

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
Galgóczi
AT&T

VICE-CHAIR



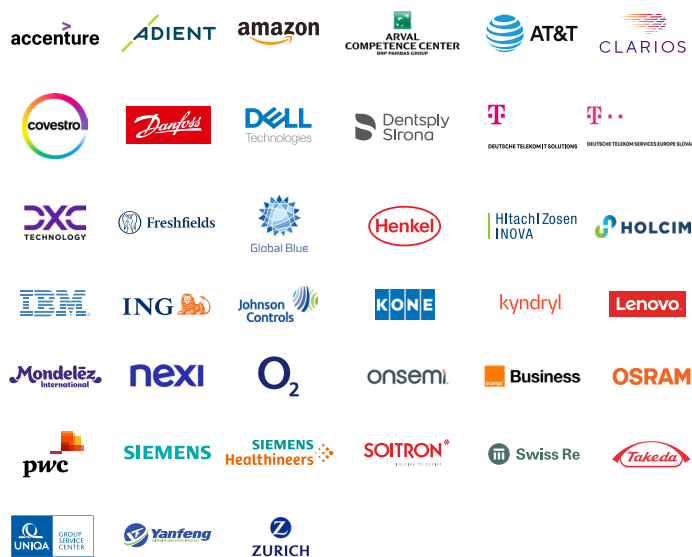
Lucia
Gröneová
Swiss Re

VICE-CHAIR



Ivan
Tomko
IBM

MEMBERS



SUPPORTERS



WHY THE BSC SECTOR MATTERS?

In 2023 AmCham Slovakia surveyed 39 business centers (BSCs = SSCs or BPOs) which were supporting AmCham BSCF at the time. The aggregate data reflects the status quo of the business centers industry in Slovakia as of August 31st 2023.



WHO IS WORKING AT THE SERVICE CENTERS IN SLOVAKIA?

The surveyed sample of service centers employs almost 38 000 people and since the last year their headcount grew by 0,93%. At the same time, 85% of member companies expect their headcount to further grow within the next 12 months. The average age of employees is 36,16 years and has constantly been growing since 2015. Two thirds of them hold a university degree. Service centers continue to preserve lean management structure as only 9% of the staff have people management positions. BSCs also employ predominantly Slovak citizens; there are only 11% of foreigners among staff of which the EU member states slightly prevail. From the point of view of gender diversity, business centers employ more women than men (50,47%) for the third time in history.

37 843

Total number of FTEs in the service centers



66%

UNIVERSITY EDUCATED



50,5%

WOMEN



11%

FOREIGN NATIONALS



36,2

AVERAGE AGE



9%

MANAGERS



1%

HEADCOUNT INCREASE (2022)

SOURCE

BSCF 2023 Survey



WHERE ARE THE BSCs LOCATED AND HOW BIG ARE THEY?

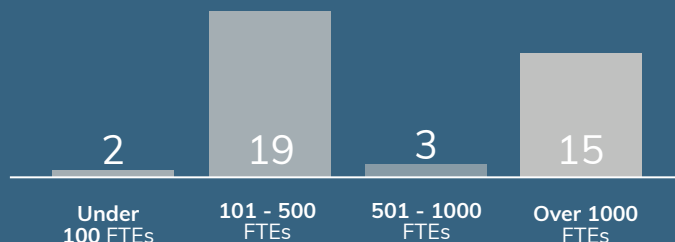
LOCATIONS

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

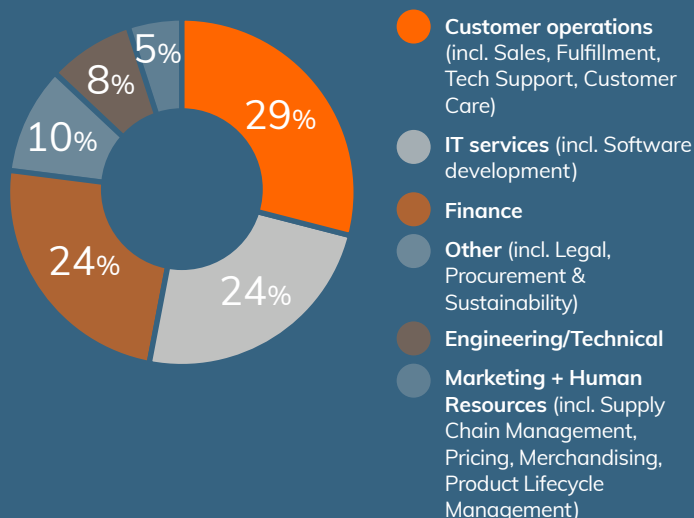
SOURCE
BSCF 2023 Survey



BUSINESS SERVICES PROVIDED

BSCs in Slovakia are mostly mature centers that provide value-add services and sophisticated processes for their global or regional operations. Almost 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 2023 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 2023 Survey



HOW BIG IS THE SHARED SERVICES INDUSTRY IN SLOVAKIA?

BSCF MEMBERS' COUNTRIES OF ORIGIN



65

NUMBER OF BSCs



40 000

NUMBER OF EMPLOYEES

BSCs
IN SLOVAKIA



39

NUMBER OF MEMBERS



37 843

NUMBER OF EMPLOYEES



BUSINESS
SERVICE
CENTER
FORUM

95%

of all
employees
in Slovakia

SOURCE
BSCF 2023 Survey



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

180,2
million €

EMPLOYEE
INCOME TAX

146,7
million €

SOCIAL
INSURANCE
(employees)

400,4
million €

SOCIAL
INSURANCE
(companies)

27,4
million €

CORPORATE
INCOME TAX

1,102
billion €

SALARIES
EXPENDITURES

2417
€

AVERAGE
MONTHLY
SALARY

3,6% of the Slovak state budget income

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 2022.

SOURCE

BSCF members calculations 2023

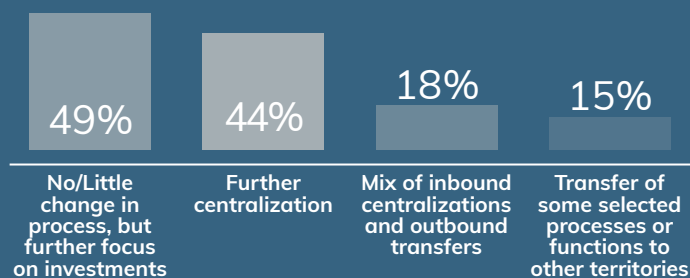


CHALLENGES 2023

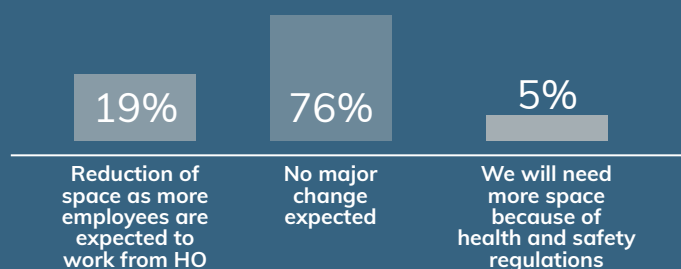
SOURCE

BSCF 2023 Survey

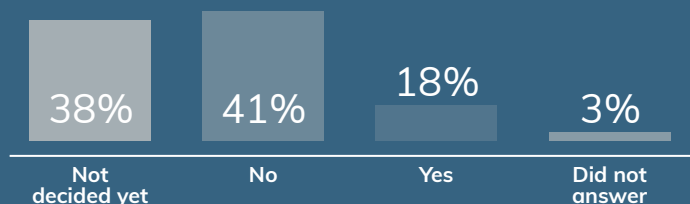
What are BSCF companies' development plans for the next 2-3 years compared to the current position (cumulative)?



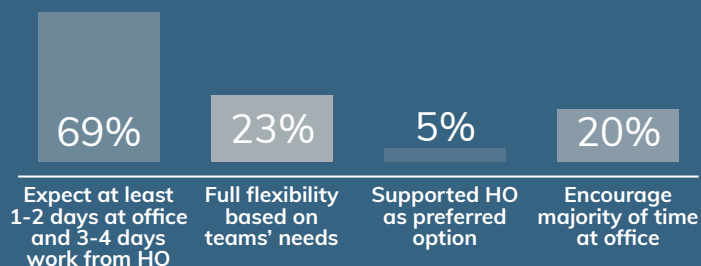
What are BSCF companies' office space plans for the next 2-3 years?



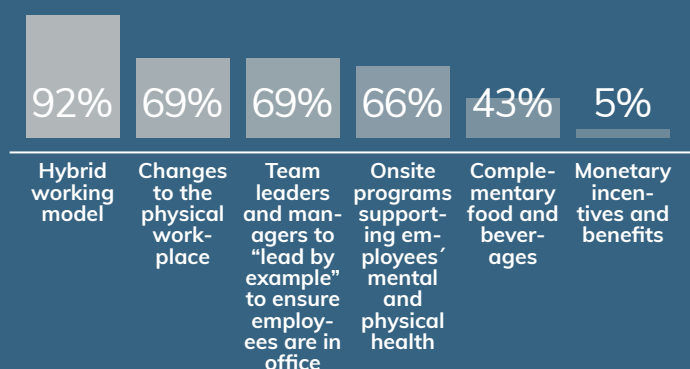
Do business centers plan to revise existing social benefits schemes for employees in response to the current economic uncertainties?



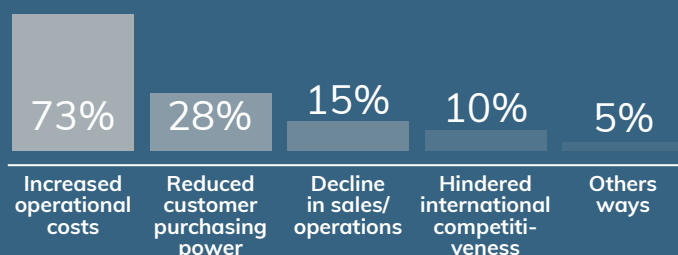
What is the planned extent of work flexibility in business centers (cumulative)?



Which incentives and changes have business centers employed to encourage people to return to the office (cumulative)?



How has the recent inflation affected business centers in Slovakia (cumulative)?

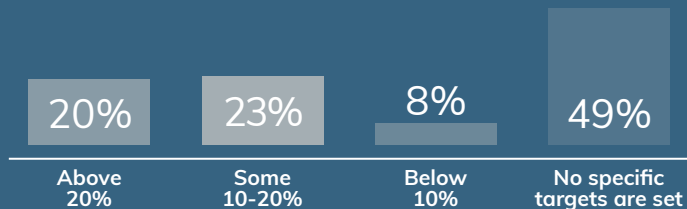




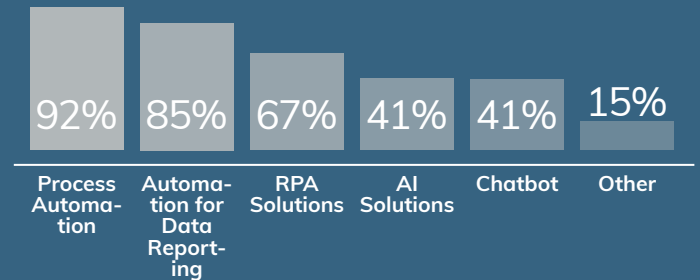
AUTOMATION

SOURCE
BSCF 2023 Survey

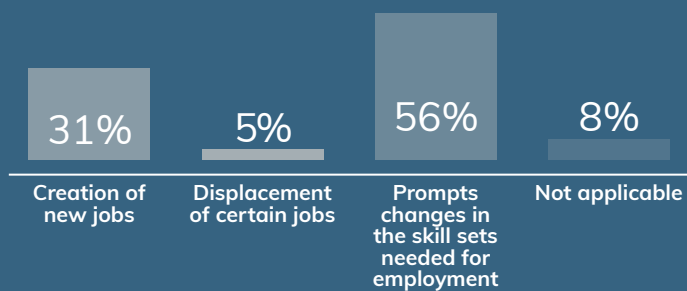
What is the planned extent of automation/robotization of relevant processes or functions in BSCF companies in next 2-3 years?



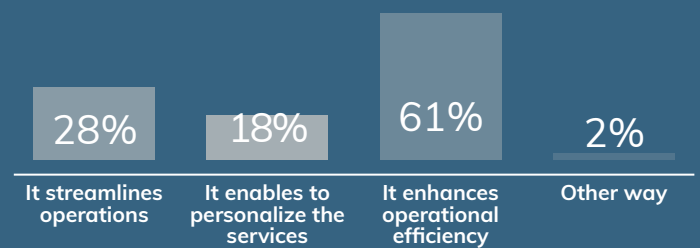
What type of automation/robotization are business centers implementing (cumulative)?



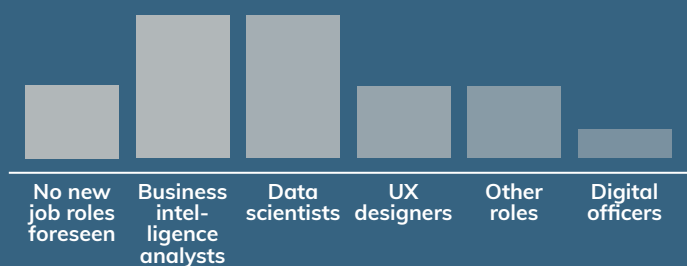
How does the implementation of AI/RPA affect the organizational structure of business centers?



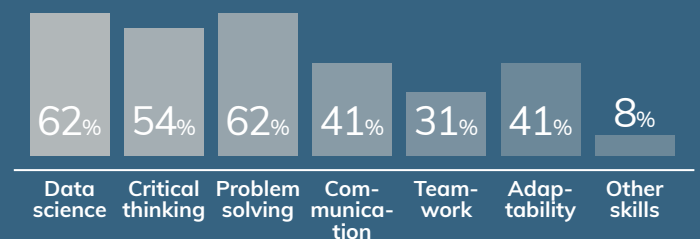
How does AI/RPA implementation influence business centers' operations (cumulative)?



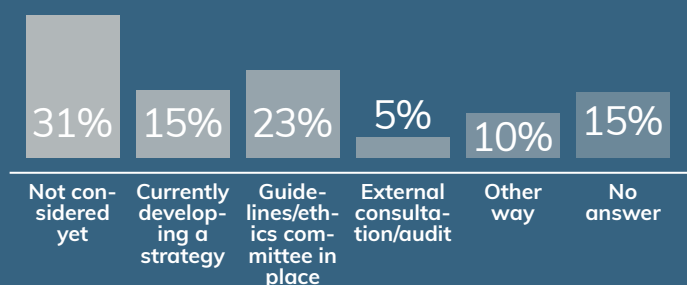
What kind of new job roles do business centers foresee in regard with the implementation of AI/RPA solutions?



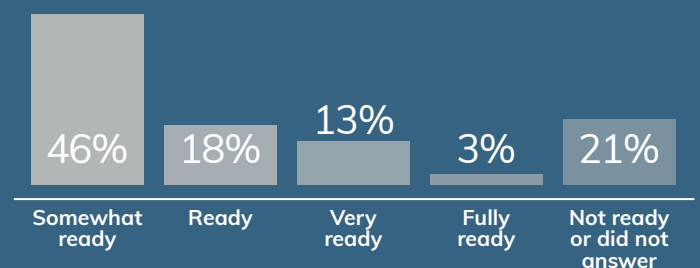
Which critical skills do business centers anticipate will be in high demand within the next 2-3 years due to AI/RPA advancements (cumulative)?



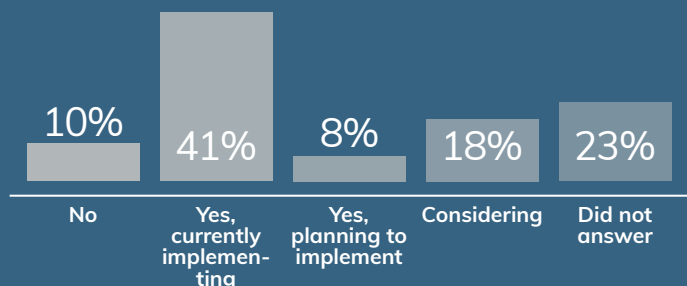
How do companies manage their centers' ethical considerations associated with AI/RPA implementation?



How would business centers rate the readiness of their workforce to adapt to AI/RPA technologies?



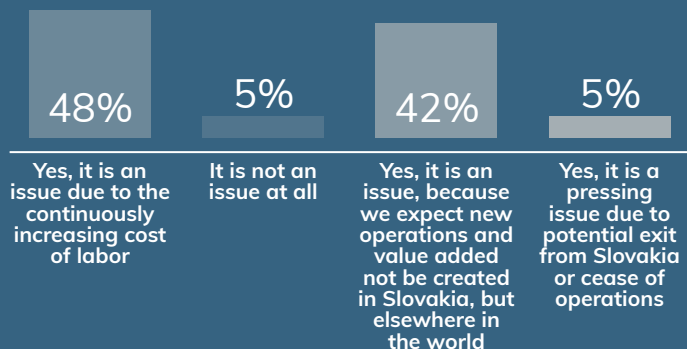
Are business centers investing in reskilling or upskilling programs to prepare their workforce for digital transformation?



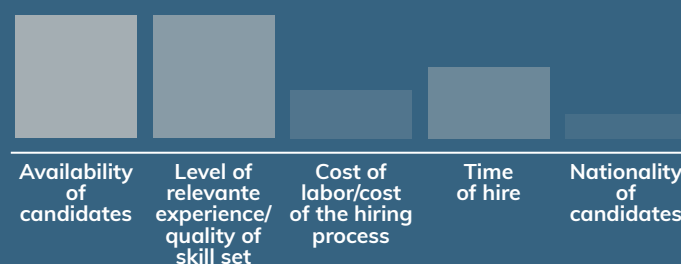
HUMAN RESOURCES

SOURCE
BSCF 2023 Survey

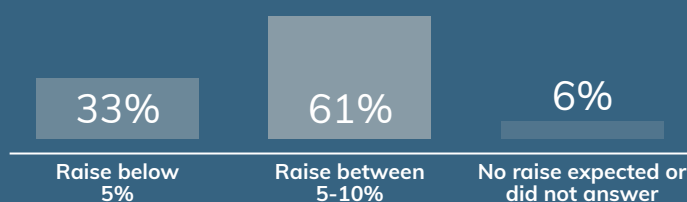
How critical is the lack of labor resources for BSCF companies' strategic development (cumulative)?



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



Do business centers expect to further raise salaries within next 12 months?



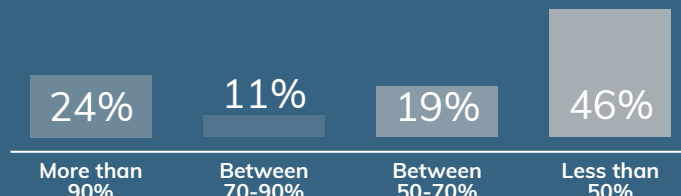
What could Slovakia's government do to help business centers achieve appropriate staffing levels (cumulative)?



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



What % of your staff continues to work remotely from home office as of August 31st 2023?



10,17%

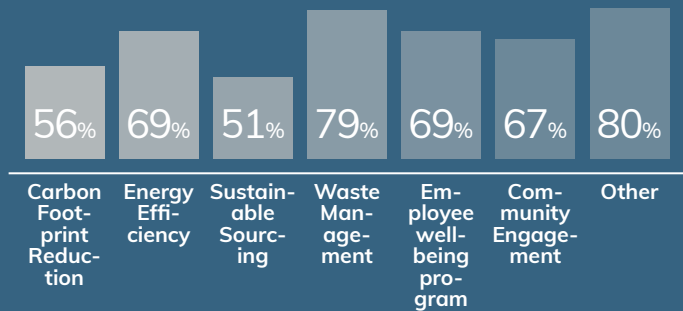
AVERAGE OVERALL ATTRITION RATE (LAST 12 MONTHS)



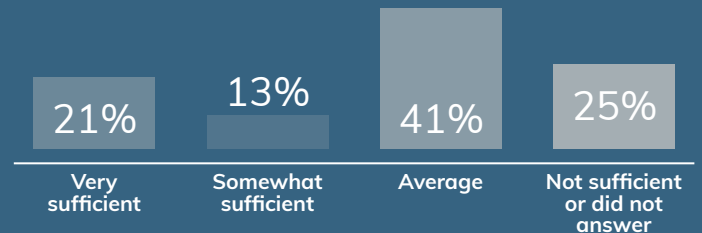
SUSTAINABILITY & ESG

SOURCE
BSCF 2023 Survey

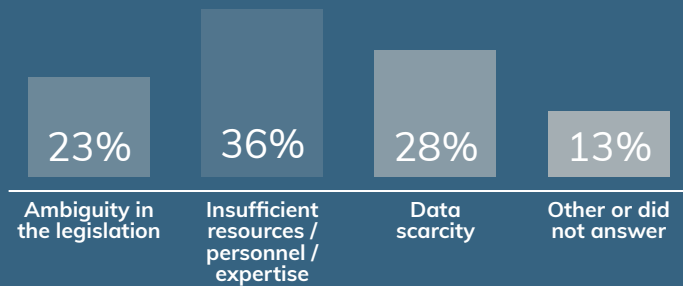
What initiatives have BSCF companies implemented to address sustainability concerns (cumulative)?



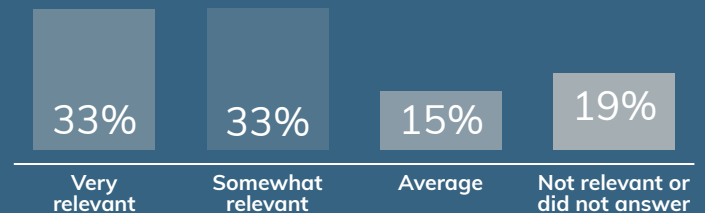
How would BSCF companies rate their knowledge of the new sustainability reporting requirements (EU Taxonomy, CSRD)?



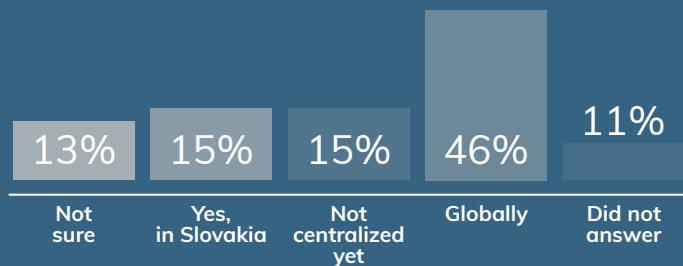
What challenges do business centers encounter in complying with the ESG reporting legislation?



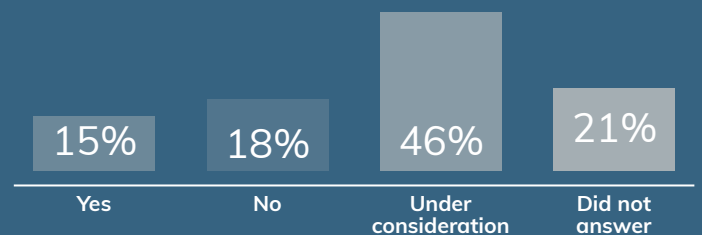
To what extent do BSCF companies think ESG reporting is relevant for their center?



Do business centers have a centralized team dedicated to ESG reporting?



Do BSCF companies plan to centralize ESG-related activities in the coming year?



6 GOOD REASONS

TO JOIN AMCHAM'S BUSINESS SERVICE CENTER FORUM



MISSION



COMMUNICATION



REPRESENTATIVENESS



INTERACTION WITH PUBLIC OFFICES



IMPACT



BUSINESS-ACADEMIC COOPERATION

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Join BSC Forum

and help to
make the voice
of BSCs stronger!



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The Business Service Center Forum
is driven by AmCham Slovakia.

