

PwC GLOBAL SSC SURVEY 2021 – BUSINESS CENTERS’ STATE OF THE ART IN CEE REGION

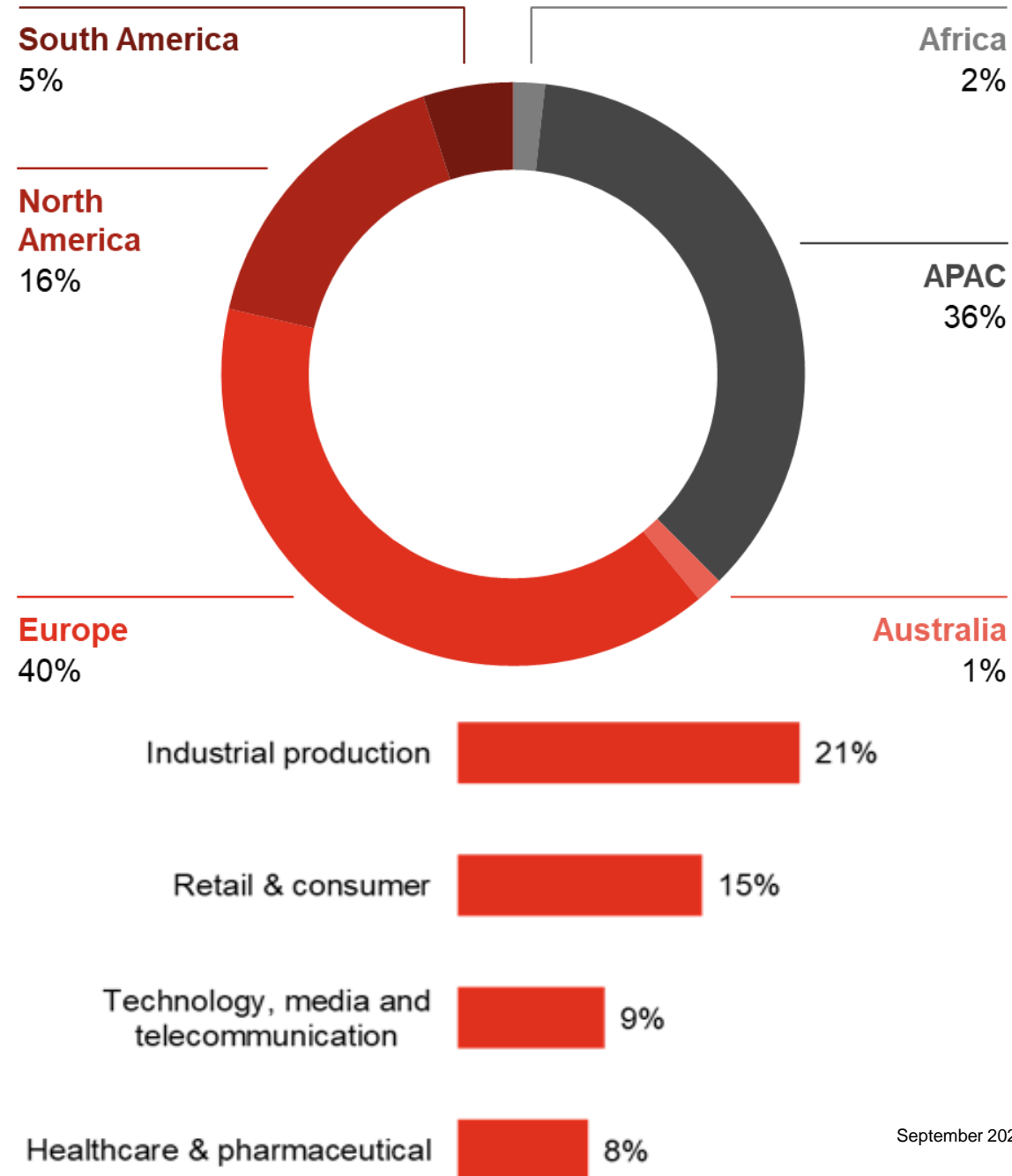
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- PwC survey covers responses from more than 300 SSCs throughout the world and from a wide variety of industries
- 40% of surveyed organisations with more than 15.000 employees
- It was conducted between Nov 2020 to Jan 2021, released in July 2021





FINDING #1

- COVID-19 has an accelerating rather than a decelerating effect on GBS

- GBS organisations performed quite well and were one of best prepared sectors in the COVID-19 pandemic period.
- GBS organisations with centralised and standardised processes, use of automation enabled them to be agile and adapt to the immediate needs of their business customers. They were also more digitally upskilled and better equipped for remote working, the pandemic has helped highlight the role of GBS as a true business partner.
- 40% of the companies surveyed do not intend to change their GBS strategy. A further 18% even said that they wanted to implement more ambitious GBS plans. This strongly indicates that COVID-19 is driving digitalisation and making employees less dependent on a single workplace than ever: companies set up work-from-home systems very quickly, and even transitions have been completed remotely.

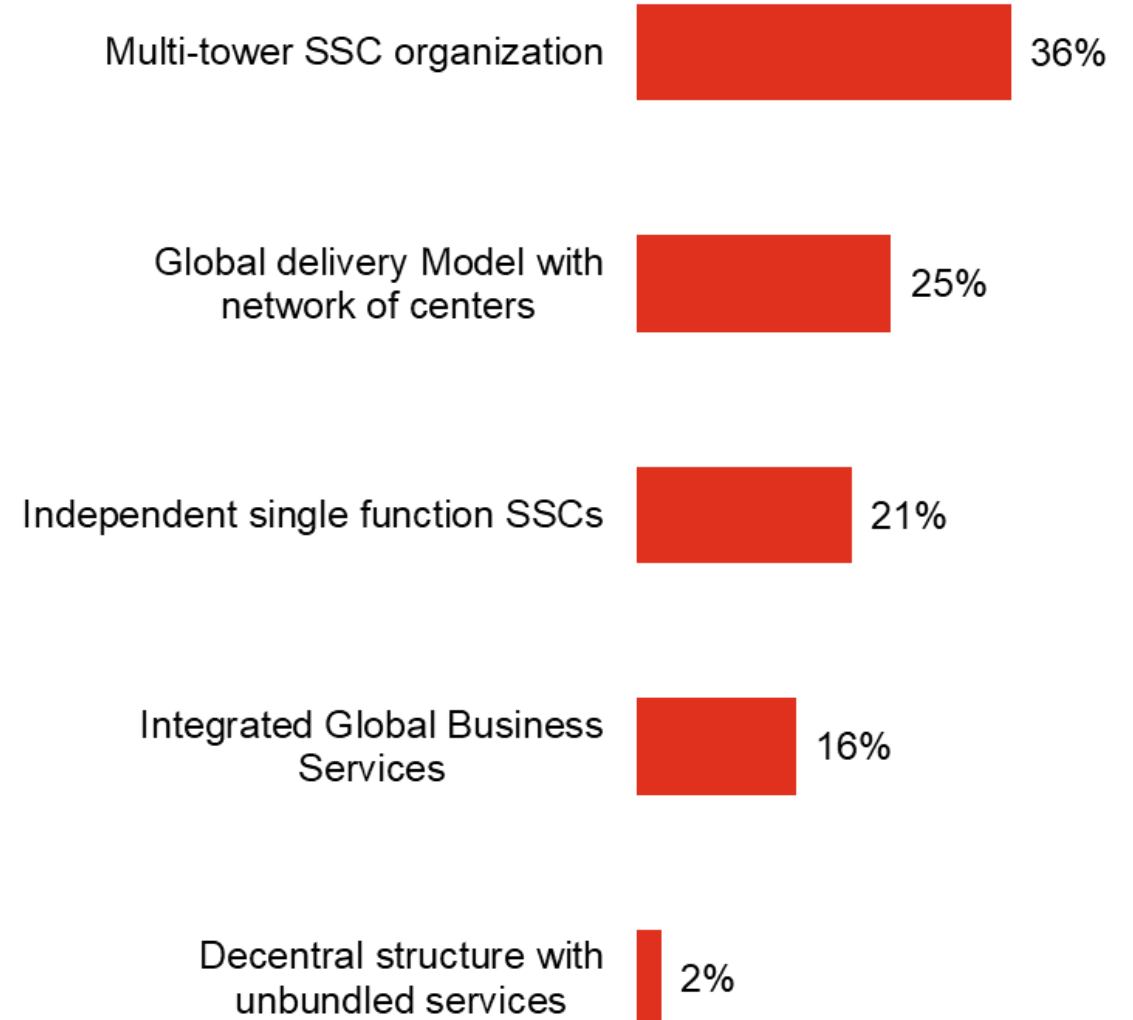


FINDING #2

GBS is becoming the rule rather than the exception:

- Multi tower SSC is the no. 1 organisation form
- This is leading to a decline in the role and influence of the accounting function in GBS.
- Integrated GBS as next step is already in place in every 7th organisation

How would you describe your current GBS organisation?

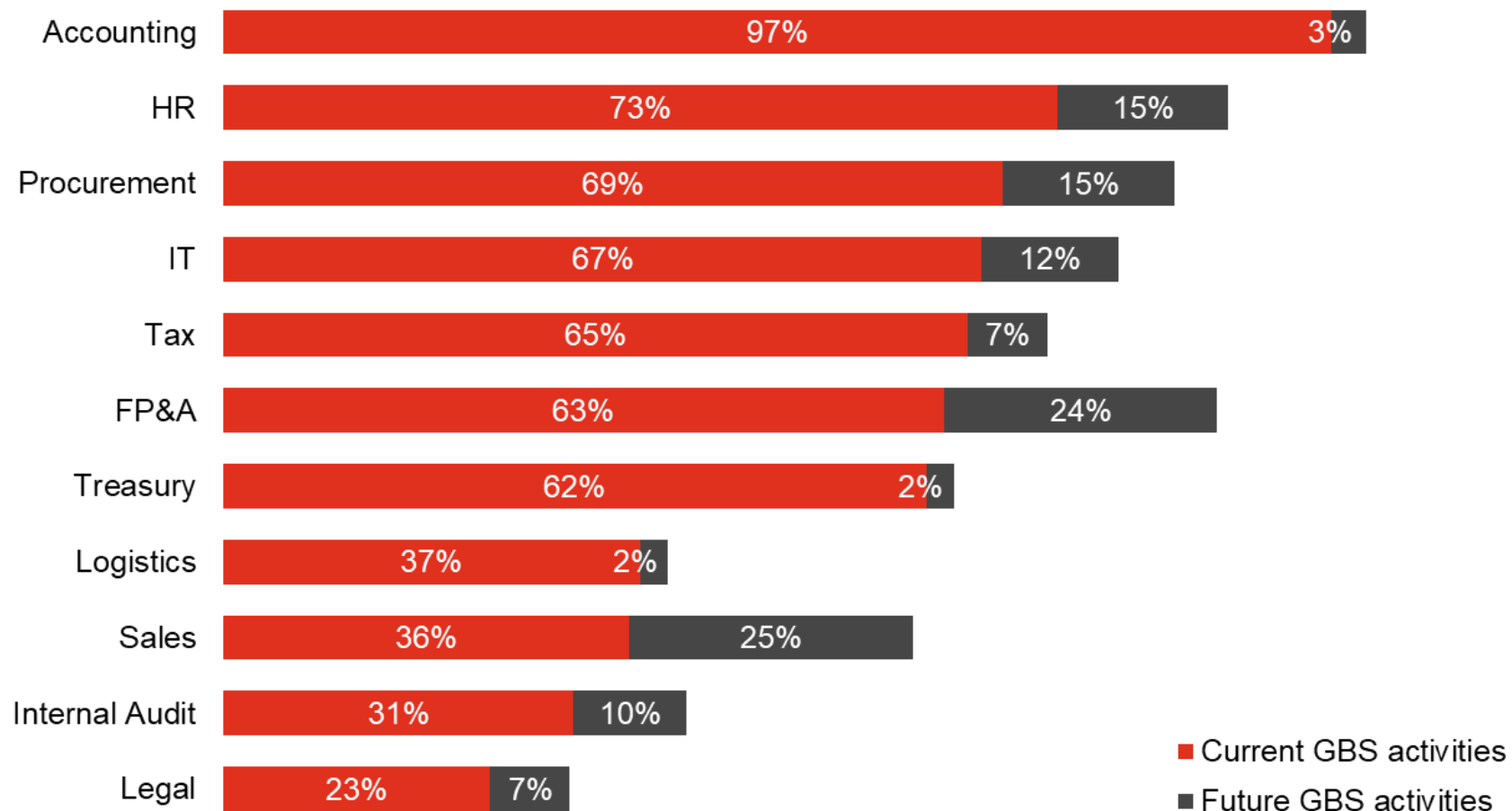




- Accounting stays no. 1 function in GBS
- HR, Procurement, IT, TAX, FP&A and Treasury functions are following
- For HR, Procurement, IT, FP&A and Sales strong growth is expected

Which services does GBS currently provide and which services are you planning to have GBS provide in the future?

(Multiple answers allowed)





FINDING #3

Focus of GBS organisations is slightly shifting from standardisation to digitalisation

- Digitalisation and automation beyond RPA are major topics for GBS
- Standardisation is named 2nd important topic
- Scope expansion the third top topic, esp.. when seen in combination with “integrating value adding services”

Which options best describe your GBS strategy for the next five years?

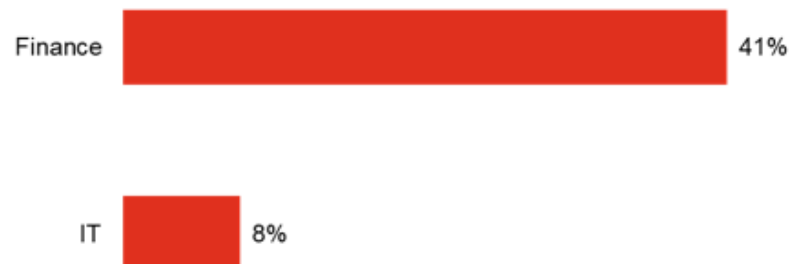
Multiple answers allowed





- Outsourcing seems to be no topic for the majority of participants – however is strongly increasing compared to surveys in recent years
- Finance clearly is the primary candidate for BPO

For which functions do you consider outsourcing services?



Do you consider outsourcing certain processes or functions?



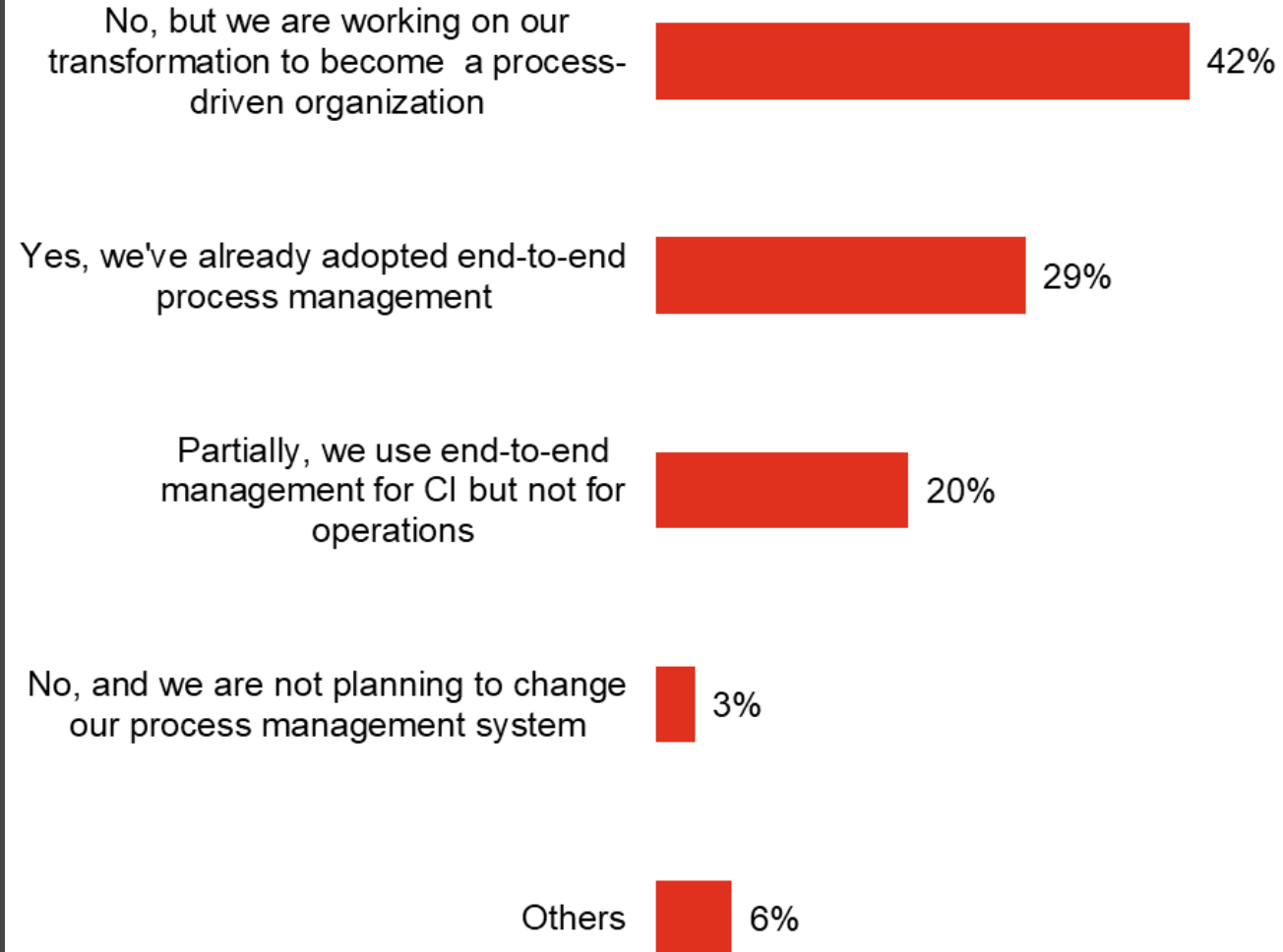


FINDING #4

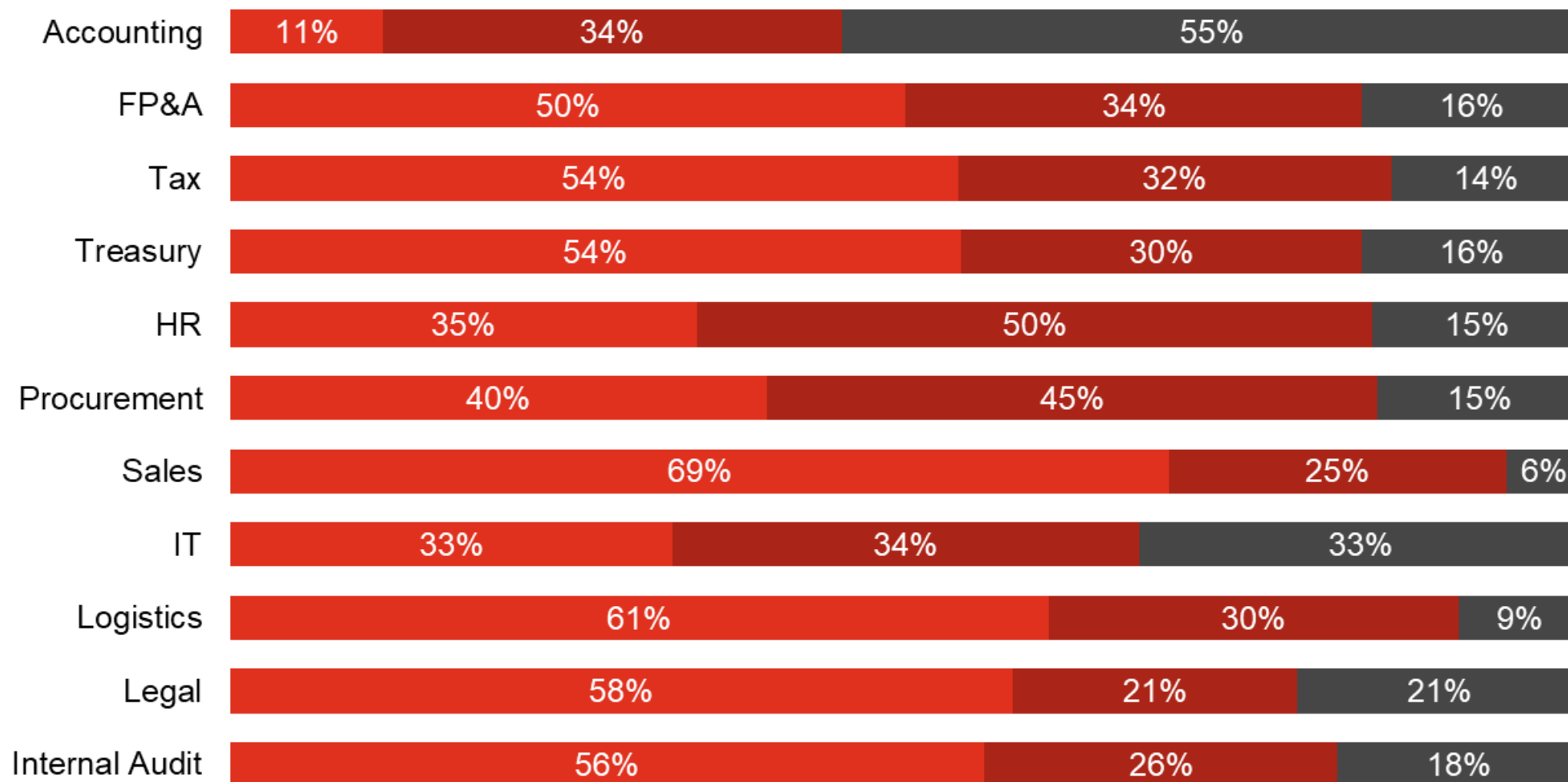
GBS organisations are moving to end-to-end process management - with the upcoming trend of making the entire GBS organisation truly process driven instead of functional driven

- Three quarters of participant either have it in place already or are in the implementation stage

Do you use end-to-end process management (i.e. process-driven organisation)?



What proportion of activities have you transferred to GBS?



Proportion of activities transferred to GBS

■ Low (1–29%) ■ Medium (30–69%) ■ High (70–100%)



FINDING #5

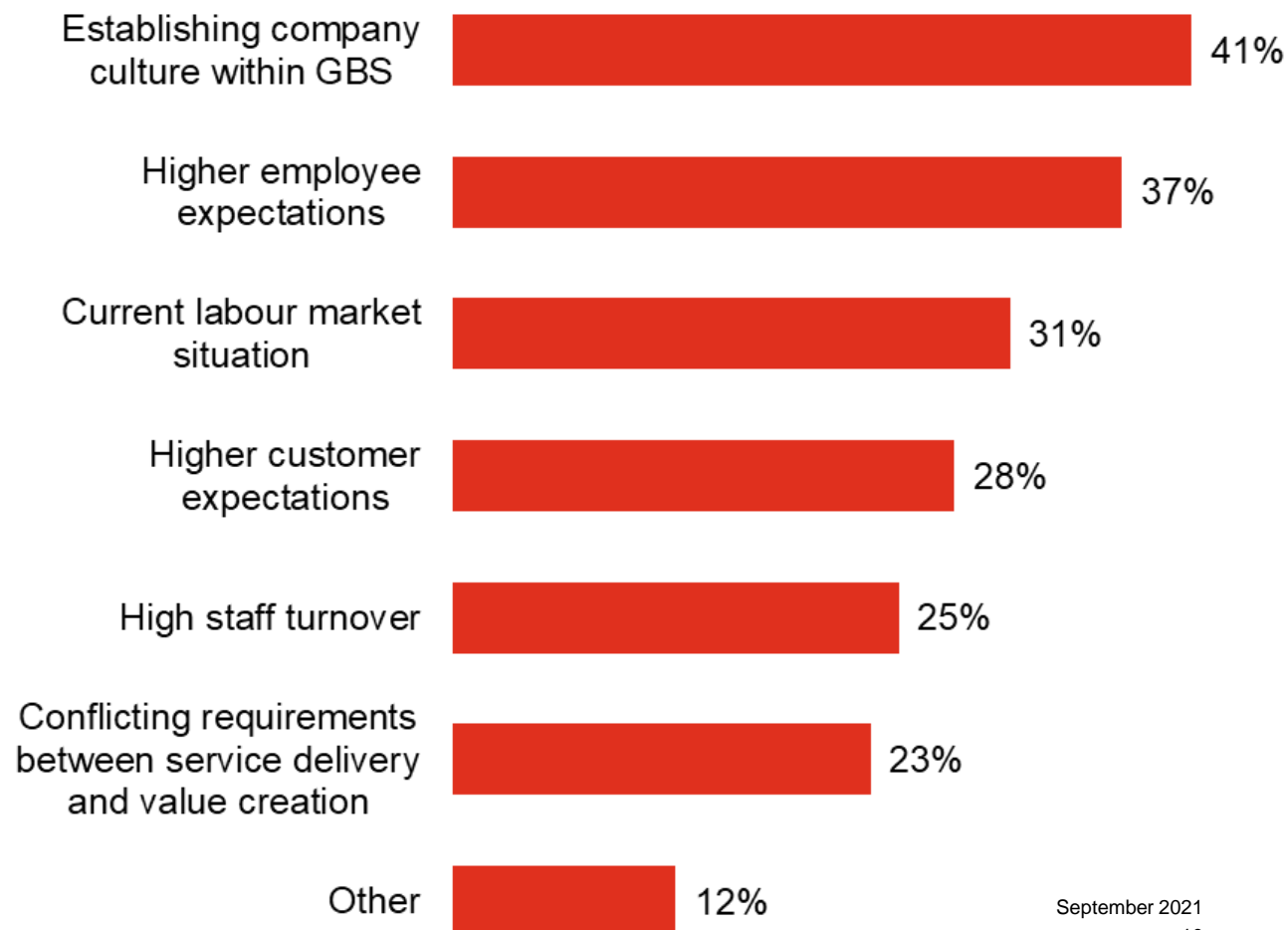
Key challenges in People and Culture area

- The no. 1 challenge for people & culture is establishing a GBS company culture, which is a key factor in our opinion
- ...followed by higher expectations of the employees -> upskilling and incentives

GBS organisations are investing in upskilling staff as well as in new hires – further fueling the war for talents

What are the biggest challenges for people and culture within your GBS organisation?

Multiple answers allowed





- Most incentives are non-financial
 - Communication and follow-ups
 - Personal development
 - Social activities
- Direct financial incentives not very common

Do you have incentives in place to reduce staff turnover?

Multiple answers allowed

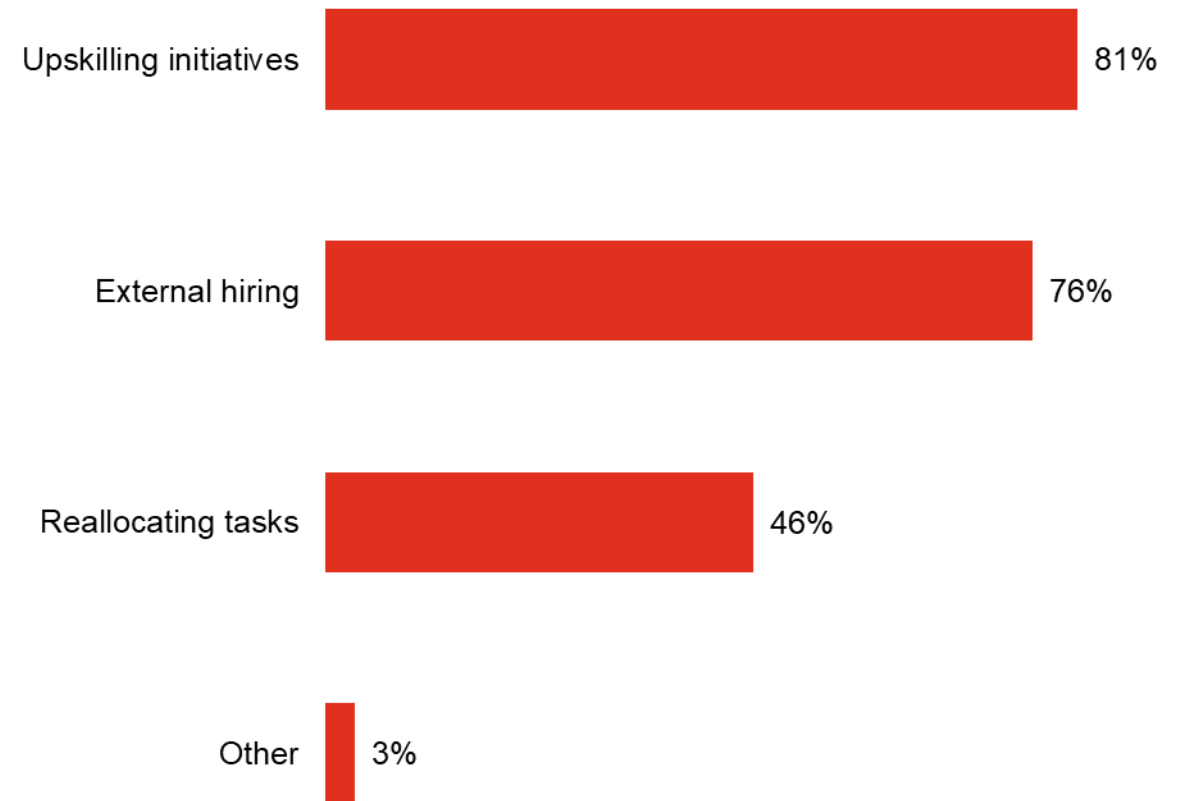




- Internal and external approaches to meet changing requirements have the same importance
- GBS are investing in upskilling of existing staff (AI, RPA, ...)
- External hiring - senior positions have most significant changes in job profiles AND are difficult to hire

How do you meet these new job requirements?

Multiple answers allowed



“ Thank you

