



# GBS 3.0

What does data tell us about the future of Business Centers?

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Head of People, Performance & Culture,  
KPMG in Slovakia

—  
12 September 2024



**Business Centers are evolving.**

**From  
Simplicity**

From routine, repetitive back-office  
services



**To  
Complexity**

To more consultative, knowledge based  
and strategic roles

# KPMG CEE SSC Network

**2 000+**

**Business  
Centres in top 5  
countries in CEE**

**1 000 000**

**Jobs**

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# KPMG CEE SSC Network



**200**  
consultants

**55**  
active clients



Czech Republic



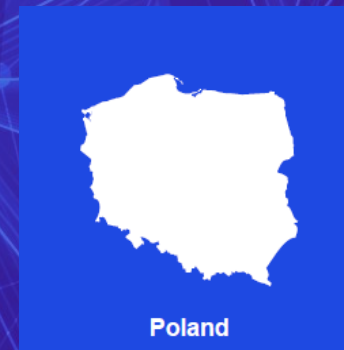
Hungary



Slovakia



Romania



Poland

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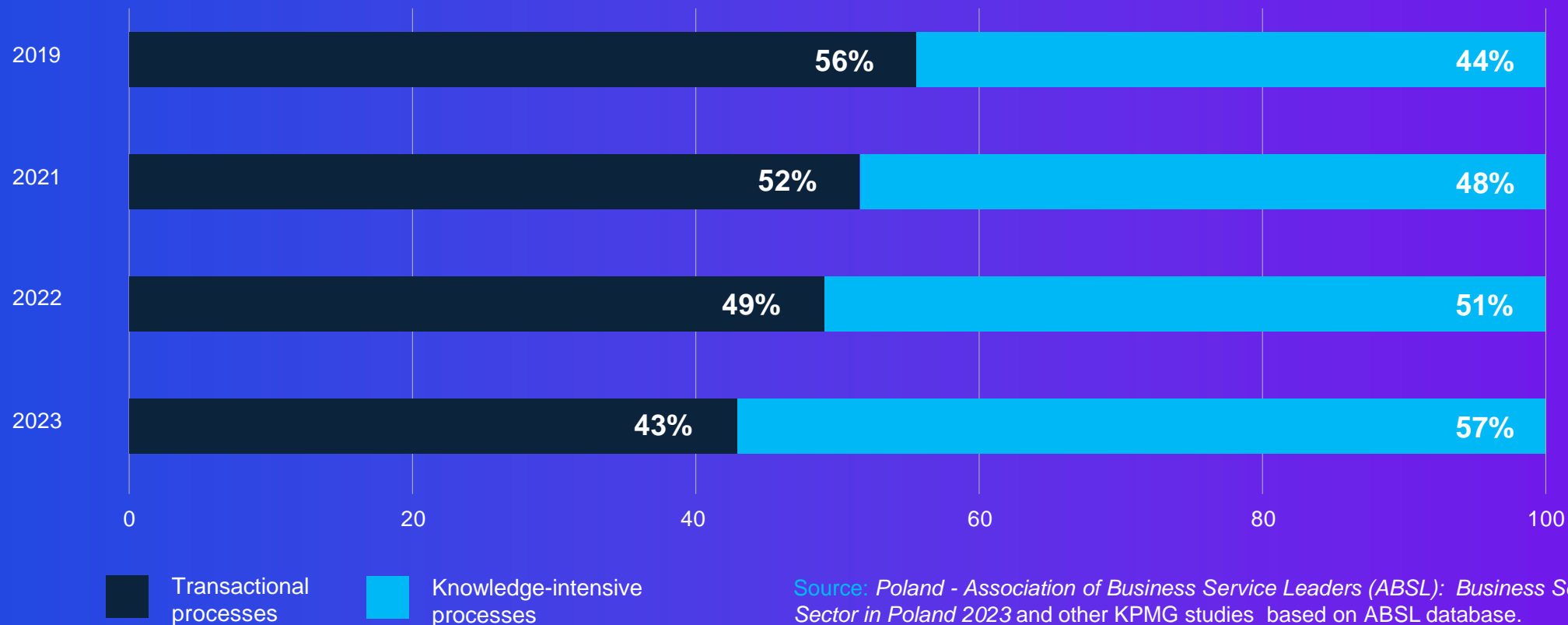
# GBS 3.0

**The Shifting Landscape of Global  
Business Services and its  
Implications in the CEE Region**

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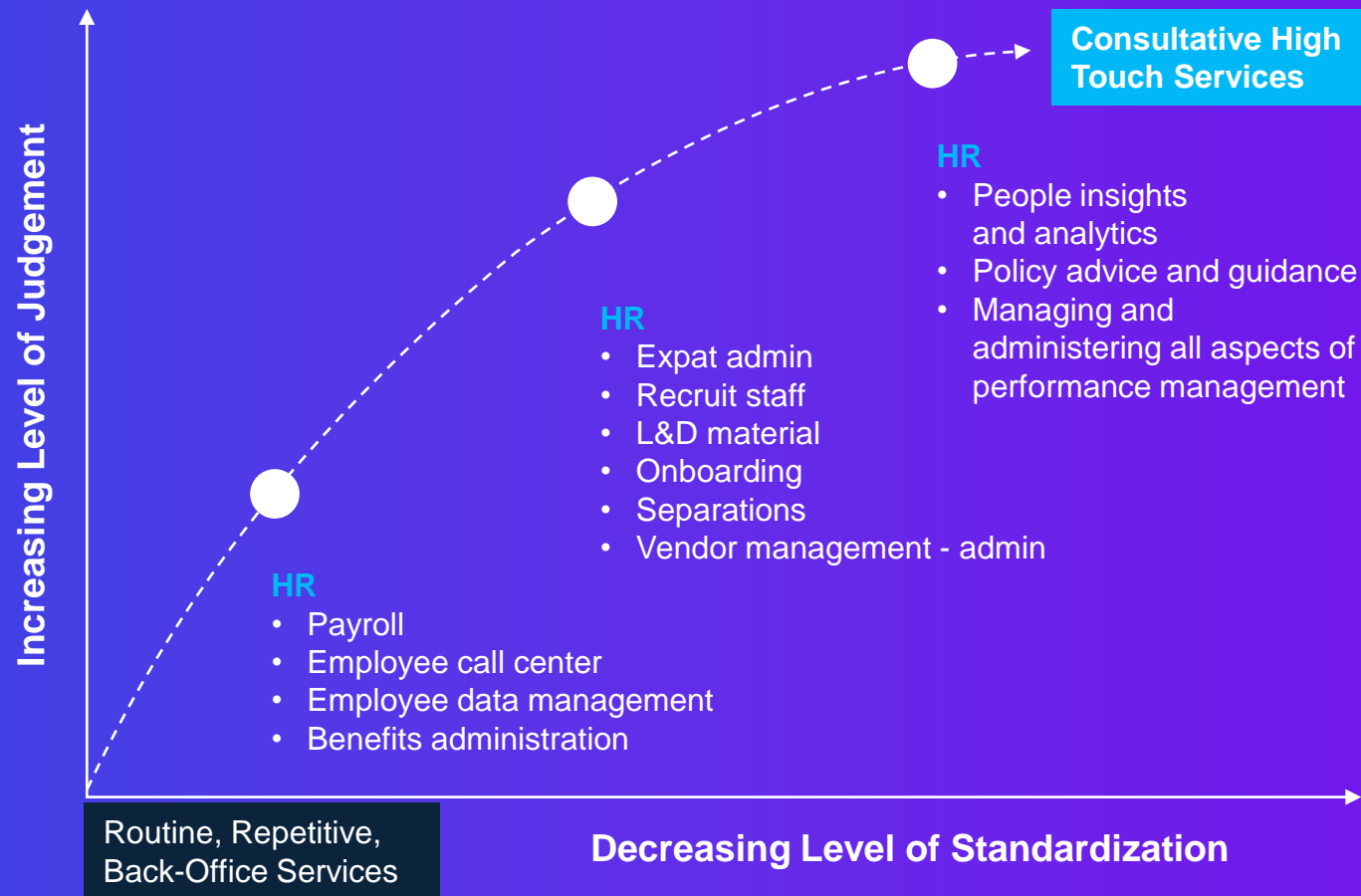


# There is a growing ratio of knowledge intensive processes





# Journey from „back-office“ to innovation hub





# Expanding the scope of work is a priority for BSC



Plan to expand the scope of their work in the year ahead

Source: Global - SSON The State of the Shared Services & Outsourcing Industry Global Market Report 2023

# CEE remains the top of choice for the GBS sector



**The central  
geographical  
location**



**Competitive  
salary level**



**Skilled talent  
pool**



**Advanced IT  
infrastructure**

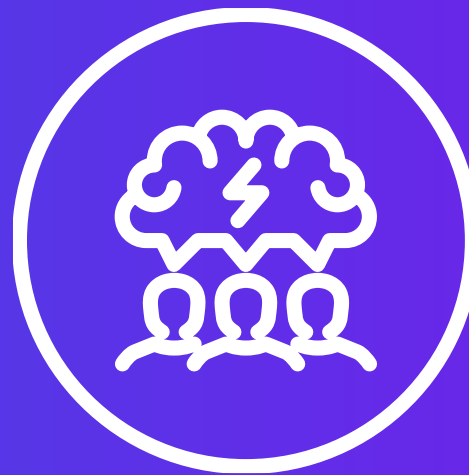
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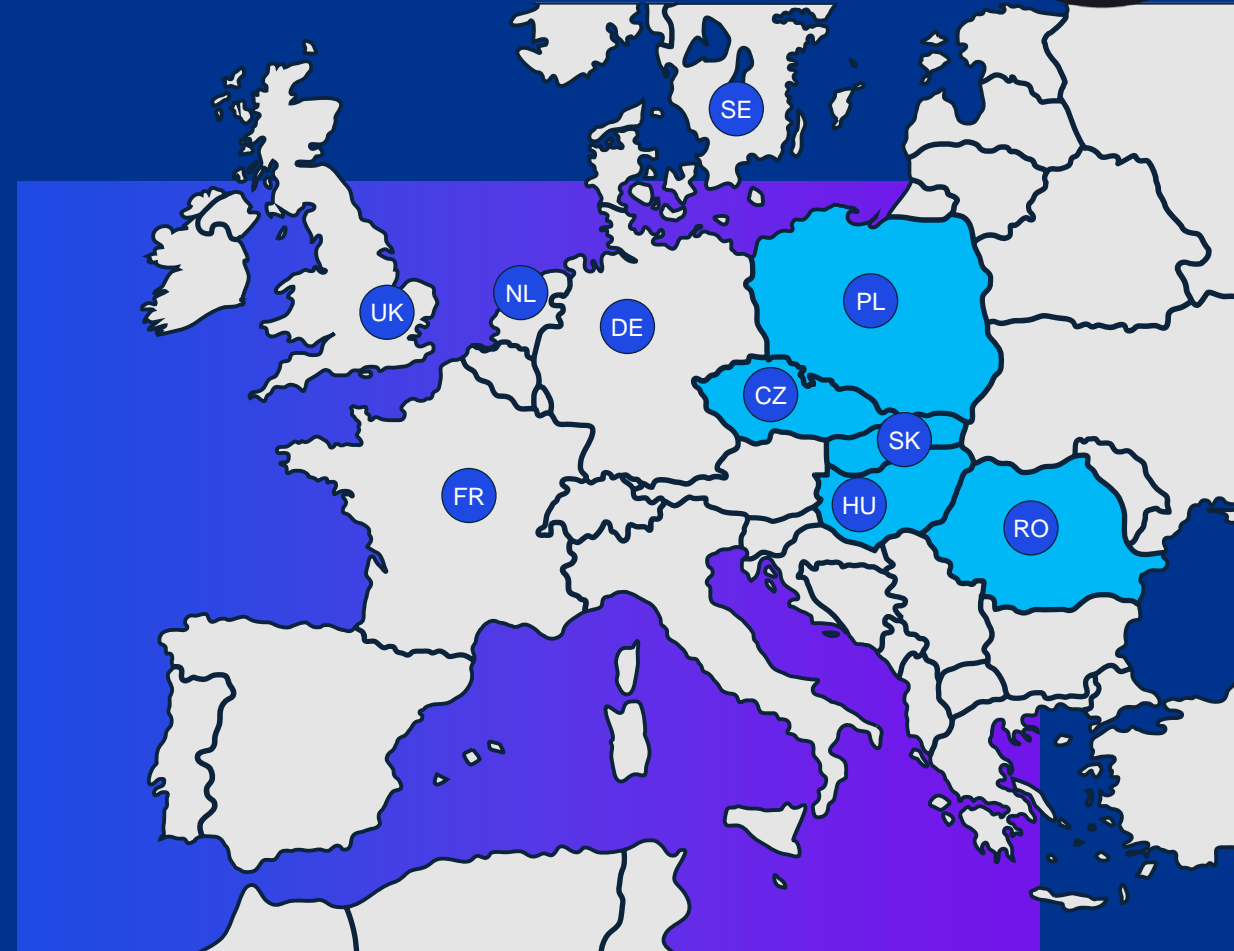
**Advanced IT  
infrastructure**

# Salaries remain consistently lower than in Western countries

Average monthly gross salary (USD)  
– CEE and Western Europe

Country	2019	2023
RO Romania	1,140	1,450
SK Slovakia	1,100	1,520
HU Hungary	1,130	1,590
PL Poland	1,310	1,820
CZ Czech Republic	1,580	1,890
FR France	2,910	3,590
UK United Kingdom	3,240	3,590
GE Germany	3,150	3,950
SE Sweden	3,890	4,280
NL Netherlands	3,580	4,580

Source: KPMG chart based on Hays salary data





Finance Accounting/Reporting/Controlling Manager 15+ years

FP&A Manager 15+ years

AP/AR Manager 15+ years

Finance Accounting/Reporting/Controlling Senior 5-15 years

FP&A Senior 5-10 years

AP/AR Senior 5-10 years

Finance Accounting/Reporting/Controlling Analyst 3-5 years

FP&A Analyst 1-5 years

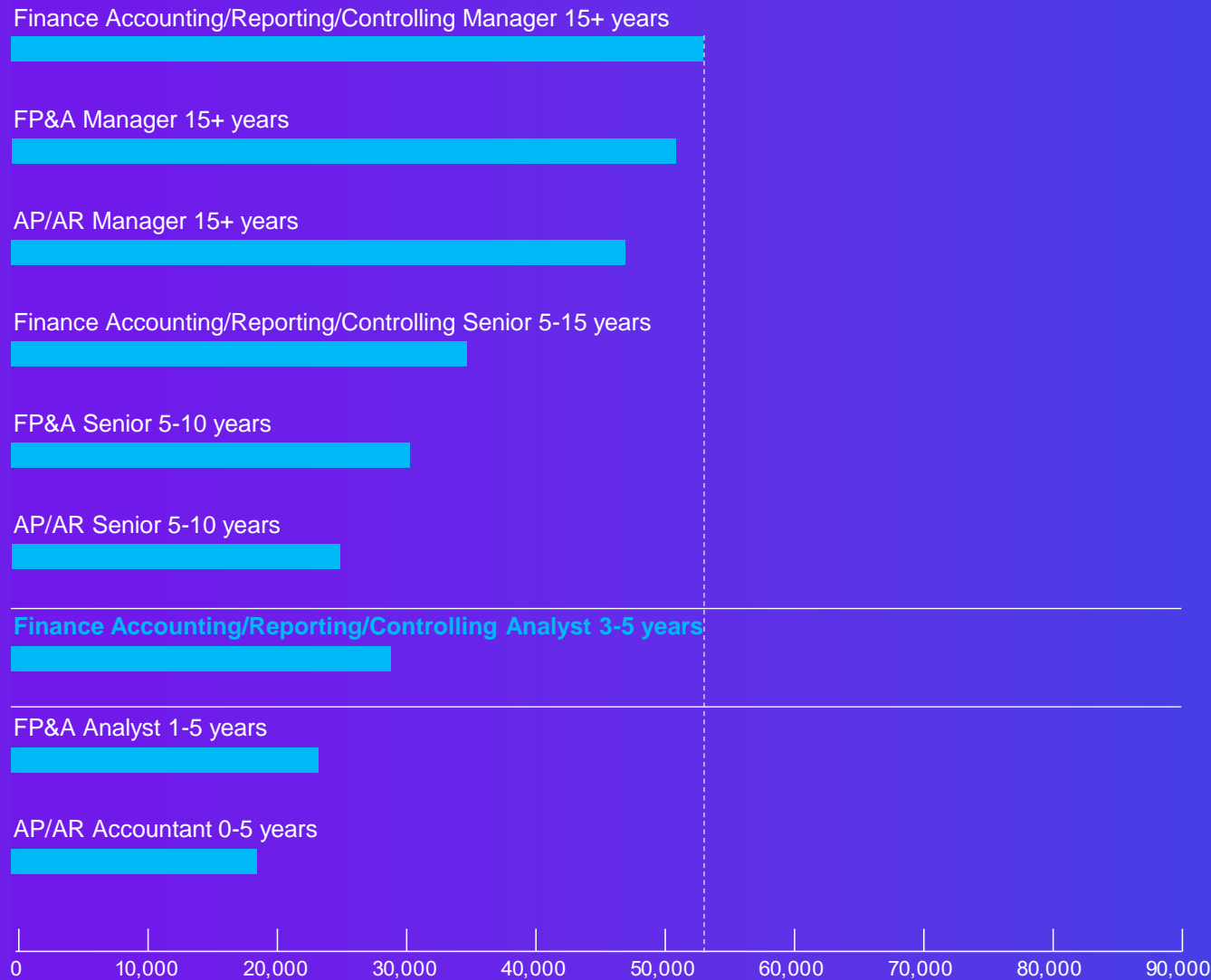
AP/AR Accountant 0-5 years



# Compared to India, CEE offers an advantage in more knowledge-based roles due to lower salary costs.

Annual base salaries in the CEE vs India in 2023 (USD)

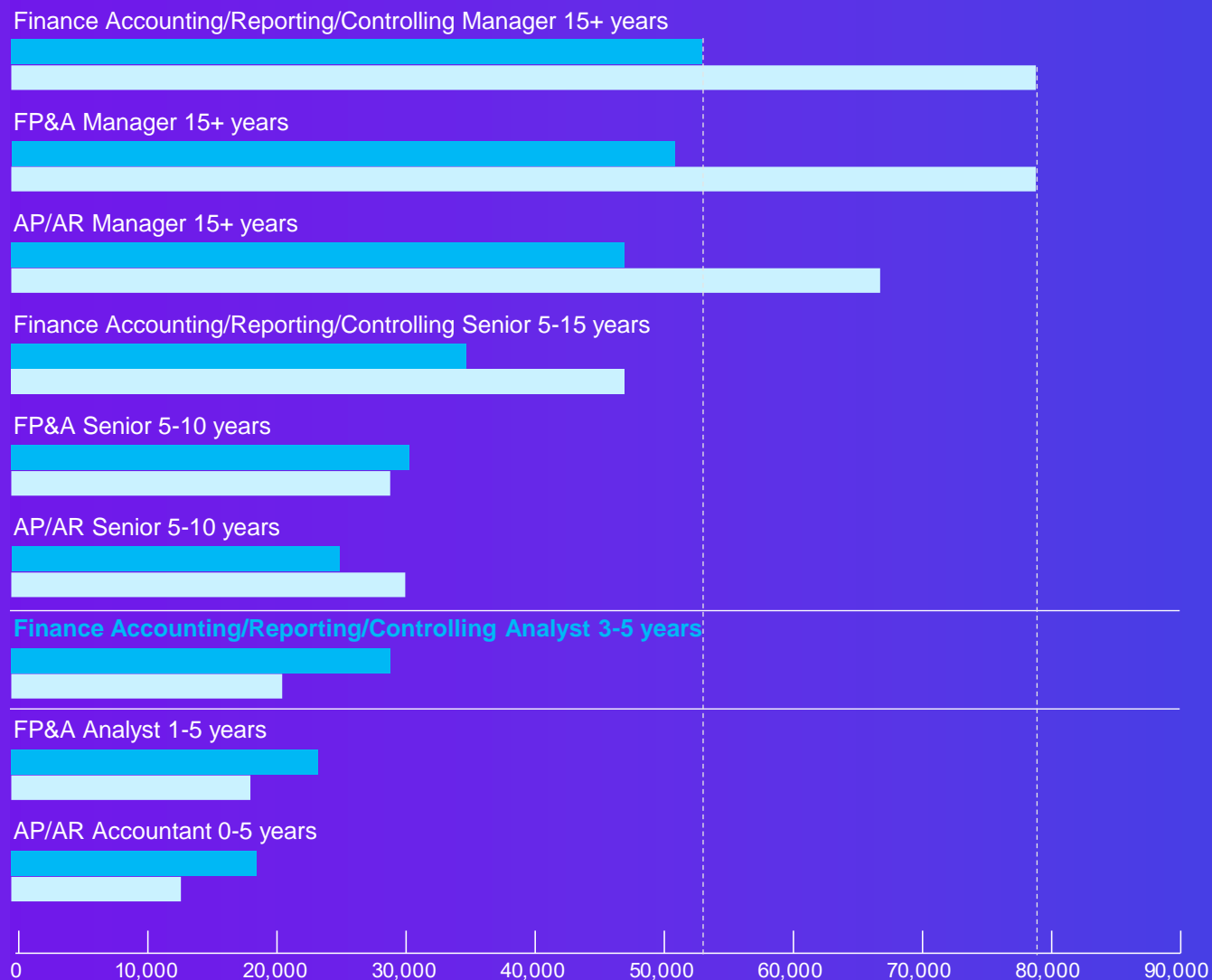
CEE India



**Compared to India, CEE offers an advantage in more knowledge-based roles due to lower salary costs.**

Annual base salaries in the CEE vs India in 2023 (USD)

■ CEE ■ India



**Compared to India, CEE offers an advantage in more knowledge-based roles due to lower salary costs.**

Annual base salaries in the CEE vs India in 2023 (USD)

■ CEE ■ India

# The biggest opportunity for GBS lays in **senior** positions

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Make sure your  
**workforce**  
is ready

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# How?

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**Hiring  
& Onboarding**



**Upskilling  
& Reskilling**



**Nurturing**

# Hiring & Onboarding



**Review  
and adapt  
processes**

**Enhance  
integration**

**Clear  
Expectations**



# Upskilling and Reskilling



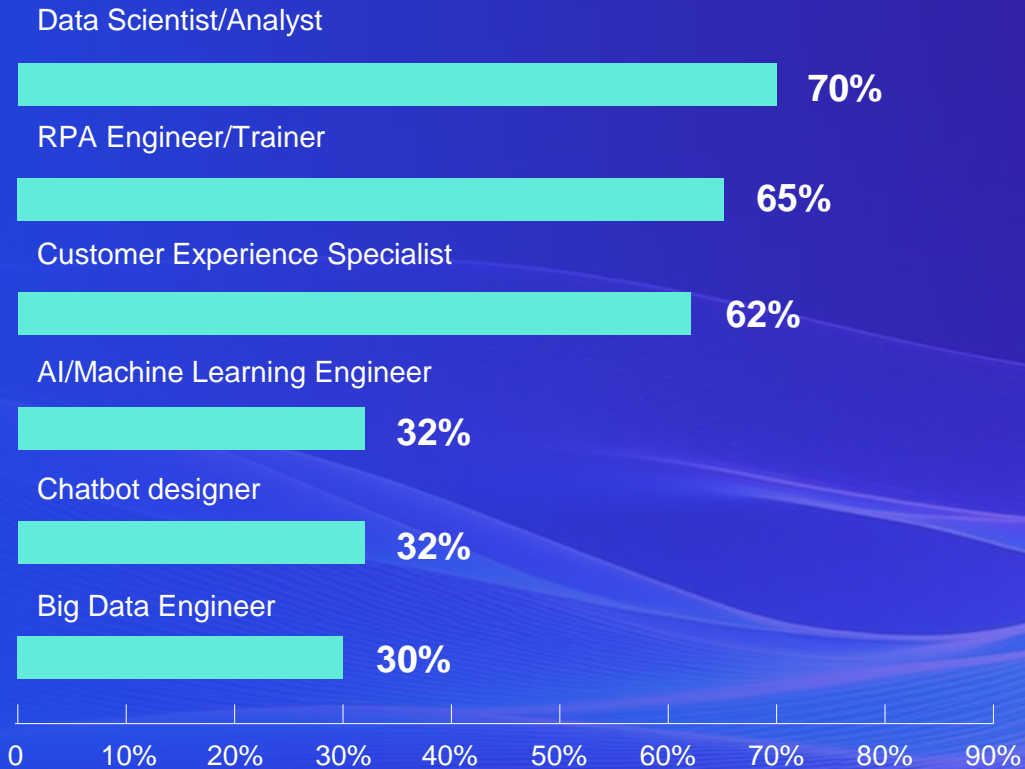
**Invest in  
Leadership  
Programs**

**Create a clear  
career and  
learning path**

**Embrace AI  
automation  
and technology**

# Upskilling and Reskilling

## Share of centers planning to introduce new roles in the near future



Source: Czech Republic - ABSL, Business Services Sector in the Czech Republic 2023

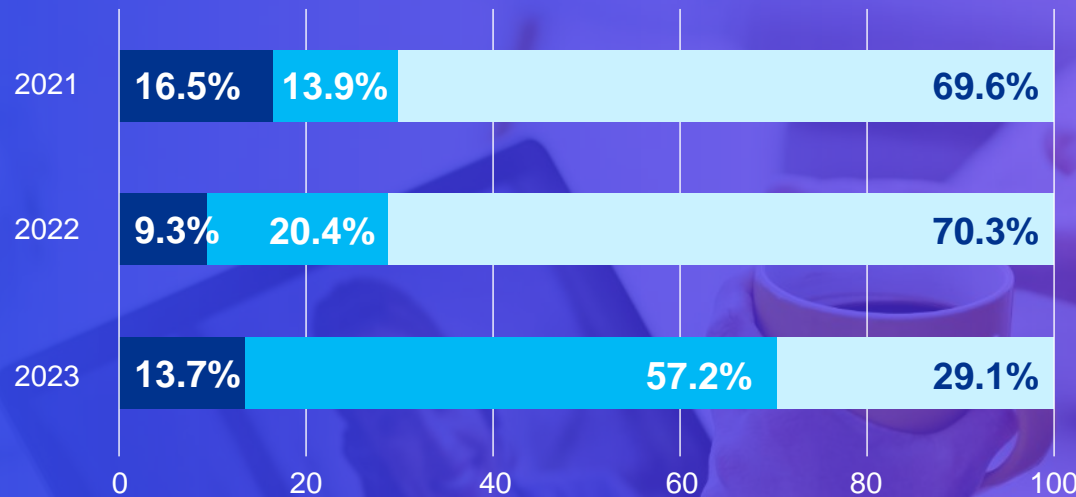
# Embrace AI automation and technology

# Nurture your talents and get them ready for life



## Tackle the remote work paradox

## Ensure opportunities to grow



There is a continuous shift from home office to a mix of WFH and office work

- Predominantly work from office
- Mix of WFH work from office
- Predominantly WFH

Source: KPMG based on ABSL Poland 2023



**The workforce of the future  
will be defined by its adaptability,  
innovation, and commitment  
to continuous learning.**





# Thank you



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# Q&A

