



#skills4future



Business Service Centers Conference

NEW VISION
NEW OPPORTUNITIES



UNDER THE AUSPICES OF



MINISTERSTVO
HOSPODÁRSTVA
SLOVENSKEJ REPUBLIKY

A woman with long dark hair, wearing a dark blue blazer over a dark top, is looking down at a tablet device she is holding. She is standing in front of a large window with a view of a city. The lighting is bright and natural, coming from the window.

BSC Forum MISSION

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

GOALS





#1


SHARE information
within the sector about
concerns, solutions and best
practices

#2

COMMUNICATE

with national and local authorities:
monitor and evaluate legislation,
labor market and corporate social
responsibility activities



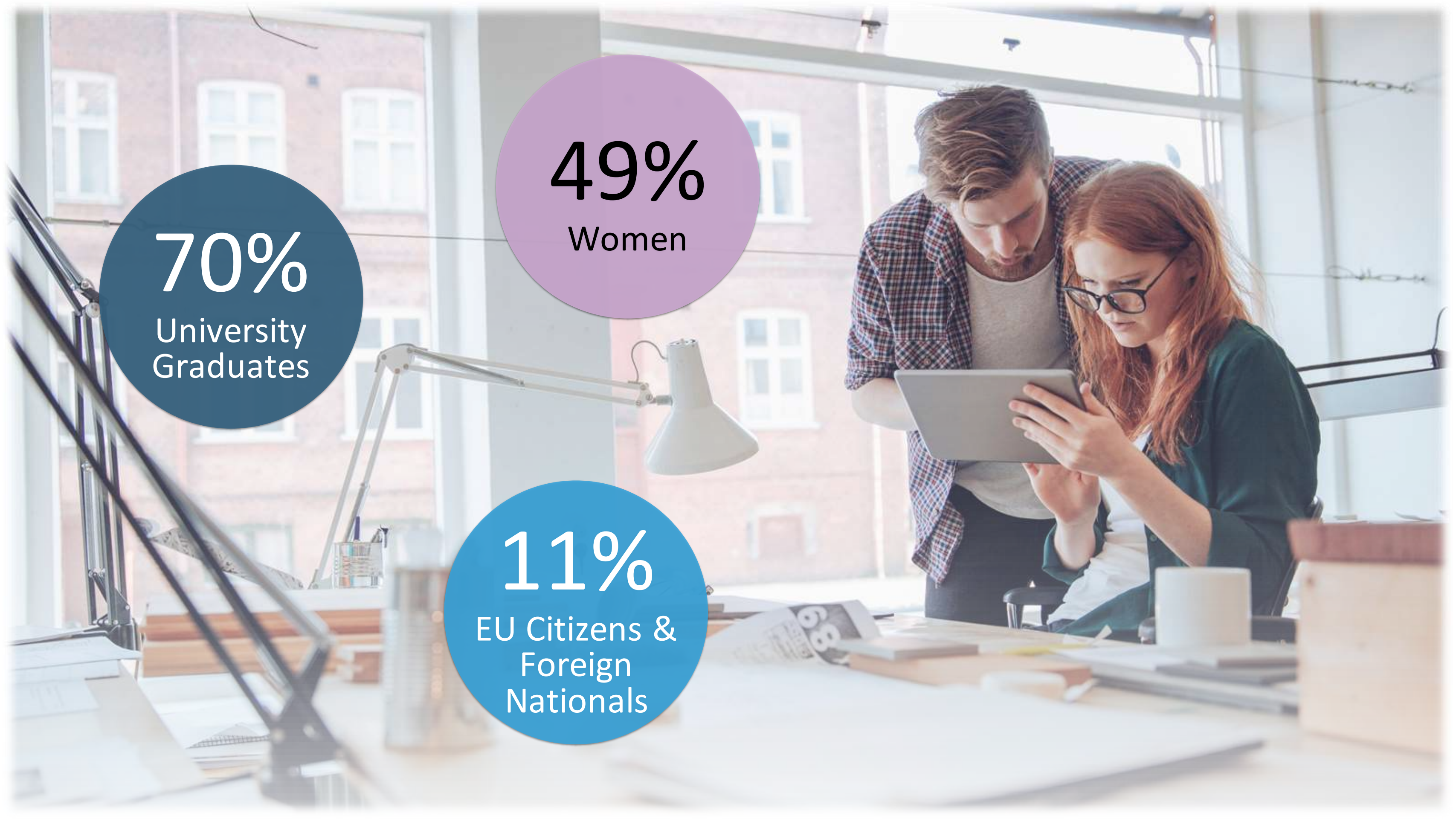


#3 INTERACT with universities
and secondary schools
to improve the employability
of graduates at BSCs

BSC sector in numbers

Data reflects status quo of 34 BSCs in 2021





70%
University
Graduates

49%
Women

11%
EU Citizens &
Foreign
Nationals

5,5%

Headcount
increase
(2020)

35 years

Average age

35.946

Total number of FTEs
in BSCF

9,2%

Managers





Where are centers located?

BUSINESS SERVICES PROVIDED

27,5% Customer Operations

24% Finance

28% IT Services

5% Marketing

3% Human Resources

5,5% Engineering & Technical

7% Legal & Procurement & Other

Languages used when providing business services from Slovakia



WEIGHTED AVERAGE MONTHLY SALARY

1.780 €
2018

1.830 €
2019

1.850 €
2020

1.900 €
2021

~ 2.5% ANNUAL GROWTH

CORPORATE
INCOME TAX

27

million euros

EMPLOYEE
INCOME TAX

162

million euros

SOCIAL SECURITY

485

million euros

SALARY EXPENSES

985

million euros

BSCs make a significant
financial contribution
to the Slovak Economy

Data for 2020

Covid-19 Experience





97% of members declare they continued services and operations with **minimum disruption** during the pandemic

71% of members did not experience any change of productivity/or efficiency, however **27% of members** indicate at least some increase of productivity during the pandemic





More than **3/4 of companies** indicate that minimum **70%** of their employees continues to work from home office.

Almost **half of companies** indicate that minimum **90%** of their staff is still operating **remotely**



80% of members **did not apply** for any support from the Government during pandemic

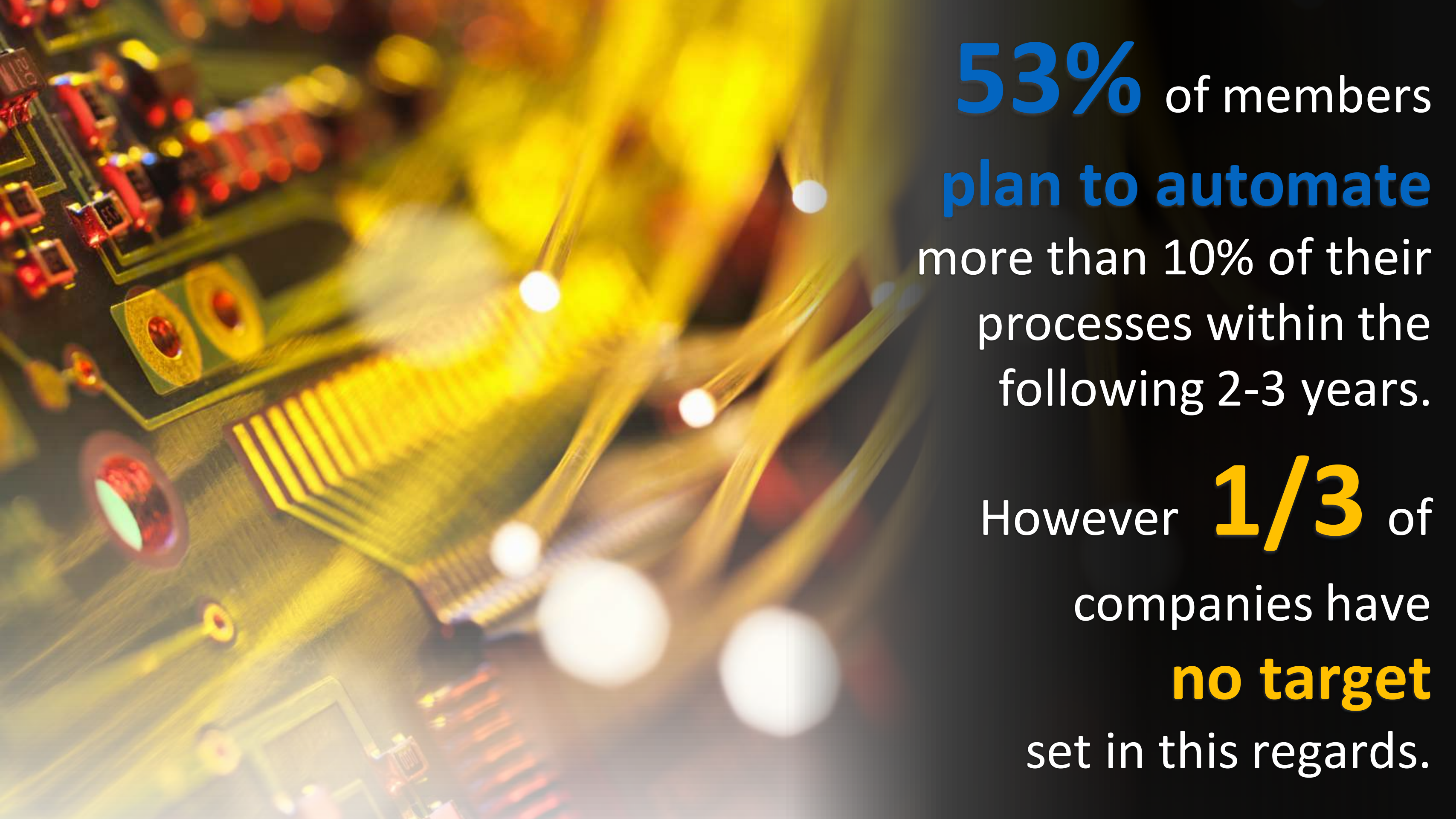
Challenges 2021





41% of members expect further centralization while approximately

same number of companies **expect no or little** change in process, but further focus on investments



53% of members
plan to automate
more than 10% of their
processes within the
following 2-3 years.

However **1/3** of
companies have
no target
set in this regards.

56% of members definitely consider **reduction of office space** as more employees are expected to work from remote location also in the near future





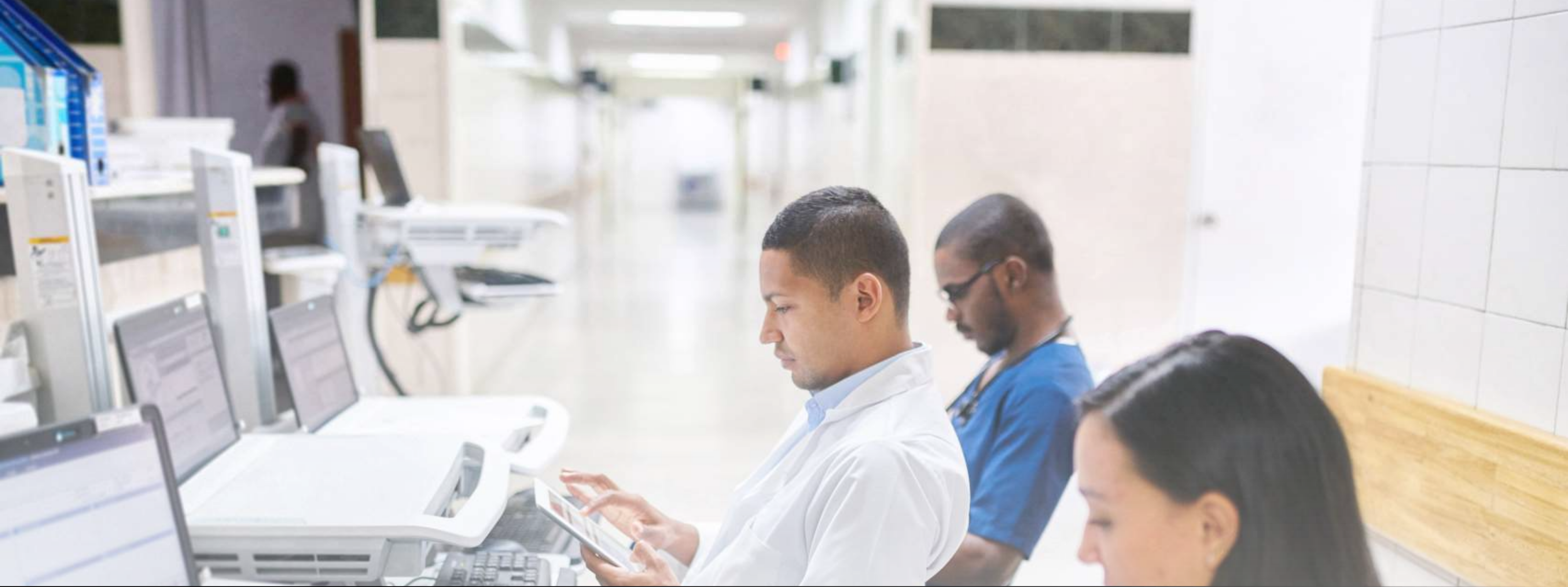
59% of members expect their employees to work at least 1-2 days at office and **3-4 days remotely,** while overall 1/3 of members provide their teams with full flexibility



77% of members
**expect their
headcount to
grow** within the next 12
months as “accompanying
effect” of further growth of
their center



Human Resources



88% of companies indicate the **lack of skilled resources is critical** to their company's strategic development due to the continuously increasing cost of labor or because they expect new operations and value added not be created in Slovakia

Almost
90% of
companies
expect
raise in
salaries by
max 10%
within next
12 months.



Average
**overall
attrition
rate**
over the last 12
months in SSC
industry in
Slovakia is
10,08%

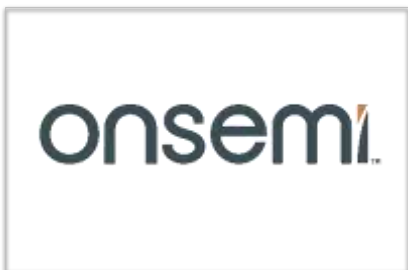




During 2020-2021 academic season, AmCham BSCF delivered education and training for more than **500 students and teachers** from across the country in 100% virtual format.

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PODNIKOVHOSPODÁRSKA
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**Business Service
Centers Conference**

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and help to make the voice of BSCs stronger!**

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