells you

EUR 27,000 of revenue per employee is extraordinarily low for a services business. For comparison, a mid-tier IT consultancy runs four to six times that. This is not a margin business, it is a volume-and-utilisation business, and it has essentially no cushion.

Work the arithmetic the other way. A dedicated agent billed at EUR 25 to 45 per hour, at say 1,600 billable hours a year, generates EUR 40,000 to 72,000. The gap between that and EUR 27,000 of revenue per *employee* is utilisation, shared-service pricing, part-time contracts and overhead headcount. Which is to say: the published rate card is the ceiling and almost nobody realises it.

WHY THIS MATTERS FOR EVERY OTHER SECTION OF THIS REPORT

A business with EUR 27,000 of revenue per head and a legislated wage floor rising 13.9% over two years has three options and only three. Raise prices to clients who are themselves under cost pressure. Move the seat somewhere cheaper. Remove the seat. Parts VII through XI are an account of which of those three German operators actually chose, and the answer is overwhelmingly the second.

Pricing structures seen in the market undated vendor quotes

Per minute	EUR 0.50–1.20	Shared-service inbound, pooled agents
Per dedicated agent hour	EUR 25–45	Named agents, client-specific training
Turkey, per workstation hour	EUR 20–40	Quoted by a Turkish operator, Apr 2026

Note the overlap at the top of the Turkish range and the bottom of the German one. The gap is not uniform; it is widest at the commodity end.

I.4

A classification change is about to break the time series

Anyone building a German call center dataset should know this before they start: the statistical ground is moving underneath the sector right now.

- **WZ 2025 replaced WZ 2008** as Germany's industry classification, introduced January 2025. Both ran in parallel through the transition.
- **Reporting year 2026 switches over**, and employment data moves to the jobs concept (Jobkonzept) at the same time.
- **Two methodology changes landing together** means the 2026 figures will not be cleanly comparable to 2024 and earlier, and the break will be easy to mistake for a real-world movement.

FORECAST, AND IT IS A SAFE ONE

Somebody will publish an article in 2027 claiming German call center employment moved sharply, based on a 2026-versus-2024 comparison that is actually a classification artefact. When that happens, check whether the series crosses the WZ 2008 to WZ 2025 boundary before believing it.

What WZ 82.20.0 does and does not capture

In	Firms whose main activity is operating call centers for third parties. Inbound and outbound. The BPO industry.
In	All employees of those firms, including those not on the phone: finance, WFM, QA, IT, management.
Out	In-house contact centers. Classified to the parent company's sector. This is the four-fifths of the function that the official industry statistics do not see.
Out	Carve-outs that bill only their own parent, depending on how they are registered.

How to size this market honestly, in one paragraph

Say: the German outsourced call center industry employs on the order of 130,000 to 160,000 people across roughly 900 identifiable sites and turns over about EUR 3.5 billion a year. Separately, the contact center *function* across the whole German economy occupies something in the region of half a million people, most of them in-house, and that larger number is an association estimate rather than a register count. Then stop. Any further precision is invented.

Part II

The employment curve

No national WZ 822 time series is publicly retrievable. What does exist is a set of regional sector sheets from the Bundesagentur für Arbeit, and two of them, Berlin and Brandenburg, are detailed enough to function as a controlled natural experiment: an expensive metropolitan market and a cheap peripheral one, same industry, same four years.

II.1

The direction is unambiguous

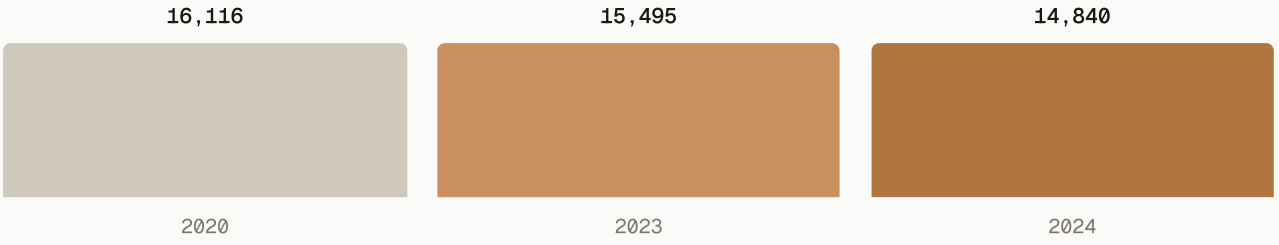
THE HEADLINE FINDING

Global call center employment is **5.3% below its December 2023 peak** and has declined for **eight consecutive quarters**. This follows more than a decade of continuous growth.

Revelio Labs, reported by CallCenterProfi, 14 October 2026. Global, not German. The German regional series below are consistent with it.

Eight consecutive quarters is the detail that matters. A single down quarter is noise. A down year is a cycle. Two full years of uninterrupted decline following a decade of growth is a regime change, and it started roughly a year after ChatGPT shipped, which is suggestive but not causal: the same window contains a German recession, a 2023 and 2024 cost-cutting wave across telco and retail, and the first serious round of offshore re-pricing.

Berlin: the expensive market



Socially-insured employees by workplace, WZ 822, reporting month June. Only the three years published as exact figures are plotted. Source: Statistik der Bundesagentur für Arbeit, Stand Februar 2025.

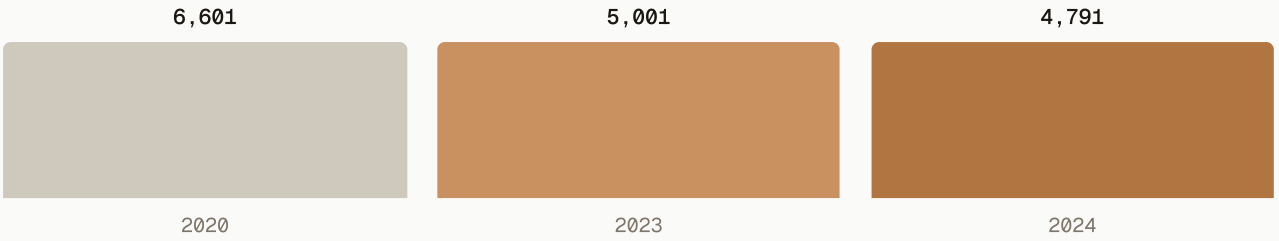
−8.6%
2024 versus 2020
−1,276 jobs

0.9%
Share of all Berlin employment
unchanged vs 2023

49%
Women as share of the workforce
48% in 2023

II.2

Brandenburg: the cheap market, and it is being hit three times harder



Same series, same method, Land Brandenburg. Only the three years published as exact figures are plotted. Source: BA, Stand Februar 2025.

−27.4%
2024 versus 2020
−1,810 jobs

0.5%
Share of all Brandenburg employment
0.6% in 2023

62%
Women as share of the workforce
unchanged vs 2023

> THE COMPARISON
>
> Berlin lost 8.6% of its call center jobs between 2020 and 2024. Brandenburg lost 27.4%. Three times the rate, in the market that is supposed to be the cost-advantaged one.

Why the cheap market lost more

This looks backwards until you think about what the eastern sites actually are. Brandenburg's call center employment was built in the 2000s on exactly one proposition: lower wages than the west, inside Germany. That proposition had a shelf life. Once the comparison set expanded to Poland, Romania, Bulgaria and now Turkey, a Cottbus seat was no longer competing against a Düsseldorf seat. It was competing against a Plovdiv seat, and it lost.

The Berlin sites survived better because they were never primarily cost arbitrage. They are closer to clients, they hold more of the complex and regulated work, and a chunk of the Berlin figure is operator head offices rather than production floor. Foundever moved its German headquarters to Berlin-Neukölln in 2024; Concentrix, Capita and TELUS Digital all run their German HQ out of Berlin.

This is the clearest geographic read in the report: the German call center map is hollowing from the periphery inward, and the eastern sites built on domestic wage arbitrage go first, because their reason for existing has been fully replaced by a cheaper foreign version.

A NOTE ON GENDER COMPOSITION

Berlin is 49% women; Brandenburg 62%. The eastern sites are substantially more female. Which means the job losses documented in this report fall disproportionately on women in regions with thin alternative employment. That is not a market-structure observation, but it is the truth about what these closures do.

II.3

Labour demand collapsed before headcount did

The headcount series understate what has happened, because they measure people still employed. The vacancy series measure whether anyone is hiring, and they fell off a cliff.

Berlin: unemployed versus registered vacancies, dialogue-marketing occupations

YEAR (ANNUAL AVG, JAN)	UNEMPLOYED	VACANCIES	RATIO
2021	4,184	672	6.2 : 1
2024	4,439	243	18.3 : 1
2025	**5,259**	**198**	**26.6 : 1**
Change 2025 vs 2021	+25.7%	−70.6%	4.3x worse

Bestände, Gleitender Jahresdurchschnitt, January. KldB 9212 Berufe im Dialogmarketing. Source: BA, Stand Februar 2025. Note: reported vacancies are a subset of all vacancies, so the levels understate demand, but the trend is valid.

Brandenburg: the same picture, flatter

YEAR	UNEMPLOYED	VACANCIES
2021	659	179
2025	731	187
Change	+10.8%	+4.5%

Brandenburg's vacancy count held up while Berlin's fell 70%. Read alongside the headcount series, the most likely explanation is churn, not growth: Brandenburg lost 27% of its jobs but the remaining sites still have to replace people constantly, so vacancies persist even as the base shrinks. That is what a high-attrition, declining industry looks like in the statistics.

THE BUNDESAGENTUR'S OWN VERDICT, VERBATIM

"Berufe mit guter Beschäftigungsperspektive können derzeit nicht identifiziert werden."

No occupation in this field currently has a good employment outlook. That is the federal employment agency's standing assessment of the sector, in its own published sheet.

II.4

One counter-signal worth noting

Everything above says demand is gone. One metric disagrees, and it is worth being honest about it.

91 days

Vacancy time, advertising and marketing occupations, Berlin

BA · Dec 2024, −1 day yoy

97 days

Vacancy time, all occupations, Berlin

BA · Dec 2024, +3 days yoy

Call center roles still fill *faster* than the Berlin average, and the gap widened slightly year on year. In an industry with 26 unemployed people per vacancy, you would expect roles to fill almost instantly, so 91 days is actually slow in that context. But against the wider labour market it is below average, which tells you these positions are not hard to staff.

The honest reading: this is not a sector with a talent shortage. It is a sector with a demand shortage. Those produce very different strategies. A talent-short industry automates to cover roles it cannot fill. A demand-short industry automates to remove roles it no longer needs. German call centers are in the second situation, and that changes who buys what.

Summary of Part II

- Global call center employment has declined for eight straight quarters and sits 5.3% below its late-2023 peak.
- Berlin lost 8.6% of call center jobs from 2020 to 2024; Brandenburg lost 27.4%.
- The eastern, cost-arbitrage sites are losing roughly three times faster than the metropolitan ones, because their advantage has been replaced by a cheaper foreign version.
- Berlin vacancies in the occupation fell 70.6% from 2021 to 2025 while unemployment in it rose 25.7%, a 26.6-to-1 ratio.
- Roles still fill faster than the Berlin average, so this is a demand problem, not a supply problem.
- No national series is publicly available, and a classification change (WZ 2008 to WZ 2025, plus the jobs concept) will break comparability from reporting year 2026.

Part III

Who actually works there

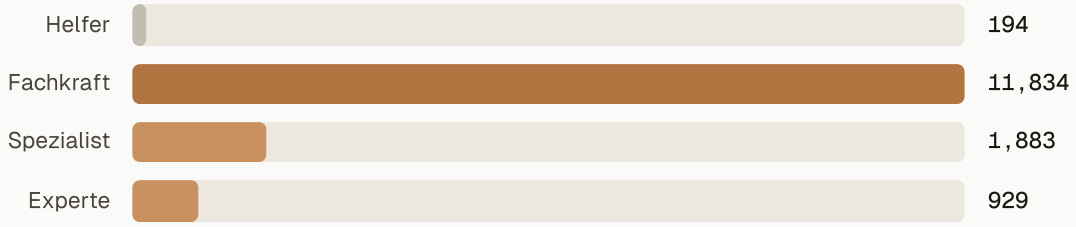
The composition of this workforce explains more about the industry's trajectory than the headcount does. It is flat, it is ageing, it has stopped training replacements, and it is measurably the most psychologically damaging common occupation in the German economy.

III.1

The skill pyramid is not a pyramid

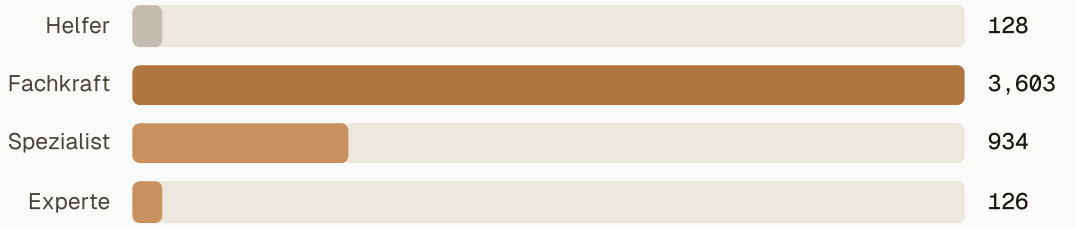
The Bundesagentur classifies every employee into four requirement levels. In a normal industry these form a pyramid. In call centers they form a block.

Berlin, June 2024 n = 14,840



80% of the workforce sits at a single requirement level.

Brandenburg, June 2024 n = 4,791



75% at Fachkraft. Only 2.6% at Experte level, against Berlin's 6.3%.

> WHAT A FLAT PYRAMID MEANS OPERATIONALLY
>
> There is almost nowhere to promote anyone to. A Fachkraft-level agent in Brandenburg is one of 3,603 people competing for 126 expert-level positions across the entire federal state. The career ladder is three rungs tall and the top two are nearly empty. This is a structural driver of attrition that no amount of engagement programming fixes: people leave because there is no next step, not because they are unhappy on any given Tuesday.

It also tells you where the expertise sits. Berlin holds 929 expert-level roles against Brandenburg's 126, a 7.4x gap on a 3.1x headcount base. The thinking work is concentrated in the metropolitan sites; the eastern sites are production floors. That asymmetry is exactly what you would expect to see immediately before production floors get moved abroad, because the thing that is hard to relocate (accumulated judgement, client relationships, regulatory knowledge) is not in those sites.

III.2

This is not a young industry any more

Age structure, Berlin, June 2024

AGE BAND	MEN	WOMEN	COMBINED
Under 25	3%	3%	6%
25 to under 35	18%	16%	34%
35 to under 50	**20%**	**19%**	**39%**
50 to under 60	7%	7%	14%
60 and over	3%	4%	7%

Age structure, Brandenburg, June 2024

AGE BAND	MEN	WOMEN	COMBINED
Under 25	3%	2%	5%
25 to under 35	8%	10%	18%
35 to under 50	**17%**	**27%**	**44%**
50 to under 60	6%	15%	21%
60 and over	3%	8%	11%

6% / 5%

Under-25 share, Berlin / Brandenburg

BA · Jun 2024

32%

Brandenburg workforce aged 50+

vs 21% in Berlin

The stereotype of the call center as a student job is twenty years out of date. Under-25s are 5 to 6% of the workforce. In Brandenburg, nearly a third of the workforce is over 50 and 23% of the total workforce is women aged 50 or older, which is the single largest demographic cell in that entire dataset.

> THE CONSEQUENCE FOR THE CLOSURE LEDGER IN PART VII
>
> When a Brandenburg or Mecklenburg site closes, the modal affected person is a woman in her fifties in a region with limited alternative employment and no formally recognised qualification for the work she has been doing for fifteen years, because the lead occupation (Callcenter-Agent) has no dual apprenticeship. That is a redeployment problem with no good answer, and it is why these closures generate the political heat they do.

III.3

The training pipeline is collapsing twice as fast as the industry

This is the leading indicator in the entire report. Operators stopped investing in their own labour supply well before the headcount decline showed up.

Indexed to 2019 = 100, reporting month December

REGION	2019	2022	2023	SERIES
Berlin	100	96	94	Socially-insured employment
Berlin	100	61	49	Apprentices, dual system
Brandenburg	100	–	69	Socially-insured employment
Brandenburg	100	–	45	Apprentices, dual system

Source: Statistik der Bundesagentur für Arbeit, Stand Februar 2025. Absolute apprentice counts are small, so percentage movements are volatile.

Absolute apprentice counts, reporting month December

REGION	2019	2020	2021	2022	2023
Berlin	41	18	25	11	20
Brandenburg	56	35	31	13	25

Berlin, an industry of roughly 15,000 people, trained **20 apprentices** in 2023. Brandenburg, roughly 5,000 people, trained 25. These are rounding errors. The sector has effectively exited formal vocational training.

WHY THIS IS STRUCTURAL RATHER THAN CYCLICAL

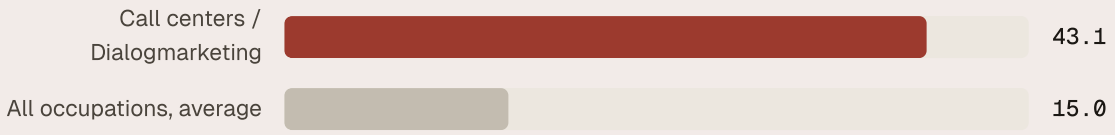
The lead occupation, Callcenter-Agent, has **no dual apprenticeship and is not a regulated training occupation**. The recognised routes (Servicefachkraft and Kauffrau/-mann für Dialogmarketing) are adjacent, not core. So the industry was always able to hire without training, and the moment conditions tightened it stopped. That makes the skill base entirely dependent on employer-internal onboarding, which is exactly the thing that gets cut first in a downturn and exactly the thing that disappears when a site closes.

For a vendor selling into this sector, that has a direct implication: the buyer has no institutional training infrastructure to plug into. Anything that requires agents to learn a new workflow has to carry its own enablement, because the customer does not have a training function capable of absorbing it.

III.4

The health data is the most damning thing in this report

PSYCHOLOGICAL SICK NOTES PER 100 EMPLOYEES



AOK data, 2025 reporting year, published October 2026, on a 0 to 50 axis. Call center workers are signed off for psychological reasons nearly three times as often as the German average.

The wider context this sits in

German sickness rate, H1 2026	5.3%	Slightly down
Psychological illness rank, 2026	#1	First time ever ahead of respiratory infections
Psych absence days per 100 AOK members, 2025	403	Up from 284 in 2016, +42% in a decade
Average duration per psychological case	28.5 days	Nearly a month per episode

Combine the two: a workforce with nearly three times the baseline rate of psychological sick leave, in a country where each such episode averages 28.5 days off. The absence cost alone is material, and it compounds the attrition problem because long absences trigger replacement hiring that often becomes permanent turnover.

> THE READ
>
> This is not a wellbeing footnote. It is a direct operating cost and a direct quality cost, and it is the strongest argument in the sector for changing how agents are managed rather than how many of them there are. It is also the thing that makes the EU AI Act's prohibition on workplace emotion recognition (Part XIV) more than a compliance detail: the most obvious technological response to agent stress is to monitor agent stress, and that specific response is now illegal.

What the BA lists as required of these people sampled from 100 job ads, 2024/25

Communication skill, strong service orientation, reliability, motivation, teamwork, independent and structured working, resilience (Belastbarkeit), care. Mandatory: IT skills and very good German. Advantageous: foreign languages, a pleasant voice, experience, and willingness to do shift work. Note that *resilience* appears in the standard requirement list, which is the industry's own acknowledgement of what the AOK data measures.

Part IV

Pay and the minimum wage ratchet

The German call center industry has a cost floor that rises on a published legislative schedule, that it cannot negotiate with, and that it has already given up trying to carve itself out of. Over the two calendar years to January 2027 that floor rises 13.9%, against flat volumes and a shrinking headcount.

IV.1

What the job actually pays

Median gross monthly earnings, Kauffrau/-mann für Dialogmarketing

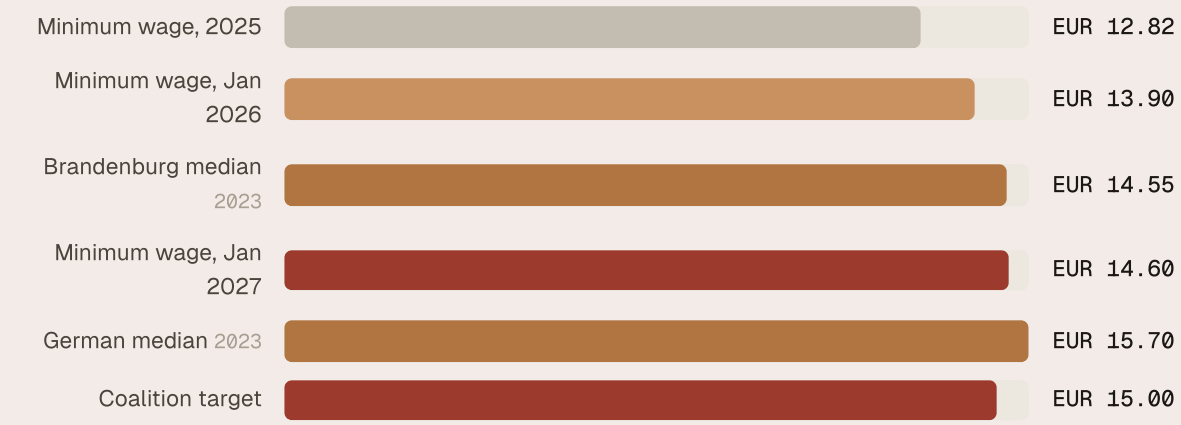
REGION	2022	2023	CHANGE
Berlin	EUR 2,493	EUR 2,678	+7.4%
Germany	EUR 2,405	EUR 2,596	+7.9%
Brandenburg	EUR 2,206	EUR 2,402	+8.9%

Source: Entgeltatlas der Statistik der Bundesagentur für Arbeit, Stand 2023. These are medians for the recognised commercial occupation, which sits above the unqualified agent role.

Put that in hourly terms

At a 38-hour week (roughly 165 hours a month), the German median of EUR 2,596 is about **EUR 15.70 per hour gross**. The Brandenburg median of EUR 2,402 is about **EUR 14.55**.

NOW COMPARE THAT TO THE LEGISLATED FLOOR



Mixing a 2023 median with 2026/27 statutory rates is deliberate. The point is the convergence: by January 2027 the statutory minimum exceeds the 2023 Brandenburg median for this occupation.

That is the whole story of the German call center cost base in one chart. Wages in the eastern sites have been tracking just above the legal minimum, and the legal minimum is catching up. Even allowing for wage growth since 2023, the compression is severe: the gap between "what we pay a trained commercial dialogue-marketing employee in Brandenburg" and "what we are legally obliged to pay anyone" is closing to almost nothing.

IV.2

The ratchet, and why there is no escape valve

The schedule

EFFECTIVE	RATE	STEP	STATUS
Through 2025	EUR 12.82	–	In force
1 January 2026	**EUR 13.90**	+8.4%	In force now
1 January 2027	**EUR 14.60**	+5.0%	Decided 27 Jun 2025
Political target	EUR 15.00	+2.7%	CDU/CSU-SPD coalition

Mindestlohnkommission decision of 27 June 2025. Cumulative increase 2025 to 2027: +13.9%.

Three reasons this bites harder here than almost anywhere else

01 **Labour is essentially the entire cost base.** At roughly EUR 27,000 of revenue per employee (Part I.3), there is no material non-labour cost to squeeze. A wage floor increase passes through to margin almost one for one.

02 **The clients are themselves cutting.** The large buyers of outsourced service in Germany are telcos, retailers and utilities, and in 2026 those are precisely the sectors announcing their own cost programmes. Passing a 13.9% increase through to a client that is cutting 19% of its own workforce is not a conversation that goes well.

03 **There is no sector carve-out and there will not be one.** The CCV pursued a sector-specific collective minimum wage through an employer association, then deprioritised it in 2014 once the statutory route gained political momentum. That door has been shut for over a decade. The association's current public position is that it advocated for a statutory minimum wage early, with carve-outs only for mandatory interns and dual students.

> THE ARITHMETIC AN OPERATOR IS ACTUALLY DOING
>
> A Brandenburg seat at roughly EUR 14.55 an hour, plus employer contributions, plus facility, plus the absence overhead implied by a 43.1-per-100 psychological sick note rate. Against a Turkish German-language seat at EUR 1,200 to 1,700 a month all-in, with a quoted total workstation cost 50 to 70 percent below Germany. That is not a close call, and it does not require anyone to believe anything about AI.

What would change this

Only two things. Either the work moves up the value chain far enough that EUR 15 an hour is cheap for it (which requires the skill pyramid in Part III.1 to stop being flat, and there is no sign of that), or regulation makes offshoring expensive enough to offset the gap. On the second: GDPR already constrains where personal data can be processed, but Turkey and the Western Balkans are managed through standard contractual clauses routinely, and the EU AI Act does not address location of processing at all. No relief is coming from that direction.

Part V

Fluctuation, and what we can honestly say about it

You asked specifically about fluctuation rates. This is the area where the published numbers are least trustworthy, so this part is shorter than it should be and is explicit about what is estimate and what is measurement.

V.1

What the data supports, and what it does not

THE NUMBER THAT GETS QUOTED

Fluctuation in the **Information and Communication** sector was **52.3% in 2025**, against an all-sector German average of 8 to 12%.

Source: HR benchmark compilation, 2025 data. Note carefully: this is the statistical sector that contains call centers, not call centers themselves.

Why I will not present 52.3% as the call center fluctuation rate

The Information and Communication sector (WZ section J) is a large, heterogeneous grouping. Call centers sit administratively near it but the section also contains software, telecoms, publishing and broadcasting, which have very different turnover profiles. A 52.3% blended figure for that whole section is high enough to suggest call centers are pulling it up, but using it as "the call center rate" would be inventing precision.

What I can say with confidence, from the official data

- **The industry has stopped training.** 20 apprentices in Berlin and 25 in Brandenburg in 2023, down 51% and 55% from 2019. An industry with a stable workforce does not need to train; an industry with high churn and no training is consuming a labour pool it does not replenish.
- **Vacancies persist in a shrinking market.** Brandenburg lost 27.4% of its jobs from 2020 to 2024 but its registered vacancies *rose* 4.5% from 2021 to 2025. Replacement hiring continuing through a 27% contraction is a churn signature.
- **Psychological absence is at nearly three times the national rate** (43.1 vs 15.0 per 100). Absence at that level feeds turnover directly.
- **There is nowhere to be promoted to.** 75 to 80% of the workforce sits at one requirement level with a near-empty tier above it (Part III.1).
- **Pay is converging on the legal minimum** (Part IV.1), which removes the main retention lever operators have.

> THE HONEST FORMULATION
>
> German call center fluctuation is very high by national standards. Every structural indicator that we can measure directly points that way, and the one headline percentage in circulation (52.3%) belongs to a broader sector and should be cited as such. If you need a defensible sentence: "turnover in German call centers runs several multiples of the 8 to 12 percent national average; the sector-level proxy is 52.3 percent for Information and Communication in 2025."

If you want this nailed down properly, the route is the CCV or a direct operator survey, not public statistics. I have flagged it in Appendix B as an open gap rather than filling it with a guess.

Part VI

The operator landscape

Six global BPO groups account for the bulk of the outsourced German market, all of them foreign-owned, five of them headquartered in Berlin. Underneath them sits a long tail of German mid-size operators, and that tail is where almost all of the interesting behaviour is happening.

VI.1

The top of the market

OPERATOR	STAFF DE	STAFF GLOBAL	GERMAN HQ	FOOTPRINT AND NOTES
TP ex-Teleperformance	~7,000	~383–490k	Dortmund	20+ German sites. Absorbed Majorel in 2023. Acquiring the o2 Bremen and Rostock centers, transfer January 2027. Also closing Senftenberg.
Concentrix	5,000+	~440k	Berlin	Also present in Austria, Switzerland and nearshore locations.
Foundever	~5,300	~150k	Berlin-Neukölln since 2024	Krefeld, Düsseldorf, Potsdam, Magdeburg, Dessau, Wittenberg. Note the eastern concentration of the production sites.
TELUS Digital	3,000+	~75k	Berlin	Dortmund, Duisburg, Essen, Aachen, Leipzig. Heavily Ruhr-weighted.
Capita	2,000+	~34k	Berlin	About 3,300 across DACH plus Poland on 16 sites. The Poland integration is explicit in how it describes itself.
Conduent	several hundred	~55k	Schwerin	24 countries. Smallest German presence of the six.

Compiled from trade sources, headcounts self-reported and of mixed vintage (2024 to 2026). Treat as orders of magnitude. The TP global figure is quoted at both 383,233 and ~490,000 in different 2026 sources depending on whether contractors are counted.

Two things to notice about this table

- **Not one of the six is German-owned.** French, American, Canadian and British. The commanding heights of German outsourced customer service are entirely foreign-controlled, which means the capital allocation decisions that close German sites are made in Paris, Fremont, Vancouver and London.
- **Five of six run their German HQ from Berlin, and their production floors from somewhere else.** Foundever's list is the clearest: HQ in Berlin-Neukölln, production in Magdeburg, Dessau, Wittenberg and Potsdam. Berlin holds the expertise (Part III.1), the east holds the volume.

TOTAL ADDRESSABLE, ROUGHLY

These six account for roughly 22,000 to 23,000 German employees. Against an outsourced-industry estimate of 127,000 to 160,000, that is around 15%. German outsourced customer service is far less concentrated than the global BPO market, and the long tail of mid-size German operators is where most of the seats sit.

VI.2

The German tail, where the actual behaviour is

Everything genuinely new in the German market over the last two years came from mid-size, German-owned operators, not from the global six.

OPERATOR	POSITION AND RECENT MOVES
gevekom	2,500 employees, 2,700 seats, 14 locations across seven countries in Europe and Africa, 30 languages, and **100% home office** Jan 2026. German sites: Berlin, Dresden, Leipzig, Frankfurt, Neubrandenburg, Chemnitz. International: Belgrade, Palma de Mallorca, Burgas, Varna, Sarajevo, Skopje, Tunis. **Opening Kenya in 2026.** Named a World's Best Employer 2024. This is the most interesting company in the German market and Part X is largely about why.
Avedo Ströer group	The only operator documented taking significant new German floorspace: 3,500 sqm in Dresden-Dobritz on a **ten-year lease** from 1 July 2025, and new offices in the Augsburg Sheridan Tower via Avedo München GmbH. Contrarian positioning: committing to physical German capacity while the market moves the other way.
hello.de AG	Berlin-based. Running a two-track strategy visibly: extending Bremen capacity to up to 1,000 sqm domestically, while opening a **third Bulgarian site in Plovdiv**, starting at 50 staff and targeting 120 seats. The same company building in Germany and in Bulgaria simultaneously is the clearest illustration of how operators actually hedge.
D+S europe	Standing up a new Gera site at Hainstraße 10, roughly 90 staff at the time of reporting, described as proceeding to plan. Now part of Ströer following the DV-COM and D+S 360 acquisitions.
Ströer	A **media group**, not a BPO, acquiring DV-COM and D+S 360 and holding Avedo. Consolidation by a buyer from outside the sector is a signal worth tracking: it usually means the incumbents are not bidding.
SUMMACOM	Sites at St. Ingbert, Völklingen and Bad Hersfeld, with a stated nationwide site-network expansion strategy 2021. Included for completeness; I found no 2025 or 2026 confirmation that the expansion proceeded.

> PATTERN
>
> The global six are managing decline in Germany. The German mid-tier is doing something more interesting: either going fully distributed (gevekom), or hedging domestic and nearshore simultaneously (hello.de), or betting against the trend on long German leases (Avedo). If you want to understand where this market goes, watch the mid-tier, because the global six will simply follow their group-level capital allocation.

VI.3

What the capital markets think

The equity market has already repriced this sector for AI displacement. That repricing is a fact about expectations, not about deployed technology, and the distinction matters.

TELEPERFORMANCE / TP, 2025 TO 2026

- **Morgan Stanley downgraded the stock explicitly on automation risk.**
- **Q3 2026: the company cut its 2026 revenue outlook and the shares fell about 15% in a day.**
- Separately, TP reduced headcount in Portugal on cost grounds 2025.

The thing to be careful about

It is tempting to read the TP share price as evidence that AI is eating call centers. It is better read as evidence that *investors believe* AI will eat call centers. Those are different claims and Part XIII shows the gap between them clearly: agentic AI is in productive use at 12% of surveyed contact centers, and the leading voice platform starts at EUR 100,000 a year.

What the repricing *does* do is change operator behaviour immediately, regardless of whether the underlying technology thesis is right yet. A listed BPO whose multiple is being compressed on automation risk has to show an automation story to its own shareholders. That creates pressure to announce AI-driven efficiency, which creates announcements like Vodafone's, which further confirms the narrative. The loop is self-reinforcing and it runs ahead of deployment.

~−15%

TP share move on Q3 2026 guidance cut

Oct 2026

12%

Contact centers with agentic AI in production

n=399 · Jan 2026

CONSEQUENCE FOR HOW TO READ EVERY ANNOUNCEMENT IN PART VII

When a German company announces job cuts and names AI, assume a mixture of three things: genuine automation, cost pressure that predates the automation, and a narrative obligation to shareholders. The Vodafone announcement of 9 November 2026 cites market saturation, competitive pressure, broadband market share loss and the end of a cable TV regulatory exemption *alongside* AI. The non-AI reasons are listed first in the company's own framing.

Part VII

Site ledger: what closed, shrank or changed hands

You asked about new buildings. The honest way to answer that is to put the build ledger next to the closure ledger, because the two only mean something together. This part is the closure side. It covers announcements from 2026 with named sites and headcounts wherever those were published.

VII.1

The 2026 ledger

COMPANY	SITE / SCOPE	ROLES	DATE	WHAT HAPPENED
Vodafone Deutschland	Company-wide, sites not named	2,300	Announced 9 Nov 2026	19% of a roughly 12,000-strong German workforce, over two financial years. Customer service named as a primary area. AI and automation named as the mechanism.
Telefónica Deutschland	Company-wide	1,100	Announced summer 2026	About every sixth role, from 6,820 FTE at the start of the year. Cited "profound changes in customer service" and AI.
Otto	Customer service	480	2026	Attributed to competition, the weak economy and changed customer behaviour.
IKEA	Kundenservice Rostock	279	Closes 30 Sep 2026	Full service center closure.
TP	Senftenberg, Lausitz	n/d	Announced 2026	Closure confirmed in regional reporting, headcount not publicly disclosed. Deliberately left unquantified rather than estimated.

~4,159
German service-side roles announced cut in 2026, excluding Senftenberg
Sum of the above

2
Of Germany's three large telcos cutting service headcount in the same year
Vodafone, Telefónica

3
Of these events landing in Mecklenburg-Vorpommern or Brandenburg
Rostock x2, Senftenberg

GEOGRAPHIC CONCENTRATION

IKEA Rostock closes, the o2 Rostock center is sold, and TP Senftenberg closes, all in 2026, all in the structurally weakest regional labour markets in the country. Overlay that on Brandenburg's 27.4% employment loss from 2020 to 2024 and the picture is not a national contraction spread evenly. It is a regional one, concentrated in exactly the places that built their service economy on domestic wage arbitrage.

VII.2

The Telefónica sale, in detail

This transaction is worth a full page because it is the template. It is not a closure, which makes it politically survivable, and the actual headcount outcome will not be visible for two to three years.

The facts

Seller	Telefónica Deutschland (o2)
Buyer	TP, formerly Teleperformance
Sites	Bremen and Rostock
Headcount	Bremen 180, Rostock 240, total ~430
Announced	31 October 2026
Original sale deadline	31 December 2026
Transfer	January 2027, pending antitrust clearance
Stated rationale	"Profound changes in customer service" and AI transformation
Union position	Ver.di secretary Christoph Heil had warned in summer that further o2 centers could close or be significantly reduced. Regional reporting characterised the outcome as "Tod auf Raten", death by instalments.
Job guarantee	TP intends to take over the sites and the 430 staff. Reporting explicitly notes this is an initial commitment and the longer-term effect on jobs and task allocation remains to be seen.

Why the structure matters more than the headline

01 **A sale is not a redundancy.** Under German transfer-of-undertaking rules the employment relationships move with the business, so the seller books no social plan cost and faces no mass-redundancy consultation. The political and union heat lands on the transaction, not on a layoff.

02 **The buyer's incentives are different from the seller's.** Telefónica had these centers as a cost line attached to its own customers. TP has them as a client contract with a margin target. TP operates 20+ German sites plus a large nearshore and offshore network, and has every reason to consolidate volume onto its cheapest capable location over the life of the contract.

03 **The attrition does the work.** In an industry with turnover running several multiples of the national average, a site does not need to be closed to be emptied. It needs to not be backfilled. That process is invisible in announcements and takes two to three years.

THE THING TO WATCH

Whether TP still operates Bremen and Rostock at comparable headcount in 2029. If the pattern holds, the answer will be no, and there will have been no announcement at any point. This is the mechanism by which German call center employment actually declines: not through closures, which are reported, but through non-replacement after transfer, which is not.

VII.3

The Vodafone announcement, and how to read an AI attribution

9 NOVEMBER 2026, FIVE DAYS BEFORE THIS REPORT

Vodafone Deutschland will cut or relocate **2,300 positions** over two financial years, about **19%** of a roughly 12,000-person German workforce. Announced by Germany chief Marcel de Groot.

What the company said, in its own order

- Market saturation and competitive pressure
- Loss of market share in broadband
- End of the cable television regulatory exemption
- Customer service to be integrated with the commercial and private-customer divisions, because shops and hotline staff currently cannot access the same systems
- IT streamlining with shortened decision paths
- Expanded process automation across the company
- AI: the TOBi digital assistant, redeveloped with generative AI; AI analysing network faults and proposing fixes
- No sites named, including no statement on the Düsseldorf headquarters

De Groot: "Our market is changing fundamentally and at a speed we haven't experienced before."

Reading it honestly

The most revealing detail is not the AI mention. It is this: *shops and hotline staff currently cannot access the same systems.* That is a 1990s systems-integration problem being solved in 2026, and it is listed as a primary driver of the restructuring. A company whose retail and telephone channels run on separate stacks does not have an AI problem, it has an architecture problem, and the headcount reduction follows from fixing it.

That does not make the AI claim false. TOBi is real and generative AI has genuinely been applied to it. But the honest causal account of 2,300 roles is: a saturated market, lost broadband share, a regulatory cliff, two decades of systems fragmentation now being consolidated, and automation applied on top of all of that. AI is a component and a framing device, not the cause.

> GENERALISATION
>
> In 2026, "AI" in a German restructuring announcement is doing the same work that "digital transformation" did in 2016 and "synergies" did in 2006. It is the acceptable public reason for a decision that cost pressure already required. Believe the headcount number. Discount the attribution by roughly half, and look for the systems-consolidation detail buried in the middle of the release, because that is usually where the real mechanism is.

Part VIII

Site ledger: what is actually being built

This is the part of your brief that does not have a clean answer, so this part explains why, shows everything I could document, and benchmarks it against what a real German call center construction cycle looked like the last time there was one.

VIII.1

First, why there is no construction dataset

You asked about new buildings being built for call centers. There is no public dataset that answers that question, and it is worth being precise about why, because the reason is itself informative.

01 **Building permits are not classified by tenant industry.** German Baugenehmigungen statistics classify by building type (office, commercial, industrial), not by who will occupy it. A call center and a law firm both show up as "Bürogebäude".

02 **Call centers almost never commission buildings.** They lease. The economics of a business with EUR 27,000 of revenue per head do not support owning real estate, and contract terms with clients are typically shorter than any sensible building amortisation.

03 **The last genuine build cycle ended around a decade ago.** See VIII.3 for the 2016 benchmark, which is the most recent documented example I could find of a purpose-built German call center facility.

04 **Therefore the only observable signal is lease announcements**, which appear in trade press and regional business news sporadically and with no systematic coverage. Anyone who sells you a "call center construction pipeline" for Germany has reconstructed it from exactly these announcements, as I have below, or invented it.

THE FINDING, STATED PLAINLY

Across 2025 and 2026 I could document **four** instances of German call center floorspace being added, of which **one** involves a long-term commitment. In the same window, four announced cut programmes total roughly 4,100 roles. The German call center is not a sector that is building. It is a sector that is consolidating out of buildings.

What this means for the question you were actually asking

If the underlying question is "where is capacity being created for this industry", the answer is: Bulgaria, Serbia, Bosnia, North Macedonia, Tunisia, Turkey and, as of 2026, Kenya. Part XI covers that. If the question is "is anybody still committing capital to German call center floorspace", the answer is yes, but it is one mid-size operator and the commitment is a lease, not a building.

VIII.2

The build ledger, 2025 to 2026

OPERATOR	LOCATION	SCALE	DETAIL
Avedo	Dresden-Dobritz, Breitscheidstraße	3,500 sqm	**Ten-year lease**, occupied from 1 July 2025. Sits inside a 35,000 sqm heritage campus of five period buildings renovated between 2002 and 2020, described as having representative character. Headcount not disclosed. `The only long-term commitment found`
Avedo München GmbH	Augsburg, Sheridan Tower	n/d	New offices taken in 2025, framed as strengthening the southern German presence with suitable conditions for a high-performance call center. Area and headcount not disclosed.
D+S europe	Gera, Hainstraße 10	~90 staff	New site build-up proceeding to plan, operations started in the office building with roughly 90 employees.
hello.de AG	Bremen	up to 1,000 sqm	Existing site, capacity being extended to up to 1,000 sqm. Note the same company simultaneously opened its third Bulgarian site.
asf energy	Wuppertal-Barmen, Am Markt 9–13	n/d	New premises occupied. An energy company's service operation rather than a BPO, included because it is in-house capacity being created.
REACH XCEL Group + LoyaltyEffect	Wilhelmshaven	n/d	New joint location opened. Scale not disclosed.

Compiled from trade press, 2025 to 2026. Not a complete census; trade coverage of lease announcements is sporadic. Any site that did not generate a press item is invisible to this method.

What the ledger has in common

- **Every single one is a lease or an occupancy, not a construction.** No purpose-built facility appears anywhere in 2025 or 2026.
- **Scale is small.** 3,500 sqm at roughly 8 to 10 sqm per workstation is on the order of 350 to 440 desks. The largest documented addition in two years is smaller than the IKEA Rostock site that closed.
- **Existing stock, often characterful.** Dresden is a renovated heritage campus; Augsburg is an existing tower. Operators are taking space that already exists, in buildings that were built for something else.
- **It is the German mid-tier doing it.** None of the global six appear on this list.

VIII.3

The benchmark: what a real build looked like

To calibrate how small the current ledger is, here is the most recent properly documented purpose-built German call center facility I could find. It is from 2016.

TELEPERFORMANCE GERMANY, MÖNCHENGLADBACH NORDPARK 2016 TO 2017

Opened	2 May 2016, new build directly opposite the football stadium
Address	Hennes-Weisweiler-Allee 10, 41179 Mönchengladbach
Floorspace	approximately 3,000 sqm
Designed capacity	250 workstations, up to 400 FTE at optimal capacity
Investment	**EUR 3.8 million**, with around 400 jobs targeted by end of 2017
Site selection rationale	Municipal economic development alignment, and a local labour market that supplied the right employees
Recognition	NRW-Invest-Award 2017, presented 3 July 2017

DATING WARNING

Search engines surface this as a 2026 opening because of how the trade archive is indexed. It is not. The opening was May 2016 and the award was July 2017. I checked this specifically because a 250-workstation new build in 2026 would have contradicted everything else in this report, and it would have been wrong. See Appendix C.

The comparison

EUR 3.8m
Capital committed to a single German call center site, 2016
Teleperformance, Mönchengladbach

EUR 0
Construction capital documented in German call center sites, 2025 to 2026
Leases only

In 2016, a global BPO put EUR 3.8 million of its own capital into German bricks, chose the city partly for its municipal economic development programme, and won a state investment award for it. In 2026 the equivalent activity is a mid-size German operator signing a ten-year lease on renovated heritage space in Dresden, and nobody is giving out awards.

That is a decade-long shift from capital commitment to contractual commitment, and from the global players to the domestic mid-tier. If you want one sentence for the "new buildings" question: **the German call center construction cycle ended around 2017 and has not restarted.**

Part IX

The office real estate question, answered properly

If call centers are not building, the next question is what is happening to the space they already occupy, and what the market they sit in looks like. German office vacancy has risen by two percentage points since 2019, the rise is concentrated in the large markets, and the eastern cities where the production floors are have the tightest office markets in the country.

IX.1

The national picture

11m sqm
Office vacancy across 127 German locations
bulwiengesa · 2024

5.6%
National office vacancy rate
2024, up ~2pp from 2019

+5m sqm
Vacancy added 2019 to 2024
Reversal of a long decline

What drove it

Two things simultaneously, per the DZ HYP market analysis: reduced space requirement from home office, and the economic slump. Letting volumes stayed low while vacancy climbed. At the same time, interest in modern space is pushing prime rents up, which produces the defining feature of the current German office market: **it has split in two.** Scarce modern space commands rising rents; everything else accumulates vacancy.

WHY THE ADJUSTMENT IS SLOWER THAN IT LOOKS

DZ HYP's own caution, and it applies directly to call centers: the changes at the office market may be *understated* because adjustment is time-lagged. Long leases and owner-occupied buildings delay the signal, and limited availability of modern space makes relocation hard. Vacancy increases are concentrated at larger office locations while smaller markets look stable.

Translate to call centers: an operator that signed a ten-year lease in 2019 is still in that building in 2026 whether or not it still needs it. The real footprint reduction in this industry is sitting in lease expiries that have not arrived yet.

Berlin as the outlier



Office vacancy rate on a 0 to 10 percent axis. Berlin prime rent nearly doubled 2014 to 2024, reaching EUR 45/sqm, then stagnated at EUR 45.50/sqm in Q3 2025.

Berlin is where five of the six global operators have their German headquarters, and it has the sharpest vacancy increase of any market studied. No other location shows a comparable rise. If any of the six decide to shrink their German corporate footprint, the space will be easy to give back and cheap to replace.

IX.2

The eastern cities, where the production floors are

This is the counterintuitive finding of Part IX. The cities that hold the call center production floors have *tighter* office markets than Berlin, which means an operator wanting to exit space there has a harder time and a better re-letting market than you would expect.

The ten eastern locations studied

Berlin, Chemnitz, Dresden, Erfurt, Halle, Leipzig, Magdeburg, Potsdam, Rostock and Schwerin. Together about 6.3 million inhabitants, 40% of the population of the six eastern federal states. Overlay the call center operator footprints from Part VI and the overlap is close to total: Foundever in Magdeburg, Dessau, Wittenberg and Potsdam; TELUS in Leipzig; gevekom in Dresden, Leipzig, Chemnitz and Neubrandenburg; Avedo in Dresden; D+S in Gera; Conduent headquartered in Schwerin.

CITY	POPULATION	OFFICE MARKET READ 2024 TO Q3 2026
Leipzig	612,000	Vacancy about 5.3% end-2025 on ~212,000 sqm available, rising to 252,000 sqm by Q3 2026. Prime rent stable at EUR 21/sqm, average EUR 13.60/sqm. More than 4% of stock let in 2024, the most active eastern market relative to size.
Dresden	565,000	Just over 3% of stock let in 2024. Described alongside Leipzig as standing out for above-average activity maintained through the downturn. Population up 9% since the 2011 census. Billions in chip-sector investment in and around the city.
Chemnitz	245,000	Vacancy above 7%, among the highest of the eastern centres. Less than 1% of stock let in 2024. European Capital of Culture 2025. Weakest letting market in the set.
Magdeburg	244,000	Saxony-Anhalt capital. Vacancy within the sub-5% eastern norm. Population recovering since 2011.
Erfurt	219,000	Thuringia's largest city, growing since 2011. One of only two eastern centres flagged for higher-than-typical vacancy, alongside Chemnitz.
Halle	~240,000	Office vacancy within the eastern norm. Note separately that logistics vacancy in the Halle/Leipzig corridor jumped from 9.5% to 16.9%, a different asset class but a signal about regional demand.
Rostock	~210,000	Largest city in Mecklenburg-Vorpommern. Site of both the IKEA closure and the o2 center sale in 2026.
Schwerin	~96,000	Less than 1% of stock let in 2024, alongside Chemnitz the thinnest market. Conduent's German HQ.

Source: DZ HYP Marktbericht Ostdeutschland 2025/2026, with Leipzig specifics from Aengevelt and regional reporting. Population figures are the DZ HYP report's.

IX.3

The footprint arithmetic

Nobody publishes square metres of call center space in Germany. Here is a defensible estimate, with the assumptions exposed so you can change them.

Working

STEP	VALUE	BASIS
Outsourced industry employment	127,000 – 160,000	BA 2023 to trade 2026
Less fully remote share	× 0.75 – 0.85	Assumption, see Part X. gevekom is 100%, most operators are far lower
Office-based heads	~95,000 – 136,000	Derived
Desk sharing ratio	× 0.6 – 0.8	Shift work and part-time make call centers unusually desk-efficient
Workstations required	~57,000 – 109,000	Derived
Space per workstation	8 – 12 sqm	Including circulation, breakout, training rooms
Estimated footprint	**0.46 – 1.3m sqm**	Outsourced industry only

CALIBRATION CHECK

Avedo's Dresden lease is 3,500 sqm. At 8 to 12 sqm per workstation that is 290 to 440 desks, which for a mid-size operator site is entirely plausible. Teleperformance's 2016 Mönchengladbach build was 3,000 sqm for 250 workstations, i.e. 12 sqm per workstation, at the upper end of the range and consistent with a purpose-built facility being more generous than a converted one. The model holds against both reference points.

Putting that in context

0.5 – 1.3m sqm

Estimated German outsourced call center office footprint

This report · derived

11m sqm

Total German office vacancy

bulwiengesa · 2024

The entire outsourced German call center industry occupies something between 4% and 12% of the office space that is currently sitting empty in Germany. If the industry vacated every square metre it holds tomorrow, it would move the national vacancy rate by a fraction of a percentage point.

> THE CONCLUSION ON REAL ESTATE
>
> Call center floorspace is not a real estate story. It is too small to matter to the office market and the office market is too loose to constrain it. What real estate does tell us is about *timing*: the ten-year lease Avedo signed in Dresden in July 2025 runs to 2035, and the industry's footprint reduction is gated by lease expiries, not by decisions. Expect the visible shrinkage to lag the operational shrinkage by three to seven years.

IX.4

Why Avedo signed a ten-year lease anyway

Every other signal in this report says do not commit to German floorspace. One operator did the opposite in July 2025, on a ten-year term. That decision is worth taking seriously rather than dismissing.

Three readings, in order of how much I believe them

1. THE ONSHORE PREMIUM IS REAL AND AVEDO IS BUYING INTO IT MOST LIKELY

The Trend-Studie finding that customer satisfaction is the top goal for just over 90% of contact centers, combined with the CCV president's observation that demand for simple mass-market service is falling while demand for complex service is rising, points to a bifurcating market. The commodity end goes offshore. The complex, regulated, high-value end stays onshore and can carry German costs. A German operator betting that the remaining German volume is the profitable kind is making a coherent bet.

2. CHEAP SPACE ON A LONG TERM IS AN OPTION, NOT A LIABILITY PLAUSIBLE

Eastern office markets are at sub-5% vacancy but rents are low in absolute terms, and the heritage campus description suggests a landlord willing to do a long deal on good terms. A ten-year lease at the bottom of the rent cycle, on space that can be sublet in a city with a 3%-plus letting rate, is not an especially risky instrument. Dresden is one of only two eastern markets with above-average letting activity.

3. EMPLOYER BRANDING IN A MARKET WHERE TALENT WILL NOT COME TO A BAD OFFICE PARTIAL

"Representative character", preserved classical details, latest technology. An industry with 43.1 psychological sick notes per 100 staff and a collapsed training pipeline has a serious employer-attractiveness problem, and gevekom's World's Best Employer recognition shows the German mid-tier competing explicitly on that axis. A good building is a cheap differentiator relative to paying more.

> **WHAT WOULD PROVE THE BET RIGHT OR WRONG**
>
> If Avedo's Dresden headcount grows through 2027 and 2028 while its peers shrink, the onshore-premium thesis holds and there is a defensible high-value German segment. If the space quietly goes to sublease by 2028, it was a cycle-timing error. Either way the answer will be visible, and it is the single most informative thing to track in the German market over the next three years.

Part X

Remote and hybrid, or why half the building question is already dead

The premise behind "how many offices are there" assumes the work happens in offices. For a meaningful and growing share of this industry it does not, and one German operator has taken that to its logical conclusion with 2,500 people and no offices for any of them.

X.1

The national baseline, and why call centers sit against it

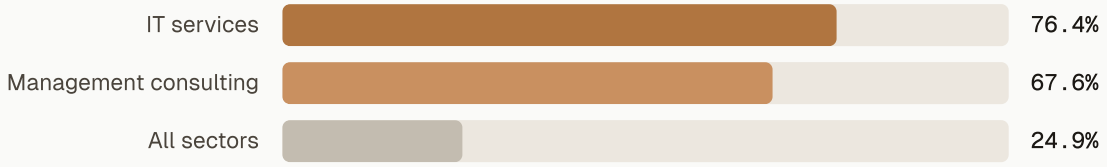
24.9%
German employees working at least partly from home
Aug 2026

24.3%
Same measure, ifo
Feb 2026

13.9%
Of job ads offering remote or hybrid, lowest since Jan 2022
Indeed · Q3 2026

The German economy as a whole has plateaued at roughly a quarter of employees doing some work from home, and the advertised share is falling: 13.9% of job postings in Q3 2026 offered remote or hybrid, the lowest since January 2022. Return-to-office pressure is real and measurable at the national level.

By sector, for scale



Share working at least partly from home, 2026, on a 0 to 100 percent axis. No call-center-specific official figure exists; see Appendix B.

DATA GAP, STATED OPENLY

There is no official home-office share for German call centers. I looked for one and it does not exist in public sources. What follows is built from operator-level evidence and from what the Bundesagentur itself says about the direction of travel, which is the best available and is not a measurement.

What the Bundesagentur says about the structural shift

From the sector sheet, Stand February 2025: stationary call and customer centers are still in the majority, but virtual centers, cloud call centers and hybrid forms are coming. The switch to virtual call centers or hybrid forms brings new challenges for managers as well as employees. That is the federal employment agency describing the industry's physical form as actively in transition, in an official document.

Reported separately in the national press: work is shifting out of call centers and into home offices, and unions have raised concerns about the difficulty of organising workers under current labour law when they are distributed.

X.2

gevekom: the end state, already operating

THE COMPANY THAT ANSWERS THE BUILDING QUESTION BY NOT HAVING ONE

2,500	2,700	100%	14
Employees	Seats	Home office	Locations, 7 countries

Status January 2026. 30 service languages.

The footprint

Germany	Berlin, Dresden, Leipzig, Frankfurt am Main, Neubrandenburg, Chemnitz
Europe	Belgrade (Serbia), Palma de Mallorca (Spain), Burgas and Varna (Bulgaria), Sarajevo (Bosnia and Herzegovina), Skopje (North Macedonia)
Africa	Tunis (Tunisia), **Kenya opening in 2026**

What "14 locations with 100% home office" actually means

This is the detail that unlocks the whole industry. The locations are not workplaces. They are **labour market access points**: legal entities, recruiting catchments and payroll jurisdictions. The company hires in Chemnitz because people live in Chemnitz, not because it has a floor there for them to sit on.

Once you see the model this way, several things follow immediately:

- **Site counts become meaningless as a capacity measure.** A "location" in this model costs almost nothing to open and almost nothing to close, which is why Kenya can be added as a line item.
- **Site closures stop being newsworthy, and stop being visible.** There is no building to photograph and no works council meeting at the gate. The 2,300 Vodafone roles and the 279 IKEA Rostock roles were reported because they had addresses. Distributed shrinkage has none.
- **The cost gap to nearshore narrows from the German side.** Remove facility cost from a German seat and you have closed part of the gap to Bulgaria without moving anyone.
- **The quality-management problem changes shape entirely.** You cannot walk the floor. Everything a supervisor used to learn by overhearing has to be recovered some other way, from the call data itself.

> THE READ
>
> gevekom is not an outlier, it is the leading indicator. It is 2,500 people, recognised as a World's Best Employer in 2024, running a model that makes the entire "how many offices" question obsolete. Any projection of German call center real estate that does not account for this model converging across the mid-tier will be wrong in the same direction.

Part XI

Nearshore and offshore: where the German-language seats went

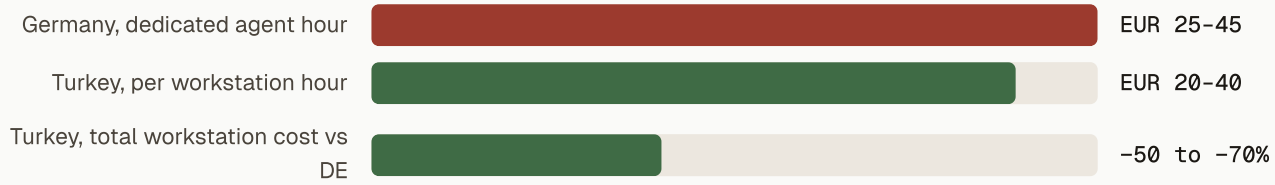
This is the displacement that is actually happening. Not AI, not yet. A German-language seat can be bought 50 to 70 percent cheaper outside Germany, the quality gap has closed enough for mainstream clients, and the cost ladder has moved on from Poland to places most German buyers have not evaluated.

XI.1

The geography

TIER	LOCATIONS	STATUS FOR GERMAN-LANGUAGE WORK
Established nearshore	Poland, Romania, Bulgaria, Croatia (Zagreb), Greece, Portugal	Mature. Polish site networks cover more than 20 languages. Operators now describe Poland, Romania and Bulgaria as having become *significantly more expensive*. These are no longer the cheap option, they are the safe option.
Western Balkans	Serbia (Belgrade), Bosnia (Sarajevo), North Macedonia (Skopje)	Active German-language delivery, visible in gevekom's footprint. Non-EU, so data transfers run on standard contractual clauses.
Emerging offshore	Turkey	Explicitly positioned as the next hub. 11,000 to 13,000 German-speaking agents. Two to three hour flight time to Germany is part of the pitch. See XI.2.
North Africa	Tunisia, Morocco	Long-established for French, growing for German. gevekom runs Tunis.
Frontier	South Africa, Kenya	Primarily English. gevekom opening Kenya in 2026 is the notable German-operator move into sub-Saharan Africa.

The cost ladder has a specific shape



Hourly ranges overlap at the top. The saving is largest on commodity volume, smallest on complex work. Source: German vendor quotes (undated) and Gold BPO, Apr 2026.

That overlap matters. At the top of the Turkish range and the bottom of the German one, the rates meet. Offshoring does not save 60% on everything; it saves 60% on the simplest work and very little on the hardest. Which is precisely the bifurcation the CCV president describes: simple mass-market service demand falling in Germany, complex service demand rising.

XI.2

Turkey, in the operator's own numbers

The most specific public account of the German-language offshore market comes from an interview with Ergün Erdem, CEO of Gold BPO Contact Center in Istanbul, published 26 April 2026. These are an interested party's figures and are presented as such, but they are the most granular available.

EUR 1.5–2bn
Turkish contact center market, annual
Apr 2026

~170,000
Agents in Turkey, 60% in-house / 40% BPO
Apr 2026

8–15%
Annual market growth
Apr 2026

THE GERMAN-LANGUAGE CAPACITY, WHICH IS THE NUMBER THAT MATTERS

German-speaking agent pool	11,000–13,000	as of April 2025
Share working in BPO	60%	i.e. ~7,000 commercially available
Language level required	B2–C1	Not native, but professionally sufficient

What it costs

ROLE	MONTHLY SALARY	COMPARISON
Turkish-language agent	EUR 700–900	Domestic market rate
German-language agent	**EUR 1,200–1,700**	vs German median of EUR 2,596 gross 2023
Team lead / leadership	up to EUR 2,000	Still below the German agent median

> THE ARITHMETIC THAT IS DRIVING GERMAN SITE DECISIONS
>
> A Turkish team lead costs less than a German agent. Scale that across a 200-seat operation and the saving is not a line item, it is a different business. And the German-speaking pool in Turkey, at 11,000 to 13,000 people, is roughly comparable to the *entire* call center workforce of Berlin (14,840).

The strategic claim worth testing

Erdem's most consequential assertion is that Poland, Romania and Bulgaria have become significantly more expensive than Turkey, and that German companies are actively searching for alternatives as a result. If true, this is the second wave of German-language offshoring, and it means the operators who moved to Poland in the 2010s are now the ones with a cost problem. hello.de opening a third Bulgarian site in 2026 is a data point against the strongest form of that claim, but the direction is clear enough: the cost ladder keeps extending, and each rung makes the one above it uncompetitive.

XI.3

What actually constrains offshoring, and what does not

Does not constrain it

- **The EU AI Act.** It regulates AI systems by risk class and transparency obligation. It says nothing about where humans answering phones are physically located.
- **GDPR, in practice.** Transfers to Turkey, Serbia, Bosnia and North Macedonia run on standard contractual clauses as routine business. It is paperwork, not a barrier. Operators have been doing it for a decade.
- **Language quality, below the complex tier.** B2 to C1 German is sufficient for the volume work, and the volume work is what moves.
- **Client resistance, mostly.** The clients are the telcos and retailers currently cutting their own headcount by 19%.

Does constrain it

- **Regulated and high-complexity work.** Financial services, insurance claims, health, anything where the agent exercises judgement with legal consequence. This is the segment Avedo appears to be betting on.
- **The German-speaking labour pool offshore is finite.** 11,000 to 13,000 in Turkey, comparable orders in the Balkans and Poland. Against 127,000-plus German seats, the offshore pool cannot absorb the whole market, which is a real ceiling even if nobody has hit it.
- **Works councils, for in-house operations.** Relocating an in-house service center out of Germany triggers Betriebsrat consultation and often a social plan. This is why the Telefónica structure (sell to a BPO, let the BPO relocate later) is so attractive: it converts a co-determination problem into a commercial one.
- **Accent and cultural expectation at the premium end.** Soft, unmeasured, and the single most commonly cited reason German buyers give for keeping work onshore. Whether it survives another two years of cost pressure is doubtful.

THE CONCLUSION OF PART XI

Offshoring, not automation, is the mechanism that has removed German call center seats to date, and it has substantially more runway. Every structural condition favours it: the cost gap is 50 to 70 percent, the regulatory friction is paperwork, the quality bar has been met for commodity work, and the clients are themselves under cost pressure. The constraints that exist are the size of the offshore German-speaking pool and the complexity of the work that stays. Both are real, and neither is binding yet.

Part XII

Demand side: channel mix and the voice volume paradox

German telephony minutes are falling hard. Contact center phone volume is not. Both of those are true at the same time and the reconciliation is the most useful demand-side insight in this report.

XII.1

Inside the contact center, voice is not moving

TREND-STUDIE CONTACT CENTER 2026 N = 399, PUBLISHED LATE JAN 2026

- **Telephone is offered by very nearly 100% of contact centers.**
- **At 66% of respondents, phone accounts for more than half of all contact volume.**
- **That share has barely changed in two years**, despite LLM-based voicebots and agentic AI arriving in the market.
- Email is the second channel. Webchat, chatbots and messenger are growing but remain in the **low single digits by actual volume**.

Study by RUF Beratung, VIER and infinit.cx. Running annually since 2019. Largest sample in the series.

Why this is the single most load-bearing finding for anyone selling into the sector

Two-thirds of German contact centers get the majority of their contacts by phone, and that has not shifted in two years of intense digital-channel investment. The industry has been told for a decade that voice is legacy. The operators' own volume data says otherwise.

The practical consequence: anything that only works on text addresses a minority of the contact volume at two-thirds of these operations. Deflection strategies that move contacts to chat have been running for years and have moved the volume mix by low single digits.

~100%
Contact centers offering telephone
n=399 · Jan 2026

66%
Where phone is >50% of volume
n=399 · Jan 2026

low single digits
Webchat, chatbot and messenger share of volume
n=399 · Jan 2026

XII.2

Outside the contact center, telephony is collapsing

Bundesnetzagentur, Jahresbericht Telekommunikation 2025

MEASURE	FROM	TO	DIRECTION
Fixed-line call minutes, Germany	57bn	~47bn	-18%
Mobile call minutes, Germany	148bn	132bn	-11%
OTT voice calls (messenger, video platforms), 2025	-	19.6bn calls	+11%
OTT voice minutes, 2025	-	198bn minutes	rising

The reconciliation

Germans are making fewer phone calls overall, and far more voice calls over messaging platforms. But when a German needs to resolve something with a company, they still pick up the phone.

Three things are happening at once and they are easy to confuse:

01 **Social and casual voice has migrated off the telephone network entirely.** 198 billion OTT voice minutes against a falling 179 billion fixed-plus-mobile. The telephone number is losing, but voice is not. The trade press headline for the Bundesnetzagentur report put it exactly right: voice stays, the telephone number loses.

02 **Transactional voice with institutions has not moved.** You do not WhatsApp your energy supplier about a billing error. The channel for "I have a problem and I need a human to fix it" is still a phone call to a published number.

03 **Therefore contact center voice volume is insulated from the telephony decline.** The 66% figure and the 18% fixed-line decline are measuring different behaviours and both are correct.

> WHAT THIS IMPLIES ABOUT WHERE THE VOLUME GOES NEXT
>
> If transactional voice is sticky because it is the channel people choose when something has gone wrong, then the volume will not be deflected away by better self-service. It will only fall when the underlying problems fall, or when the voice call itself is answered by something other than a person. That is the real AI question for this industry, and Part XIII shows how early it still is.

One more demand-side marker

MUUUH! Voice Studie 2026, with YouGov: **46% of Germans** agree that AI voice agents will be able to handle most customer service enquiries within a few years, up from 40% the year before. Consumer acceptance is moving roughly six points a year. That is fast for an attitudinal measure and it is the leading indicator for whether automated voice is commercially viable at scale.

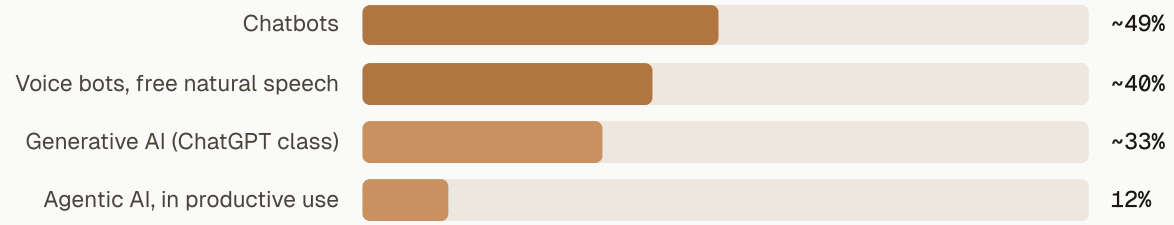
Part XIII

AI adoption: what is actually in production

The best German data on this is a 399-respondent study published in January 2026. It shows an industry where half claim chatbots, a third use generative AI, and one in eight has agentic AI in production. The gap between the narrative and the deployment is roughly three years wide.

XIII.1

The adoption numbers



Trend-Studie Contact Center 2026, n=399, published 28 January 2026. By RUF Beratung, VIER and infinit.cx.

Separately, **63%** of German companies are implementing, testing or running AI in customer service. Note the width of that definition: "testing" is doing a lot of work in a number like that.

THE CAVEAT THE STUDY'S OWN PUBLISHER SUPPLIED

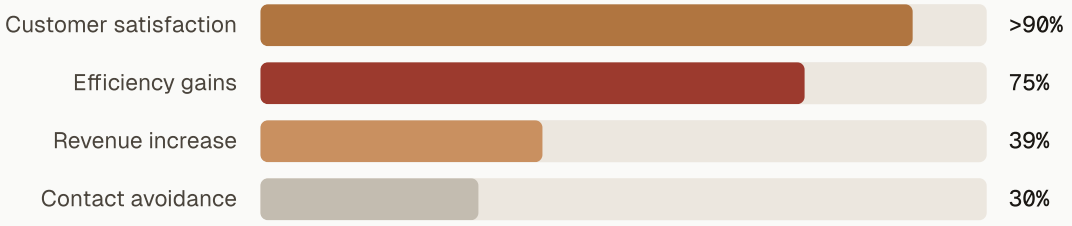
VIER CEO Rainer Holler, on the 49% chatbot figure: automation in customer contact is now well accepted, half use chatbots, though these are **likely rule-based rather than AI-based**.

That is one of the vendors who commissioned the study, publicly discounting its most impressive number. Take it seriously.

Growth, where it is measurable

Voice bots with natural speech	~20% → ~40%	Doubled versus prior years
Consumer acceptance of AI voice agents	40% → 46%	Year on year, MUUUH!/YouGov 2026

What operators say they are trying to achieve



Efficiency at 75% is the highest point in the study's entire time series since 2019. Contact avoidance fell from 36%; revenue rose from a low of 33%.

The movement in those four numbers is the strategic story. Efficiency is at an all-time high for the series. Contact avoidance is *down* six points, and revenue generation is up six. Operators are moving away from "stop customers contacting us" and toward "make the contact worth having", while squeezing cost harder than ever. Those two shifts together describe an industry trying to turn a cost centre into something defensible.

XIII.2

What is blocking it

The study names three blockers, and none of them is the technology.

Qualification
Employee skills to operate and supervise these systems

Data quality
The inputs these systems need do not exist in usable form

IT infrastructure
Fit-for-purpose systems to run them on

Each of these is confirmed independently elsewhere in this report

- **Qualification.** Part III.3: the sector trains 20 apprentices a year in Berlin and 25 in Brandenburg. 75 to 80% of staff sit at a single requirement level with almost nothing above it. There is no internal capability to operate sophisticated systems, and no training function to build one.
- **IT infrastructure.** Part VII.3: Vodafone, one of the largest and best-capitalised operators in the country, is restructuring 2,300 roles partly because *its shop staff and its hotline staff cannot access the same systems*. If that is true at Vodafone it is true nearly everywhere.
- **Data quality.** Harder to corroborate externally, but it follows from the other two. An industry that has not invested in integration and has no technical staff does not have clean data.

THE PRICE FLOOR

Parloa, the Berlin AI-voice company treated as the reference vendor in German coverage, has a minimum annual platform cost for clients of **EUR 100,000-plus**. Named clients include Barmenia Gothaer, Rossmann and E.ON One.

Set that against the industry's economics: roughly EUR 27,000 of revenue per employee. A EUR 100,000 annual floor is the full-year revenue of about four employees. For a 200-seat operator that is a serious but survivable line item. For the long tail of German operators below 100 seats it is simply out of reach, which means the AI voice category as currently priced addresses the enterprise and the top of the mid-market, and nothing else.

Where the informed observers land

- **Marie-Christine Fregin**, economist at Maastricht University: the question is whether people will still be sitting in call centers in future. Expects fewer but better-paid positions handling complex tasks.
- **Dirk Egelseer**, CCV president and a Nuremberg call center operator: demand for simple mass-market services is declining while demand for complex service is rising.

Both are describing the same bifurcation, from different ends. It is the same bifurcation the offshore cost ladder produces in Part XI, which is why the two forces are hard to tell apart from the outside and why operators can attribute either outcome to either cause.

XIII.3

Dating the AI displacement honestly

Putting the deployment data next to the employment data gives a reasonably clear answer to when AI starts actually removing German call center jobs at scale.

The evidence for "it is already happening"

- Vodafone cut 2,300 roles in November 2026 and named AI and the TOBi assistant.
- Telefónica cut 1,100 and cited AI transformation.
- Morgan Stanley downgraded Teleperformance on automation risk; TP cut 2026 guidance and lost about 15% in a day.
- Global call center employment is down 5.3% from peak across eight quarters.

The evidence for "not yet, not really"

- Agentic AI is in productive use at 12% of contact centers.
- Half the claimed chatbots are rule-based, by the study sponsor's own assessment.
- Phone is still more than half of contact volume at 66% of operations, unchanged in two years.
- The named blockers are skills, data and infrastructure, all of which take years.
- The leading voice platform starts at EUR 100,000 a year against EUR 27,000 revenue per employee.
- Vodafone's own release lists market saturation, broadband share loss, a regulatory cliff and systems fragmentation before it gets to AI.
- Offshore offers a documented 50 to 70 percent saving today with no integration project.

THE CALL

German call center employment is falling now, and AI is not yet the main reason. The mechanisms doing the work in 2026 are offshoring, demand contraction and cost-driven restructuring that uses AI as its public rationale. Genuine AI-driven displacement at scale needs agentic deployment to move from 12% toward 40%, voice automation to handle the two-thirds of volume that is still telephone, and the skills and data blockers to clear. On the observed trajectory, with voice bots having doubled from 20% to 40% in roughly two years, that is a **2028 to 2030** event, not a 2026 one.

Which means the industry gets hit twice: once by geography between now and 2029, and again by automation after that. The second wave arrives at a workforce that has already been cut and relocated, with the remaining German seats concentrated in the complex work that automates last and slowest.

Part XIV

Regulation: the AI Act, and the gate that matters more

Most published commentary on the EU AI Act and contact centers has the dates wrong, because the high-risk timetable was pushed back and the correction did not travel as fast as the original. Meanwhile the constraint that actually determines whether a German contact center can deploy speech analytics is not the AI Act at all. It is a 1972 works constitution statute.

XIV.1

What is prohibited outright, and has been since February 2025

ARTICLE 5(1)(F) EU AI ACT

Placing on the market, putting into service, or using **emotion recognition systems in the workplace** is **prohibited**. In force since **2 February 2025**. Narrow exemptions for medical or safety purposes only.

Legal commentary is explicit that this reaches call centers monitoring employee sentiment. This is not a grey area and it is not a future obligation.

Why this lands on this industry specifically

Agent sentiment monitoring was one of the most heavily marketed contact center AI categories of the early 2020s. Detect agent stress, flag burnout risk, coach in real time. Part III.4 shows exactly why the market existed: this workforce has nearly three times the national rate of psychological sick leave, so the problem the category addressed is severe and real.

That entire product category is now illegal in the EU when applied to employees. The most intuitive technological response to the industry's worst measured problem has been removed from the table.

The adjacent category: voice analysis for employee evaluation

Speech analytics used to **evaluate employees** falls into the **high-risk** classification rather than the prohibited one. Permitted, but subject to the full high-risk obligation set: risk management, data governance, technical documentation, logging, human oversight, accuracy and robustness, conformity assessment.

> THE PRACTICAL LINE
>
> Analysing what was *said* on a call, to assess how the interaction was handled, is high-risk and permitted with obligations. Inferring the agent's *emotional state* is prohibited. The boundary is not always obvious in a product, and vendors blur it. Anyone evaluating a speech analytics tool for a German contact center should get a clear written answer on which side of that line it sits before anything else.

XIV.2

The timetable, with the correction most commentary misses

DATE	STATUS	WHAT APPLIES
2 Feb 2025	In force	Article 5 prohibitions, including emotion recognition in the workplace.
Aug 2026	In force	**Article 50 transparency obligations, fully applicable and enforceable.** If a customer is interacting with an AI system, they must be informed. Penalties up to **EUR 15 million or 3% of global annual turnover**.
~~2 Aug 2026~~	Moved	Was the expected start of high-risk obligations for standalone AI systems. **It is not.** This date is still widely repeated in vendor content and is wrong.
2 Dec 2027	Future	High-risk obligations for **standalone** AI systems now begin here.
2 Aug 2028	Future	High-risk obligations for **embedded** high-risk systems.

WHAT THIS DELAY ACTUALLY DOES

It buys the industry sixteen extra months on the expensive part: the conformity, documentation and oversight regime around speech analytics used for employee evaluation. It does **not** touch the prohibition, which has been live since February 2025, and it does not touch Article 50, which is live, enforceable and carries the largest fines of anything in scope here.

So the compliance priority for a German contact center right now is, in order: (1) are we doing emotion recognition on employees, because that is already illegal; (2) do customers know when they are talking to a bot, because that is already enforceable at 3% of global turnover; (3) high-risk readiness for December 2027.

Article 50 in practice, since the voice bots are at 40%

Forty percent of German contact centers run voice bots with free natural speech. Every one of those interactions now carries a disclosure obligation. The fine ceiling (EUR 15m or 3% of global turnover) is calculated on group revenue, which for the global six means a very large number attached to a disclosure failure at a single German site. This is the most concretely enforceable AI obligation currently touching the sector and it gets a fraction of the attention that the high-risk rules get.

XIV.3

The gate that actually decides it: the Betriebsrat

SECTION 87(1)(6) BETRIEBSVERFASSUNGSGESETZ

The works council has a genuine **co-determination right** over the introduction and use of technical systems **intended to monitor** the behaviour or performance of employees. The works council must be involved **before** use, not after.

Why this outranks the AI Act in practice

01 **The threshold is lower.** German case law reads "intended to monitor" broadly: a system that is *objectively capable* of monitoring behaviour or performance is caught, regardless of intent. Call recording with any analysis layer is caught. There is no de minimis.

02 **The remedy is harder.** AI Act non-compliance is a regulatory risk with a fine attached at the end of a process. Works council co-determination is a precondition: deploy without agreement and the works council can obtain an injunction, and data gathered may be unusable in any employment proceeding.

03 **It bites years earlier.** It applies now. High-risk obligations start in December 2027.

04 **It is per-employer.** Every single German operator with a works council negotiates its own Betriebsvereinbarung. There is no central approval and no precedent that binds anyone else.

The AI Act has sharpened this rather than replacing it. Where an AI system performs automated task allocation based on performance data, that is high-risk, it requires monitoring of effects on working conditions, and it requires works council involvement. German works councils have been actively preparing for AI Act compliance and co-determination since the August 2026 milestone.

> THE SEQUENCING THAT ACTUALLY GOVERNS A GERMAN DEPLOYMENT
>
> First the Betriebsrat, then everything else. A German contact center cannot deploy speech analytics, AI-based routing, automated quality scoring or performance dashboards without a works council agreement, and that negotiation is the long pole. Twelve to eighteen months is not unusual for a contentious system in a unionised operation. Any plan that treats the AI Act as the gate and the works council as a formality has the order backwards and will be late.

One structural note

Unions have raised concerns that distributed home-office work makes organising harder under current labour law. If that holds, the remote shift in Part X gradually weakens the works council gate: a 100%-home-office operator spread across 14 locations in seven countries has a structurally weaker co-determination footprint than a single 400-seat German site. That is not the stated reason anyone gives for going remote, but it is a real consequence of it.

Part XV

Synthesis: six structural reads

What the evidence in the preceding fourteen parts adds up to, stated as claims that can be checked against reality over the next three years.

XV.1

Reads one to three

READ 1 · THE DISPLACEMENT HAPPENING RIGHT NOW IS GEOGRAPHIC, NOT TECHNOLOGICAL

Offshoring delivers a documented 50 to 70 percent cost reduction today, with no integration project, no works council negotiation and no AI Act exposure. Agentic AI is at 12% production deployment against blockers (skills, data, infrastructure) that take years to clear. Every operator facing the January 2027 minimum wage step has one option available immediately and one available around 2029. They are taking the first.

Falsifiable by: agentic AI deployment crossing 30% in the 2028 Trend-Studie while German offshore seat counts plateau.

READ 2 · THE GERMAN MARKET IS BIFURCATING, AND ONLY THE TOP HALF SURVIVES ONSHORE

The CCV president says simple mass-market demand is falling while complex demand rises. The Maastricht economist expects fewer, better-paid roles on complex work. The offshore cost ladder saves most on commodity volume and least on complex work. The only operator committing to new German floorspace took heritage space on a ten-year lease, which is a bet on the premium end. Four independent lines of evidence, one conclusion: German seats survive where the work is complex, regulated or judgement-heavy, and nowhere else.

Falsifiable by: Avedo's Dresden space going to sublease by 2028, or by expert-level roles continuing to concentrate in Berlin while total German seats fall across all tiers equally.

READ 3 · VOICE IS NOT GOING ANYWHERE INSIDE THE CONTACT CENTER, WHATEVER HAPPENS TO TELEPHONY

Phone is more than half of contact volume at 66% of German contact centers and that has not moved in two years, through the arrival of LLM voicebots. Meanwhile German fixed-line minutes fell 18% and mobile 11%. The reconciliation is that transactional voice with institutions is the channel people choose when something has gone wrong, and that is structurally sticky. Digital channel investment has moved the volume mix by low single digits over a decade.

Falsifiable by: the phone share of volume dropping below 50% for a majority of respondents in the 2028 or 2029 Trend-Studie.

XV.2

Reads four to six

READ 4 · THE BUILDING QUESTION IS OBSOLETE, AND THE ANSWER IS GEVEKOM

Nothing is being built. The documented 2025 and 2026 additions are four leases, one of them meaningful. The last purpose-built German call center facility I could document is from 2016, at EUR 3.8 million for 250 workstations. Meanwhile a 2,500-person German operator runs 14 locations in seven countries with 100% home office, where "location" means a recruiting catchment and a payroll entity rather than a floor. Site counts have stopped measuring capacity.

Falsifiable by: any purpose-built German call center facility breaking ground before 2029, or by a major operator publicly reversing to mandatory on-site working.

READ 5 · THE VISIBLE SHRINKAGE WILL LAG THE REAL SHRINKAGE BY THREE TO SEVEN YEARS

Three mechanisms hide the decline. Lease terms: Avedo's Dresden commitment runs to 2035, and DZ HYP's own caution is that office market adjustment is time-lagged by long leases. Transfers rather than closures: Telefónica sold Bremen and Rostock to TP rather than closing them, so the headcount outcome surfaces two to three years later as non-replacement. And distributed work: a remote operator shrinking has no building to close and no gate for a camera crew. The reported closure ledger systematically understates what is happening.

Falsifiable by: TP still operating Bremen and Rostock at comparable headcount in 2029.

READ 6 · THE BINDING CONSTRAINT ON CONTACT CENTER AI IN GERMANY IS A 1972 STATUTE, NOT THE AI ACT

Section 87(1)(6) BetrVG gives works councils genuine co-determination over any technical system capable of monitoring employee behaviour or performance, before deployment, with injunctive remedy. That catches essentially every speech analytics, AI routing and automated quality product. It applies now, employer by employer, with no central precedent. The AI Act's expensive high-risk regime does not start until December 2027. Any German AI deployment plan that sequences the AI Act first and the works council second will be late.

Falsifiable by: a wave of German speech analytics deployments proceeding without works council agreements, or legislative change to BetrVG.

TENSION TO HOLD BETWEEN READ 4 AND READ 6

Remote work weakens the works council gate at the same time as it dissolves the building. The more distributed the industry becomes, the easier it gets to deploy monitoring technology and the harder it gets for anyone to organise against it. Nobody is choosing remote work for that reason, and it is a consequence regardless.

XV.3

What to watch, with dates

Six observable events over the next three years that will confirm or break the reads above. These are the cheapest possible tests.

WHEN	EVENT	WHAT IT TELLS YOU
1 Jan 2027	Minimum wage steps to EUR 14.60	The ratchet in Part IV executes. Watch for a cluster of site announcements in Q1 2027, since this is the forcing event operators have been planning around.
Jan 2027	TP takes over o2 Bremen and Rostock	Start of the clock on Read 5. Headcount at these two sites in 2029 is the single cleanest test in this report.
23–25 Feb 2027	CCW Berlin, Estrel Congress Center	Europe's largest contact center congress, roughly 8,000 sqm of exhibition. The exhibitor list and the agenda are the cheapest read on what the sector is actually buying next year.
Late Jan 2028	Trend-Studie Contact Center 2028	Agentic AI from 12%, voice bots from 40%, phone share from 66%. Three numbers, one annual publication, direct tests of Reads 1 and 3.
Whenever published	CallCenterProfi ranking 2026	Data collection closed 1 Sep 2026, results not out as of this report. First digital survey, revised question set. Will give the first properly comparable 2026 operator headcounts.
2 Dec 2027	AI Act high-risk obligations begin for standalone systems	Sixteen months later than most of the market believes. Watch whether speech analytics vendors are actually ready, and whether the delay gets extended again.

THE ONE-PARAGRAPH VERSION OF THIS ENTIRE REPORT

German call center employment has fallen for eight straight quarters, concentrated in the eastern regions that were built on domestic wage arbitrage, while a legislated wage floor rises 13.9% over two years to January 2027. Operators are responding by moving seats to Turkey, the Balkans and North Africa at 50 to 70 percent lower cost, and by dissolving the physical site entirely into distributed home working. Nothing is being built: the last documented purpose-built German facility dates to 2016, and the entire 2025 to 2026 build ledger is four leases. AI is real, early (12% agentic deployment), priced out of the long tail at EUR 100,000 a year, blocked on skills, data and infrastructure, and currently functioning more as the public rationale for cost decisions than as their cause. Voice remains more than half of contact volume at two-thirds of operations and has not moved in two years. The binding constraint on deploying anything that watches an agent is not the AI Act but section 87(1)(6) of the works constitution act, which applies now.

APPENDIX A

Source register with vintage

Every substantive figure in this report, with its source and the year it was measured. Ordered by confidence tier.

Official

SOURCE	VINTAGE	USED FOR
Statistik der Bundesagentur für Arbeit, Brancheninformation Callcenter, Land Berlin	Stand Feb 2025, data to Jun 2024	Berlin employment series, status pyramid, age structure, gender, apprentices, unemployed vs vacancies, vacancy times, employment outlook verdict
Same, Land Brandenburg	Stand Feb 2025, data to Jun 2024	Brandenburg equivalents
BA Entgeltatlas	2023	Median gross monthly earnings, Kauffrau/-mann Dialogmarketing, Berlin / Brandenburg / Germany
Bundesagentur für Arbeit, via dpa	2023	~127,000 Dialogmarketing specialists
Mindestlohnkommission decision	27 Jun 2025	EUR 13.90 from Jan 2026, EUR 14.60 from Jan 2027
Bundesnetzagentur, Jahresbericht Telekommunikation 2025	2025	Fixed-line and mobile minutes, OTT voice calls and minutes
Destatis, WZ 2025 classification change	2025 / 2026	Classification break from reporting year 2026, jobs concept
EU AI Act, Articles 5 and 50; Annex III high-risk regime	2024 regulation, dates as noted	Prohibition from 2 Feb 2025, Article 50 live Aug 2026, high-risk moved to 2 Dec 2027 and 2 Aug 2028
Betriebsverfassungsgesetz s.87(1) (6)	in force	Works council co-determination over monitoring-capable technical systems
AOK Fehlzeiten-Report	2025 data, published Oct 2026	43.1 psychological sick notes per 100 in call centers vs 15.0 average; 403 psych absence days per 100 members; 28.5 days per case; psychological illness first in the absence ranking; 5.3% national sickness rate H1 2026

Surveyed

SOURCE	VINTAGE	USED FOR
Trend-Studie Contact Center 2026, RUF Beratung + VIER + infinit.cx, n=399, annual since 2019	Published 28 Jan 2026	Chatbots ~49%, voice bots ~40%, GenAI ~33%, agentic AI 12%; goals (satisfaction >90%, efficiency 75%, revenue 39%, contact avoidance 30%); blockers; phone offered by ~100% and >50% of volume at 66%; digital channels low single digits; Holler quote on rule-based chatbots
MUUUH! Voice Studie 2026 with YouGov	2026	46% of Germans expect AI voice agents to handle most service enquiries within a few years, up from 40%
Revelio Labs, via CallCenterProfi	Published 14 Oct 2026	Global call center employment 5.3% below Dec 2023 peak, eight consecutive quarterly declines
bulwiengesa, via DZ HYP Marktbericht Ostdeutschland 2025/2026	2024 data	National office vacancy 11m sqm / 5.6%, +2pp since 2019 across 127 locations; Berlin ~8% and prime rent EUR 45.50/sqm Q3 2025; eastern centres below 5%; letting activity Dresden >3%, Leipzig >4%, Chemnitz and Schwerin <1%; city populations; time-lag caution
Aengevelt and regional reporting, Leipzig office market	end-2025 / Q3 2026	Leipzig vacancy 5.3%, 212,000 sqm rising to 252,000 sqm; prime EUR 21/sqm, average EUR 13.60/sqm; Chemnitz above 7%
ifo and Indeed, German home office	Feb to Q3 2026	24.9% working at least partly from home Aug 2026; 24.3% ifo Feb 2026; 13.9% of job ads remote or hybrid Q3 2026; IT services 76.4%, consulting 67.6%
Statista market forecast	2025 estimate	German call center industry revenue ~EUR 3,483m

Trade and press

SOURCE	VINTAGE	USED FOR
CCV (Customer Service & Call Center Verband Deutschland)	2025/2026	520,000 to 560,000 employees broad definition; ~300 member companies covering roughly half of jobs; minimum wage position and the abandoned Branchenmindestlohn; Egelseer on simple vs complex demand
Trade compilations (zweiloewen, gutes-consulting, buzzness)	mixed, mostly 2025/2026	896 call centers; state distribution (NRW 206 / 25.8%, Bayern 148 / 13.0%, BW 90 / 7.5%, Niedersachsen 9.1%, Hessen 7.5%); operator headcounts and site lists; per-minute and per-hour rate ranges
CallCenterProfi	2021 to 2026	Avedo Dresden lease and Augsburg; Turkey interview; o2 sale; employment analysis; SUMMACOM; ranking status
teltarif, butenunbinnen, cio.de, ms-aktuell, nordkurier, onvista, t-online	2026	o2 / TP transaction detail and ver.di reaction; Vodafone 2,300; IKEA Rostock 279; TP Senftenberg
Handelsblatt / dpa	2026	Otto 480 roles; Parloa EUR 100,000+ entry and named clients; Fregin and Egelseer
CCW / Messe Berlin	2026	CCW 2027, 23 to 25 Feb 2027, Estrel Congress Center, ~8,000 sqm

Vendor, single-source

Ergün Erdem, CEO Gold BPO Istanbul, interview	26 Apr 2026	All Turkish market and cost figures. Interested party, used because it is the only granular public account of German-language offshore capacity.
gevekom company material	Jan 2026	2,500 employees, 2,700 seats, 14 locations, 7 countries, 30 languages, 100% home office, Kenya 2026
HR benchmark compilation	2025	52.3% fluctuation in Information and Communication; 8 to 12% all-sector average. Sector proxy, not call-center-specific.

Primary document URLs

For re-checking. All retrieved 13 to 14 November 2026.

BA Brancheninformation Callcenter Berlin	arbeitsagentur.de/vor-ort/datei/brancheninformation_callcenter_ber_ba195303.pdf
BA Brancheninformation Callcenter Brandenburg	arbeitsagentur.de/vor-ort/datei/brancheninformation_callcenter_bra_ba195298.pdf
CCV minimum wage position (and /trend-studie-contact-center-2026-weder-krise-noch-revolutio/)	cc-verband.de/themen/mindestlohn/
Trend-Studie coverage	connect-professional.de/markt/trend-studie-contact-center-2026-404335.html
Employment decline analysis	callcenterprofi.de/branchennews/detailseite/analyse-call-center-beschaeftigung-faellt-seit-acht-quartalen-20269020/
Turkey nearshore interview	callcenterprofi.de/branchennews/detailseite/interview-die-tuerkei-wird-zur-echten-nearshore-alternative-20268725/
Avedo Dresden lease	callcenterprofi.de/branchennews/detailseite/juli-2025-avedo-bezieht-neue-bueroflaeche-in-dresden-20248097/
o2 sale to TP	teltarif.de/en/o2-telefonica-callcenter-bremen-rostock-teleperformance/news/106193.html
Vodafone 2,300 roles	teltarif.de/vodafone-stellenabbau-konsolidierung/news/107454.html
AI in the call center business	handelsblatt.com/dpa/arbeitsmarkt-wie-kuenstliche-intelligenz-das-callcenter-geschaeft-veraendert/30238998.html
DZ HYP Ostdeutschland 2025/2026; Leipzig via aengevelt.com/2026-01-28-bueromarkt-leipzig/	dzhyp.de/fileadmin/user_upload/Dokumente/Ueber_uns/Marktberichte/DZHYP_Marktbericht_Ostdeutschland_2025_2026.pd
Psychological absence, call centers	nordkurier.de/regional/mecklenburg-vorpommern/callcenter-kundenservice-pflege-diese-jobs-sind-besonders-belastend-4919913
AOK Fehlzeiten-Report 2026	personalwirtschaft.de/news/hr-organisation/krankenstand-2026-psychische-erkrankungen-erstmals-haeufigste-ursache-fuer-fehlzeiten-206734/
Operator landscape compilation; CCW 2027 at ccw.eu	gutes-consulting.de/ratgeber/call-center-outsourcing-die-50-groessten-call-center-dienstleister-in-deutschland/

ON PAYWALLS

CallCenterProfi's full articles sit behind a subscription and the PwC contact center and CRM market study returned 403. Where only a preview was accessible, figures come from the free portion or secondary coverage and are marked trade-tier. A CallCenterProfi subscription is the highest-value paid source for this sector.

APPENDIX B

Open data gaps

Things I went looking for and could not find in public sources. Listed so that nobody has to repeat the search, and so that the limits of this document are explicit.

GAP	STATUS AND HOW TO CLOSE IT
National WZ 822 employment time series	Only regional sheets (Berlin, Brandenburg) are published as retrievable PDFs. The national series exists inside GENESIS-Online at Destatis and in the BA statistics portal but is not exposed as a document. Closing it requires a GENESIS query or a direct BA data request. This is the single most valuable missing number in the report.
Call-center-specific fluctuation rate	Does not exist publicly. The 52.3% figure belongs to the whole Information and Communication sector. Closing it requires a CCV member survey or direct operator data. See Part V.
Home office share in German contact centers	No official or surveyed figure found. National economy-wide figures (24.9%) and one operator's 100% are the only anchors. The Trend-Studie would be the natural place for this and it did not appear in the published coverage. Worth asking the study authors directly.
TP Senftenberg headcount	Closure confirmed in regional reporting, headcount never published. Left unquantified in Part VII rather than estimated. Closing it requires regional press archive access or a ver.di contact.
CallCenterProfi ranking 2026	Data collection closed 1 September 2026, first time run as a digital survey with a revised question set, results not published as of 14 November 2026. This will be the best operator-level dataset for 2026 when it lands. Worth a calendar reminder.
Minijob and part-time share in call centers	The BA sheets give requirement level and gender but not contract type. Part-time is described qualitatively in the academic literature as a significant and gendered feature of the sector, without current national percentages.
German call center office floorspace, measured	Nobody publishes it. Part IX.3 constructs an estimate (0.46 to 1.3m sqm) with the assumptions exposed. A better version would need a commercial real estate database with tenant-industry tagging.
Leiharbeit (agency labour) share	Not found in any public source for this sector. Likely material given the staffing model, and completely invisible.
PwC German contact center and CRM market study	Returned HTTP 403. Likely contains market sizing, outsourcing share and AI adoption that would corroborate or contradict several sections here. Worth retrieving by another route.
In-house contact center census	The ~400,000 people doing this work inside non-call-center companies are statistically invisible by construction, because WZ classification follows the parent company's sector. There is no way to count them from official data. This is a permanent limitation, not a research gap.

APPENDIX C

Claims I checked and rejected

Things that surfaced during research, looked usable, and turned out to be wrong. Recorded because each one would have made this report worse, and because they will surface again for anyone researching this sector.

1 · "TELEPERFORMANCE OPENED A 250-WORKSTATION SITE IN MÖNCHENGLADBACH IN MAY 2026"

Wrong by ten years. The opening was 2 May 2016 and the NRW-Invest-Award followed on 3 July 2017. Search engines surface it as current because of how the trade archive is indexed and because the press release carries no prominent date. I checked it specifically because a 250-desk new build in 2026 would have contradicted everything else in the report. Used in Part VIII.3 as the 2016 benchmark instead, which is where it is genuinely valuable.

2 · "SUMMACOM OPENED A NEW WUPPERTAL-BARMEN SITE IN SEPTEMBER 2026"

Wrong by five years. The SUMMACOM expansion article is dated 20 September 2021 and describes St. Ingbert, Völklingen and Bad Hersfeld with a stated intention to expand nationwide. The Wuppertal-Barmen premises at Am Markt 9 to 13 belong to a separate 2026 item about asf energy. Two unrelated stories merged in the search results.

3 · "AUSTRIA: 4,004 EMPLOYER FIRMS AND 118,731 EMPLOYEES IN CALL CENTERS"

Belongs to a different trade association. I pulled the WKO Branchendaten PDF for September 2026 to verify and Fachverband 710 is *Telekommunikations- und Rundfunkunternehmungen*, not call centers. The figure is real; it is just not about this industry. This is the kind of error that propagates for years once it enters a market report. Austria was dropped from scope before this mattered, but the figure is in circulation and should be treated as contaminated.

4 · "GERMANY HAS ALMOST 6,000 CALL CENTERS EMPLOYING 450,000 PEOPLE"

Not wrong, but not comparable. It implies 75 people per site, which only works if you count every in-house service desk. The 896-site figure implies 140 to 180 per site and is consistent with the official 127,000 to 160,000 headcount. Both counts are presented in Part I.2 rather than reconciled, because averaging them would produce a number that describes nothing.

5 · "AI ACT HIGH-RISK OBLIGATIONS START 2 AUGUST 2026"

Superseded, and still widely repeated. Standalone high-risk systems moved to 2 December 2027, embedded to 2 August 2028. A great deal of 2025-vintage vendor and advisory content still cites August 2026 and has not been corrected. What *did* take effect in August 2026 is Article 50 transparency, which is enforceable at up to EUR 15m or 3% of global turnover. See Part XIV.2.

APPENDIX C, CONTINUED

The DACH material that did not survive scoping

6 · SWITZERLAND, DROPPED FOR LACK OF A DEFENSIBLE NUMBER

CallNet.ch, the sector association founded in 1997, is cited variously as representing 650 contact centers with over 20,000 staff, as a sector with over 30,000, as at least 900 call centers with around 30,000 people, and currently as 32,000 jobs. No dates attach reliably to most of these. The best current Swiss data point I found is at the operator level: Callpoint runs about 600 staff across Basel, Fribourg and Zurich. A Swiss chapter would have been 30,000 plus or minus 10,000 with no measurement behind it.

7 · "BUW OPENS TORGELOW WITH 500 JOBS" AND "TWENTY4HELP OPENS NEUBRANDENBURG WITH UP TO 500 JOBS"

Both surfaced in a 2026 search for new openings. Both are archive items from a previous expansion cycle, and buw no longer exists as an independent company. Excluded from the build ledger in Part VIII.2. Any German call center expansion claim without a verifiable date should be assumed to be from the 2010s cycle until proven otherwise, because that cycle generated far more press than the current one.

8 · AUSTRIA, THE FINDINGS THAT ARE WORTH KEEPING

Dropped from scope, but two structural figures did survive verification and are worth recording because they have no German equivalent. Austrian call centre structure splits roughly **54% in-house, 36% external, about 10% carved out**, and the average Austrian call centre employs **95 people**. If that in-house share is anywhere near transferable to Germany, it corroborates the Part I.1 conclusion from an independent direction: the function is overwhelmingly in-house and the outsourcing industry is the minority of it.

What could *not* be verified is any Austrian headcount, for the reason in item 3 above. Anyone picking Austria up later should start from Statistik Austria's Leistungs- und Strukturstatistik rather than from WKO Fachverband summaries, because the Fachverband boundaries do not align with the industry.

9 · ONE SWISS DATA POINT THAT IS SOLID

Callpoint runs about **600 staff across Basel, Fribourg and Zurich**, and a separate October 2026 compilation identified roughly **25 contact centre outsourcing providers** in Switzerland with Basel as the largest hub. That is a real, dated, operator-level anchor, and it is the only Swiss figure in this document I would repeat out loud. The association-level headcounts are not.

Pattern across the first seven: this sector's trade press archive is deep, poorly dated, and heavily indexed, which makes a 2010s expansion story look like a 2026 one. Date every claim at the source before using it. Four of those seven errors were pure date confusion, and two were a figure correctly reported about the wrong industry.

Numi | OFFICE OF THE CTO

Colophon

Prepared for Ron van Cann against NUM-1818. Research conducted 13 and 14 November 2026 from open sources only. Scope narrowed from DACH to Germany at the requester's direction after a scoping interaction; Austria and Switzerland findings are preserved in Appendix C.

Pages	72
Distinct sources	30+
Oldest figure used	2016
Newest figure used	9 Nov 2026
Claims checked and rejected	7
Open gaps declared	10

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