



BUSINESS SERVICES SECTOR IN THE CZECH REPUBLIC

2019



Report prepared by

Association of Business Service Leaders in the Czech Republic (ABSL)

in cooperation with:

ACCA, Deloitte, JLL, Randstad





Deloitte.





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Six years of mapping the Business Services success story in the Czech Republic

For the past six years ABSL has been carefully monitoring the unprecedented growth and development within the Czech business services. While the first ABSL Report focused on defining the business services and articulating a common identity, six years later it provides a deep analysis of this strong dynamic sector with a common voice and vision. The ABSL Report 2019 points out the current hot trends in the sector by providing crucial input for strategic decision-making that can have impact in bringing more investment and business into the Czech Republic.

The purpose of ABSL Report 2019 is to provide a comprehensive overview of the shared services and business services centres in the Czech Republic.

The source of data and information come from the Survey conducted by ABSL amongst member companies in the period from June until October 2018. The survey has been completed by 52 member companies employing almost 25 thousand people.

Some of the supporting data has been collected through an independent ABSL's own research across the sector to provide a more in-depth overview of the industry.

What do ABSL members say about the Report?



"Very insightful in order to draw a comparison against other SSCs / BSCs and determine the right path and strategy to set for the future."

Monster Worldwide s.r.o



"My bible (mainly the salaries per range)."

International SOS



"A benchmark in specific areas to validate competitiveness of our proposal."

"I have presented it even in the U.S. when

people asked about our main location,

Panalpina Business Services Prague, s.r.o.



"The information from the ABSL Report was extensively used by our Executive management and other Global Services leaders supporting our efforts to bring additional scope of services to our Prague organization."

JNJ Global Business Services s.r.o.



"Shared with Corp Leadership to keep them updated on trends in CZ and SSC sector, and with Benefits/ Compensation team to drive salary adjustments for the SSC."

Jarden BSG/Newell Brands

Main highlights and achievements of ABSL in 2018

The year 2018 was a very busy year for ABSL. Almost forty ABSL events throughout this year created an amazing opportunity for more than 1,300 participants from over 80 member and 14 supporting companies to share their expertise and know-how from the business services sector. Our networking events, webinars and clubs proved to be the most popular, attracting many specialists and leaders from HR, IT and Finance, who were eager to network and share their professional experience. On top of these above mentioned expert sessions, over 120 people signed up for the ABSL Cup to run the 5km relay team-race held for the first time, showing us that there is really positive interest in sports activities too.

40 events

networking & social events

6 chapter meetings

2

sports events

1,350 participants

9ABSL Clubs

10 webinars













L About ABSL



What does ABSL stand for?

Association of Business Service Leaders (ABSL) in the Czech Republic was founded in 2013. Our members are companies operating in the Business Services and Business Outsourcing Industry. ABSL Currently represents over 80 member companies, including 14 supporting members providing supportive services to the sector.



Our Vision

We believe that through cooperation the business services can grow, develop and innovate together. Becoming even stronger trusted partners and valued employers.

» Research of the Sector

Gather and maintain business intelligence market data, key statistics and sector insights to support existing business services and attract new investors to the Czech Republic.

» Strong Public Relations

Promote the ABSL and business services through cooperation with media, PR, one-voice response to current events, promotion of sector successes and organization of events.

» Cooperation with Authorities

Build relationship with relevant national and local authorities to open dialogue and cooperation to support industry interests.

» Business Services Community

Build a strong community of business services leaders sharing knowledge and cooperating on major projects designed to advance the sector.

» Cooperation with Universities

Create relationship with relevant universities to open dialogue and cooperation on adopting education to support business needs and attract new talents to the sector.

» Strategic Partnerships

Develop a network of strategic business partners helping to advance the goals of the association and its members.

82

member companies

14

supporting member companies

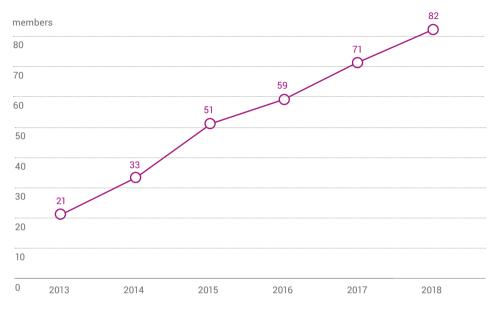


Figure 1.0
ABSL Czech Republic membership growth



The ABSL Board of Directors

Ota Kulhánek

Chairman of the Board of Directors, Director at Accenture Business Services

Jonathan Appleton

Managing Director, ABSL

Radka Bellissimo

Head of Jarden Business Services Group

Veronika Ben Mansoura

Senior Operations Manager, Medtronic

Simona Benešová

Transformation Director, BlueLink

Tomáš Frkal

Managing Director, Process Solutions

František Havel

GSC Operations Manager, Novartis

David Mansfeld

Managing Director, JNJ Global Business Services

Roman Pavloušek

Global Finance SSC Manager, Atlas Copco Services

Jan Skoták

Regional Center Head, Infosys

Jaromír Staroba

HR Director Europe, People Lead, Anheuser-Busch InBev





Atlas Copco































Bodycote

CGI































































































































| ABSL Diamond Awards 2018

ABSL Diamonds were created to award the projects and initiatives that have significant and tangible impact and contribute to the dynamic growth of the industry. As the largest organization representing the sector, ABSL wants to promote innovative, cutting-edge solutions and initiatives that continue to inspire the community to strengthen its excellence in customer experience, IT and talent development as well as the working environment. The ABSL Diamond Awards 2018 were awarded to projects in seven categories from the 35 submitted nominations. A record amount of projects that push the industry into new and exciting directions.

Winners of ABSL Diamonds 2018

SIEMENS

» Education

Siemens for the educational program developed internally to support employees in their career path.



» Business Innovation

Dimension Data successfully centralised IT support functions from 47 countries into their new Prague delivery centre during 2018.

ABInBev

» Customer Initiative

At Anheuser-Busch InBev the aim was to increase the transparency of additional costs incurred during overseas shipping and subsequent reduction of these costs.



» Value Creation

Zebra Technologies Company for its project focusing on the development and motivation of employees. They created several opportunities for developing the skills of their employees.



» Business Excelence

The KBC Group, Shared Service Center CZ Company for the development of an innovative technological method to reduce operating costs considerably.



» Employer Branding

Atlas Copco Company for putting into place a successful rebranding campaign, focusing on existing and potential employees, partners and local communities in relation to changing its name from Edwards Services to Atlas Copco Services.



» Innovative Workplace

Johnson & Johnson for moving offices from three various locations in Prague into a new modern space, the appearance of which the employees themselves were able to influence.



ABSL FUSION Leadership Development Programme

THE FIRST BUSINESS SERVICES LEADERSHIP DEVELOPMENT PROGRAMME.

ABSL Fusion launched in January 2019 exclusively for ABSL Members, leveraging ABSL network of visionary leaders across the sector to help develop future leadership talent.





Czech Business Services from Vision to Reality



In our first 5 years, ABSL has been an active contributor to the Czech business services sector doubling in size and complexity from 50k employees in 2014 to over 100k professionals in 2019. This spectacular growth has been combined with a massive increase in the power and technical capability of our Czech centres – which now rank amongst the most mature in the world. Our services sector has spread across the country and new centres have brought major new investment and talent to Czech cities across Bohemia and Moravia – a true Czech success story.

In our Vision 2025, our ABSL members set out the road map for the continued success of our amazing sector – this Vision has become the driving strategy for our ABSL activities and ensured that we stay ahead of the competition in our global sector. One year later – it is a good time to revisit the Vision and our 2019 report shows the incredible progress that our Czech centres have made in the last year and the potential for the future success of our Czech business talents. Our four Vision Cornerstones below show the road ahead and mark out our achievements in 2018.



The Scope of Czech Business Services – Wider, Faster, Smarter. (pages 25-30)

Czech service centres now deliver the full spectrum of business functions from complex, multifunctional hubs. The IT services sector has always been a major part of Czech business and in 2019 it moved into first place in our Czech sector – approaching 45% of all Czech centres. Customer Services continues to expand across the sector and Czech centres are now leading the world with new Robotics as a Service teams and capabilities.

Czech goes Global – as IT/Customer service centres serve across the world, so our sector moves to a truly 24/7 Full Timezone Capability – with over 30 % of centres delivering live services to customers in the Asias/Americas and beyond.

The Czech Republic is now established as a Knowledge Based Hub with mature centres providing the majority of services in the advanced or partner stage. Knowledge driven processes are King and more than half of ALL Czech centres deliver a Majority of Knowledge Driven processes across their networks.



Czech Technology, Automation, Digitalisation and Robotics – It's in the DNA. (pages 37-40)

The land of Čapek is in the driving seat in Robotics with over 4,000 active Robot employees serving customers across our sector. Robots now represent 4% of our Czech services sector and specialist Robot capability teams of over 1,000 expert engineers have been established to transform our sector's future.

The vast majority of Czech centres – over 80% are driving Automation and AI initiatives for their Global companies from Czech cities – and a third of the sector is developing AI capabilities as the next step for service disruption.

The growth of the Czech services sector is now being achieved at a significant level through Technology – not just by adding headcount. Robot technology usage has tripled in the last year and ensures that Czech centres are able to deliver innovative, higher value services with Robot and Digital technologies taking on the lower value positions. Czech centres are delivering ever higher levels of service with a reduction in headcount growth – and significant capability now delivered through technologies.



Czech Business Services Talent – Our Competitive Advantage.

(sections 2 and 3)

Education, training and development is key to the success of Czech Business Services. The sector now invests more than 4 times the national average in educating our business services professionals. Many leading Czech centres have established award winning internal Academies to ensure constant development opportunities for their talents. The level of cooperation with Czech universities and schools is at a record level as business centres invest heavily in the continued pipeline of local talents for the future.

Expats are our International Expertise and Czech centres employ over 35,000 international professionals – one of the highest numbers in Europe and a significant contributor to our sector capability. These international talents build their careers in the country and have ensured that Czech cities are rated as some of the best in the world – and attract even further talent to boost our sector.



Czech Republic – A Bohemia for Business Services. (pages 18-20)

Czech business services centres continue to rate the country as great place to build their business – with high ratings over 80% for excellent infrastructure and business environment. Cooperation and support from the Czech government and authorities improves year on year and reached its highest level for our members in 2018. This was supported by ABSL with significant progress in our involvement with Ministries, Media, Ambassadors and key partners such as Czechlnvest. In 2018, ABSL formed a number of key alliances and working groups to promote our agenda for business services and recommend improvements in legislation and support for our key sector.

The growth and success of Czech services in multiple Czech cities across the country is shown clearly in our 2019 map of business services. As outlined in our Vison 2025, this regional success story is crucial to the future success of our sector and ensures that the multiple benefits of business service centres are felt across the Czech lands, providing Czech and International investors with multiple locations and flexibility to meet their growing demands.



A Thank you

2019 is a record year for our sector as we pass 100,000 employees and approach 300 business centres across the Czech lands. We would like to thank all of our ABSL members and Czech business centres for their incredible achievements in the last 5 years. We present this 2019 ABSL Report as testament to these achievements and trust that you will find the contents both insightful and useful for your business decisions in this great country.

Jonathan Appleton, Managing Director ABSL



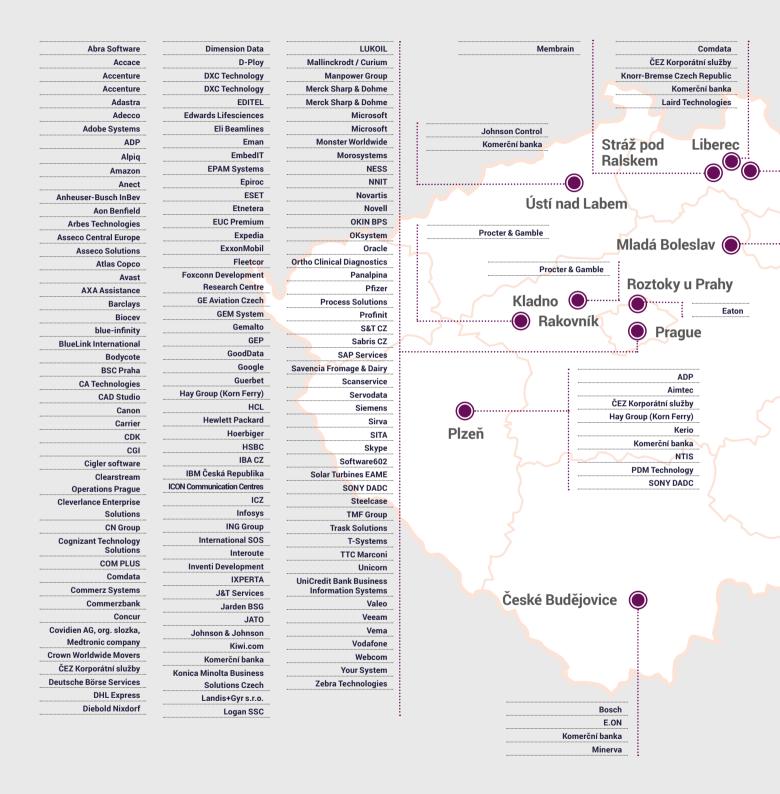
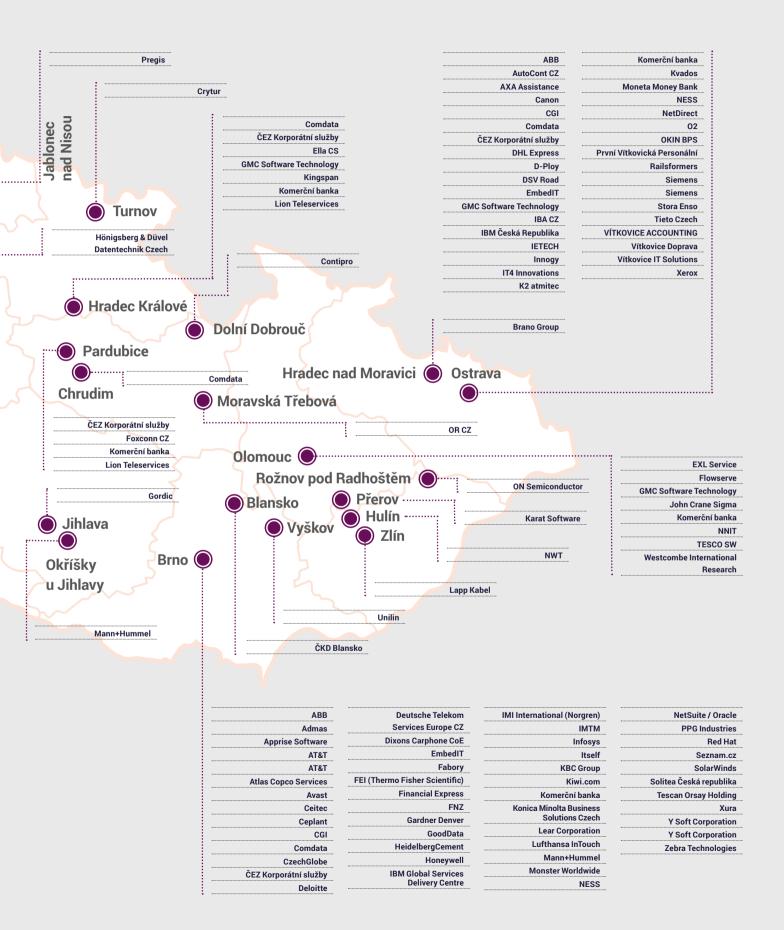


Figure 2.0
Overview of business services centres in the Czech Republic
Source: ABSL own study



BASIC FACTS ON BUSINESS SERVICES SECTOR IN THE CZECH REPUBLIC



100,000

total number of jobs



391

average number of employees in a Czech Business Service centre



290

total number of business services centres



3

locations with business services centres employing more than 5000 people



12%

employment growth in the year 2018



48%

is the average number of female employees at business services centres



29

number of Fortune 500 / Standard & Poor's index investors with business service centres in the Czech Republic



35%

average share of employed foreigners



57

number of business services centres with at least 500 employees



81%

of foreigners in the business services centres come from other EU countries

Source: ABSL own study

Distribution of business services centres in the Czech Republic

In 2018 the proportion of employees within the business services centres located in Prague rose from 45% to 50%. However, Brno and Ostrava together continue to host more than a third of the sector. Other emerging regions include Olomouc, Plzeň, Hradec Králové, Liberec, České Budějovice or Pardubice. Together with other smaller cities these locations host 17% of the sector in the Czech Republic.

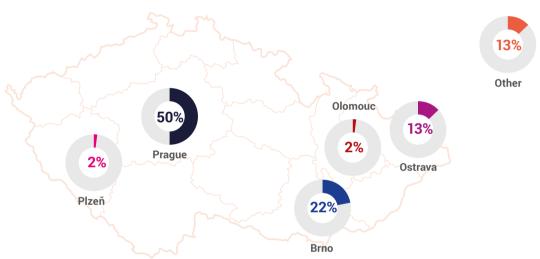


Figure 2.1
Proportion of employees in business service centres according to location
Prague, Brno, Ostrava - Locations with more than 10,000 employees in business services
Source: ABSL own study

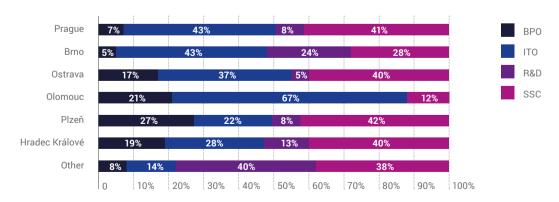


Figure 2.2
Proportion of employees in business service centres in selected cities according to centre type
Source: ABSL own study

The most significant shift, when comparing to the previous year, can be observed in the percentage of the sector's workforce within ITO. Almost in all the cities one can observe a reduction in the proportion of employees within SSC's in favour of increasing employment within ITO.

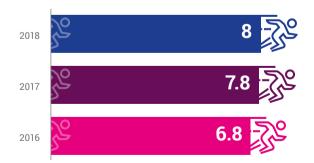
In 2017 in Prague the proportion of employment in SSC's reached 53%, but it dropped to only 41% in 2018. Furthermore, in 2017 the ITO employment amounted to 32% of the business services workforce in Prague, but a year later this number rose to 43%.

"In business services centres located in Prague, Brno and Ostrava more people are employed in ITO than in SSC's."

Apart from Ostrava, all the locations also report an increase in the percentage of employees within R&D. Therefore the growth of the sector can largely be attributed to the growth within ITO and R&D.

| Competition on the local market

As part of the ABSL Survey the centres evaluate the level of competition between themselves on the local market. They are asked to apply a scale of 1 to 10, 10 being the highest competition. Although with the increasing demand for talents the competition is increasing, the rate of increase is fairly slow. Currently the centres score the level of competition at 8 points out of 10 compared to 7.8 in the previous year.



8.0

average rating of competition among business services centres in local markets in 2018

Figure 2.3

Average rating of competition between business services centres in local markets

Source: ABSL Survey 2016-2018

Location structure and assessment

The surveyed centres were further asked to evaluate their location based on a number of factors. The centres rated each factor on a scale from 1 to 10, 10 representing the highest satisfaction.

This showed that the centres are generally satisfied with the public transport and image of the city, even though the ratings slightly fluctuate since 2016. On the contrary, the availability of talent pool and the cooperation with local authorities are rated generally lower. The cooperation with local authorities, however, has slowly been improving over the last three years. The availability of talent pool fluctuates, but it is currently at the same level as in year 2016.

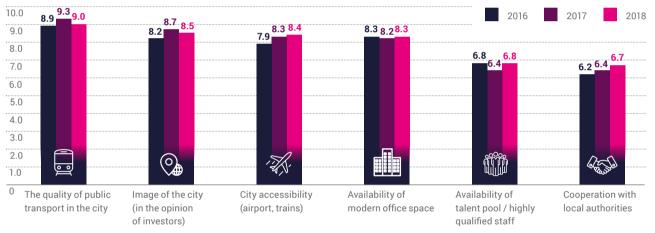


Figure 2.4
Assessment of local markets as place to do business
Source: ABSL Survey 2018



6.8

average rating of availability of talent pool / highly qualified staff in 2018, which is the same level as in 2016. When comparing the three largest Czech hubs, Prague, Brno and Ostrava, Prague scores generally the best among the centres. An exception is cooperation with authorities, which is perceived by Ostrava centres as very good compared to Brno and Prague.

In the previous year the centres evaluated Brno favourably and Ostrava remained on the third place in all categories. In 2018, however, the centres significantly improved their rating of Ostrava allowing it to claim the second place in many categories.

Factor	1	2	3
Availability of talent pool / highly qualified staff	Prague	Brno	Ostrava
City accessibility (airport, trains)	Prague	Ostrava	Brno
The quality of public transport in the city	Prague	Ostrava	Brno
Availability of modern office space	Prague	Ostrava	Brno
Image of the city (in the opinion of investors)	Prague	Ostrava	Brno
Cooperation with local authorities	Ostrava	Brno	Prague
Perception of competition on the local market	Prague	Brno	Ostrava

Figure 2.5
Ranking of business services locations
Source: ABSL Survey 2018



| Employment growth in Business Services

12%

employment growth in business services centres in 2018



expected employment growth in business services centres in 2019

Over the last 5 years, in which the ABSL has been mapping the Czech business services, the sector experienced a massive growth. The Czech centres doubled the number of their employees, which is a staggering expansion and success story of the Czech business services. The growth rate peaked in 2015 and in 2017 reaching 18% and 19%. The business services sector is now one of the largest employers in the Czech economy with 100,000 employees.

In 2018 the employment within Czech business services continued to grow at a rate of 12%, which illustrates that as the sector matures the growth slowly shifts from increasing headcount to developing new technologies and higher-value services.

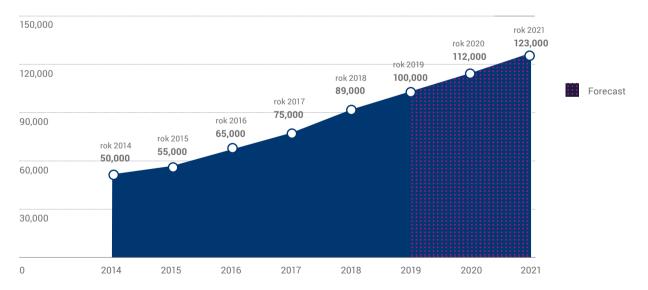


Figure 2.6
Employment growth in business service centres
Source: ABSL own study

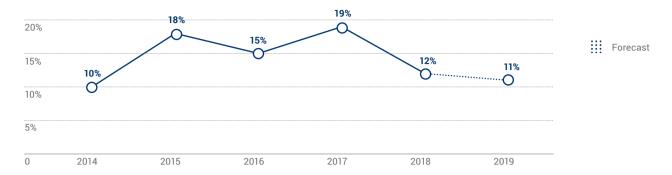


Figure 2.7
Employment growth in business service centres
Source: ABSL Survey 2013-2018

Compared to the previous year a decrease in the growth rate is reported by centres of all sizes. In the year 2018 75% of the surveyed centres grew, which is 8% less than in year 2017. 75% of the centres expect to grow in 2018 by 11% on average. A year earlier 85% of the centres expected to grow by 11%. Therefore the sector is maturing and gravitating towards a long-term sustainable growth rate.

Similarly to the previous year, the highest growth rates are reported by mid-sized centres (200-500 employees). 87% of the mid-sized centres grew by an average of 13%.

The growth of the small sized centres (less than 200 employees) continues to slow down. 63% of the centres grew in the year 2018 by an average 12%. However, for the year 2019 the small centres expect to grow by 8%, which is 3% lower than the expected sector growth rate.

	% of centres that gre	ew or expect growth	Average % growth		
Size	2018	2019	2018	2019	
<200	63%	67%	12%	8%	
200-500	87%	67%	13%	8%	
>500	79%	86%	10%	13%	
Total	75%	75%	12%	11%	

Figure 2.8
Growth of employee numbers in business services in 2017 and forecast for 2018 according to centre size
Source: ABSL Survey 2018

86%

of large business services centres expect to grow in 2019 by 13%

8%

medium and small centres growth prediction for 2019

Analyzing the growth rate by business services centre type offers valuable insights. In the year 2017 the highest levels of growth were reported by hybrid centres, combining services for both internal and external clients. These centres grew their employee base by 26%. However, in 2018 these centres predicted the lowest increase in employee numbers - only 7%. In reality, only 43% of the hybrid centres grew in 2018 and on average by only 3%. Furthermore, the hybrid centres predict to grow only by 5% in the year 2019.

In the year 2018 the commercial providers and captive service centres also grew slower than originally predicted. However, both types of centres expect significant growth in the year 2019. In 2019 the commercial providers predict to grow by 22%, which is twice the rate expected by the whole sector.

	% of centres tha	t predict growth	Average % growth	
Туре	2018	2019	2018	2019
Commercial provider / outsourcing Service Center	75%	88%	7%	22%
Hybrid model (both internal and external clients)	43%	57%	3%	5%
Internal unit / captive Service Center	81%	75%	13%	19%
Total	75%	75%	12%	11%

Figure 2.9
Growth of employee numbers in business services in 2018 and forecast for 2019 according to centre size
Source: ABSL Survey 2018

22%

Expected employee growth in 2019 within commercial providers, outsourcing service centres

CENTRES' PLANS FOR THE NEXT 2 YEARS



82%

B=

17%

centres planning expansion of activities in the next 2 years

centres planning to stabilize and optimize the current activities



4%

centres planning to reduce their activities

As seen from the table above, the sector continues to grow and mature. The vast majority (72%) of centres continue to focus on expansion especially by introducing new activities and bringing in new customers. However, this percentage has significantly decreased compared to the previous year, illustrating the maturing of the sector and slower headcount growth.

This is further confirmed by an increasing percentage of the centres planning to focus on stabilizing their current activities. While in 2017 only 12% of centres planned to focus on stabilization, this number grew to 17% in 2018. Furthermore, as the sector matures, 4% of centres even plan to reduce their activities. In the previous year none of the surveyed companies reported any plans in reduction of activities.



6%

of centres have other plans such as expansion of knowledge based services provided while reducing the transactional tasks or bringing new customers, locations and activities

Expansion of activities – new activities, new customers

Expansion of activities – same activities, new customers

Expansion of activities – new activities, same customers

Stabilization and optimization of current activities

Reduction of activities

No plans to change current activities

Other plans

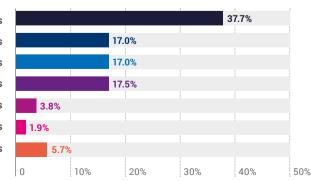


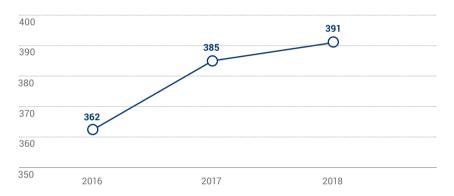
Figure 2.10

Business service centres' plan to change their activities in the next 2 years

Source: ABSL Survey 2018

| Employment structure of business services centres by size

The typical business services centre in the Czech Republic on average employs 391 employees which illustrates a slight increase compared to the previous year, in which the average centre size was 385 employees. 11% of the centres exceed 1,000 employees with the largest centres reaching 1 500 employees. Compared to the previous year, the biggest increase was in the number of mid-sized centres (200-500 employees). While in 2017 only 20% of the centres reported this size, in 2018 this number grew to 28%.



Average number of employees in the business services in the Czech Republic

Source: ABSL Survey 2016 - 2018

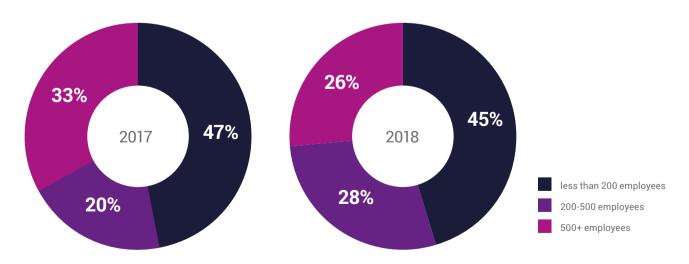


Figure 2.11 Number of business services centres by employees count Source: ABSL Survey 2018

| Services delivered by business services centres

The distribution of the employment within the business services marks a significant milestone. For the first time the largest percentage of the employment is not within SSC's, as was the case in previous years. In 2017 48% of the employees worked within SSCs compared to only 37% in 2018. This year the largest share of the workforce resides within ITO, 40%, while in 2017 ITO hosted only 34% of the workforce.

The percentage of the employees within R&D also rose, from 12% in 2017 to 14% in 2018. There was also 1% increase in the share of employees within BPO

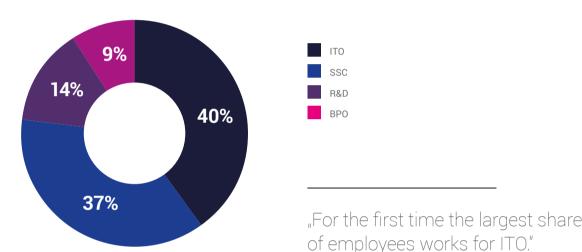


Figure 2.12
Structure of employment in business services centres according to the centre type

Source: ABSL own study

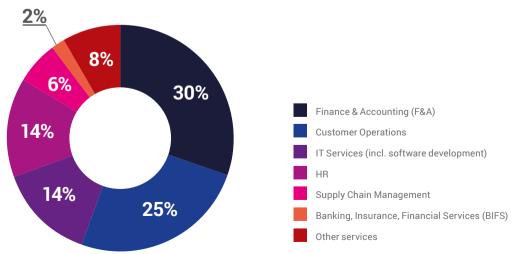


Figure 2.13
The structure of employment in business service centres by categories of supported business processes
Source: ABSL Survey 2018

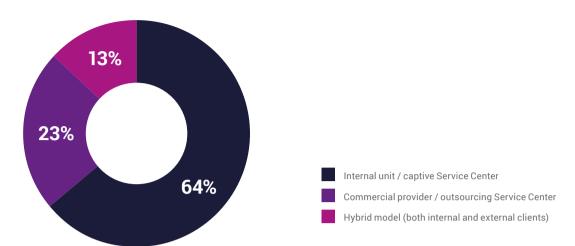


Figure 2.14
Employment structure of business service centres by function category
Source: ABSL Survey 2018

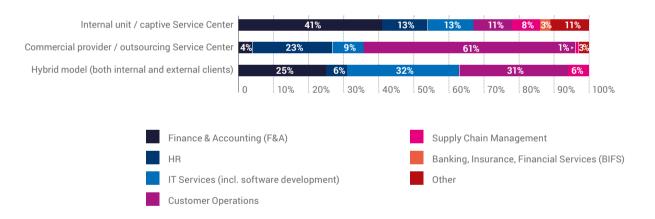


Figure 2.15
Employment structure of business services centres by business process categories supported at centres with different organizational model
Source: ABSL Survey 2018

| Countries of origin of business service centres

The largest investors in Czech Business Services continue to be USA and Germany - accounting for 39% of all employment within the surveyed business services centres. The Czech Republic maintains its position as the business services hub for 29 of the US Fortune 500/S&P global investors. The Czech centres continue to represent the third largest segment of the sector with more than 11% of employees.

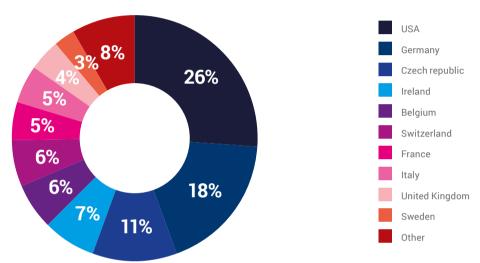


Figure 2.16
Structure of employment at business service centres by parent company headquarter location
Source: ABSL Survey 2018

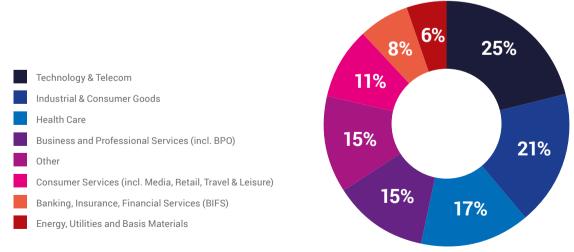


Figure 2.17
Structure of business service centres by parent company industry
Source: ABSL Survey 2018

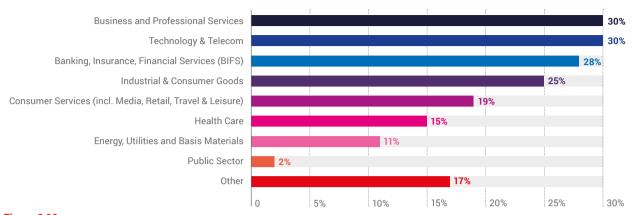
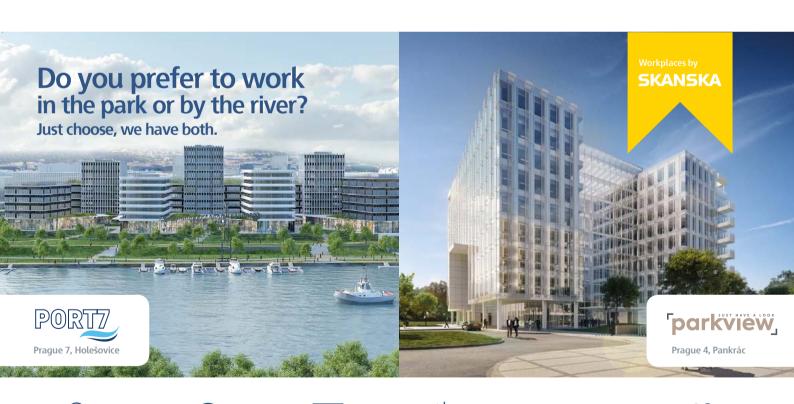


Figure 2.18
Industry structure of companies (external and internal customers) supported by business service centres located in the Czech Republic
Source: ABSL Survey 2018



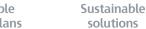




WELL and LEED certification

Unique architecture

Flexible floorplans



Types and level of services delivered by Czech business services

As the Czech BSCs grow, the portfolio of the services delivered to their customer develops. The leaders of the services portfolio continue to be Finance & Accounting together with HR. 89% and 75% of all the centres deliver such services respectively. The increasing adoption of IT Services by the Czech centres continues to utilize the qualified technical talents available within the country.

In the previous years, the Czech centres have established themselves as multifunctional. 85% of the centres continue to support more than one business process. However, as the centres mature, one can observe a trend of specialization, which is illustrated by a slight decrease in process categories per centre (from 4.1 in 2017 to 3.7 in 2018). Furthermore, the centres are shifting from covering larger number of transactional process categories towards developing deeper expertise within fewer processes.

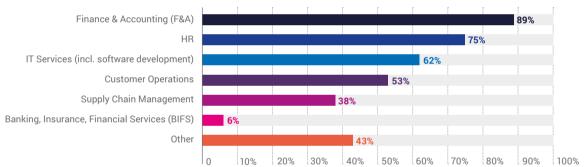


Figure 2.19
The structure of business process categories in business service centres
Source: ABSL Survey 2018

85%

of centres are multifunctional units and support more than 1 business process 3.7

average number of business processes supported by business service centres

LEVEL OF SERVICES PROVIDED

68%

of all processes are now being delivered in the advanced or partner stage

15%

of the surveyed companies remained on the same level of service advancement

15%

of the centres even perform more knowledge-based activities than transactional 83%

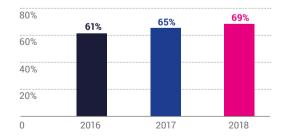
of surveyed companies have advanced the level of services provided in the last year

94%

of the centres provide a combination of transactional and knowledgebased activities

2%

of the centres perform purely transactional tasks



"The Czech Republic is quickly becoming a knowledge-based hub with mature centres providing majority of services in advanced or partner stages."

Figure 2.20
Percentage of processes within Czech business services centres delivered in the advanced or partner stage
Source: ABSL Survey 2016 - 2018

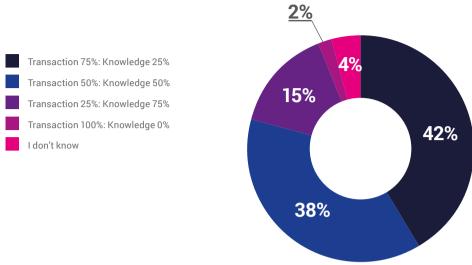


Figure 2.21
Structure of business service centres by the nature of activities performed
Source: ABSL Survey 2018

NUMBER OF BUSINESS PROCESSES SUPPORTED

BY CZECH BUSINESS SERVICE CENTRES

average number of process categories

average number of processes



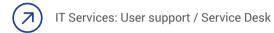


13

average number of business processes supported

Business processes on the rise and on the go in 2018

What process categories did Czech business services centres start supporting in 2018 most frequently compared to 2017?



Customer Operations: Customer Helpdesk

☐ IT Services: Other IT services

(7) IT Services: Infrastructure Management / Support

Project Management Office

What process categories did the centres most often abandon in 2018 compared to 2017?



Finance & Accounting (F&A): Treasury

Document Management

IT Services: Application Lifecycle Management (incl. software development)

Other services adopted:

RPA as a service, customer care, employee service, R&D - new service lines

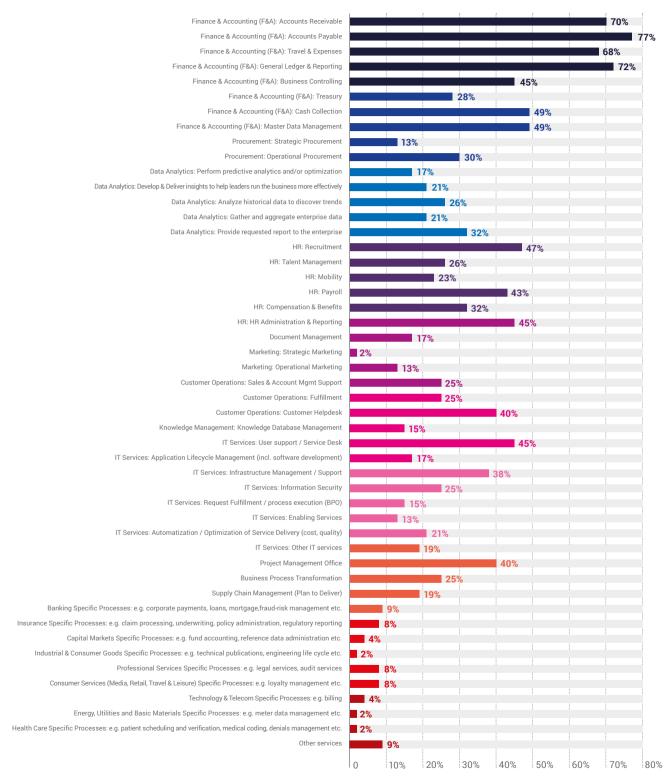
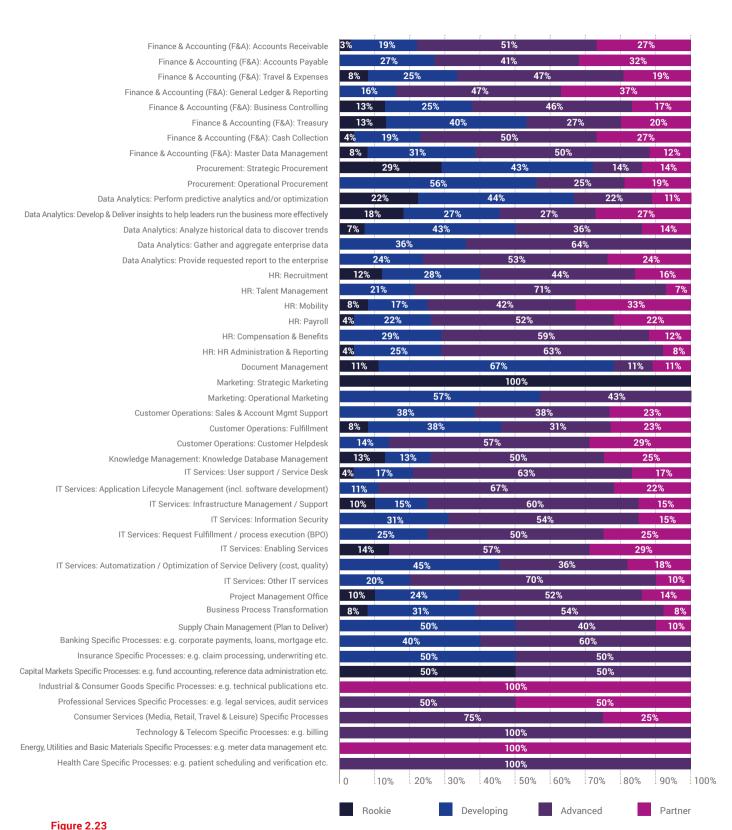


Figure 2.22
Processes supported by Czech business services
Source: ABSL Survey 2018



List of selected processes at business service centres - maturity level

Source: ABSL Survey 2018

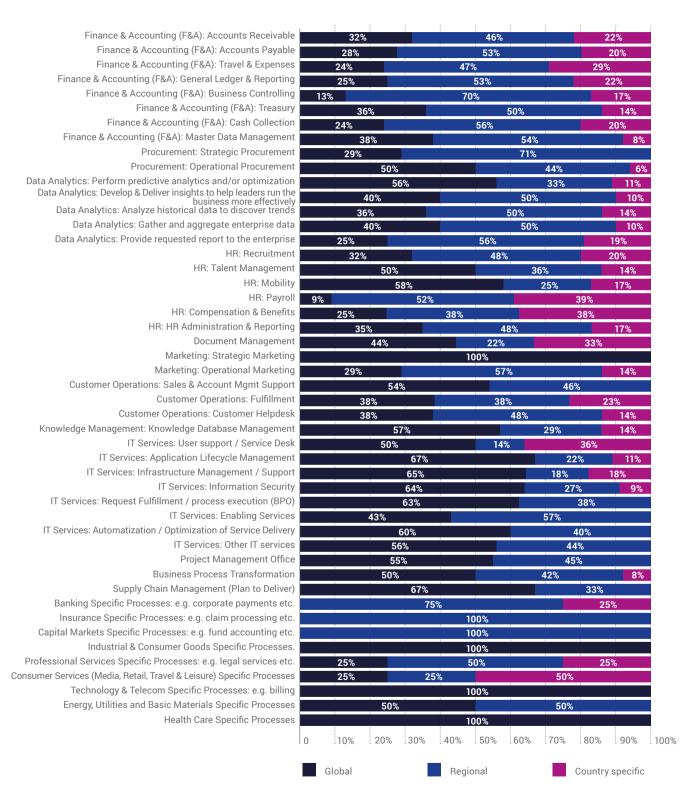


Figure 2.24
List of selected processes at business service centres - process owner
Source: ABSL Survey 2018

I Geographical scope of services delivered from the Czech Republic

The geographical scope of services delivered reflects the international reach of the Czech centres. 94% of the centres provide services internationally with one third of all Czech centres providing services globally.

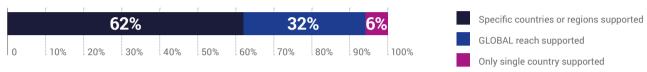


Figure 2.25
Proportion of business services centres according to the region supported
Source: ABSL Survey 2018

The geographical scope of provided services continues to grow across majority of the regions. Currently 81% of the centres provide services within the Czech Republic, compared to 76% in 2017. Furthermore, the centres increasingly serve clients within the South America. In 2017 only 14% of the centres provided their services to the South America, however, in 2018 it is already 25% of the centres. Similar increase can be observed within the Asia Pacific region, whose support grew from 16% of the centres in 2017 to 23% in 2018.

These regions are increasingly serviced by the Czech business services centres especially in the field of IT, where the Czech centres offer high level of expertise.

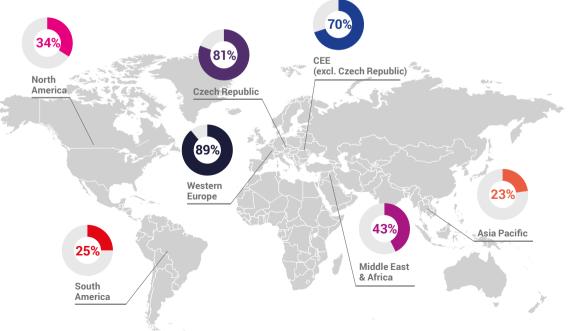


Figure 2.26
Proportion of business services centres supporting the selected regions
Source: ABSL Survey 2018

The scopes of robotics and automation

ROBOTS AND AUTOMATED PROCESSES PROVIDE WORK EQUIVALENT TO:



4,000

full time employees, compared to 1 500 in 2017



4%

of the Czech business services workforce, which is double compared to 2017



14

on average 14 full-time employees per centre, which is 90% increase compared to 2017

ROBOTICS AND AUTOMATION EXPERTS WITHIN CZECH BUSINESS SERVICES:



1%

of the sector workforce



1,200

employees



50

employees - the size of the largest Czech SSC robotics team



6.3

is the equivalent of full time employees, which on average compose the automation team within centres that are driving the automation initiatives inside their centre

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Figure 2.27
Scope of services that are automated in the business services centres
Source: ABSL Survey 2018

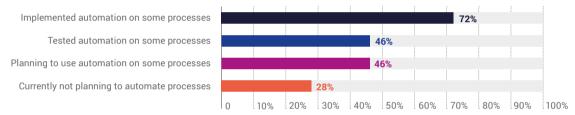


Figure 2.28
Proportion of business service centres which have implemented, tested or are planning to use automation
Source: ABSL Survey 2018

72% of the surveyed companies have already implemented automation. On average this related to 29% of their processes. 46% of the companies have tested but not yet implemented automation, which on average concerned 22% of their processes. The same proportion, 46% of the surveyed companies, are also currently planning to use automation on some of their processes. On average they are currently planning to use it on 27% of their processes. 28% of the surveyed centres are not planning to implement automation on their processes at the moment.



of the surveyed companies have already implemented automation on some of their processes

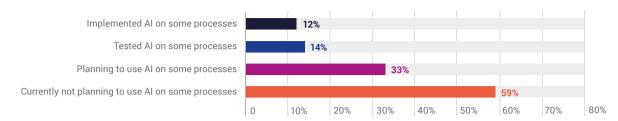


Figure 2.29
Proportion of business service centres which have implemented, tested or are planning to use artificial intelligence
Source: ABSL Survey 2018

Implementation of artificial intelligence

The artificial intelligence (AI) is increasingly reaching the agenda of the Czech BSCs. 12% of the surveyed centres have already implemented AI on average on 18% of their processes. 14% of the companies are in the stage of testing AI on some of their processes. On average this related to 13% of their processes. However, one third of the surveyed centres is planning to use AI on average in 20% of their processes.



of the business services centres are planning to use AI in some of their processes



of automation initiatives in the business service centres are driven directly by their inputs or in the combination of their inputs and external sources



Figure 2.30
Driver of automation intiatives in the business service centres
Source: ABSL Survey 2018

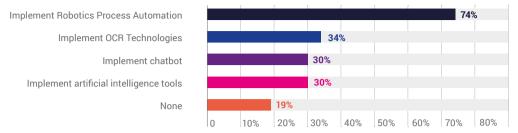


Figure 2.31
Methods likely to be used by business services centres in the upcoming year to increase automation
Source: ABSL Survey 2018



increase in implementation of AI tools

Other methods include chatbots, voice chatbots, middleware platforms such as Pega, Microsoft Business Intelligence, NLP, self-service through digitalization, increased utilization of core ERP and many more. A significant rise was noted in the use of chatbots in customer services and HR process.



HUMAN CAPITAL IN THE BUSINESS SERVICES SECTOR



490%

of employees within the business services centres in the CR are employed on a full time basis



6%

of business services centres employ at least 20% of their employees on a part time basis



🗳 **9,000**

business services professionals are currently on maternity or paternity leave



35%

average share of foreigners among employees in business services centres



81%

of foreigners in the business services centres come from other EU countries



 $\mathbf{60}\%$

average share of business services employees with a university degree



◎ 70%

of business services centres employ at least 90% of their employees on full time basis



42%

of business services centres employ people with postgraduate diploma or professional certification



average number of languages used at business services centres in the Czech Republic



of business services centres employ foreigners



of the business services employees are currently on maternity or paternity leave

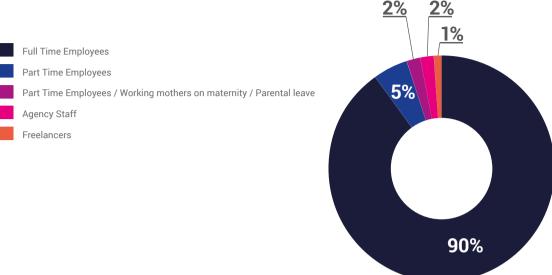


Figure 2.32
Structure of employment in the business services centres according to the employment status

Source: ABSL Survey 2018

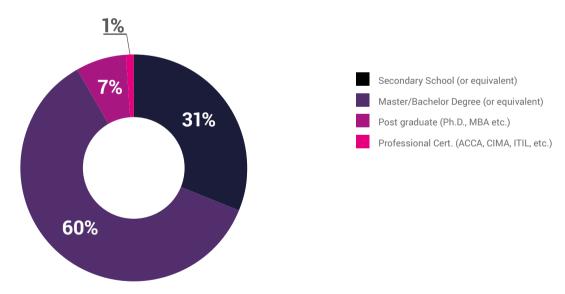


Figure 2.33
Level of education of employees in the business services centres
Source: ABSL Survey 2018

LANGUAGES USED AT BUSINESS SERVICES CENTRES



30

the largest number of languages used by one business services centre



9

average number of languages used in business services centres



30%

of business services centres use more than 10 languages

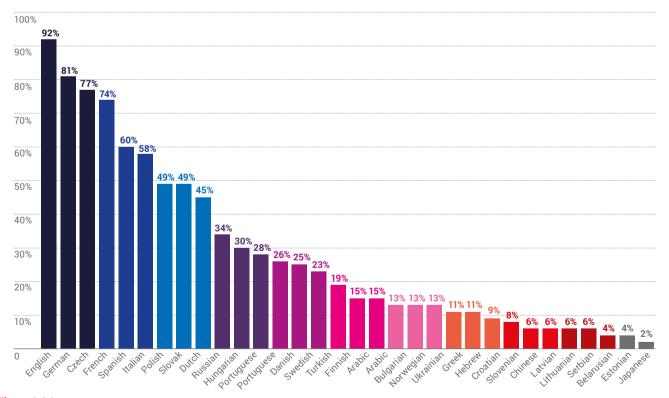


Figure 2.34
Languages used at the business services centres
Source: ABSL Survey 2018

International talent in Czech Business Services

The business services continue to attract talents from abroad allowing the Czech Republic to benefit from an inflow of qualified international workforce. Similarly to the previous year, the foreigners represent 35% of the employees within the business services. Out of these, 81% originate from other EU countries.

45% of the employees within business services centres located in Prague are foreigners. However, almost one third of the business services employees in Brno are foreigners too. This illustrates that other cities apart from the capital are becoming increasingly attractive for the expats.



岁 35%

proportion of foreign employees in Czech business service centres



81%

of foreigners in the business services centres come from other EU countries



<u>4</u> 79%

of business services centres employ at least 10% of foreigners



26%

of business services centres employ more foreigners than local staff



5%

of business services centres employ at least 70% of foreigners



the maximum share of foreigners in one business services centre



of Prague business services centres employees are foreigners



Prague ranks 8th among the top 72 expat cities in the world -Expat City Ranking 2018

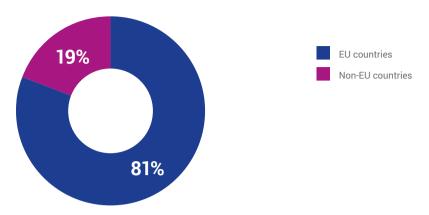


Figure 2.35
Origin of foreigners employed in the Czech BSCs
Source: ABSL Survey 2018

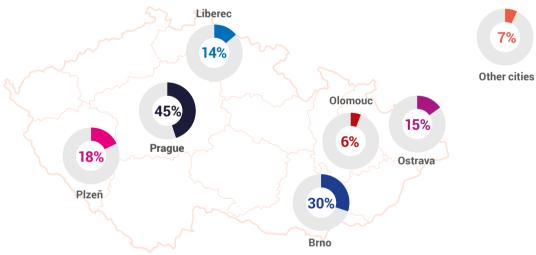


Figure 2.36 Foreigners employed in the Czech BSCs in selected cities Source: ABSL Survey 2018

| Foreigners in the Czech Republic



Source: Ministry of Interior, February 2018



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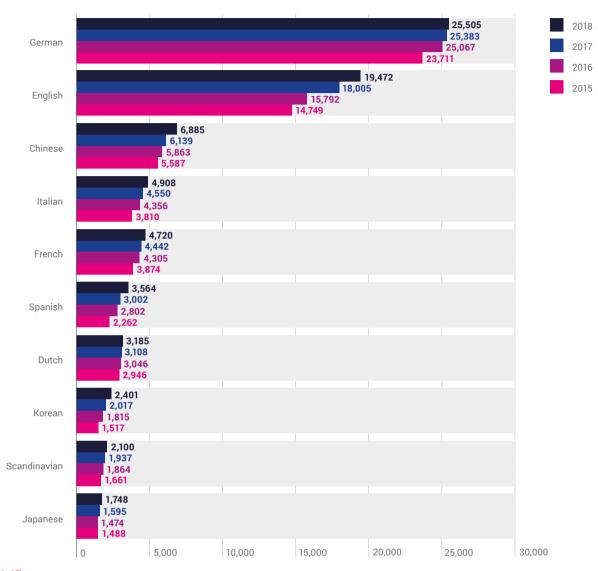


Figure 2.37

Number of foreigners in the Czech Republic with temporary and permanent type of stay according to the language

Note: English - Australia, Canada, Ireland, Great Britain, United States, South Africa, Malta, New Zealand

Spanish: Argentina, Ecuador, Chile, Cuba, Mexico, Peru, Spain, Venezuela

German: Germany, Austria, Switzerland

French: France, Belgium

Scandinavian: Denmark, Finland, Norway, Sweden, Iceland

Source: Source: Ministry of Interior, February 2018 (via CzechInvest)

| Recruitment and competition for talent

The average recruitment lead time in business services within the Czech Republic has risen to 8.1 weeks, 1 week higher than in 2017, more than 2 weeks higher than in 2016. The centres continue to experience a rising level of competition for talents in the marketplace. The most difficult talents to hire are currently individuals with English + non EU language with a recruitment lead time rising sharply and exceeding 10 weeks.



Figure 2.38
Average recruitment lead time in Czech BSCs
Source: ABSL Survey 2018, 2017

As the competition on the market for talents rises, the centres increasingly concentrate on building a strong employer brand for themselves as well as for the sector as a whole.

To achieve this the Czech business services centres focus on the working practices, which include for example flexible working hours, performance management, home office options, salary and increasingly also the organisational values, which are significantly reflected in the company culture.

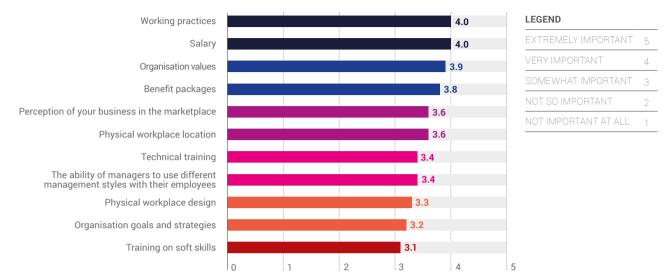


Figure 2.39
Importance of elements of employer brand to attract candidates to business services
Source: ABSL Survey 2018

| The attrition rate within business centres

With the rising competition on the market for talents, the attrition within the centres also continues to increase. However, it remains **at or below 20%** in all supported business processes apart from BIFS (Banking, Insurance, Financial Services) and Customer Operations, where it reaches higher levels.

In terms of the **centre size** the attrition is reported the lowest in small business services centres (less than 200 employees) and the highest is reported in mid-sized centres (200-500 employees).

Further breaking down the attrition by **function category** shows that the lowest attrition is reported by Internal units / captive Service Centres while the highest attrition was in Commercial providers / outsourcing Service Centres.

The attrition levels are also significantly lower in centres with a high percentage of **knowledge-based activities** as opposed to transactional. This proves that in order to retain people the centres need to develop and implement technologies, which will allow the transactional tasks to be minimized and free the employees to focus on challenging and stimulating knowledge-based activities.

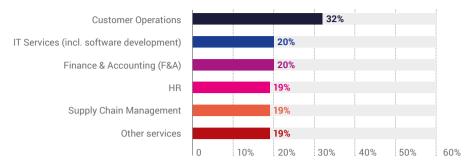


Figure 2.40
Attrition by categories of supported business processes
Source: ABSL Survey 2018

The proportion of involuntary leavers increased to 27% compared to only 18% in the previous year. This may be partially explained by the strategic restructuring in some of the centres.

A vast majority of the leavers, specifically 86%, leave from agent level positions. Therefore, the attrition at first line and senior management continues to be significantly lower. This shows that the sector manages to retain qualified and motivated people interested in building a long-term career.

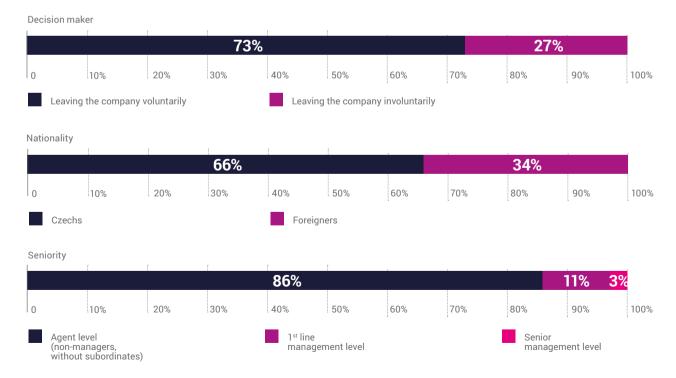


Figure 2.41
Average profile of employees leaving the business services centres
Source: ABSL Survey 2018

Key measures in retention

Compared to the previous year the centres increasingly focus on building their employer brand via strong company culture and company reputation. The financial support for continuous education has also gained popularity with 55% of centres employing it compared to 49% in the previous year. The performance based pay is being used by only 45% of the centres, while last year 60% of the centres used it to retain people.

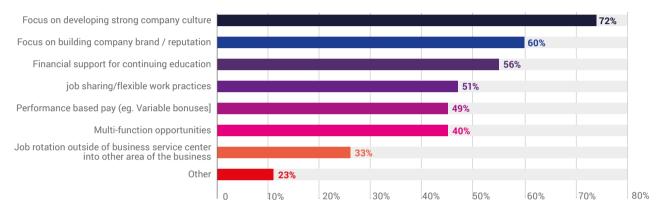


Figure 2.42
Introduced measures to improve retention in Czech business services centres

Other: Salary adjustments to reflect market movements, talent management, new package of benefits (Multisport card, sport activities in the office, additional pay for public holiday work, referral bonus, ACCA certifications, ...), specific individual career & development plan, close people management Source: ABSL Survey 2018

The recent Randstad Survey 2017 has illustrated that for job-seeking students some of the crucial factors when choosing the future employer are the **brand of the company** or the **overall company environment**.

The Randstad Survey 2017 reveals that the recruitment and retention strategies adopted by business services centres are in line with what the job-seekers actually value. This likely contributes to the sector being able to grow at the given rate even in regions with low unemployment levels.

[&]quot;The centres increasingly focus on building their employer brand via strong company culture and company reputation."

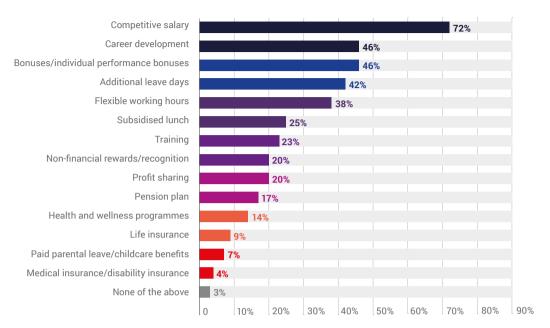


Figure 2.43
What candidates (students) are interested in when looking for a job in companies
Source: Randstad Survey



The popularity of employee benefits

The centres are increasing the portfolio of benefits offered to their employees. Among the most popular benefits are meal vouchers or subsidized lunches, flexible working hours and sport entertainment.

Compared to the previous year, the centres most often started offering the possibility of home office to agent-level staff. While in 2017, 60% of the centres allowed the agent-level employees to take advantage of home office, in 2018 the proportion of the centres rose to 77%.

Another benefits increasingly adopted by the centres include a company mobile phone for personal use or covering commuting costs (especially for management level).



of business services centres offer flexible working hours to some of their employees



87%

of business services centres enable home office to some of their employees



17 77%

85%

of business services centres allow home office at agent-level

of business services centres allow

roles, compared to 80% in 2017

flexible working hours at non-managerial



business services centres use cafeteria system for non-financial benefits, 5% more than in the year 2017

	Total	Agent level (non- management staff)	1st line management	Senior management
Vouchers for lunches / Lunch cards	98%	98%	87%	85%
Flexible working hours	92%	85%	83%	85%
Possibility for HomeOffice	87%	77%	79%	81%
Sports entertainment	83%	83%	79%	79%
Subsidizing language courses	77%	75%	68%	62%
Service Center-provided mobile phone for personal use	72%	25%	62%	70%
Pension fund	70%	70%	66%	66%
Free fruits in the Office	62%	62%	57%	55%
Additional payed days off	62%	60%	58%	58%
Cafeteria system	58%	58%	53%	51%
Leasure trips / activities	53%	53%	49%	49%
Life insurance	47%	45%	43%	45%
Subsidizing (postgraduate) studies or other professional courses	42%	32%	32%	38%
Travel cost cover / commute to work	28%	26%	26%	28%
Medical pack	26%	21%	21%	26%
Preferential share purchase options	21%	19%	19%	21%
Additional health insurance (other than a medical pack)	17%	9%	6%	13%
Child care / infant care subsidies; Service Center kindergarten	15%	15%	11%	11%
Other	13%	11%	11%	13%

Figure 2.44
Employee benefits offered by the business services centres at various seniority levels
Source: ABSL Survey 2018



Diversity and corporate social responsibility

The Business Services sector in the Czech Republic is one of the most dynamic and diverse sectors of the Czech economy. It brings together a vast number of nationalities, age groups and employees in various life situations.

Women continue to represent almost half of the sector workforce. The centres increasingly react to this by offering part time or reduced work arrangements to maternity or paternity leavers. While in the previous year 72% of the centres offered such arrangements, in 2018 this share rose to 83%. However, there is still an area for improvement in terms of developing women in leadership functions. Only 37% of senior management within the Czech business services are women.

The sector also attracts progressive young professionals with 61% of the employees being millennials. However, almost half of the centres also employ workers 50+ and 19% of the centres employ long-term unemployed, which is a great shift compared to only 5% of the centres employing long-term unemployed in the previous year. Furthermore, one third of the sector employs people with disabilities, which means an increase of 11% compared to the previous year.

Among other diversity strategies outlined by the surveyed centres are the active attraction and recruitment of people of different race, cultures and geographies into the business services centres or developing parental programs.

WOMEN IN CZECH BUSINESS SERVICES

48%

average number of female employees

51%

women at 1st line management

56%

women at operational staff

37%

at senior management

Source: ABSL Survey 2018





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61%

of business services employees are millennials



÷ 9%

of business services employees are on maternity or paternity leave



of business services centres employ people with disabilities

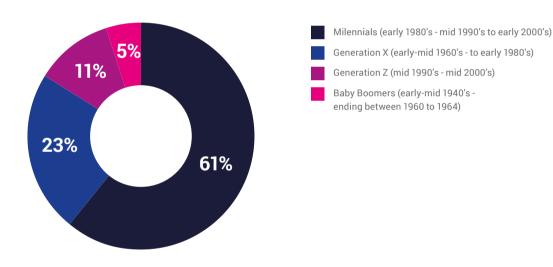


Figure 2.45 Demographics distribtion within Czech business services centres Source: ABSL Survey 2018

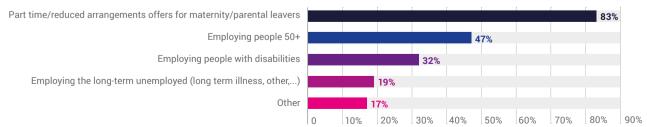


Figure 2.46 Methods used within business services centres to address diversity Source: ABSL Survey 2018

| Volunteering and charity programmes

The 100,000 employees of the Czech business services centres are encouraged to be involved in a variety of charity and volunteering programmes. In general 83% of the centres have some kind of volunteering or charity programmes, which is a 13% increase compared to the previous year. Environmental friendly activities continue to remain as the most popular activity. The biggest change can be observed in programmes focused on people from socially excluded area or group, which are now supported in 34% of the centres, an increase of 8% compared to the previous year.



of business services centres have some kind of volunteering/charity programme, compared to 70% in 2017

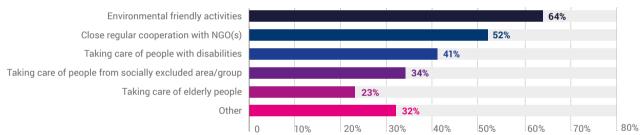


Figure 2.47
Volunteering/charity programmes in business services
Source: ABSL Survey 2018





I Introduction

As digital technologies, artificial intelligence and automation of processes transform the workforce landscape rapidly, business centres understand the need to focus on developing skillsets that are radically different from today.

The most popular form of cooperation for 72% of business centres is the direct recruitment of future employees. Nevertheless, many companies are also creating additional forms of cooperation to promote their business through joint conferences, training, educational projects or research projects, especially in the IT sector.

Many companies also follow the trend of investing into the education of newcomers as well as their long-term employees, adapting to technological and social factors that have direct impact on career paths. Interestingly, ACCA identified four dynamics of change in learning in reaction to the changing demographics of the working population.

CZECH UNIVERSITIES - AN OVERVIEW



67

Number of Universities in the Czech Republic



72,057

Number of graduates in the Czech Republic in the year 2017/2018



299,054

Number of students in the Czech Republic in the year 2017/2018



26

Number of public Universities

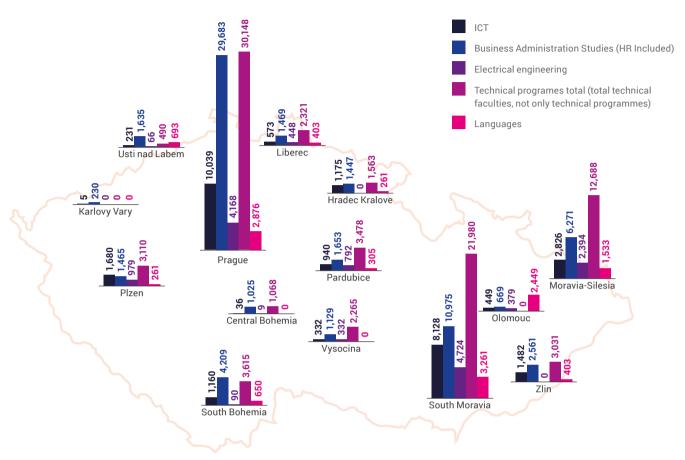


Figure 3.0

Total university students at Czech Universities, according to the regions and sectors

Source: Ministry of Education, Youth and Sport, 2018 (via CzechInvest)

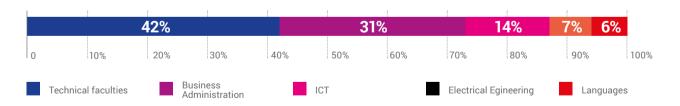


Figure 3.1

Students of Languages, Electrical Engineering, ICT, Business Administration and programmes at technical faculties in the Czech Republic (academic year 2017/2018)

Source: Ministry of Education, Youth and Sport, 2018 (via Czechinvest)

^{*}HR Studies included

^{**}not only technical programmes

Cooperation between business service centres and universities

Most companies in the business services cooperate with educational institutions (75%), including public and private universities, as a means to attract and secure their talent pipeline.



75%

of Czech business services centres collaborate with universities compared to 62% in 2017



of Czech business services centres organize joint conferences with universities



72%

of Czech business services centres recruit future employees through cooperation with universities



12%

growth in cooperation with universities

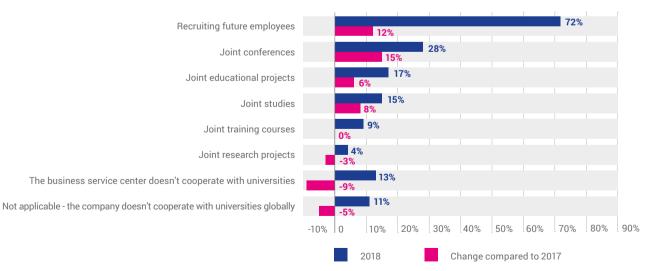


Figure 3.2 Types of collaboration between business services centres and universities Source: ABSL Survey 2018

Investment into training and development of talent

The centres increasingly focus on developing their talents. This helps the centres retain qualified and motivated employees, attract new talents and drive the progress within the sector forward.

Virtually all the surveyed areas of training gained popularity compared to the previous year. While in 2017 only 23% of the employees received compliance management training, in 2018 this number rose to 42%. Furthermore, time management and management & coaching skills are provided to more than 10% higher percentage of the employees than last year. This trend can be observed even in professional qualifications and quality and change management.

60% of the surveyed centres report that they experience a shortage of technical and automation skills. Since these fields are put forward by many of the centres as significant priorities for the upcoming years, a sufficient supply of talents with technical skills will be crucial for allowing the Czech centres to keep up with the international trends. Apart from the technical knowledge the centres prioritize development of leadership skills. 51% of the surveyed centres put the development of leadership skills among their high priorities.



43

average number of training hours per year provided by business services centres to their employees +5 compared to 2017



42%

of the Czech business services centres provide compliance management training to their employees



51%

of the Czech business services centres prioritize Leadership skills



60

of the surveyed centres experience technology and automation skills deficit

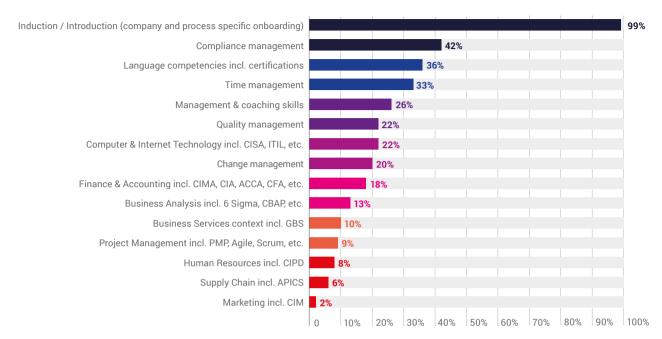


Figure 3.3
Percentage of employees receiving specific trainings within business services centres
Source: ABSL Survey 2018

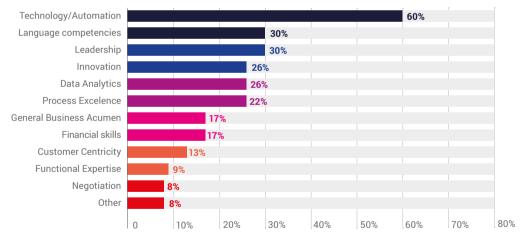


Figure 3.4 Skills deficit experienced by the business services centres Source: ABSL Survey 2018

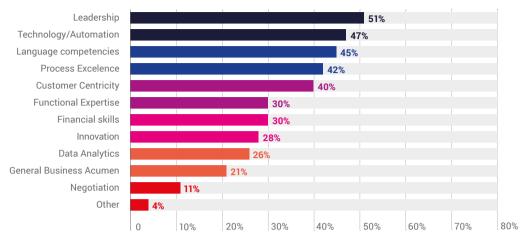


Figure 3.5
Skills prioritized by the business services centres

Source: ABSL Survey 2018

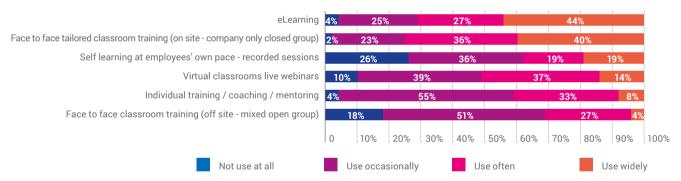


Figure 3.6 Training methods used in business services centres Source: ABSL Survey 2018



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Learning for the future



Global view by ACCA

The working place is changing fast. Social and technological developments are changing our working lives and careers. The traditional career paths now no longer fit the norms. Companies are expecting more from those, who join the business services industry and as individuals we are also seeking a professional role for a longer part of our lives, as the demographics of the working population change.

There are several significant trends changing business world. These range from technological to social factors, each of which has a direct impact on career paths and the skills needed. In turn, these influence how we, as individuals, develop the skills that we need. There are four dynamics of change that are causing us to reappraise our personal learning journeys:

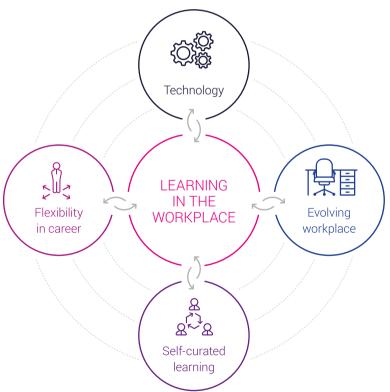


Figure 3.7
Four dynamics of change in workplace learning
Source: ACCA



Technology

The first dynamic is technology. ACCA's report The Race for Relevance (ACCA 2017) highlighted six technologies that are having an impact on accounting and finance. These were cloud-based computing, data analytics, robotic process automation, social media, cybersecurity and artificial intelligence (AI). In various combinations, for any enterprise, these have the potential to change ways of working, to automate job tasks and require new skills.



The evolving workplace

2018 student survey showed that those about to enter the workforce are well aware of the changes needed. For them, interpretation of data, communication, vision and strategy will be top responsibilities in future.



Figure 3.8
Student survey – critical skills for development
Source: ACCA student survey July 2018, 7,785 respondents





Flexibility in careers

As individuals, we are increasingly adopting more flexible career paths. We are moving from the traditional, so called 'ladder' path to a more dynamic path where we increasingly make career choices aligned to our personal growth agendas. The transition to these more flexible careers creates challenges for the learning community in appropriately addressing the available progressions in various organisations. But it also emphasises the individual's role in sustaining their own development path through verifiable skills - perhaps with the use of micro-qualifications and 'badges' (i.e. verifiable digital awards). We need to ensure that, as individuals, we are able to demonstrate our abilities to potential employers.

Ladder career path



Lattice career path showing options

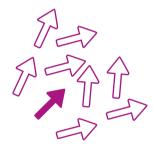


Figure 3.9 **Ladder vs Lattice** Source: ACCA



The growth of self-curated learning

Many older workers have sustained careers in a world where learning took place at a time and place that fitted into a cycle. In the past, they were happy to wait for the course to come around and trusted the employer that it was the right one for their career development journey. No longer does that suffice. Career paths are fast moving and are far more individual than ever before: so is, or should be, our approach to learning and development. There are now an increasing number of learning options available to the individual - the application of technology in learning has made the acquisition of new knowledge and skills far more accessible than ever before, while at the same time, such volume and diversity are making poor and irrelevant content less and less tolerable for learners. This range will probably continue to increase as technology offers additional modes of training.

The future workplace learning landscape

Given the inevitable cost pressures on an organisation, employers need to make sure that when they invest in the development of an individual they do so in a manner that is going to achieve the performance results that they desire. They need to be selective and focused in the choices that they make. There are a number of things which therefore need to be considered:

- » Experiential learning is still seen as most effective. In the discussion about the importance of understanding the learner's needs and the importance of the culture of the organisation in supporting growth, we should not forget that we have not fundamentally changed the way that we learn as individuals.
- » Quality of learning design is critical. The design of learning interventions has moved a considerable way from the slide-based presentations of the past. Quality design can now personalise the learner's journey, for example through a cherry-picked selection of e-learning.
- » Coaching and mentoring are not the same thing and both have an important role to play.
 A mentoring relationship is a longer-term one, while coaching relates to guiding the learner through the performance of a specific task or activity.
- » The evolution of learning technologies is vastly enlarging the marketplace. The varied methods by which effective learning can be provided will continue to evolve.
- » Not everyone wants to learn in the same way and learning should be tailored appropriately

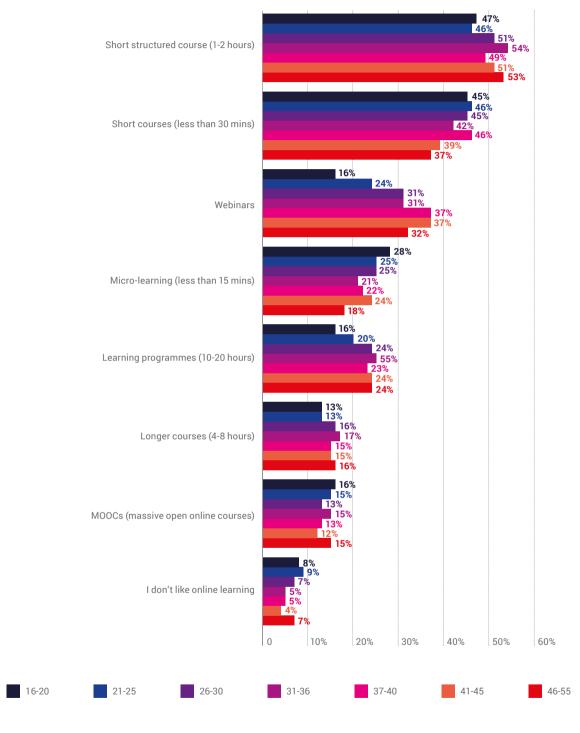


Figure 3.10
Preferred online learning by age group
Source: ACCA student survey July 2018

I Top ten tips for companies on learning strategies



 Align your organisation's learning strategy to your strategic goals.



Recognise the impact of these changes on the time spent in mentoring and coaching.



Understand the role that learning plays in developing talent and achieving strategic value.



 Measure effectiveness and return in longer-term growth – not short-term response.



Create and maintain an effective culture that supports continuous learning in the workplace.



8. Revisit your systems strategy to reflect the shift in modes of learning consumption.



 Recognise the impact of the generational changes in the workforce.



Improve learning design and focus on the personal journey.



Adopt a more flexible approach to learning - allow learners to identify content from both within and outside the organisation.



10. Consider how to support individuals' development into their next role rather than just their current role

4 LABOUR MARKET



CZECH MACROECONOMIC INDICATORS



2.8%

unemployment rate

Source: Ministry of Labour and Social Affairs / MoLSA, Oct 2018

3.6%

increase in average gross monthly nominal wage per FTE (Q2 2018)

Source: Czech Statistical Office, Q3



1 202 €

average gross monthly salary is 31,851 CZK / 1,202 €

Source: Czech Statistical Office, Q2

2.4%

GDP growth in Q2 2018

Source: Czech National Bank



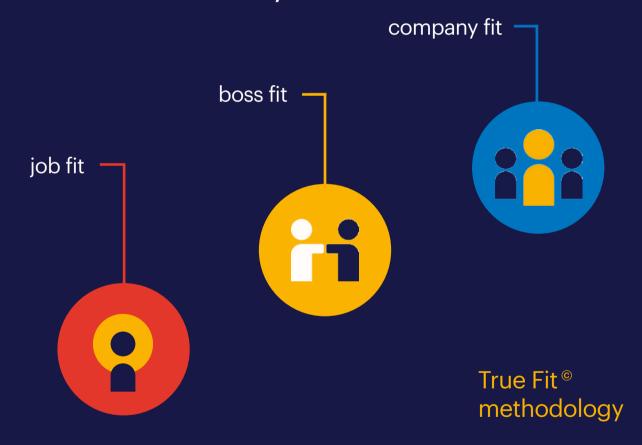
| Key labour code characteristics

	Employment contracts	twice, meaning a maximum of nine ye Nother possible forms of employment co Agreement to perform work: used ma scope of work must not exceed 20 ho Agreement to complete work: the sco 300 hours per calendar year for one e Probation period must last no longer tha	contract maximum of three years and can be renewed ears in total, next part must be indefinite only ntracts include: inly for part time employment, urs per week in average pe must not exceed	
Jan	Notice periods	» Mandatory notice period of two months	for employers and employees	
	Contributions	 Employers: 34% (for social security and Employees: 11% (for social security and Income tax: 15% from supergross wage 	health insurance)	
	Working hours	 40 hours is the standard working week 38.75 hours is the maximum those work 37.5 hours is the maximum those working three-shifts and more operations can with the shifts must not exceed eight hour 	ork in a week	
	Overtime	 > 150 hours is the maximum amount of overtime an employer may request in any calendar year > Can rise to 300 hours if agreed in writing > Overtime must not exceed an average of eight hours per week for more than 26 weeks Premiums of at least 10% of average hourly wage must be paid for night/weekend work > Additional bonus of at least 25% of average hourly wage must be paid for overtime hours > Rises to 100% for bank holidays, additional compensatory time off may be agreed on instead 		
	Annual leave	 4 weeks is the minimum requirement pe Often employers increase this by an add 	r year, plus approx. 14 days of paid state holidays litional week or two	
+	Standard benefits offered to specialists	 » Flexible working hours » Additional holiday entitlement » Trainings » Meal vouchers / contribution » Pension contributions and/or life insurance » Contribution for sport, cultural activities 	 » Medical care » Sick days » Bridge days » Cafeteria plan » Transport contributions » Refreshment at a workplace 	
+	Above the standard benefits (typical for IT, BSC, finance, managerial positions)	 » Pleasant workplace: free drinks and food, play zones, fitness classes, sport facilities, massages » Kids clubs, kindergartens, au-pair services » Company car » Smartphones, laptops – the latest models » Home office 	 » Presents for anniversaries/birthdays » Family days » Team building activities » Free Language courses » Couching & personal development » Above-standard medical care » Trainings & personal development programs 	

HR tech with

heart and soul.

Success depends on the people around you. That's why making the right decisions on who you're surrounded by count.



Randstad believes in the power of people and finds the best candidates to help you grow, perform and succeed.

הר randstad

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	Position	Salary grade Junior 0 - 2 years experience ENG	Salary grade Senior 3 - 5 years experience ENG	Language proficiency per additional language	Recruitability of profiles: 1 easy to find, 5 very difficult
	Accountant AP/AR - High school/Univer. Degree, Microsoft office, detail oriented, invoicing process, administration, KPI fulfillment - nr. of errors/discrepancies	28 - 33,000	33 - 40,000	5 - 10,000	2
	TAX Accountant - High school/Univer. Degree, Microsoft office, detail oriented, Complex TAX knowledge, finance background, administration.	35 - 45,000	45 - 70,000	5 - 10,000	3
	Financial Controller - University degree in economics, at least 2 - 3 years in finance, Analytical Skills, Excel perfect knowledge, reporting	35 - 45,000	45 - 75,000	5 - 10,000	2
oles	Financial Analyst - University degree in economics, at least 2 - 3 years in finance, Analytical Skills, Excel perfect knowledge, reporting	30 - 40,000	40 - 58,000	5 - 10,000	3
Finacial roles	General Ledger - University degree in economics, at least 2 -3 years in finance, Complex background in accounting, Accounting standard IFRS, US GAAP, Excel, reporting	45 - 55,000	55 - 70,000	5 - 10,000	4
正	Team Leader Finance - High school/Univer. Degree, Leading group 10 - 15 colleagues, Microsoft office, Reporting KPI, Leadership skills, at least 2 - 4 years in Finance, Board - 3 position		65 - 90,000	5 - 10,000	2
	Finance Manager - University degree, at least 3 - 5 years in Finance, Management of Team Leaders, KPI set up, Implementor of finance strategy, reporting, Microsoft office, Board - 3 position		80 - 120,000	10 - 15,000	1
	Director of Finance - University degree, at least 5 - 7 years in Finance. Strategy owner of Financial Process and creator, leadership skills, ERP Set up, Microsoft office, Board -1 position		Senior 3 - 5 years proficiency per addition language (23,000) 33 - 40,000 5 - 10,00 (25,000) 45 - 70,000 5 - 10,00 (25,000) 45 - 70,000 5 - 10,00 (25,000) 55 - 70,000 5 - 10,00 (25,000) 55 - 70,000 5 - 10,00 (25,000) 55 - 70,000 5 - 10,00 (25,000) 35 - 45,000 5 - 10,00 (25,000) 55 - 75,000 5 - 10,00 (25,000) 55 - 75,000 5 - 10,00 (25,000) 55 - 75,000 5 - 10,00 (25,000) 55 - 75,000 5 - 10,00 (25,000) 55 - 75,000 5 - 10,00 (25,000) 55 - 75,000 5 - 10,00 (25,000) 55 - 75,000 5 - 10,00 (25,000) 55 - 75,000 5 - 10,00 (25,000) 55 - 75,000 5 - 10,00 (25,000) 55 - 75,000 5 - 10,00 (25,000) 55 - 75,000 5 - 10,00 (25,000) 55 - 1	15 - 20,000	1
	HR Administration - High school/Univer. Degree, Microsoft office, detail oriented, preparation of onboarding administration, KPI fulfillment - nr. of errors/discrepancies	30 - 38,000	38 - 50,000	5 - 10,000	2
	Payroll Specialist - High school/Univer. Degree, payroll administration/ preparation, detail oriented, customer approach, KPI fulfillment - nr. of errors/discrepancies	Salary grade Junior 0 - 2 years experience ENG 28 - 33,000 33 - 40,000 5 - 3 - 5 years experience ENG 28 - 33,000 33 - 40,000 5 - 3 - 3 years g 35 - 45,000 45 - 75,000 5 - 3 years g 30 - 40,000 40 - 58,000 5 - 3 years g 30 - 40,000 5 - 70,000 5 - 3 years g 30 - 40,000 40 - 58,000 5 - 3 years g 30 - 40,000 55 - 70,000 5 - 3 years g 30 - 40,000 55 - 70,000 5 - 3 years g 30 - 40,000 55 - 70,000 5 - 3 years g 30 - 40,000 55 - 70,000 5 - 3 years g 30 - 40,000 55 - 70,000 5 - 3 years g 30 - 40,000 55 - 70,000 5 - 3 years g 30 - 40,000 5 - 3 years g 30 - 40,000 5 - 3 years g 30 - 40,000 35 - 40,000 5 - 3 years g 30 - 40,000 35 - 45,000 5 - 3 years g 30 - 40,000 35 - 45,000 5 - 3 years 30 - 40,000 40 - 50,000 5 - 3 years 30 - 40,000 40 - 50,000 5 - 3 years 30 - 40,000 40 - 50,000 5 - 3 years 30 - 40,000 40 - 50,000 5 - 3 years 30 - 40,000 40 - 50,000 5 - 3 years 30 - 40,000 40 - 50,000 5 - 3 years 30 - 40,000 40 - 50,000 5 - 3 years 30 - 40,000 40 - 50,000 5 - 3 years 30 - 40,000 30 - 30,000 30 - 30,000 5 - 3 years 30 - 40,000 30 - 30,000 3	5 - 10,000	2	
	Learning&Development Specialist - High school/Univer. Degree, Microsoft office, development and training set up based on requirement of TL, assessment center program, administrative type	35 - 40,000	45 - 70,000 45 - 75,000 40 - 58,000 55 - 70,000 80 - 120,000 120 - 200,000 38 - 50,000 40 - 50,000 40 - 55,000 55 - 75,000 70 - 90,000	5 - 10,000	2
HR roles	Recruitment Specialist - High school/Univer. Degree, candidate search, prescreening, interviewing, advertisement creating, KPI fulfillment - nr. of delivered/interviewed candidates	35 - 43,000	40 - 55,000	5 - 10,000	2
	HR Business Partner - University degree in HR, at least 2 -3 years in HR, knowledge of the branch and internal process, demand on Hiring manager, feedback delivery, Microsoft office	45 - 55,000	55 - 75,000	5 - 10,000	2
	HR Team Leader - High school/Univer. Degree, Leading group 10 - 15 colleagues, Microsoft office, Reporting KPI, Leadership skills, at least 3 - 5 years in HR Board - 2/3 position	55 - 70,000	70 - 90,000	5 - 10,000	1
	HR Manager - University degree, at least 5 - 7 years in HR Strategy owner of HR Process, implementor and creator, leadership skills, KPI set up, reporting, Microsoft office, Board -1/2 position	85 - 110,000	110 - 130,000	10 - 15,000	1
(0	IT Help desk - High school/Univer. Degree, technically oriented, basic IT background, KPI - nr. of tickets solved	35 - 40,000	37 - 50,000	5 - 10,000	2
IT roles	IT infrastructure average - University degree, technical skill set, IT background for at least 3 years (front/back)	55 - 80,000	80 - 110,000	10 - 15,000	4
_	IT Development average - University degree, technical skill set, IT background for at least 3 years (front/back)	50 - 75,000	75 - 100,000	10 - 15,000	5

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	Position	Salary grade Junior 0 - 2 years experience ENG	Salary grade Senior 3 - 5 years experience ENG	Language proficiency per additional language	Recruitability of profiles 1 easy to find, 5 very difficult
	IT Team Leader - University degree in technical environment, at least 4 years in IT sector, Leadership, reporting, Board - 2/3 position	65 - 85,000	85 - 100,000	15 - 20,000	2
IT roles	IT Project manager - University degree in technical environment, at least 4 years in IT sector, project lead management, KPI oriented, set up project strategy, Board - 2/3 position	110 - 140,000	130 - 160,000	15 - 20,000	3
	IT Manager - University degree in technical environment, at least 5 - 7 years in IT sector, Leadership, reporting, managerial skills, Board -1/2 position	120 - 150,000	150 - 180,000	15 - 20,000	2
Service support	Customer Service representative - High school/Univer. Degree, Sales & Customer oriented, Microsoft office, KPI driven, ability to work under pressure. KPI nr. of customers processed, customer satisfaction survey 1 - 5 ranking	28 - 33,000	33 - 40,000	5 - 10,000	2
vice s	Order Clerk - High school/Univer. Degree, Sales & Customer oriented, Microsoft office, KPI driven, order management, creating and tracking	28 - 33,000	22 - 40,000	5 - 10,000	2
	Customer Care team Leader - High school/Univer. Degree, at least 3 - 5 years in branch, Leading group 10 - 15 colleagues, Microsoft office, Reporting KPI, Leadership skills, Board - 2/3 position	45 - 55,000	55 - 70,000	10 - 15,000	2
Customer	Customer Service Manager - University degree, at least 5 - 7 years in branch, Leading Customer center operations, Microsoft office, KPI set up, Strategy owner, creator and implementor, communication with Center head, Board -1/2 position	Junior 0 - 2 years experience ENG 2 - 5 years experience ENG 3 - 5 years experience ENG 65 - 85,000 85 - 100,000 15 - 20 years 120 - 150,000 150 - 180,000 15 - 20 years 120 - 150,000 150 - 180,000 15 - 20 years 120 - 150,000 150 - 180,000 15 - 20 years 120 - 150,000 150 - 180,000 15 - 10, years 120 - 150,000 150 - 10, years 120 - 150,	10 - 15,000	2	
	Buyer - High school/Univer. Degree, managemenet of 50 - 150 suppliers, negotiation skills, Sales oriented,	30 - 35,000	35 - 45,000	5 - 10,000	2
iance	Strategic Buyer - High school/Univer. Degree, managemenet of 150 - 2000 suppliers, negotiation skills, Sales oriented, tender manangmeent and assignment to suppliers, Leader ship skills, reporting, Excel	45 - 60,000	60 - 90,000	5 - 10,000	3
Compliance	Procure to pay (P2P) - High school/Univer. Degree, integration of the purchasing department with the accounts payable, Excel, reporting	30 - 35,000	35 - 45,000	5 - 10,000	2
80	Procurement & Compliance specialist - High school/Univer. Degree, Supplier code creator, focus on internal rules, reporting of discrepancies and violations, Microsoft office, at leas 2 years in procurement	Jniver. Degree, at least colleagues, Microsoft office, 3 position ree, at least 5 - 7 years in s, Microsoft office, KPI entor, communication with emenet of 50 - 150 suppliers, 30 - 35,000 35 - 45,000 e, managemenet of 150 - 2000 tender manangmeent and reporting, Excel Degree, integration of the payable, Excel, reporting necessary in procurement st 3 - 5 years in Procurement,	5 - 10,000	4	
Procurement	Team Leader P&C - University degree, at least 3 - 5 years in Procurement, compliance, ethical code owner, leader of 10 - 15 colleagues, leadership skills, KIP set up, reporting, Microsoft office, Board - 2/3 position	55 - 70,000	70 - 90,000	10 - 15,000	2
	Manager P&C - University degree, at least 5 - 7 years in Procurement, compliance, Strategic owner of P&C Process, implementor and creator, leadership skills, KIP set up, reporting, Microsoft office, Board -1/2 position	Salary grade Junior 0 - 2 years experience ENG	10 - 15,000	2	
	Inbound Sales Agent - High school/Univer. Degree, Sales & Customer oriented, Microsoft office, KPI driven, reporting, Excel, KPI nr. of customers processed, customer satisfaction survey 1 - 5 ranking	27 - 32,000	30 - 35,000	5 - 10,000	3
Sales	Outbound Sales Agent - High school/Univer. Degree, Sales & Customer oriented, Microsoft office, KPI driven, ability to work under pressure, KPI nr. of sold products, signed contracts	32 - 36,000	35 - 40,000	5 - 10,000	3
Sa	Telesales Team Leader - High school/Univer. Degree, Leading group 10 - 15 colleagues, Microsoft office, Reporting KPI, Leadership skills, Board - 2/3 position	45 - 55,000	55 - 70,000	10 - 15,000	2
	Telesales Manager - University degree, Leading call center operations, Microsoft office, KPI set up, Strategy owner, creator and implementor, communication with Center head, Board -1/2 position	60 - 85,000	85 - 110,000	10 - 15,000	2



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	Position	Salary grade Junior 0 - 2 years experience ENG	Salary grade Senior 3 - 5 years experience ENG	Language proficiency per additional language	Recruitability of profiles: 1 easy to find, 5 very difficult
	Accountant AP/AR - High school/Univer. Degree, Microsoft office, detail oriented, invoicing process, administration, KPI fulfillment - nr. of errors/discrepancies	25 - 30,000	30 - 38,000	5 - 10,000	2
	TAX Accountant - High school/Univer. Degree, Microsoft office, detail oriented, Complex TAX knowledge, finance background, administration.	28 - 32,000	32 - 45,000	5 - 10,000	3
	Financial Controller - University degree in economics, at least 2 - 3 years in finance, Analytical Skills, Excel perfect knowledge, reporting	30 - 37,000	37 - 60,000	5 - 10,000	3
səlc	Financial Analyst - University degree in economics, at least 2 - 3 years in finance, Analytical Skills, Excel perfect knowledge, reporting	30 - 37,000	37 - 60,000	5 - 10,000	2
nacial r	General Ledger - University degree in economics, at least 2 -3 years in finance, Complex background in accounting, Accounting standard IFRS, US GAAP, Excel, reporting	35 - 45,000	45 - 55,000	5 - 10,000	3
证	Team Leader Finance - High school/Univer. Degree, Leading group 10 - 15 colleagues, Microsoft office, Reporting KPI, Leadership skills, at least 2 - 4 years in Finance, Board - 3 position	42 - 50,000	50 - 60,000	5 - 10,000	2
	Finance Manager - University degree, at least 3 - 5 years in Finance, Management of Team Leaders, KPI set up, Implementor of finance strategy, reporting, Microsoft office, Board - 3 position	60 - 70,000	70 - 90,000	10 - 15,000	1
HR roles Finacial roles	Director of Finance - University degree, at least 5 - 7 years in Finance. Strategy owner of Financial Process and creator, leadership skills, ERP Set up, Microsoft office, Board -1 position	80 - 90,000	90 - 120,000	15 - 20,000	1
	HR Administration - High school/Univer. Degree, Microsoft office, detail oriented, preparation of onboarding administration, KPI fulfillment - nr. of errors/discrepancies	25 - 28,000	28 - 35,000	5 - 10,000	1
	Payroll Specialist - High school/Univer. Degree, payroll administration/ preparation, detail oriented, customer approach, KPI fulfillment - nr. of errors/discrepancies	30 - 35,000	35 - 40,000	10 - 15,000	2
	Learning&Development Specialist - High school/Univer. Degree, Microsoft office, development and training set up based on requirement of TL, assessment center program, administrative type	25 - 30,000	30 - 45,000	5 - 10,000	3
HR roles	Recruitment Specialist - High school/Univer. Degree, candidate search, prescreening, interviewing, advertisement creating, KPI fulfillment - nr. of delivered/interviewed candidates	gree, Microsoft office, detail e background, administration. gree, Microsoft office, detail e background, administration. gree, Microsoft office, detail e background, administration. gronomics, at least 2 - 3 years knowledge, reporting gronomics, at least 2 - 3 years knowledge, reporting gronomics, at least 2 - 3 years knowledge, reporting grounding, Accounting standard IFRS, grounding, Accounting standard standard IFRS, grounding, Accoun	5 - 10,000	3	
	HR Business Partner - University degree in HR, at least 2 -3 years in HR, knowledge of the branch and internal process, demand on Hiring manager, feedback delivery, Microsoft office	40 - 45,000	45 - 65,000	5 - 10,000	2
	HR Team Leader - High school/Univer. Degree, Leading group 10 - 15 colleagues, Microsoft office, Reporting KPI, Leadership skills, at least 3 - 5 years in HR Board - 2/3 position	45 - 55,000	55 - 70,000	5 - 10,000	1
	HR Manager - University degree, at least 5 - 7 years in HR Strategy owner of HR Process, implementor and creator, leadership skills, KPI set up, reporting, Microsoft office, Board -1/2 position	60 - 85,000	85 - 120,000	10 - 15,000	1
(^	IT Help desk - High school/Univer. Degree, technically oriented, basic IT background, KPI - nr. of tickets solved	30 - 35,000	35 - 43,000	10 - 15,000	2
T roles	IT infrastructure average - University degree, technical skill set, IT background for at least 3 years (front/back)	40 - 50,000	50 - 65,000	10 - 15,000	3
_	IT Development average - University degree, technical skill set, IT background for at least 3 years (front/back)	40 - 50,000	50 - 90,000	10 - 15,000	5

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	Position	Salary grade Junior 0 - 2 years experience ENG	Salary grade Senior 3 - 5 years experience ENG	Language proficiency per additional language	Recruitability of profiles 1 easy to find, 5 very difficult
	IT Team Leader - University degree in technical environment, at least 4 years in IT sector, Leadership, reporting, Board - 2/3 position	50 - 60,000	60 - 75,000	15 - 20,000	3
IT roles	IT Project manager - University degree in technical environment, at least 4 years in IT sector, project lead management, KPI oriented, set up project strategy, Board - 2/3 position	50 - 65,000	65 - 100,000	15 - 20,000	3
	$\label{local_equation} \textbf{IT Manager} - University degree in technical environment, at least 5-7 years in IT sector, Leadership, reporting, managerial skills, Board-1/2 position$	90 - 100,000	100 - 150,000	15 - 20,000	2
upport	Customer Service representative - High school/Univer. Degree, Sales & Customer oriented, Microsoft office, KPI driven, ability to work under pressure. KPI nr. of customers processed, customer satisfaction survey 1 - 5 ranking	25 - 30,000	30 - 40,000	5 - 10,000	2
vice sı	Order Clerk - High school/Univer. Degree, Sales & Customer oriented, Microsoft office, KPI driven, order management, creating and tracking	25 - 30,000	30 - 40,000	5 - 10,000	2
mer Ser	Customer Care team Leader - High school/Univer. Degree, at least 3 - 5 years in branch, Leading group 10 - 15 colleagues, Microsoft office, Reporting KPI, Leadership skills, Board - 2/3 position	45 - 50,000	50 - 60,000	5 - 10,000	2
Custo	Customer Service Manager - University degree, at least 5 - 7 years in branch, Leading Customer center operations, Microsoft office, KPI set up, Strategy owner, creator and implementor, communication with Center head, Board -1/2 position	Junior 0-2 years experience ENG senior 3-5 years experience ENG sexperience EN	10 - 15,000	2	
	Buyer - High school/Univer. Degree, managemenet of 50 - 150 suppliers, negotiation skills, Sales oriented,	28 - 33,000	33 - 45,000	5 - 10,000	2
iance	Strategic Buyer - High school/Univer. Degree, managemenet of 150 - 2000 suppliers, negotiation skills, Sales oriented, tender manangmeent and assignment to suppliers, Leader ship skills, reporting, Excel	35 - 50,000	50 - 60,000	5 - 10,000	3
Sales Procurement & Compliance Customer Service support IT roles	Procure to pay (P2P) - High school/Univer. Degree, integration of the purchasing department with the accounts payable, Excel, reporting	28 - 33,000	33 - 42,000	5 - 10,000	2
	Procurement & Compliance specialist - High school/Univer. Degree, Supplier code creator, focus on internal rules, reporting of discrepancies and violations, Microsoft office, at leas 2 years in procurement	Salary grade Junior 3-5 years 2-5	5 - 10,000	4	
Procure	Team Leader P&C - University degree, at least 3 - 5 years in Procurement, compliance, ethical code owner, leader of 10 - 15 colleagues, leadership skills, KIP set up, reporting, Microsoft office, Board - 2/3 position	55 - 70,000	70 - 80,000	10 - 15,000	2
	Manager P&C - University degree, at least 5 - 7 years in Procurement, compliance, Strategic owner of P&C Process, implementor and creator, leadership skills, KIP set up, reporting, Microsoft office, Board -1/2 position	65 - 80,000	80 - 100,000	10 - 15,000	2
	Inbound Sales Agent - High school/Univer. Degree, Sales & Customer oriented, Microsoft office, KPI driven, reporting, Excel, KPI nr. of customers processed, customer satisfaction survey 1 - 5 ranking	25 - 30,000	30 - 40,000	5 - 10,000	3
les	Outbound Sales Agent - High school/Univer. Degree, Sales & Customer oriented, Microsoft office, KPI driven, ability to work under pressure, KPI nr. of sold products, signed contracts	30 - 35,000	35 - 40,000	5 - 10,000	3
Sa	Telesales Team Leader - High school/Univer. Degree, Leading group 10 - 15 colleagues, Microsoft office, Reporting KPI, Leadership skills, Board - 2/3 position	40 - 50,000	45 - 55,000	5 - 10,000	2
	Telesales Manager - University degree, Leading call center operations, Microsoft office, KPI set up, Strategy owner, creator and implementor, communication with Center head, Board -1/2 position	55 - 80,000	80 - 100,000	10 - 15,000	2



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	Position	Salary grade Junior 0 - 2 years experience ENG	Salary grade Senior 3 - 5 years experience ENG	Language proficiency per additional language	Recruitability of profiles: 1 easy to find, 5 very difficult
	Accountant AP/AR - High school/Univer. Degree, Microsoft office, detail oriented, invoicing process, administration, KPI fulfillment - nr. of errors/discrepancies	25 - 30,000	30 - 35,000	5 - 10,000	2
	TAX Accountant - High school/Univer. Degree, Microsoft office, detail oriented, Complex TAX knowledge, finance background, administration.	28 - 38,000	38 - 50,000	5 - 10,000	3
	Financial Controller - University degree in economics, at least 2 - 3 years in finance, Analytical Skills, Excel perfect knowledge, reporting	30 - 35,000	37 - 45,000	5 - 10,000	3
oles	Financial Analyst - University degree in economics, at least 2 - 3 years in finance, Analytical Skills, Excel perfect knowledge, reporting	34 - 38,000	40 - 45,000	5 - 10,000	3
Finacial roles	General Ledger - University degree in economics, at least 2 -3 years in finance, Complex background in accounting, Accounting standard IFRS, US GAAP, Excel, reporting	35 - 45,000	40 - 55,000	5 - 10,000	3
正	Team Leader Finance - High school/Univer. Degree, Leading group 10 - 15 colleagues, Microsoft office, Reporting KPI, Leadership skills, at least 2 - 4 years in Finance, Board - 3 position		50 - 70,000	5 - 10,000	2
	Finance Manager - University degree, at least 3 - 5 years in Finance, Management of Team Leaders, KPI set up, Implementor of finance strategy, reporting, Microsoft office, Board - 3 position		65 - 90,000	5 - 10,000	1
	Director of Finance - University degree, at least 5 - 7 years in Finance. Strategy owner of Financial Process and creator, leadership skills, ERP Set up, Microsoft office, Board -1 position		90 - 120,000	15 - 20,000	1
	HR Administration - High school/Univer. Degree, Microsoft office, detail oriented, preparation of onboarding administration, KPI fulfillment - nr. of errors/discrepancies	23 - 27,000	27 - 35,000	5 - 10,000	2
	Payroll Specialist - High school/Univer. Degree, payroll administration/ preparation, detail oriented, customer approach, KPI fulfillment - nr. of errors/discrepancies	25 - 33,000	33 - 40,000	5 - 10,000	2
	Learning&Development Specialist - High school/Univer. Degree, Microsoft office, development and training set up based on requirement of TL, assessment center program, administrative type	25 - 33,000	35 - 43,000	5 - 10,000	3
HR roles	Recruitment Specialist - High school/Univer. Degree, candidate search, prescreening, interviewing, advertisement creating, KPI fulfillment - nr. of delivered/interviewed candidates	0 - 2 years experience ENG	5 - 10,000	2	
_	HR Business Partner - University degree in HR, at least 2-3 years in HR, knowledge of the branch and internal process, demand on Hiring manager, feedback delivery, Microsoft office		45 - 65,000	5 - 10,000	2
	HR Team Leader - High school/Univer. Degree, Leading group 10 - 15 colleagues, Microsoft office, Reporting KPI, Leadership skills, at least 3 - 5 years in HR Board - 2/3 position		65 - 85,000	5 - 10,000	1
	HR Manager - University degree, at least 5 - 7 years in HR Strategy owner of HR Process, implementor and creator, leadership skills, KPI set up, reporting, Microsoft office, Board -1/2 position		80 - 120,000	10 - 15,000	1
(^	IT Help desk - High school/Univer. Degree, technically oriented, basic IT background, KPI - nr. of tickets solved	25 - 30,000	30 - 35,000	5 - 10,000	2
T roles	IT infrastructure average - University degree, technical skill set, IT background for at least 3 years (front/back)	40 - 50,000	50 - 65,000	10 - 15,000	4
_	IT Development average - University degree, technical skill set, IT background for at least 3 years (front/back)	40 - 50,000	50 - 90,000	10 - 15,000	5

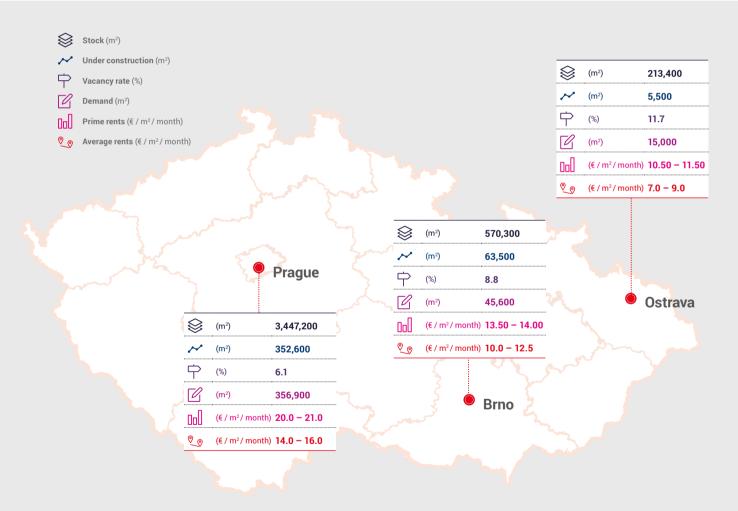
*******		•	Ost	rava	······································
	Position	Salary grade Junior 0 - 2 years experience ENG	Salary grade Senior 3 - 5 years experience ENG	Language proficiency per additional language	Recruitability of profiles 1 easy to find, 5 very difficult
	IT Team Leader - University degree in technical environment, at least 4 years in IT sector, Leadership, reporting, Board - 2/3 position		70 - 85,000	15 - 20,000	2
IT roles	IT Project manager - University degree in technical environment, at least 4 years in IT sector, project lead management, KPI oriented, set up project strategy, Board - 2/3 position		80 - 100,000	15 - 20,000	3
	$\label{lem:intermediate} \textbf{IT Manager} - University degree in technical environment, at least 5-7 years in IT sector, Leadership, reporting, managerial skills, Board-1/2 position$		90 - 130,000	15 - 20,000	2
Service support	Customer Service representative - High school/Univer. Degree, Sales & Customer oriented, Microsoft office, KPI driven, ability to work under pressure. KPI nr. of customers processed, customer satisfaction survey 1 - 5 ranking	20 - 25,000	25 - 30,000	5 - 10,000	2
vice s	Order Clerk - High school/Univer. Degree, Sales & Customer oriented, Microsoft office, KPI driven, order management, creating and tracking	20 - 25,000	25 - 30,000	5 - 10,000	2
omer Servic	Customer Care team Leader - High school/Univer. Degree, at least 3 - 5 years in branch, Leading group 10 - 15 colleagues, Microsoft office, Reporting KPI, Leadership skills, Board - 2/3 position	30 - 40,000	35 - 45,000	5 - 10,000	2
Customer	Customer Service Manager - University degree, at least 5 - 7 years in branch, Leading Customer center operations, Microsoft office, KPI set up, Strategy owner, creator and implementor, communication with Center head, Board -1/2 position		50 - 65,000	proficiency per additional language ,000	2
	Buyer - High school/Univer. Degree, managemenet of 50 - 150 suppliers, negotiation skills, Sales oriented,	28 - 33,000	33 - 42,000	5 - 10,000	2
Compliance	Strategic Buyer - High school/Univer. Degree, managemenet of 150 - 2000 suppliers, negotiation skills, Sales oriented, tender manangmeent and assignment to suppliers, Leader ship skills, reporting, Excel	42 - 55,000	55 - 65,000	5 - 10,000	3
Compl	Procure to pay (P2P) - High school/Univer. Degree, integration of the purchasing department with the accounts payable, Excel, reporting	28 - 33,000	33 - 42,000	5 - 10,000	2
So	Procurement & Compliance specialist - High school/Univer. Degree, Supplier code creator, focus on internal rules, reporting of discrepancies and violations, Microsoft office, at leas 2 years in procurement	Board -1/2 position er. Degree, Sales illity to work under satisfaction survey stomer oriented, ting and tracking ergree, at least es, Microsoft office, ast 5 - 7 years in oft office, KPI munication with f 50 - 150 suppliers, emenet of 150 - 2000 enanangmeent and parameter an	5 - 10,000	4	
Procurement	Team Leader P&C - University degree, at least 3 - 5 years in Procurement, compliance, ethical code owner, leader of 10 - 15 colleagues, leadership skills, KIP set up, reporting, Microsoft office, Board - 2/3 position		65 - 75,000	10 - 15,000	2
	Manager P&C - University degree, at least 5 - 7 years in Procurement, compliance, Strategic owner of P&C Process, implementor and creator, leadership skills, KIP set up, reporting, Microsoft office, Board -1/2 position	Salary grade Junior 0 - 2 years experience ENG	10 - 15,000	2	
	Inbound Sales Agent - High school/Univer. Degree, Sales & Customer oriented, Microsoft office, KPI driven, reporting, Excel, KPI nr. of customers processed, customer satisfaction survey 1 - 5 ranking	25 - 30,000	29 - 34,000	5 - 10,000	3
Sales	Outbound Sales Agent - High school/Univer. Degree, Sales & Customer oriented, Microsoft office, KPI driven, ability to work under pressure, KPI nr. of sold products, signed contracts	26 - 32,000	30 - 36,000	5 - 10,000	3
Sa	Telesales Team Leader - High school/Univer. Degree, Leading group 10 - 15 colleagues, Microsoft office, Reporting KPI, Leadership skills, Board - 2/3 position	30 - 50,000	35 - 55,000	5 - 10,000	3
	Telesales Manager - University degree, Leading call center operations, Microsoft office, KPI set up, Strategy owner, creator and implementor, communication with Center head, Board -1/2 position		65 - 85,000	10 - 15,000	2





| Office Market in the Czech Republic

The Czech Republic has continued to demonstrate stable economic growth which has translated into a steady development of the country's office markets – it is the second largest office market in Central and Eastern Europe (over 4.2 million m² of modern office stock) and continues to expand at a healthy pace (over 420,000 m² under construction). The Czech Republic currently offers 3 main city hubs from which to launch and grow business services - Prague, Brno and Ostrava.



Overview of office market in Prague, Brno and Ostrava
Source: JLL, Prague Research Forum Q3 2018, Regional Research Forum H1 2018



KEY DATA FROM THE OFFICE MARKET IN THE CZECH REPUBLIC

Prague

- » As the capital city, Prague is the largest and most established office market in the Czech Republic with 3.45 million m² of modern office space, comprising of mainly modern A-class properties, which account for 72% of the total stock. The main office hubs are particularly located around metro stations, which provide excellent accessibility and public services nearby.
- » Due to strong economic fundamentals and positive economic growth in general, we have registered high demand for office space over the last couple of years which peaked in 2017 with almost 540,000 m² of leased office space. Gross demand in the third quarter of 2018 outperformed the 5-year average by 20% and amounted to 127,500 m². The total gross demand, year to date, reached 356,900 m², down by 2% y-o-y. The leading source of demand in 2018 YTD were companies from the IT, manufacturing and advertising & media sectors.
- » Several notable co-working players such as WeWork, IWG (Spaces), New Work and HubHub entered the market with others expected to begin operations between 2019 and 2020.



million m² of modern office space

- » Development activity is slowly returning to pre-crisis levels. After a record low of new supply in 2016, when only 36,300 m² were delivered to the market, another 136,000 m² of modern office space was completed in 2017 and further growth is expected in upcoming years. The total new supply for 2018 is estimated to reach a level of 160,100 m², while ca. 200,000 m² is scheduled for 2019. The pace of construction is one of the highest recorded on the Prague office market. Currently, there is approximately 352,600 m² of office space under construction with scheduled completion between 2018 and 2020.
- » Due to the strong leasing activity and very positive net absorption in Q3 2018, the vacancy rate decreased q-o-q by 60 bps to its current level of 6.1%, representing the lowest level since Q2 2008. With respect to the current leasing activity and the level of speculative construction, we forecast the vacancy rate will remain low throughout 2019.
- » Prime rents in Prague oscillate at the level of €20.00 21.00 m²/month, whereas average rents for office space in Prague range between €14.00 16.00 m²/month. We forecast rents to increase over the short-term horizon due to a lack of available space in the most sought after locations and continued high demand for offices.





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Capital



Research



Office Agency



Tenant Representation



\$ Valuation



Retail



Property

Management



Industrial Agency



Project and Development Services



X Tétris

Brno

- » With 570,300 m² of modern office space, Brno represents the largest regional office market in the Czech Republic outside of Prague. Brno's office stock more than doubled in size over the last ten years and development activity is booming.
- » In H1 2018, two new office buildings totalling 25,600 m² of modern office space were completed. Development activity remains very strong with another 63,500 m² of offices currently under construction with scheduled completion between 2018 and 2020. The total new supply for 2018 is forecasted to reach ca. 50,500 m² which would result in one of the strongest years in terms of new supply.
- » Thanks to the availability of a highly educated and qualified labour force, the Brno office market is benefiting from a strong presence and demand from the IT and business services sectors. The five largest transactions concluded in Brno during H1 2018 were represented by companies from these sectors, namely Moravia IT, AT&T, Monster, 2K Czech and Cleverance.



- » Overall, we have seen strong and stable leasing activity in Brno over the last couple of years with average annual gross demand of 55,900 m². In H1 2018, gross demand in Brno totalled 45,600 m² which represents a 55% increase in comparison with the previous half year and a y-o-y increase of 80%.
- » As a result of the relatively strong new supply delivered to the market, the vacancy rate increased slightly in H1 2018 to its current level of 8.8%. This figure reflects an increase by 150 bps compared to H2 2017. There is approximately 50,200 m² of offices immediately available for lease.
- » Prime rents in the city of Brno are favourable when compared to the capital city.

 The current prime headline rents for the top office projects on the market reach a level of €13.50 14.00 m²/month. The majority of offices on the market are nevertheless being offered in the range of €10.00 12.50 m²/month.



Ostrava

- » The current modern office stock in Ostrava totals 213,400 m² which makes the city the third largest office market in the Czech Republic (after Prague and Brno).
- » Development activity in Ostrava has been quite constrained over the last couple of years. Since 2013, only four smaller office buildings with a total leasable area of 13,000 m² have been completed. Currently, there is only one project under construction Smart Innovation Center, with planned completion in H2 2018. This project will enlarge the office market by an additional 5,500 m² of modern office space.
- » Following the results of 2017, occupier activity continued at a solid pace with 15,000 m² of offices leased in H1 2018, representing a y-o-y increase by 137%. Against H2 2017 results, gross demand increased by 6%. We have witnessed a few transactions over 1,000 m² concluded in H1 2018, the most notable one was the renegotiation of OKIN BPS in The Orchard Ostrava (7,300 m²). Companies offering business services remain the most active on the market.
- » Due to a relatively strong demand for offices and no new supply in H1 2018, the vacancy rate in Ostrava dropped to 11.7%, representing a decrease of 160 bps compared to H2 2017 and the lowest vacancy rate since 2010. At the end of H1 2018, there are eight office properties that offer more than 1,000 m² of available space for lease.



» Prime headline rents for modern office space Ostrava typically range between €10.00 – 12.00 m²/month, depending mainly on the exact location, quality and age of the project. Prime headline rents in the Ostrava office market remained stable in the range €10.50 – 11.50 m²/month. Average rents for office space in Ostrava range between €7.00 – 9.00 m²/month.



6 GLOBAL HUMAN CAPITAL TRENDS



l Human Capital Trends

Czech firms find employee well-being, or physical, mental, financial and spiritual health, to be of the greatest importance (92%). Nevertheless, only 57% of respondents believe that their firm is ready for it. These are the conclusions of Deloitte's Global Human Capital Trends report in 2018. The survey included over 11,000 respondents across 124 countries worldwide, including the Czech Republic.

"In recent years, more and more focus has come to be placed on well-being. This is, among others, owing to the current low unemployment rate and the generation of millennials entering the workforce. Employees as well as job applicants not only show greater interest in how the employer approaches all components of employee well-being but they also actively seek such treatment. Flexible working hours enabling a better work-life balance have become almost a matter of fact," says Barbora Černíková, a Deloitte learning specialist and organiser of the Happiness at Work conference.

As the survey shows, well-being (which places fourth in global terms) is followed by the issue of people data and the perception of related risks (85%). In this regard, Czech respondents agreed with the global results. The third trend, both in the Czech Republic and worldwide, is a shift from building a career towards gaining experience (84%). Nevertheless, half of respondents said their organisations were not very effective and efficient in enabling people to manage their careers. Additionally, the top 5 trends in the Czech Republic included personalised and agile rewards (80%) and artificial intelligence, automation and robotics (78%), the latter, in fact, ranking eighth in global terms.

Czech respondents primarily included representatives of small firms of up to 1,000 employees (45%). Medium-sized companies of up to 10,000 employees accounted for 36% and large companies of over 10,000 employees for 19%. Almost two thirds of answers were given by middle management (61%), with top management accounting for 19% of Czech respondents.

The survey's findings show that trends shift towards focus on an individual, placing emphasis on the quality of internal and external relations within the firm. The key topic for companies is a shift from the company's internal focus to the external ecosystem. Firms are evaluated based on the quality of their relations with employees, customers, communities and regulators. If the firm is to preserve its reputation, which is vital for recruitment, and retain its key employees as well as loyal customers, it must cultivate these relations.

"Companies must talk to the outside world, actively manage their involvement and how they communicate about themselves, and invest in the ecosystem by treating all their employees fairly, creating a working environment that not only promotes career-building but also employee well-being," says Pavel Šimák, leader of Advisory Service Czech Republic.



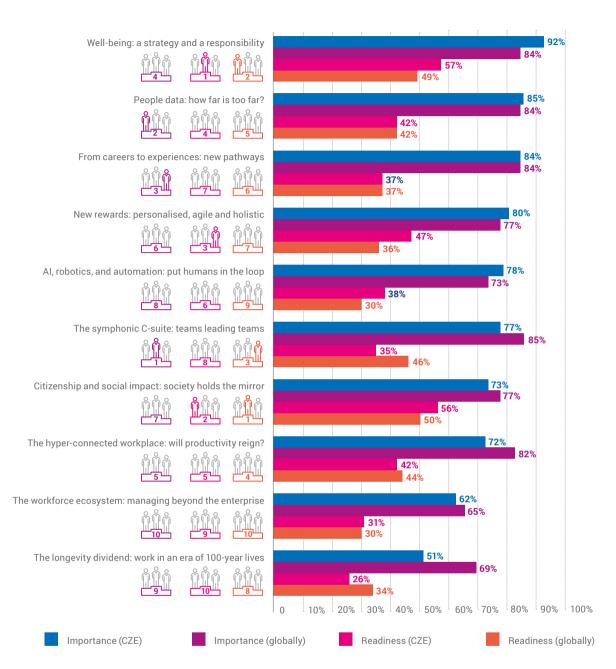


Figure 6.0
2018 Human Capital Trends in the Czech Republic and Worldwide
Source: Deloitte.cz

The survey also shows that 96% of Czech firms are planning on growing in 2018, 58% of which to a greater degree than in 2017. In the next 12-18 months, 36% of Czech firms are planning on increasing their investments in HR.

Accelerating trend in SSC sector Human Resources in the Cloud

"Over the last decades, companies have been undertaking many steps to cloud computing and shared services centres. This trend was driven in order to manage efficiencies as well as to deal with the complexity of recent business. It is difficult to imagine these changes taking place without cloud-based capabilities. New cloud-based services have been experiencing widespread adoption and this trend is still accelerating. It is great to see that cloud technology has matured enough and therefore cannot be overlooked even in HR service delivery." says Ondrej Prerovsky, Head of HR Cloud at Deloitte Czech Republic

We looked at the main differentiators behind the adoption of cloud computing and shared services through our experience of running change and transformation projects globally.

So where is the advantage of cloud solution?

» Flexibility and no initial investment

Necessary services are provided when required and are based on the latest process and technology standards. Frequent upgrades provide assurance to stay in line with latest trends. Thanks to the subscription method there is no initial investment.

» Configuration and easy deployment

Deployment is much faster than a traditional on premise solution. All you need is a web browser and internet connection. And thanks to intuitive self-services, the majority of configuration is in the hands of the HR department.

» Security

This is often the top concern. Please be assured that cloud providers use strict security standards and top solutions. These might not be affordable to every company. Therefore, data would be safe and even better protected.

We believe that both platforms - cloud computing and shared services - are not only going with market trends, but also rapidly changing the behaviour of consumers. Both programs require careful planning and strong change management amongst key stakeholders and employees.

While it does not seem as apparent when considering shared service and cloud computing solutions, both will provide the ability to implement change easily, quickly and smoothly.

If implemented well, they allow long-term, sustainable and effective management of costs and processes.



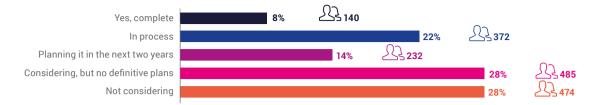


Figure 6.1
Limited investment in HR and talent systems

"What are yours plans to replace current HR technology with new integrated cloud-based systems?" Source: Deloitte.cz

Global Deloitte Shared Service Conference in Prague: Employee's retention as one of the key focuses

In October 2018, the annual Global Deloitte Shared Services conference was held in Prague and was attended by representatives of international companies running their SSC agenda. The Czech sector was represented by companies such as Johnson & Johnson Global Services Prague, AB InBev Capability Centre, Novartis Global Services Centre and many others.

Over the last 20 years the conference has built up the reputation of being the largest and most insightful event of its kind in the market. This year's topics focused on how to leverage advances in technology to create a more personalised, improved service for our end users and customers in a shared services context.

Its main theme was therefore "welcome to the digital age".





One of the main topics of the conference was how to predict employees' retention. The answer is simple – using **predictive analytics**. Maybe it sounds easy but in fact there is a lot to do. How to build the right model which reflects client context? First of all you need to define the relevant data sources. And then feed the system with real data.

Predictive analytics in practice

The work data of each observed employee in the minimum length of 12 months will serve as source data. Approximately 20 most important predictors out of 500+ are identified (specific for each organisation). The initial sources for observing employees include, for example, rewards, sociodemographic data, attendance, time off data and many others.

The result of predictive analytics could for example be a list of employees with high probability of leaving the organisation in the following period (say three months). It often confirms the intuition of HR and business professionals but also identifies areas which clients frequently report as unexpected.

Predictive analytics is therefore able to determine the risk that employees will leave and identify key reasons for it. From a broader perspective, it enables essential decisions in the area of HR and answers questions such as how to build a team, how to set up bonuses, whom to give preference to in the entry interview in the context of the identified reasons for departure of previous employees, etc.

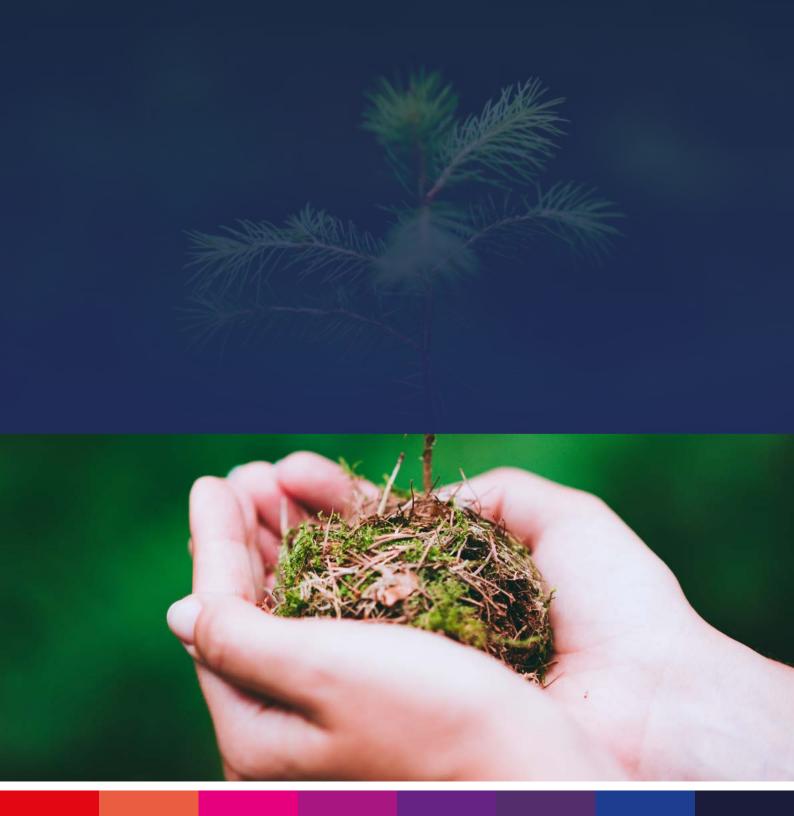
Did you know...

Staff retention becomes a critical success factor for SSCs in today's labour market. Why is that? There are three important reasons:

- Talent is cited as the number one challenge among SSC leaders in receiving sites, globally.
- 2. There is a significant increase in lead times for sourcing new talent in receiving countries.
- And also a much stronger focus on addressing the issue through retention interventions compared to the traditional focus on recruitment.



7 INVESTMENT INCENTIVES



CZECH REPUBLIC

Strategic services centres and related activities could be subsidised by cash grants or tax incentives in the Czech Republic.

I Investment Incentives

The investors in the Czech Republic may benefit from using investment incentives for strategic service centres. These include shared service centres (SSCs), repair centres, centres for software development, data centres, customer support centres and technology centres.

Strategic service centres shall be able to prove their international reach, i.e. services provided by the SSC shall reach another two countries in addition to the Czech Republic.

SSCs are understood as business plants or their parts focusing on taking over the management, operation and administration of international operations such as accounting, finance, human resources, marketing etc. The internal operations of SSCs are taken over from a controlling or controlled person or contractual partners, for whom these activities are not the subject matter of their business.

A repair centre shall mean a business plant focusing on the repair of technically advanced equipment (eg. office machines and computing equipment, electronic machinery etc.). A software development centre shall mean a business plant or its part, focusing on the development of new, or the innovation of existing, software. A data centre focuses on the storage, sorting and management of data using its computer systems and their related components, and a customer support centre focuses on managing relations and communications with customers through electronic communications networks.

A technology centre shall mean a business plant or its part, focusing on applied research, development and innovation of technically advanced products, technologies and manufacturing processes, including the creation and innovation of their software intended for use in production and to increase added value.

The maximum intensity of the investment incentives is 25 percent of eligible costs in all regions of the Czech Republic with the exception of Prague.

Shared service centres may utilise the investment incentives in the form of:

- » Corporate income tax relief for a period of up to 10 years; and
- » Cash grant for job creation (CZK 100,000 CZK 200,000 in the regions with a high unemployment rate).

On top of the 25 percent of maximal state aid in certain regions:

» Cash grant for training and retraining up to the amount of 50 percent of the training costs.



The eligible costs can be calculated as the amount of salary costs including social security and health insurance of the newly created jobs for a two-year period (there are certain limits that apply to salary costs – three times the average wage) or alternatively as the amount of assets while at least 50 percent of these costs must comprise newly acquired machinery.

In order to qualify for the investment incentive, the SSC and repair centres have to create at least 70 new jobs, software development and data centres 20 new jobs and customer support centres 500 new jobs. These new jobs shall be created in direct connection with an investment incentive project. Also, these job positions have to be retained throughout the period of the utilisation of the incentives (at least for 5 years).

Regarding the technology centre, the general conditions for investment projects are also the acquisition of tangible and intangible fixed assets worth at least CZK 10,000,000, where no less than CZK 5,000,000 must be expended on the acquisition of machinery, acquired at market price and which was not produced more than 2 years prior to its acquisition, and the creation and filling of at least 20 new jobs.

Procedure of Application

The company that wants to apply shall not start the investment project before submitting an application to Czechlnvest which represents the administrative body for investment incentives.



Figure 7.0
Investment Incentive Application Procedure.
Source: Deloitte.cz

Research and Development Tax Incentives (R&D Super Tax Deduction)



Background

» The corporate income tax rate in the Czech Republic is 19%. The Czech Republic offers a super tax deduction for costs incurred in qualified research activities.



Nature of incentives R&D super deduction

» The super deductions for qualifying research expenses incurred in the Czech Republic have two components as follows:

» Volume-based super deduction

A super deduction of 200% of the costs incurred during the implementation of R&D projects is available. The additional 100% deduction provides tax savings of 19% of qualified research expenses.

» Additional incremental super deduction

To the extent that the amount of qualifying research expenses increased from the prior year, an additional 10% deduction on the increased amount is permitted. This means that a 210% deduction is permitted on the qualifying costs that exceed the prior period, thereby providing tax savings for the increase in research spending to approximately 21% of qualified research expenses.

Expenses are generally eligible for the R&D super deduction if:

- » The expenses were incurred by the taxpayer in executing an R&D project concerning experimental or theoretical work, planning or design work, calculations, technology designs, production of a functional sample or prototype of a product or its part, connected with the execution of an R&D project;
- » The expenses are expenses that are tax deductible; and
- » The expenses are separately identified from other expenses.

If the super deduction cannot be utilised in the current period, it may be carried forward for three years.





Eligible industries and qualifying costs

» The criteria for qualified research are similar to the definition of R&D in the OECD Frascati Manual. The basic criteria are the presence of an appreciable element of novelty and clarification of research or technical uncertainties. These may exist even if the subject of the research is known in the industry subject to certain conditions being fulfilled.

Qualifying activities include the introduction of new or improved technology, systems, or services, and the production of new or improved materials, products and equipment, design and verification of prototypes, pilots, or demonstration equipment.

Qualifying expenses include wages and salaries, materials, depreciation of tangible assets used in direct relation to the project, and other operating expenses directly related to the project (i.e. travel reimbursements, low value assets, costs related to finance leasing, and other operating costs).

While purchased R&D, contract research and other services are typically not qualified research expenses, limited exceptions exist for the following:

- » R&D services provided by public universities and public research institutions;
- » Services related to the R&D project (verifying or proving that the result of the R&D meets the requirements set out by legal regulations); and
- » Finance leasing of tangible assets used in a qualified R&D project.

The super deduction cannot include expenses funded through government/public subsidies.



Other Concerns

» Documentation requirements are imposed on taxpayers that claim super deductions. Before the project starts, the taxpayer must compile a written R&D document specifying the qualified activities. At the end of the taxation period, the taxpayer must prepare a document specifying the costs incurred in the qualified project. These documents must be prepared and retained, but do not have to be submitted with the annual tax return. These documents, however, may be reviewed by the tax authorities during a tax audit. An expert opinion that approves the R&D nature of activities performed within the R&D project may need to be obtained.

Cash Grants from EU funds



Background

» The Czech Republic has been a member of the EU since 2014 and has been benefiting from the European Structural and Investment Funds (ESI Funds). Through 11 programmes, the Czech Republic has been allocated EUR 24.2 billion from the ESI Funds over the period of 2014-2020. With a national contribution of EUR 7.88 billion, the Czech Republic has a total budget of EUR 32.08 billion to be invested in various areas, from creating jobs and growth to investing in research and innovation, protecting the environment, supporting sustainable transport, promoting employment and labour mobility, and enhancing social inclusion. Companies generally may apply for various types of direct and indirect support. The amount of the subsidy depends on the type of the subsidy programme.



Operational Programme Enterprise and Innovation for Competitiveness (OPEIC) » OPEIC is the most prevalent source of funding share service centres and related activities.

Under OPEIC, approximately EUR 4.3 billion was allocated from the European Regional Development Fund. OPEIC provides various types of special programmes supporting: R&D activities, innovation, energy saving projects, training centres, marketing projects, other technology projects, etc.

Detailed rules and conditions are specified in calls for proposals and they can vary call by call. Calls are announced usually every year with a certain date for opening the call and the submission date of the applications.

The general conditions to cash grant applicants are as follows:

- » It may be a small, medium-sized or large enterprise.
- » It must declare in an affidavit that it has been registered as an income tax payer in one of the EU Member States; the applicant should also realise that it must have established business premises or a branch in the Czech Republic at the time the aid is disbursed.
- » It must declare in an affidavit that it has no debt towards selected institutions in the country in which it is based, or in the country its branches are based or towards aid providers from projects co-financed from the EU budget.
- » It must declare in an affidavit that it is not in arrears for wages for its employees and does not have any outstanding obligations arising from a recovery order drawn up on the basis of a Commission Decision, declaring the aid as unlawful and incompatible with the internal market.



Projects whose outputs are classified under any of the following sectors are not eligible for support:

- » Agriculture, forestry, fishery and aquaculture (CZ-NACE A 01, A 02, A 03);
- » The coal industry (CZ-NACE B 05, C 19.1);
- » The steel sector:
- » Industrial production of synthetic fibres;
- » Shipbuilding (CZ-NACE C 30.11);
- » Transport and related infrastructure;
- » Production and distribution of energy; and
- » Energy infrastructure.

General conditions:

- » The project must be implemented on the territory of the Czech Republic, outside the Capital City of Prague.
- » The aid applicant must clearly demonstrate ownership or other rights to the property and land where the project is to be implemented.
- » The project does not envisage aid for activities associated with export volumes (export subsidies) support for the establishment and operation of a distribution network abroad, or for other standard costs related to export activities (customs, insurance, etc.); or aid contingent on the use of domestic goods in preference to imported goods.
- » The project has not started before the date of submission of the aid application.
- » The project may not violate EU horizontal policies or their fundamental principles, such as gender equality and sustainable development.

The following selected activities for share service centres could be subsidised under OPEIC:



Establishment and operation of shared services centres

Specific conditions:

- » Minimum number of new jobs requested 5 for small enterprises, 10 for medium-sized enterprises and 20 for large enterprises.
- » Minimum investment costs requested CZK 0.3 million for small enterprises, CZK 0.5 million for medium-sized enterprises and CZK 1 million for large enterprises.

Eligible costs:

- a) Wages of staff, rental, services of experts; and
- b) Hardware, software and other expenditure relating to the project.

Level of public aid:

- » 45% of eligible costs for small enterprises;
- » 35% of eligible costs for medium-sized enterprises; and
- » 25% of eligible costs for large enterprises.



Creation of new IS/ ICT solutions

Specific conditions:

- The minimum number of new jobs requested 2 for small enterprises,
 3 for medium-sized enterprises and 4 for large enterprises.
- » Minimum investment costs requested CZK 0.15 million for small enterprises, CZK 0.5 million for medium-sized enterprises and CZK 1 million for large enterprises.

Eligible costs:

- » Wages of staff, rental, services of experts; and
- » Hardware, software and other expenditure relating to the project.

Level of public aid:

- » 45% of eligible costs for small enterprises;
- » 35% of eligible costs for medium-sized enterprises; and
- » 25% of eligible costs for large enterprises.





Construction and modernisation of data centres

Eligible costs:

- » Acquisition of land, buildings;
- » Renovation of buildings;
- » Hardware;
- » Software:
- » Other machinery and equipment; and
- » Services of experts (only for SMEs).

Level of public aid:

- » 45% of eligible costs for small enterprises;
- » 35% of eligible costs for medium-sized enterprises; and
- » 25% of eligible costs for large enterprises.

Operational Programme Employment (OPE)

- » OPE focuses mainly on supporting employment and adaptability of the workforce; social inclusion and combating poverty; social innovation and international cooperation and effective public administration. The maximum amount of the subsidy depends on the region and job position.
- » Detailed rules and conditions are specified in calls for proposals and they can vary call by call. Calls are announced usually every year with a certain date for opening the call and the submission date of the applications.

The following selected activities for share service centres could be subsidised under OPE:



Training and retraining of employees A cash grant is provided for general or specific training of employees.

Eligible costs:

- » Wages of internal lectures;
- » Lost wages of trainees;
- » Administration costs of the project (project manager, project administrator);
- » Training services;
- » Travels; and
- » Overheads.

The level of public aid:

» Up to 85% of eligible costs.

Deloitte.



Deloitte and Anaplan Alliance

Optimal business planning

Deloitte and Anaplan industry solutions

Deloitte has several go-to-market industry solutions that leverage Anaplan. We currently have solutions for the following areas:



SSC Operations: Providing SSC organisations with effective solution for workforce planning, chargeback models, annual budgeting and process performance dashboards.



Sales Operations: Providing tools to enhance sales planning and forecasting tasks such as quota planning, territory planning, pricing and quoting, commission calculation, sales forecasting, and sales capacity planning.



Finance Planning and Analysis: Helping clients find more effective ways to execute tasks such as financial consolidation, profitability analysis, balance sheet and cash planning, budgeting, forecasting and reporting, strategic planning, and workforce planning.



Trade Promotion Management: Providing consumer packaged goods companies with sophisticated models to better manage trade promotions so they can balance revenue across channels and increase overall revenue and profitability.



Tax Planning: Providing tools for transfer pricing and tax optimisation to help clients more effectively manage their tax liabilities.



Supply Chain: Providing end-to-end solutions to help clients manage inventory, supply-demand planning (S&OP) and long-term capacity planning.

About our Alliance

Our alliance combines the wisdom of Deloitte's strategic planning capabilities and our industry professionals (incl. SSC and GBS experts) with disruptive technology from Anaplan. Together, we are taking real-time planning and forecasting to an entirely new level.

With Deloitte and Anaplan, today's businesses can utilise modern technology to sift through massive amounts of data in real-time. The results can be used to drive better, more informed business decisions, as well as a faster response to changing market dynamics.

About our Anaplan Practice

Deloitte has successfully delivered more than 150 Anaplan project, including many of Anaplan's largest implementations to date. A key differentiator for Deloitte is our deep content knowledge and experience in all areas of the business (incl. SSC and GBS functions). This enables us to help clients enhance their planning efforts across multiple business functions from sales and finance to tax planning and supply chain.

Another common requirement is the need to integrate Anaplan with cloud solutions. In addition to being a thought leader in cloud computing, Deloitte has vast experience with related cloud solutions. Giving our practitioners an edge when it comes to integrating Anaplan with these and other cloud components.



