

# BSC BUSINESS SERVICE CENTER FORUM

## WHO ARE WE?

The **Business Service Center Forum (BSCF)** brings together shared service centers (SSC), centers of excellence and business process outsourcing (BPO) providers operating in Slovakia.

A **Shared (Business) Services Center (SSC)** is an organizational unit responsible for the execution of specific tasks (e.g. Finance & Accounting, IT support, HR) supporting the core activity of the company.

**Business process outsourcing (BPO)** involves contracting of the operations and responsibilities of specific business processes to a third-party service provider.

## MISSION

Raise awareness of the BSC sector's role in the Slovak economy and help it grow further in Slovakia.

## GOALS

- Share information within the sector about concerns, solutions and best practices.
- Communicate with national and local authorities: monitor and evaluate legislation, labor market and CSR activities.
- Interact with universities and high schools to improve the employability of graduates at BSCs.

## LEADERSHIP

CHAIR



**Gabriel Galgóci**  
AT&T

VICE-CHAIR



**Martin Bednár**  
Dell

VICE-CHAIR



**Paul Burt**  
IBM

## SPONSORS



## SUPPORTERS



# WHY THE BSC SECTOR MATTERS?

In 2020 AmCham Slovakia surveyed 32 business centers (BSCs = SSCs or BPOs) which were supporting the BSC Forum at the time. The aggregate data reflects the status quo between January 1 and July 31, 2020.



## WHO IS WORKING AT THE SERVICE CENTERS IN SLOVAKIA?

The surveyed sample of service centers employs more than 34 000 people and since the last year their headcount grew by 3,5%. The average age is 34 years and almost three quarters of employees hold a university degree.

Service centers have a lean management structure as only 9,6% of the staff have people management positions. BSCs also employ predominantly Slovak citizens; there are only 11% of foreigners among staff whereas those from the EU are in majority (64%).

From the point of view of gender diversity, for the first time BSCF members companies have been employing more women than men - 50,5% of all FTEs have been females.

# 34 077

Total number of FTEs in the service centers



## 72%

UNIVERSITY EDUCATED



## 51%

WOMEN



## 11%

FOREIGN NATIONALS



## 34

AVERAGE AGE



## 9,6%

MANAGERS



## 3,5%

HEADCOUNT INCREASE (2019)

SOURCE

BSCF 2020 Survey



## WHERE ARE THE BSCs LOCATED AND HOW BIG ARE THEY?

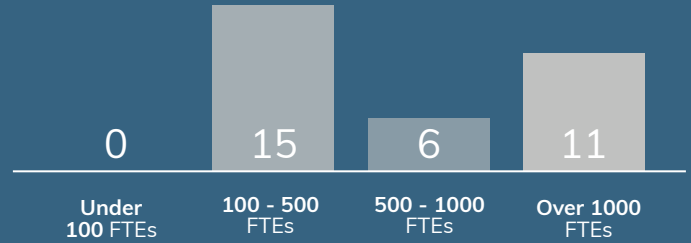
### LOCATIONS

The majority of BSCs is still clustered in Bratislava and Košice. However, investors are gradually discovering advantages of regional hubs in Nitra, Žilina, Prešov, Komárno, Banská Bystrica, Nové Zámky, Považská Bystrica and other cities.

## SIZE

In the context of Central and Eastern Europe, Slovakia is noteworthy for having a significant number of X-Large BSCs (employing more than a 1000 people). Together with the medium-sized they present the majority of all the BSCs surveyed.

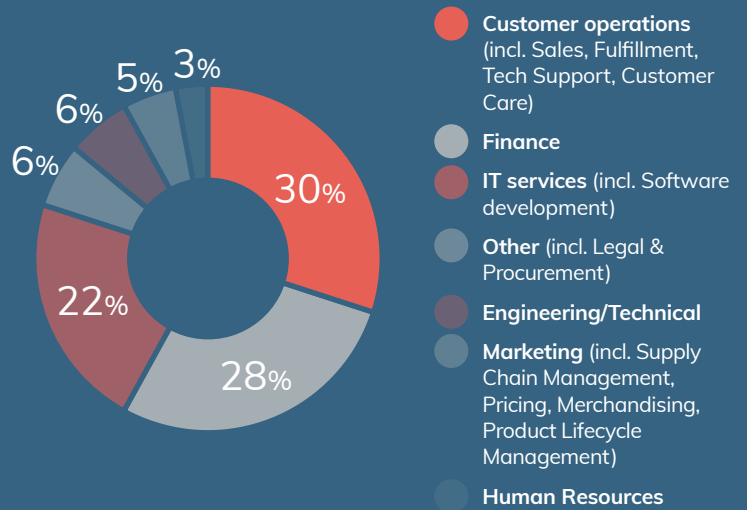
SOURCE  
BSCF 2020 Survey



## BUSINESS SERVICES PROVIDED

BSCs in Slovakia are mostly mature centers that provide value-add services and sophisticated processes for their global or regional operations. 80% of all services fall within advanced Customer Operations (including Sales, Fulfillment, Tech Support and Customer Care), Financial Services or IT Services. The graph shows percentage of BSCF members' employees in these fields:

SOURCE  
BSCF 2020 Survey



## LANGUAGES USED WHEN PROVIDING BUSINESS SERVICES FROM SLOVAKIA

In order to serve their clients in their mother tongue BSCs hire staff with good and diverse foreign language skills. Proficiency in English is a must everywhere. The level of the second or third foreign language makes a difference when exploring the job opportunities in this sector.

SOURCE  
BSCF 2020 Survey



## HOW BIG IS THE SHARED SERVICES INDUSTRY IN SLOVAKIA?

BSCF MEMBERS' COUNTRIES OF ORIGIN



**65**

NUMBER OF BSCs



**37 000**

NUMBER OF EMPLOYEES

**BSCs**  
IN SLOVAKIA



**32**

NUMBER OF MEMBERS



**34 077**

NUMBER OF EMPLOYEES



**BUSINESS SERVICE CENTER FORUM**

**92%**

of all employees in Slovakia

SOURCE  
BSCF 2020 Survey



## WHAT IS THE ANNUAL CONTRIBUTION OF BSCF MEMBER COMPANIES TO THE SLOVAK ECONOMY?

**136**  
million €

EMPLOYEE  
INCOME TAX

**110,5**  
million €

SOCIAL  
INSURANCE  
(employees)

**296**  
million €

SOCIAL  
INSURANCE  
(companies)

**3,3%** of the Slovak **state budget income**

**824,5**  
million €

SALARIES  
EXPENDITURES

### SOURCE

Financial information was prepared by PricewaterhouseCoopers Slovensko, s.r.o. based on data from BSCF, Register of financial statements and from Trend weekly for year 2019.

**1850**  
€

AVERAGE  
MONTHLY  
SALARY

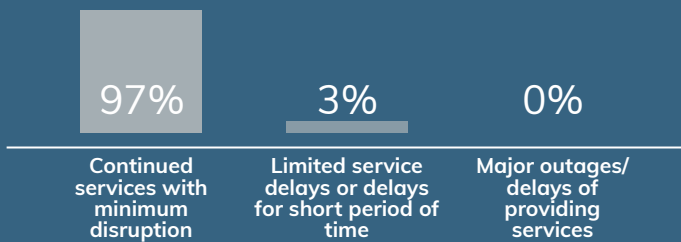
**SOURCE**  
BSCF  
members  
calculations  
2020



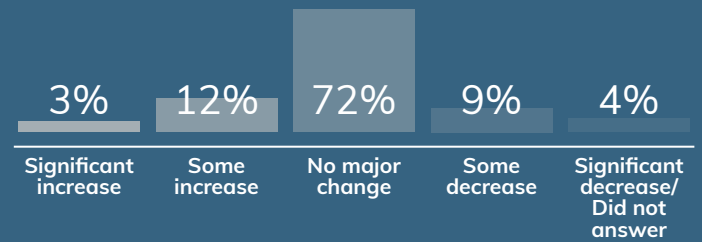
## COVID-19 EXPERIENCE

**SOURCE**  
BSCF 2020 Survey

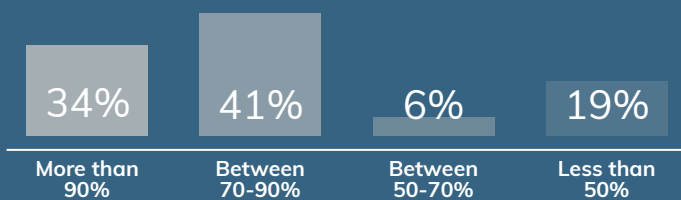
How did BSCF companies cope with the Covid-19 period since March 2020?



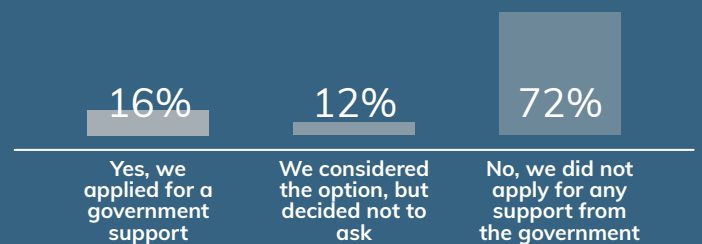
Did BSCF companies experience change of productivity/ efficiency during the pandemic?



What % of staff continued to work remotely from home office by 31 July 2020?

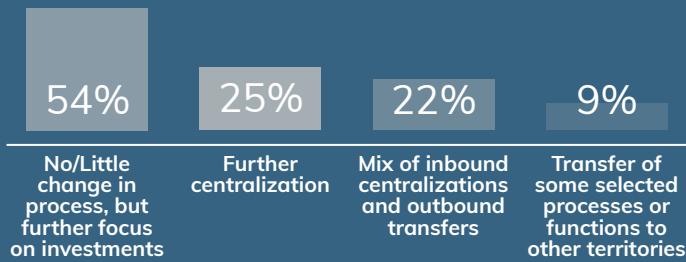


Did BSCF companies request or consider to ask for any form of approved governmental support?

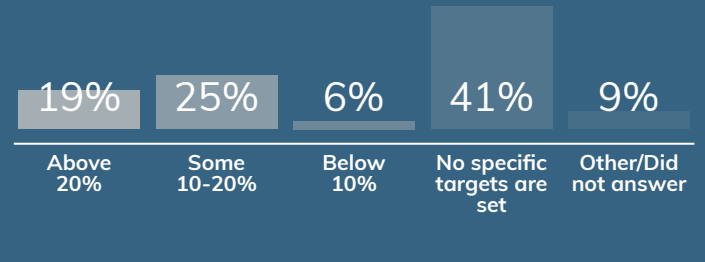




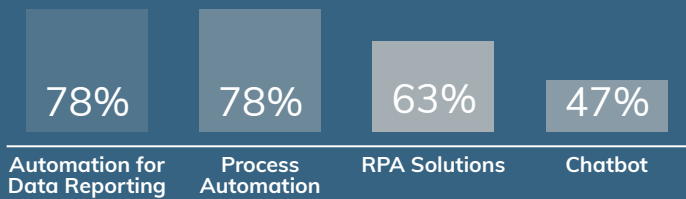
What are BSCF companies' development plans for next 2-3 years compared to the current position (cumulative)?



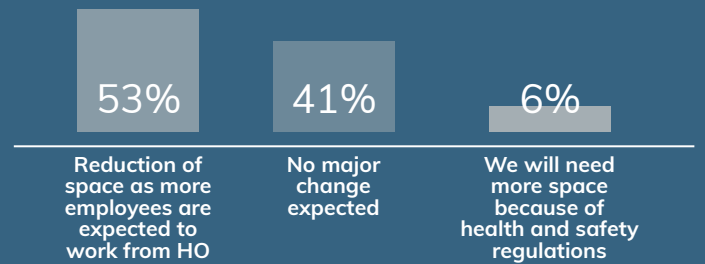
What is the planned extent of automation/robotization of relevant processes or functions in BSCF companies in next 2-3 years?



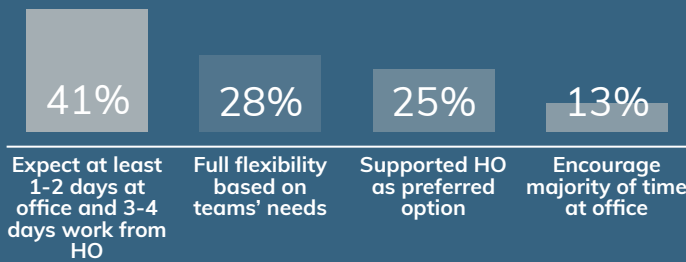
What type of automation/robotization are business centers implementing (cumulative)?



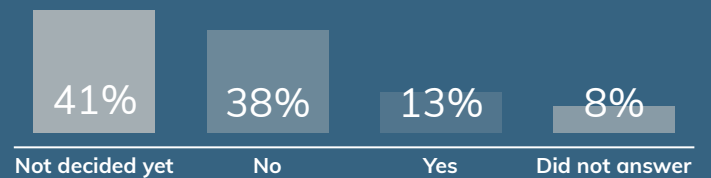
What are BSCF companies' office space plans for the next 2-3 years?



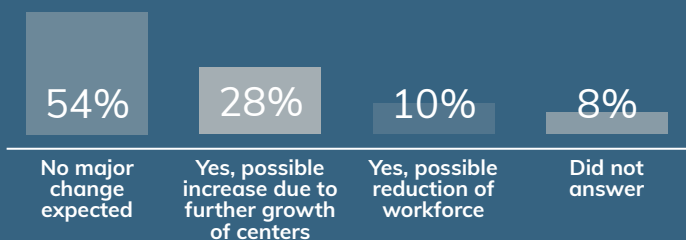
What is the planned extent of work flexibility in business centers (cumulative)?



Do business centers plan to revise existing social benefits schemes for employees in response to the current economic uncertainties?

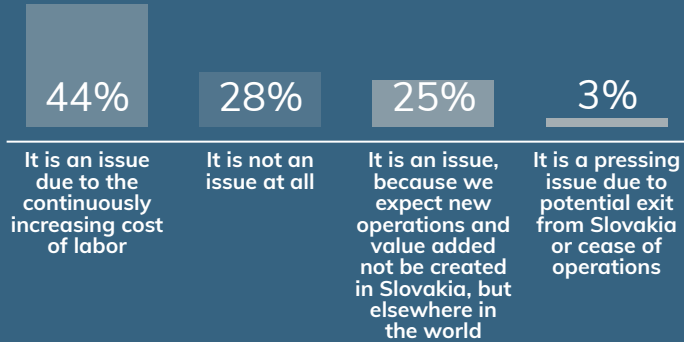


Do business centers consider adjusting number of employees in response to the economic environment?

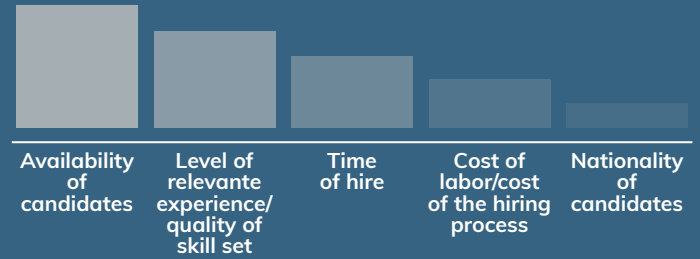




How critical is the lack of labor resources for BSCF companies' strategic development?



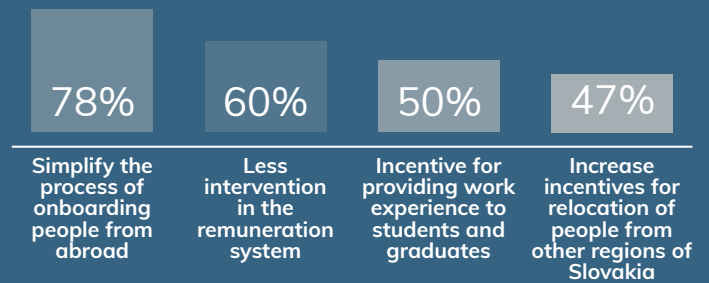
What is the main issue for BSCF companies with the hiring process?



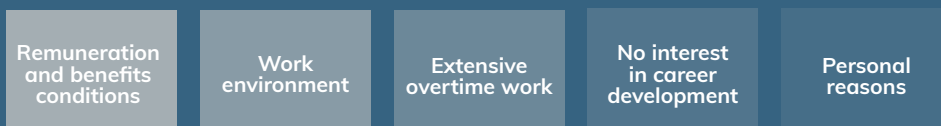
Do BSCF companies expect to further raise salaries within next 12 months?



What could government do to help business centers achieve appropriate staffing levels (cumulative)?



What are the main reasons for labor fluctuations at BSCF companies?



**10,23%**  
AVERAGE OVERALL  
ATTRITION RATE  
(LAST 12 MONTHS)

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# 6 GOOD REASONS

## TO JOIN AMCHAM'S BUSINESS SERVICE CENTER FORUM

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### MISSION

BSCF aims to raise awareness of the business centers' role in the Slovak economy and helps it grow further in the country.



### COMMUNICATION

BSCF shares information within the sector about concerns, solutions and best practices in areas such as HR, education, media exposure and many more.



### REPRESENTATIVENESS

BSCF is the leading platform for business centers in Slovakia, amplifying a joint voice of over 92% of all the industry's FTEs.



### INTERACTION WITH PUBLIC OFFICES

The community frequently interacts with national and local authorities, monitors the labor market and proposes changes to the legislation.



### IMPACT

Powerful and direct legislative impact in Slovakia, supporting the continuous improvement of business environment.



### BUSINESS-ACADEMIC COOPERATION

BSCF interacts with universities and high schools to improve the employability of graduates at business centers and strengthens the skillset of future industry leaders.

# Join BSC Forum

and help to  
make the voice  
of BSCs stronger!

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bscf.eu



business.service.center.forum



business-service-center-forum



career4usk

The Business Service Center Forum  
is driven by AmCham Slovakia.

