



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



Marek Chudík
IBM

VICE-CHAIR



Lucia Gröneová
Swiss Re

VICE-CHAIR



Ivan Tomko
Lenovo

MEMBERS



SUPPORTERS



WHY THE BSC SECTOR MATTERS?

In 2024 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 2024.



WHO IS WORKING AT THE SERVICE CENTERS IN SLOVAKIA?

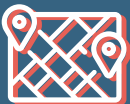
The surveyed sample of service centers employs almost 37 000 people. Half of the member companies expect their headcount to further grow within the next 12 months, while one third of them expect no change in this regard. The average age of employees is 36,4 years and has constantly been growing since 2015. Two thirds of them hold a university degree. Service centers continue to preserve lean management structure as only 10% of the population have people management positions. BSCs continue to employ predominantly Slovak citizens; there are only 11% of foreigners among staff whereas those from the EU member states slightly prevail. From the point of view of gender diversity, business centers employ almost balanced range of professionals – 49% of them are women.

36 930

Total number of FTEs in the service centers

UNIVERSITY EDUCATED		66%
WOMEN		49%
FOREIGN NATIONALS		11%
AVERAGE AGE		36,4
MANAGERS		10%

SOURCE
BSCF 2024 Survey



WHERE ARE THE BSCs LOCATED AND HOW BIG ARE THEY?

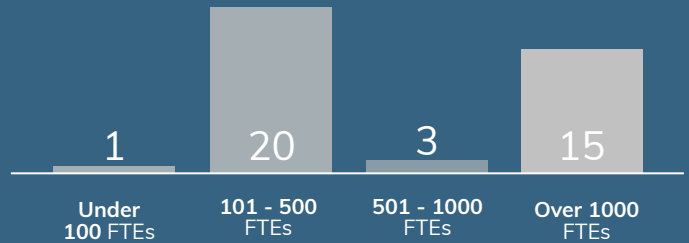
LOCATIONS

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).

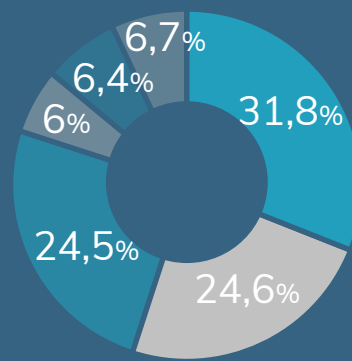
SOURCE
BSCF 2024 Survey



BUSINESS SERVICES PROVIDED

BSCs in Slovakia are mostly mature centers that provide value-add services and sophisticated processes for their global or regional operations. More than 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 2024 Survey



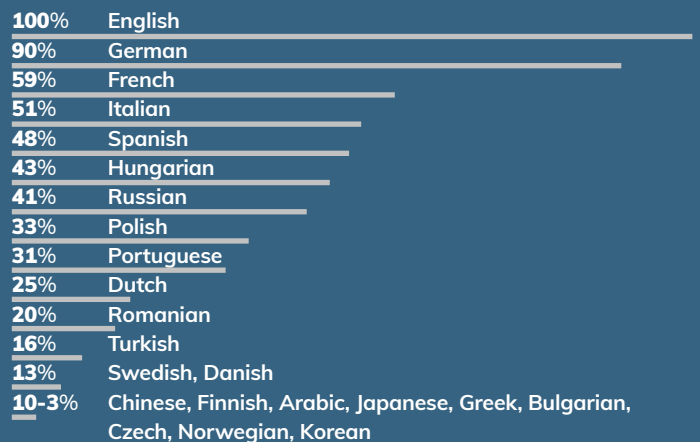
- Customer operations** (incl. Sales, Fulfillment, Tech Support, Customer Care)
- IT services** (incl. Software development)
- Finance**
- Engineering/Technical**
- Other** (incl. Legal, Procurement & Sustainability)
- Marketing + Human Resources** (incl. Supply Chain Management, Pricing, Merchandising, Product Lifecycle Management)



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 2024 Survey



BSCF MEMBERS' COUNTRIES OF ORIGIN



HOW BIG IS THE SHARED SERVICES INDUSTRY IN SLOVAKIA?



95%

of all employees in Slovakia

SOURCE
BSCF 2024 Survey



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

186,2
million €

EMPLOYEE INCOME TAX

151,6
million €

SOCIAL INSURANCE
(employees)

410,6
million €

SOCIAL INSURANCE
(companies)

31,0
million €

CORPORATE INCOME TAX

3,0% of the Slovak state budget income

1,138
billion €

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 2023.

2548
€

AVRG. MONTHLY SALARY

SOURCE

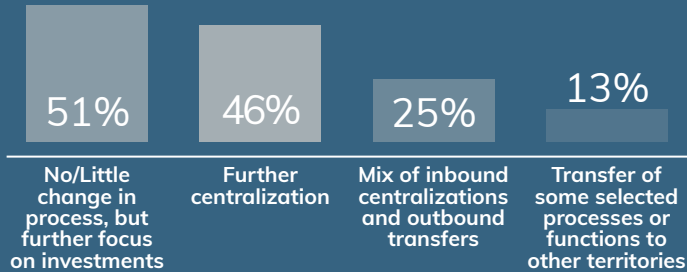
BSCF members calculations, 2024



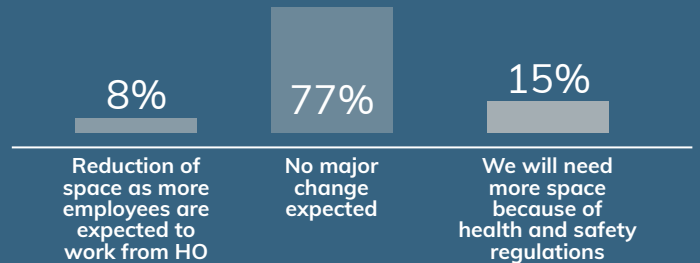
CHALLENGES 2024

SOURCE
BSCF 2024 Survey

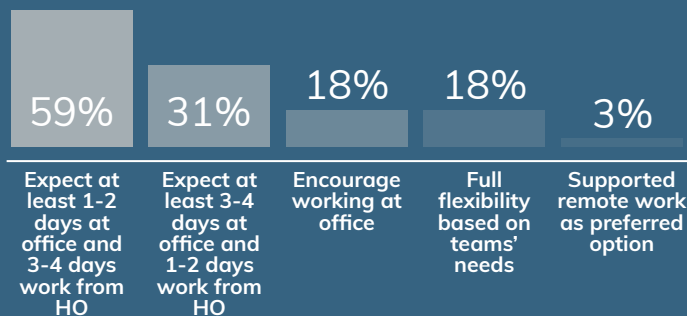
What are BSCF companies' development plans for next 2-3 years compared to the current position (cumulative)?



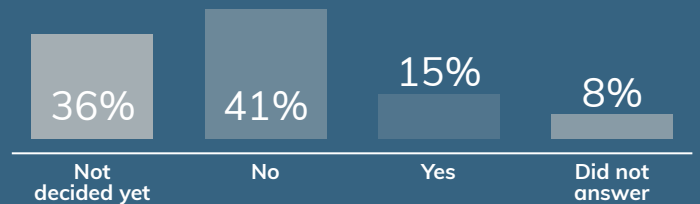
What are BSCF companies' office space plans for the next 2-3 years?



What is the current extent of your flexible weekly working time arrangement (cumulative)?



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

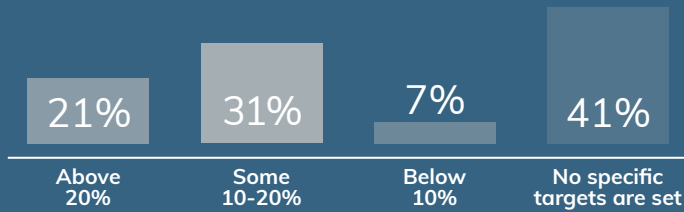




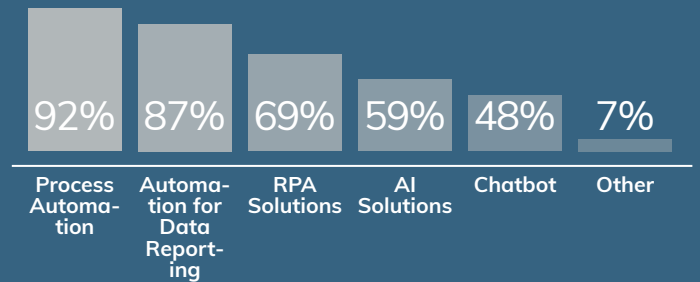
AUTOMATION

SOURCE
BSCF 2024 Survey

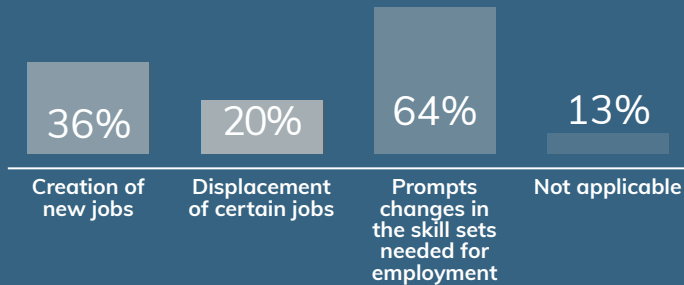
What is the planned extent of automation/robotization of relevant processes or functions in BSCF companies in next 2-3 years?



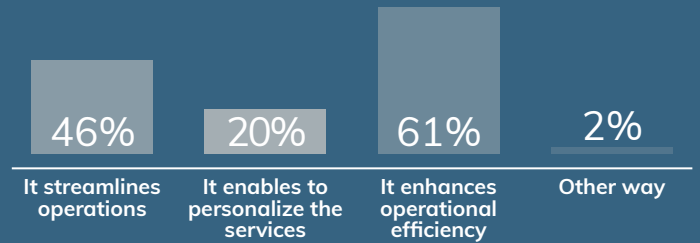
What type of automation/robotization are business centers implementing (cumulative)?



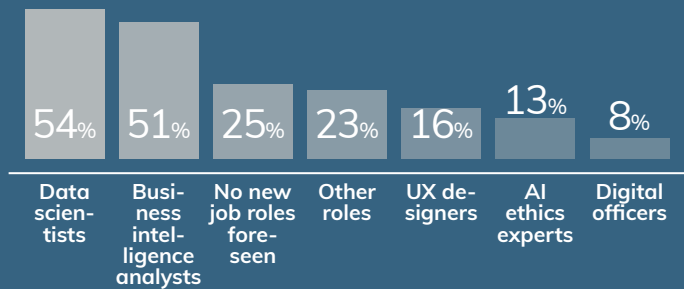
How does the implementation of AI/RPA affect the organizational structure of business centers (cumulative)?



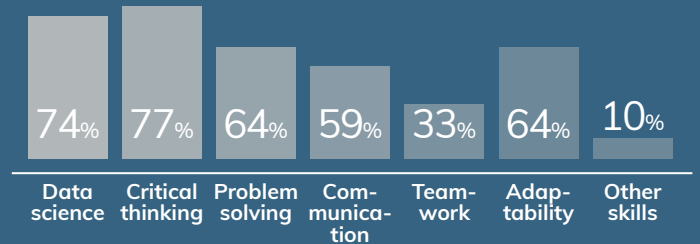
How does AI/RPA implementation influence business centers' operations (cumulative)?



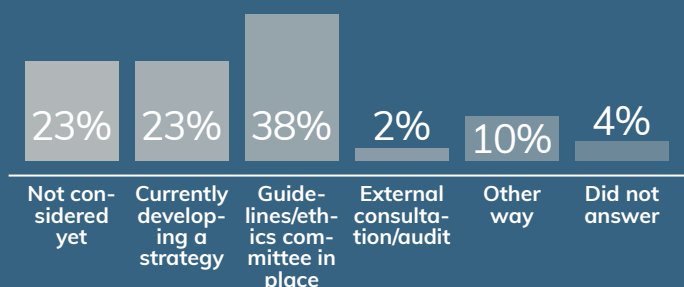
What kind of new job roles do business centers foresee in regard with the implementation of AI/RPA solutions (cumulative)?



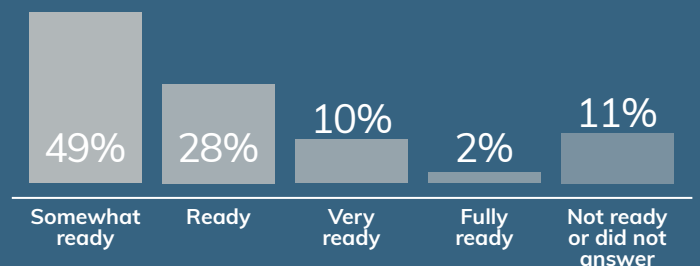
Which critical skills do business centers anticipate will be in high demand within next 2-3 years due to AI/RPA advancements (cumulative)?



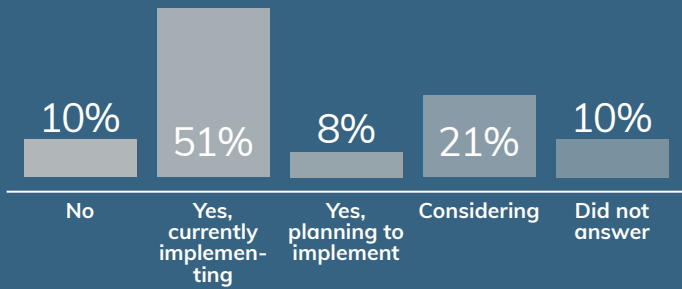
How do BSCF companies manage their centers' ethical considerations associated with AI/RPA implementation?



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



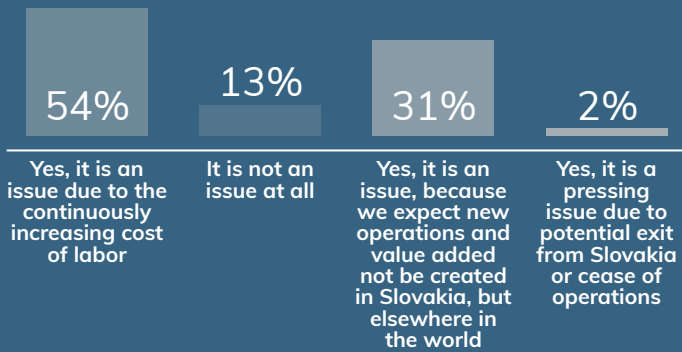
Are business centers investing in reskilling or upskilling programs to prepare their workforce for digital transformation?



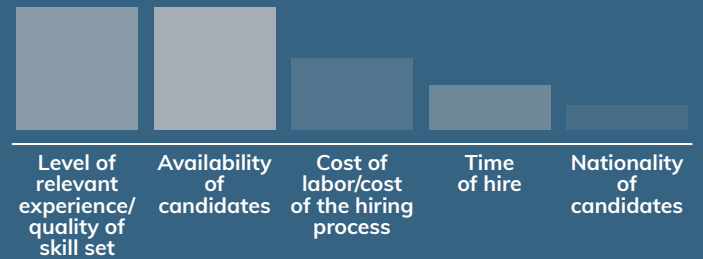
HUMAN RESOURCES

SOURCE
BSCF 2024 Survey

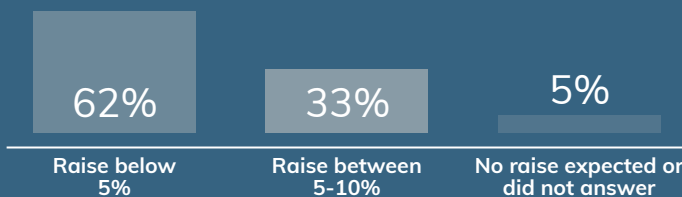
How critical is the lack of labor resources for BSCF companies' strategic development?



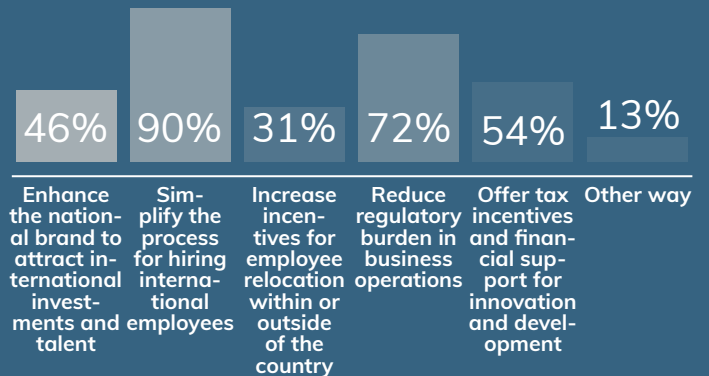
What is the main issue for BSCF companies with the hiring process?



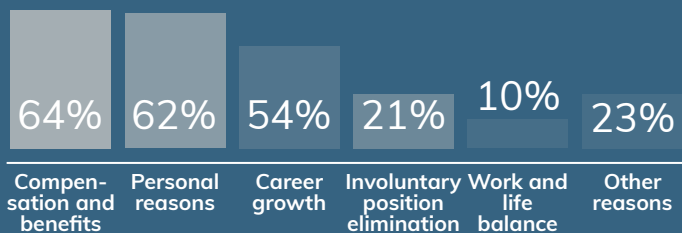
Do business centers expect to further raise salaries within next 12 months?



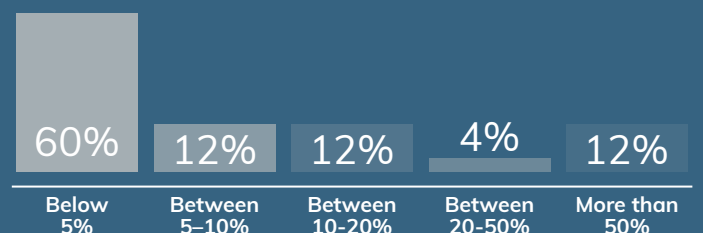
What measures can the government implement to support BSCF companies in thriving (cumulative)?



What have been the main reasons for labor fluctuations at BSCF companies over the last 12 months (cumulative)?



What % of BSCF companies' staff permanently works from a remote location?

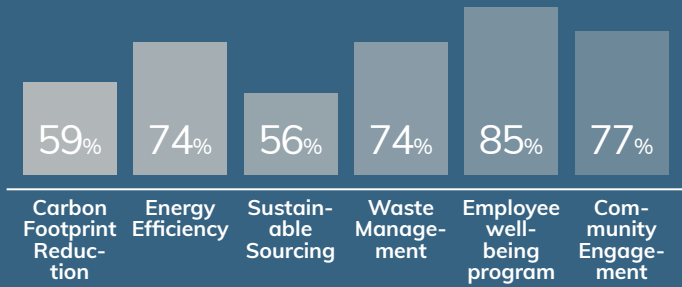


9,81%

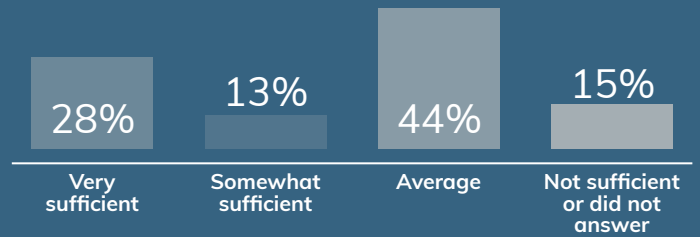
AVERAGE OVERALL ATTRITION RATE (LAST 12 MONTHS)



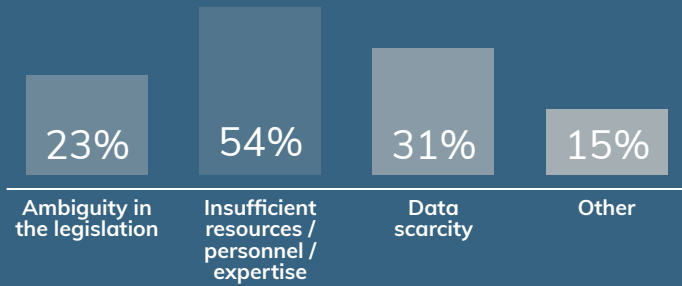
What initiatives have BSCF companies implemented to address sustainability concerns (cumulative)?



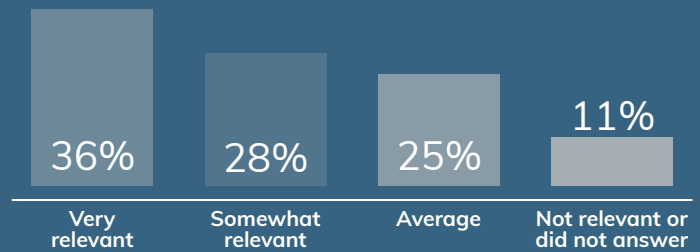
How would you rate your knowledge of the new sustainability reporting requirements in the European Union?



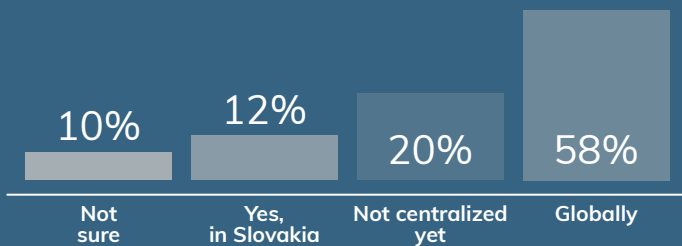
What challenges do business centers encounter in complying with the ESG reporting legislation (cumulative)?



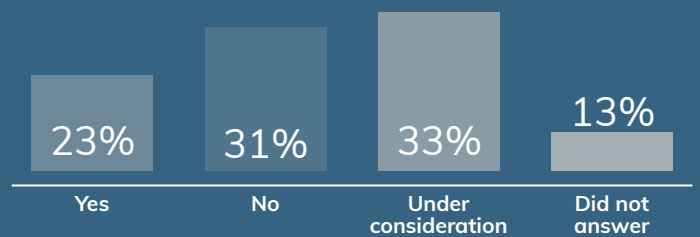
To what extent do BSCF companies think ESG reporting is relevant for their center?



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





Join BSC Forum

and help to
make the voice
of BSCs stronger!



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