



---

# Business Services Sector in the Czech Republic

## 2022



**Report prepared**  
**by Association of Business Services Leaders in the Czech Republic (ABS L)**  
in cooperation with:  
Colliers, The Hackett Institute, Grafton Recruitment and GI Group



## **Authors of the Report:**

### **ABS L Project Team**

Data Analysis: **Michaela Peterková**  
Content Curator: **Helena Tabakovová**  
Editing & Promotion: **Markéta Fillingerová**  
ABS L's Own Study: **Adéla Fejfarová**  
Introduction & Revision: **Jonathan Appleton**  
ABS L Fusion: **Klára Černá**

### **Other contributors**

Chapter 4: People & Talent Management

**Grafton Recruitment & GI Group**

Chapter 5: Labour Market and Salaries in Business Services

**Grafton Recruitment and GI Group**

Chapter 6: Going Hybrid: Work from Home & Emerging Workplace Solutions

**Colliers, Scott.Weber Workspace**

Chapter 7: Training & Education

**The Hackett Institute**

Chapter 9: Real Estate and Office Market

**Colliers**

Chapter 10: Work Revolution

**Colliers**

With special thank you to members of the ABS L Board of Directors.

**Photographs:** Getty Images, Shutterstock, ABS L archive

**Graphic layout and typesetting:** **COPY GENERAL**

[www.copygeneral.cz](http://www.copygeneral.cz)

© ABS L 2022

All copyrights in this work are the property of ABS L. Unless otherwise stated by the relevant provisions of law, any use, reproduction, duplication, modification, adaptation or retransmission of this work, in whole or in part, in any manner, without the prior written consent of the copyright holder, is a violation of copyright law.

## CONTENT

---

<b>1. ABSL Introduction</b>	<b>4</b>
Chapter Content Provider: ABSL	
<b>2. The Key Trends &amp; Highlights of Business Services</b>	<b>14</b>
Chapter Content Provider: ABSL	
<b>3. Snapshot of Business Services in the Czech Republic</b>	<b>19</b>
Chapter Content Providers: ABSL, Grafton Recruitment & GI Group	
<b>4. People &amp; Talent Management</b>	<b>41</b>
Chapter Content Providers: ABSL, Grafton Recruitment & GI Group	
<b>5. Labour Market and Salaries in Business Services</b>	<b>60</b>
Chapter Content Providers: ABSL, Colliers	
<b>6. Going Hybrid: Work from Home &amp; Emerging Workplace Solutions</b>	<b>74</b>
Chapter Content Providers: ABSL, The Hackett Institute	
<b>7. Training &amp; Education</b>	<b>84</b>
With contributions from The Hackett Institute	
<b>8. Tech-Driven Change</b>	<b>100</b>
Chapter Content Provider: ABSL	
<b>9. Real Estate and Office Market</b>	<b>107</b>
Chapter Content Provider: Colliers	
<b>10. Work Revolution</b>	<b>112</b>
With contributions from Colliers	
<b>11. Key Terms</b>	<b>118</b>
Chapter Content Provider: ABSL	



# 1

## ABSL INTRODUCTION





## 20 YEARS OF BUSINESS SERVICES IN THE CZECH REPUBLIC AND THE SECTOR CONTINUES TO FLOURISH AND GROW

---

Dear readers,

On behalf of the ABSL Board of Directors, let me proudly welcome you to the brand new 2022 Annual Report for Business Services in the Czech Republic. In the last 10 years, ABSL and our Reports have become the market leaders for insights, information and analysis into the business services sector both here in Czech and Internationally.

As our sector grows in size, maturity and impact every year, so does the importance of our contribution and voice in the future of the Czech Republic and the hundreds of international companies that have made this country their global hub for business services.

In this packed report you will find a toolkit resource that will provide you with sector insights, trends and future strategies to enable you to:

- » Benchmark your own business service operation against the sector in WFH, Digital, Services Maturity, Technology, Talents and many other areas.
- » Promote your Czech location and the success stories behind Global Business Services in this country.
- » Educate your teams and key sponsors on the trends and characteristics of business here in the Czech Republic, directly from best practices in the sector.
- » Learn new approaches and opportunities from the best practice, Diamond winning projects highlighted in innovation, value added services, talent education and many more.
- » Predict future trends and build your business strategies to be ahead of the curve in leading office trends, talent strategies and insights from our global strategic partners.

So I urge you to kick back, close the door or Zoom call - and enjoy one of the most insightful and relevant business reports to kick off your 2022 and beyond. Feel the power of the ABSL network and the strength of our amazing business services sector.

Jonathan Appleton  
Managing Director, ABSL Czech Republic



## INTRODUCING ABSL

---

Association of Business Service Leaders (ABSL) in the Czech Republic was founded in 2013. It is the largest association of companies operating in the Business Services and Business Outsourcing Industry. It acts as a platform for enhanced dialogue and collaboration within the Business Services Community. ABSL currently represents close to 100 member companies.



## ABOUT THIS REPORT

---

The purpose of the ABSL Report 2022 is to highlight the most significant data and provide an overview of the shared, business and outsourcing services in the Czech Republic. The source of data in this publication comes from the ABSL Survey, which was conducted amongst ABSL member companies in the period from June until November 2021.

The in-depth ABSL Survey has been completed by 52 centres employing almost 30 thousand people. The supporting data and information have been collected through an ABSL's own independent research across the sector in order to provide a more complex overview of the industry.



Find digital resources associated with this report at

**[absl.cz/report2022](https://absl.cz/report2022)**





## THE ABSL BOARD OF DIRECTORS

---

**Ota Kulháněk**

Chairman of the Board of Directors  
ABSL Czech Republic

**Jonathan Appleton**

Managing Director ABSL  
Czech Republic

**František Havel**

NGSC Prague Strategy & Operations  
Manager at Novartis

**Sergei Holmeckis**

Managing Director at Deutsche Telekom  
Services Europe Czech Republic

**Iveta Chvátlová**

Managing Director at SAP Services

**Adam Kiwalski**

GBS Head Business Solutions & Services  
and Delivery Management at Siemens

**Helle Juhl McDermott**

VP Shared Services and Site-Leader  
Prague at Curium Pharma

**Jan Nedělník**

General Manager at Comdata Czech  
and Comdata Hungary

**Roman Pavloušek**

Global Finance Service Centre  
Manager at Atlas Copco Services

**Jan Skoták**

Regional Center Head at Infosys  
Czech Republic

**Jaromír Staroba**

Director of Prague Capability Center  
at Anheuser-Busch InBev

**Nicole Pierson**

Senior Director, Global Services Procurement  
EMEA at Johnson & Johnson

## THE ABSL TEAM

---

**Helena Tabakovová**

Senior Operations Manager, ABSL

**Michaela Peterková**

Digital Projects Manager, ABSL

**Anna Štiptová**

Education Programmes Manager

**Adéla Fejfarová**

Event & Community Coordinator,  
ABSL

**Yuliia Ovchynnikova**

Marketing & Communication  
Coordinator

## ABSL MEMBER COMMUNITY

---



Think Ahead



accenture

Adecco



ALPIQ



BLUElink

Bodycote

Canon



Coaching Systems



Deloitte.



expats\_cz







## ABSL HIGHLIGHTS & ACHIEVEMENTS IN 2021

---

This year was pivotal for Czech Business Services and for ABSL. Just like many of our members, we had to re-shape our processes to accommodate going from digital to the new hybrid reality. In 2021, we connected, we learned, and we grew along with our sector.

### WE CONNECTED

and inspired each other during digital & live events, sharing knowledge and experiences.

**220**

attendees at live events

**350**

leaders attending ABSL Hybrid Conference

**500**

attendees at digital events

**10**

Diamond Award winners

**LinkedIn**

ABSL groups set up on LinkedIn

### WE LEARNED

at ABSL Fusion - qualifications tailored for Business Services run in partnership with The Hackett Institute, University of New York in Prague, and Coaching Systems.

**20**

Fusion Leader graduates

**MBA**

MBA in GBS launched

**10**

Fusion Professional graduates



## WE GREW

and became an even stronger sector through the exchange of market data analysis, strong government and public relations, and vast media coverage.



### Market Data

Market Data Research & Analysis



### Cooperation

Strategic Cooperation with Authorities



### Battlecard

ABSL Battlecard created



# 455

Articles worth 11.2 million CZK published

## ABSL DIAMOND AWARDS 2021

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 2021 were awarded to projects in seven categories from 40 submitted nominations. A record amount of excellent projects that push the industry into new and exciting directions.



## WINNERS OF ABSL DIAMONDS 2021

---



### BUSINESS INNOVATION

Atlas Copco Services for its smart travel cost audit project, which was invented to reduce manual tasks during the travel costs control for the company's employees.



Conectart for a Smart IVR project on Samsung's customer line which significantly streamlines the work of the contact center through an automated voice signpost.

---



### COMMUNITY AND CITIZEN SUPPORT

Johnson & Johnson Global Business Services for its numerous initiatives that support the health and well-being of its employees, their families and communities, charity, and environmental protection.

---



### EDUCATION

Pfizer for a program aimed at expanding employees' knowledge and skills and increasing their attractiveness in building a career with a new employer.



Kyndryl for a very comprehensive approach to educating their employees and working with student talent including cooperation with schools and universities on their syllabus.

---



### EMPLOYER BRANDING AND PEOPLE ENGAGEMENT

Deutsche Telekom Services Europe Czech Republic for involving their employees in the communication of their brand and the promotion of the entire sector of business services which led to an increased employee commitment and satisfaction.



GOODCALL

GoodCall and ExxonMobil for a joint project, which focused on supporting the ExxonMobil employer brand in the Czech Republic by organizing a competition for a trip to England to visit the Red Bull Racing factory.





## INNOVATIVE WORKPLACE AND REMOTE WORKING STRATEGIES

Novartis for their project called Reimagine Workplace, which is unique in its comprehensive approach to designing a future work model based on employee feedback and includes piloting a 4-day working week.



## VALUE CREATION

ABInBev Prague Digital Hub for implementing a series of innovations based on data analysis and using machine learning or artificial intelligence for CX upselling and smart inventory management.



## CUSTOMER INITIATIVE

Comdata Czech for developing a new automated customer care solution Care24 for smaller companies. Its emergence was triggered by current market needs with escalated customer queries in e-shops.

## WHAT DO OUR MEMBERS SAY ABOUT US?



'Great network of people sharing and helping each other. It is fantastic to be part of such a dynamic group full of energy yet not competing but cooperating.'



'Best practice sharing, global/local trends, being a part of and driving the future of GBS in CZ, connection to colleagues, building community of people, shaping the government thoughts and legislation.'



'Being a member of ABSL means for us contributing to the success of the Czech Shared Services business and helping to attract new talent to our industry that we all can benefit from in the future.'



'Valuable information, learnings, webinars, information exchange with other members. State of the art conference.'





Chapter Content Provider: ABSL

# 2

## KEY TRENDS & HIGHLIGHTS OF BUSINESS SERVICES



## BASIC FACTS

---

The sector continues to grow despite the pandemic and business service centres are reporting positive numbers in employment growth, upscaling their expert teams and services they provide. The metropolitan hubs of Prague, Brno and Ostrava are being joined by clusters of new centres in emerging locations in East and South Moravia and other parts of the Czech Republic.



# 145,000

total number of jobs



# 200,000

expected number of jobs in 2025



# 13%

employment growth in the year 2021  
compared to 5% in 2020



# 350

total number of business services  
centres

## Digitalization & Automation

---



# 13,000 FTEs

equivalent work performed by  
automation



# 12

average number of automation  
experts per centre (FTEs)



# 4,200

automation experts within the sector

## Diversity of Workforce

**44%**

share of foreigners

**36** years

the average employee age

**59%**

share of women



### WHAT ARE BUSINESS SERVICES ABOUT?

“Business services are a relatively young sector, created thanks to the expansion of the Internet and by the efforts of global companies to separate from individual branches some basic operational activities, such as accounting or IT support, and centralize them in one place and in a separate organizational unit where a team of experts will take care of them.

The advantage is higher work efficiency, transparency, and especially the possibility of easier innovation and, more recently, automation and digitization.

Gradually, companies found that far more areas could be addressed in this way, such as marketing, customer service, human resources, logistics, legal services, and even research and development. Today, business services centers are often the main innovation centers of their parent companies. Their experts also deal with, for example, robotic process automation, digitization, and data analytics. You can think of business services centers as the internal engine of any large company.”

Source: ABSL Battlecard 2021



## IMPACT OF COVID-19: INNOVATION AND FLEXIBILITY

The pandemic accelerates the positive transformation of the sector as the Czech centres continue to report an overall positive impact of the pandemic on their operations, with almost no impact on productivity. Some even track increase in effectiveness or new business opportunities.



# 95%

of centres report overall positive or no impact of COVID-19 on their operations



# 36%

of centres report overall positive impact of COVID-19 pandemic +16% compared to 2020



# 60%

of centres\* measure no impact on productivity



# 72%

of employees work fully from home & come optionally to the office

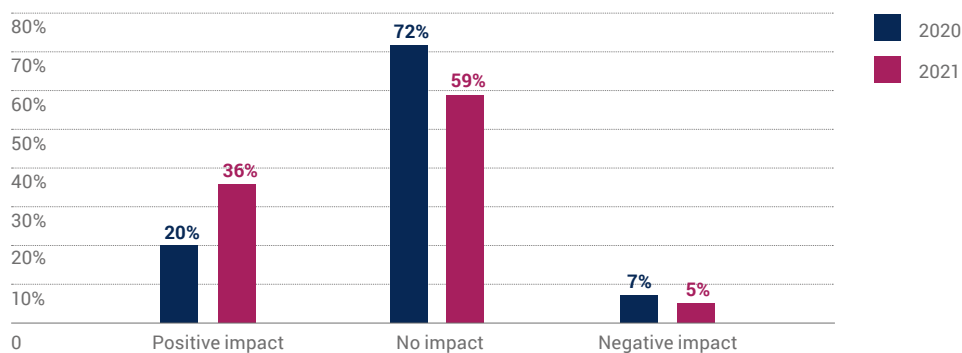


# 56%

of centres\* invest into digital reskilling

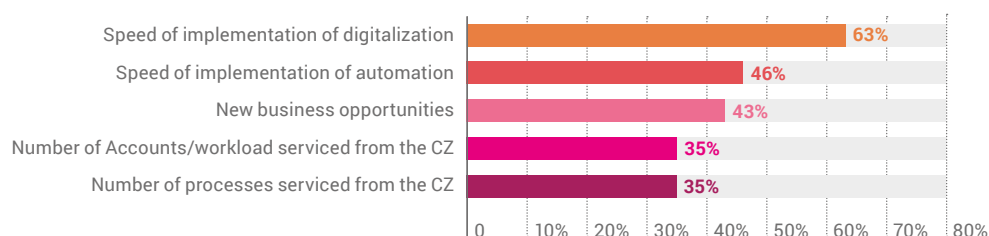
\*ABSL Work-from-Home Survey Outcomes 2021

### Overall positive impact of Covid-19 raises by 16%



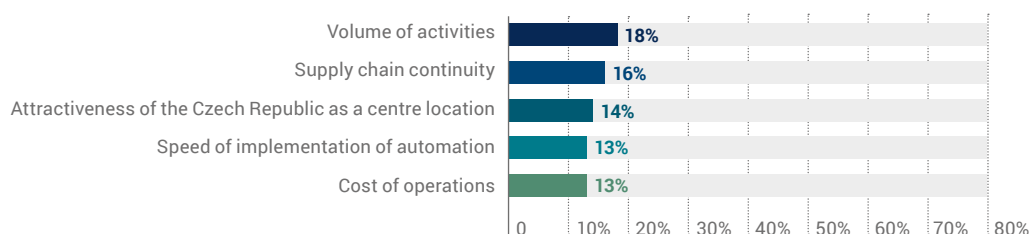
Source: ABSL Survey 2021

## Most common positive impact of COVID-19 on business services in CZ



Source: ABSL Survey 2021

## Most common negative impact of COVID-19 on business services in CZ



Source: ABSL Survey 2021

## Impact of COVID-19 on business services centres in the Czech Republic

	2021			change from 2020		
	% of centres					
	Positive impact	No impact	Negative impact	Positive impact	No impact	Negative impact
Speed of implementation of digitalization	63%	31%	6%	11%	-15%	4%
Speed of implementation of automation	46%	42%	13%	-7%	-4%	11%
New business opportunities	43%	47%	10%	6%	-3%	-3%
Number of Accounts/workload serviced from the CZ	35%	63%	2%	17%	-13%	-3%
Number of processes serviced from the CZ	35%	60%	4%	19%	-23%	4%
Volume of activities	33%	49%	18%	14%	-1%	-13%
Cost of operations	17%	71%	13%	-7%	8%	0%
Service delivery / processing capability	17%	79%	4%	-2%	0%	2%
Attractiveness of the Czech Republic as a centre location	16%	69%	14%	-10%	-1%	11%
Employee numbers	14%	76%	10%	12%	2%	-14%
Supply chain continuity	2%	82%	16%	-5%	0%	5%
Overall impact	36%	59%	5%	16%	-13%	-3%

Source: ABSL Survey 2021

Chapter Content Provider: ABSL

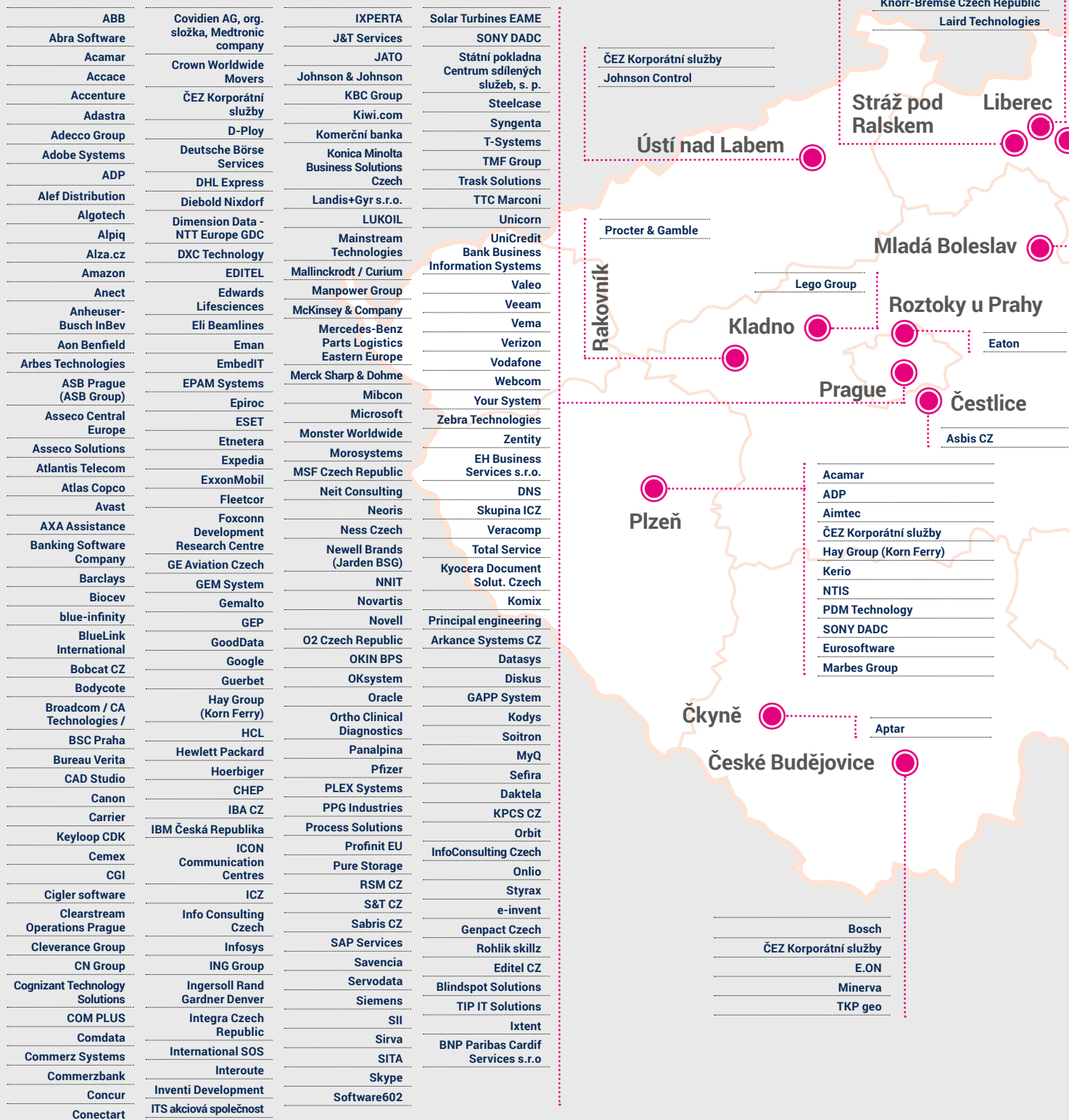
# 3

## SNAPSHOT OF BUSINESS SERVICES IN THE CZECH REPUBLIC

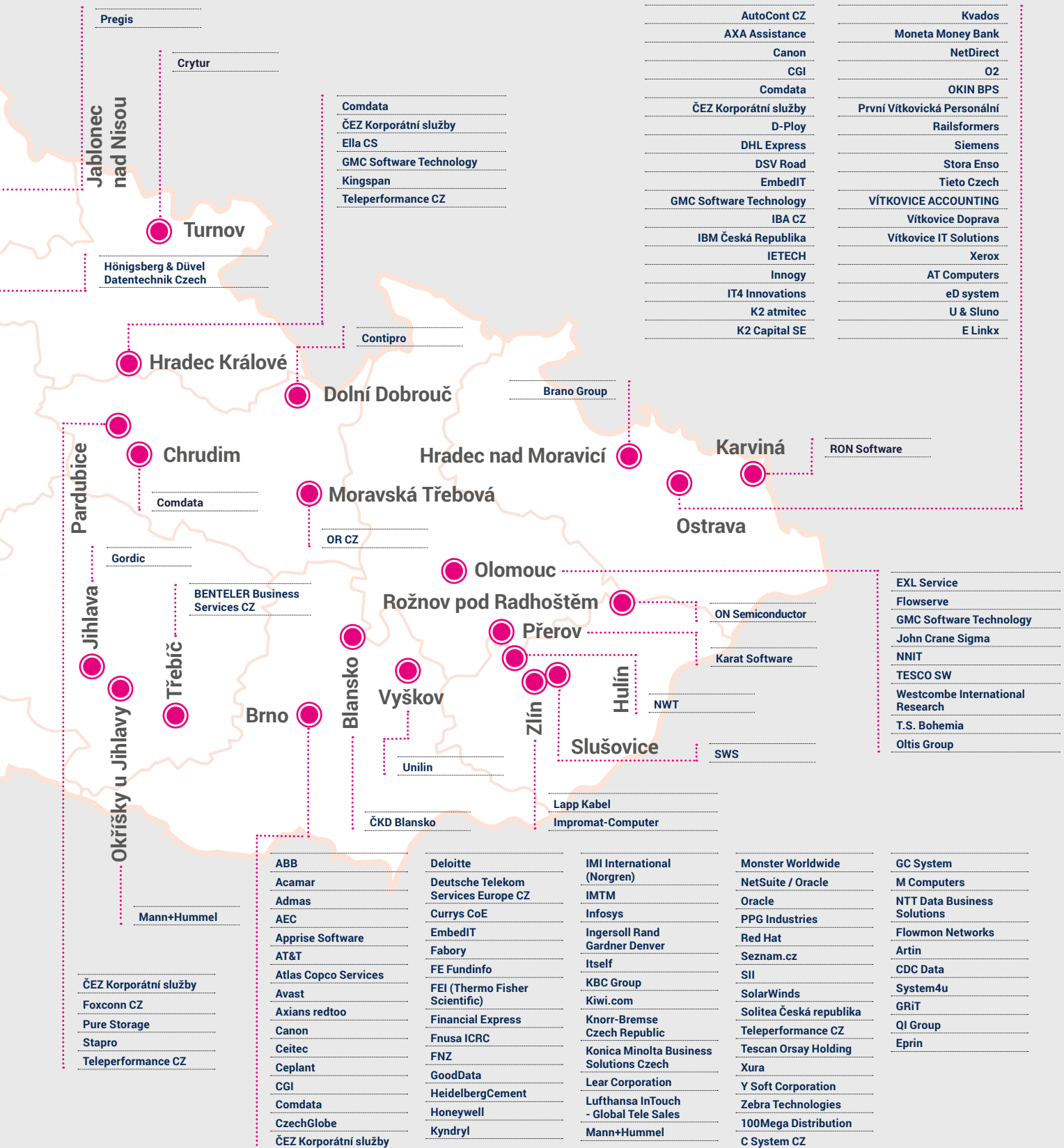




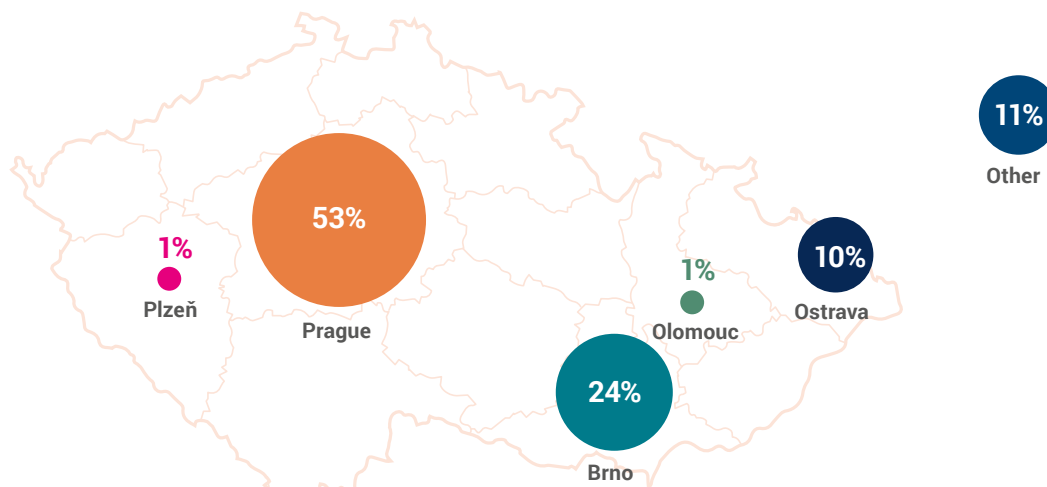
## Overview of business services centres in the Czech Republic



Source: ABSL's own study 2021



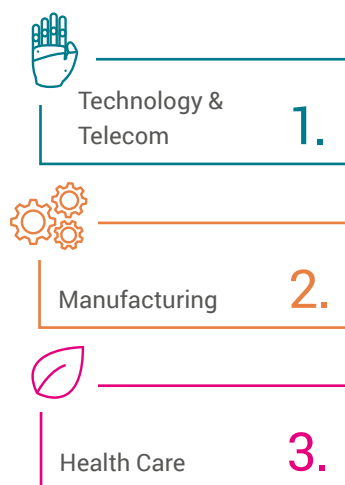
## Proportion of employees in business service centres according to location



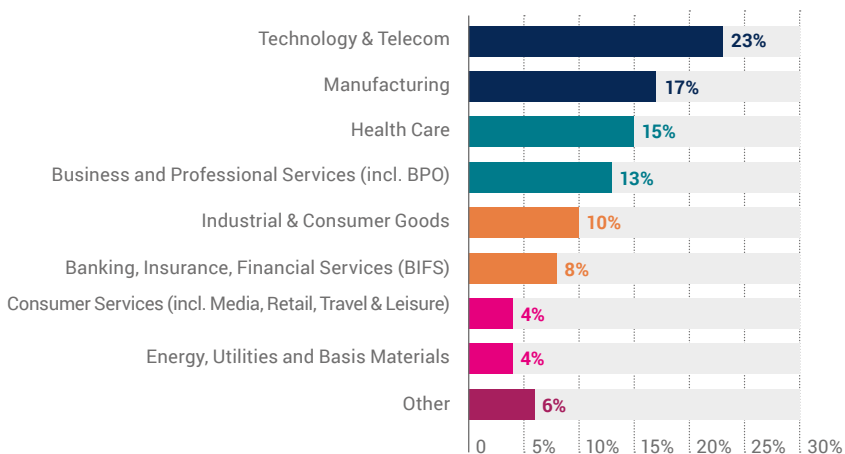
Source: ABSL's own study 2021

The most popular locations of business services centres in the Czech Republic continue to be the capital city of Prague and regional cities of Brno, Ostrava, Olomouc as well other emerging locations in Plzeň, Pardubice, Liberec, Ústí nad Labem, Hradec Králové and České Budějovice.

## Top 3 most represented parent company industries



## Sector represented by the parent company



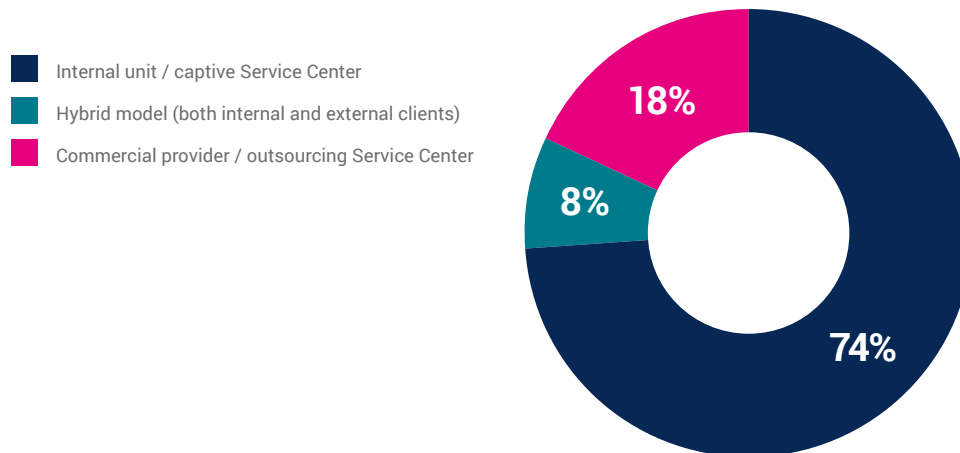
Source: ABSL Survey 2021



## Types of business service centres

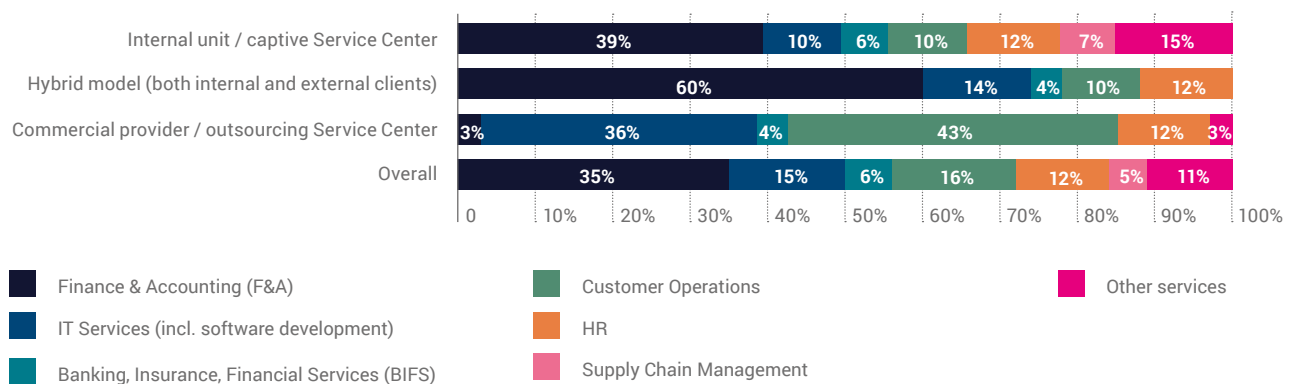
Majority of the centres in the Czech Republic operate as internal units and captive service centres - Shared Service Centres. The employees of these centres most often deliver services in the areas of Finance & Accounting (39% of employees), whereas IT and customer services are predominantly delivered by outsourcing centres.

### Share of business services centres in the Czech Republic according to the type



Source: ABSL Survey 2021

### Structure of employment in business service centers by categories of supported business processes



Source: ABSL Survey 2021

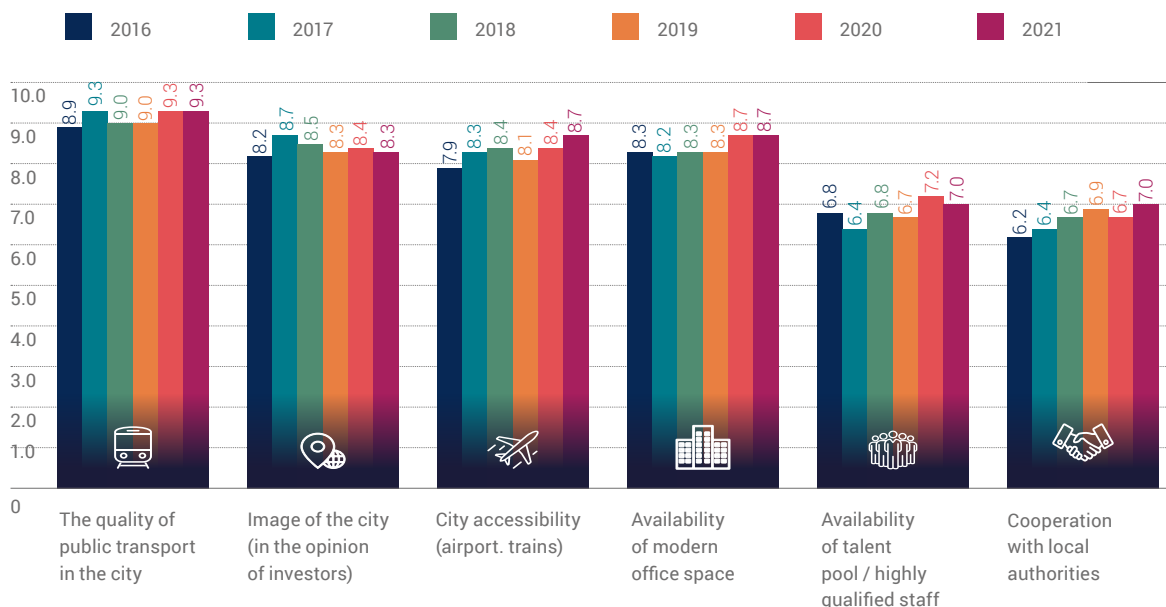
## LOCATION ATTRACTIVENESS & COMPETITION ASSESSMENT

### Assessment of local markets as an attractive location for business services

The Czech Republic as a centre location keeps its high attractiveness for foreign investors. The centres located here appreciate great infrastructure such as public transport and accessibility, which they tend to score more than 8 points out of 10. Availability of modern office space and city image are other factors keeping investors highly satisfied.

Slightly lower scores are given to the availability of talent pool and cooperation with local authorities, which is, however, gradually improving in the eyes of the centres' management.

### Assessment of local markets as place to do business



Source: ABSL Survey 2021

### Competition on the local market

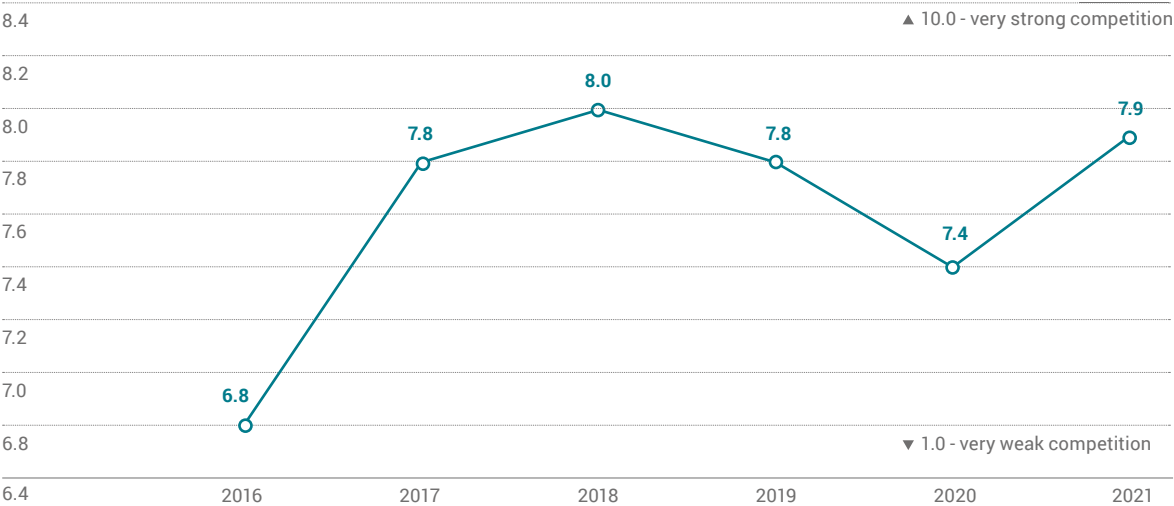
The respondents of the ABSL Survey 2021 were asked to score the competition on the local market from 1 being the lowest to 10 as the highest. On average, the responding centres reported a competition of 7,9 out of 10. This means an increase compared to the previous 2 years.



# 7,9/10

average rate of competition  
among business services  
centres in local markets in 2021

Perceived competition on the local market



Source: ABSL Survey 2016 - 2021



WHAT IS THE ADVANTAGE OF THE CZECH REPUBLIC AS A CENTRE LOCATION COMPARED TO OTHER COUNTRIES?

The main advantage is the combination of a local educated skilled workforce, a stable economic and political environment, the country's attractiveness to foreigners, and reasonable costs. The Czech Republic is not the cheapest destination in CEE and cannot and does not want to compete with the lowest price.

The value of the country, however, lies in the quality of work, expertise, and sustainability, which is largely based on the ability of the Czech Republic to attract and retain employees from abroad.

Source: ABSL Battlecard 2021

## Continuous Employment Growth

The overall rate of growth of employee numbers within the sector returned back to the pre-covid level, and even slightly increased. In total, the sector grew by 13% in 2021 and is expected to reach 145,000 jobs in 2022. This means that the sector has almost tripled in size over the last 8 years.

Further 9% growth is expected in the year 2022, which if projected should bring the sector size close to 200,000 employees in 2025.



# 13%

employment growth in business services centres in 2021



# 145,000

number of jobs in business services in the Czech Republic in 2022



# 9%

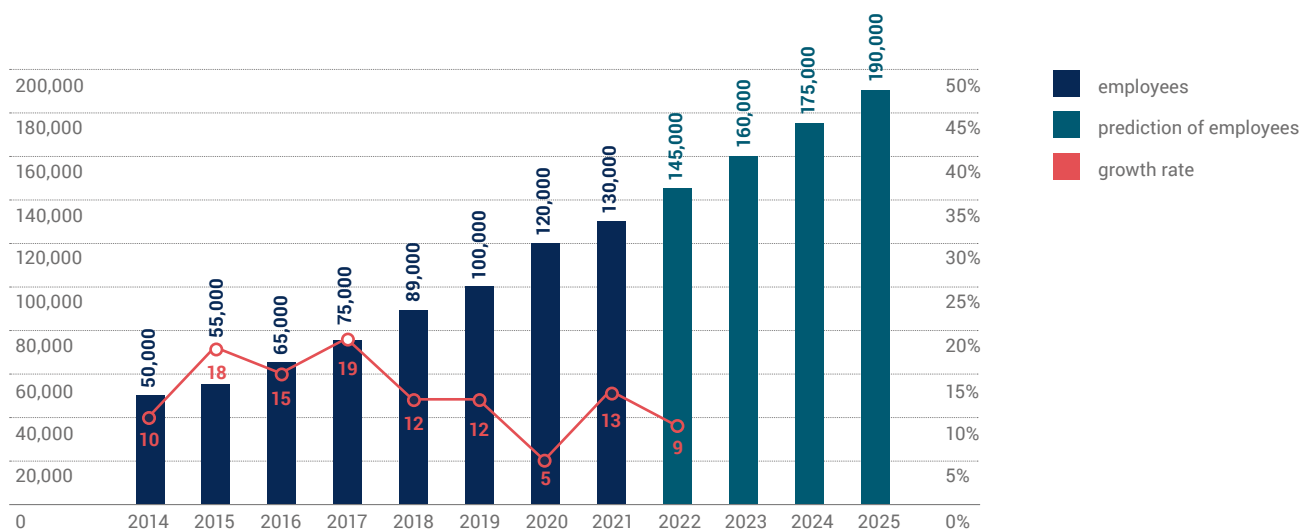
expected employment growth in business services centres in 2022



# ~200,000

expected number of jobs in 2025

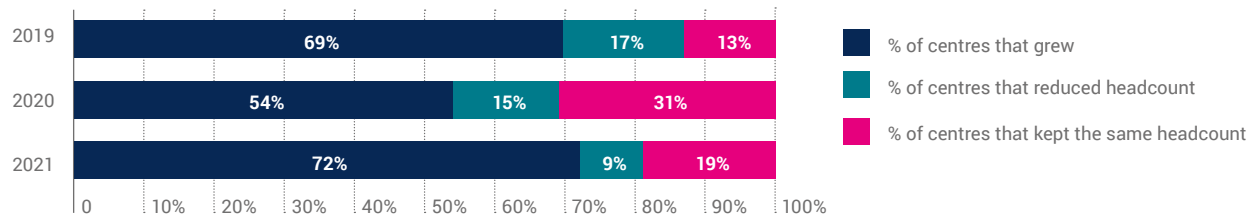
## Growth of business services in the Czech Republic



Source: ABSL Survey 2014 - 2021



## Growth & reduction of employee numbers in Czech centres in 2021



Source: ABSL Survey 2021



### WHY IS THE BUSINESS SERVICES SECTOR IN THE CZECH REPUBLIC GROWING FASTER THAN OTHER SECTORS?

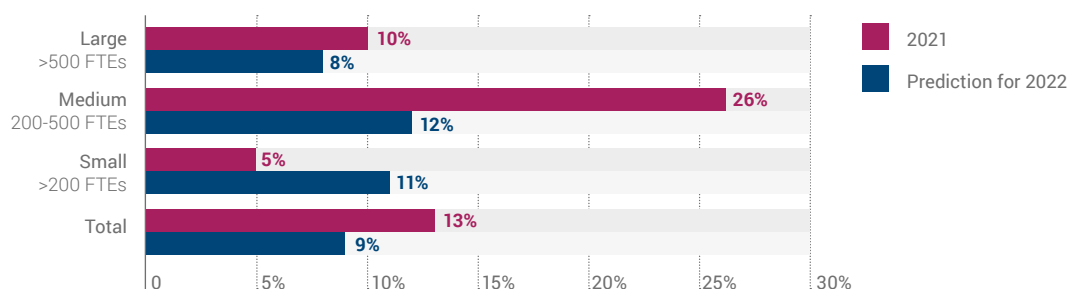
1. **Thanks to the rapid development of information technology.** The sector is still relatively young compared to other sectors and is still developing dynamically. This development is aided by rapid progress in IT and modern technologies, which are closely linked to the business services sector.
2. **Thanks to the expansion of the scope of existing centers.** A large number of centers have been opened in the Czech Republic in the last 10 years. The centers have gradually „grown up“, settled down, and found that the Czech Republic is a very high quality and safe destination for business services and are now investing in their further development and expansion.
3. **Thanks to global digitization.** Most global companies are investing in modern technology and digitization, and this has a very positive impact on the business services sector. The process of digitization allows parent companies to use business services centers for work with high added value.
4. **Thanks to the attractiveness of the Czech Republic for investments in business services.** The combination of a well-educated language workforce, membership in the European Union, a stable economic environment, interesting cities, and developed infrastructure is still very attractive for multinational companies.

Source: ABSL Battlecard 2021

## Employment growth by centre size

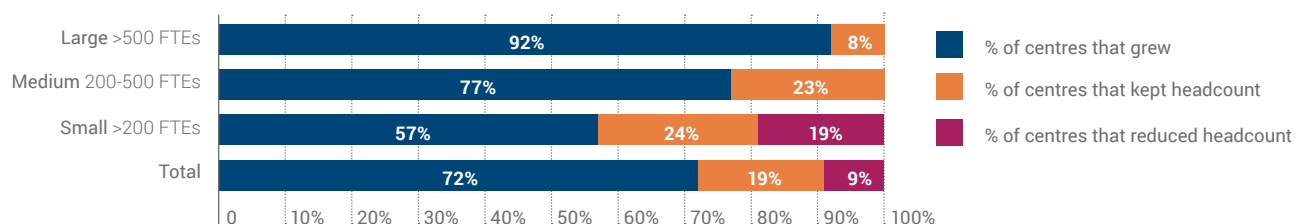
In terms of headcount numbers, medium centres grew the most in 2021 and also predicted the highest growth rate in 2022. The lowest growth in terms of employment was reported by small centres with less than 200 employees. 19% of small centres even reported a reduction in headcount in 2021 and plans for further reductions in 2022.

### Growth in employee numbers by centre size



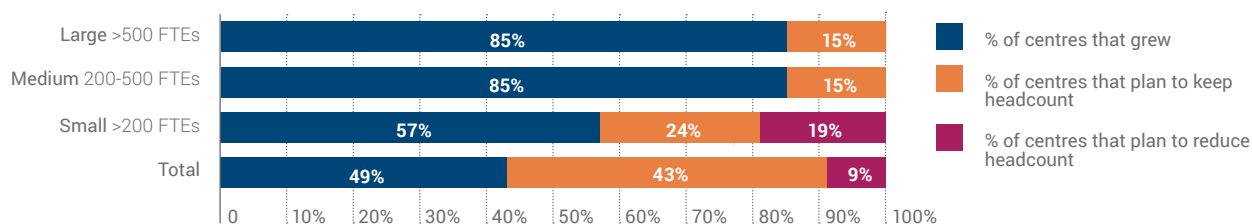
Source: ABSL Survey 2021

### Employment growth in 2021 by centre size



Source: ABSL Survey 2021

### Employment growth prediction for 2022 by centre size



Source: ABSL Survey 2021

## The Near Future of Czech Business Services

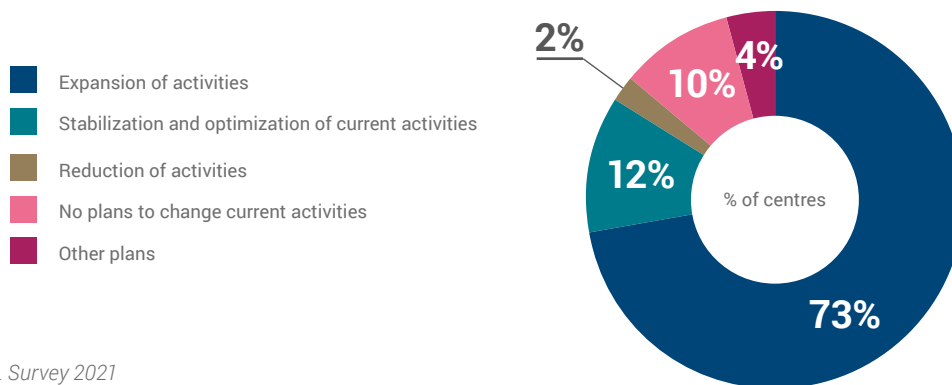
In 2020 there has been a significant drop in a share of centres that planned to expand their activities in the next 2 years. In 2021, however, the share of centres that plan to expand returned to the pre-pandemic level. 73% of centres plan to grow in the next 2 years. This shows the growing optimism and confidence returning back to Czech business services after they successfully handled the pandemic crisis.



# 73%

of centres plan to expand their activities in the next 2 years

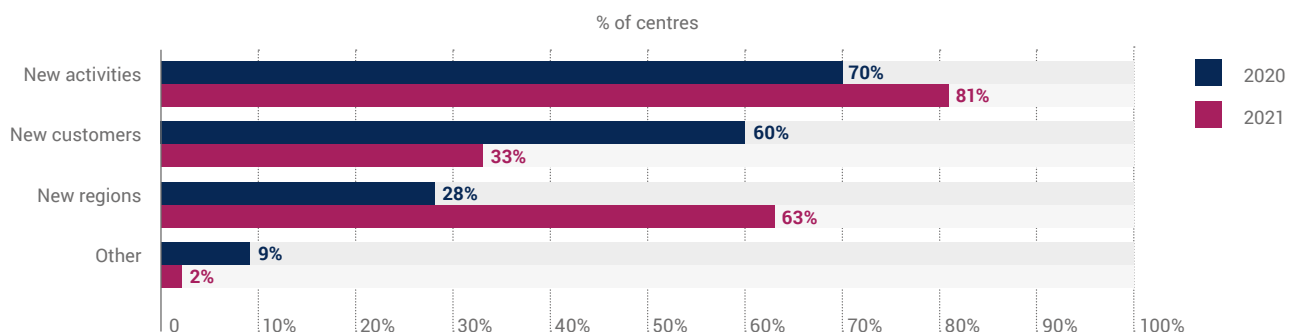
### Centres' plans for the next 2 years



Source: ABSL Survey 2021

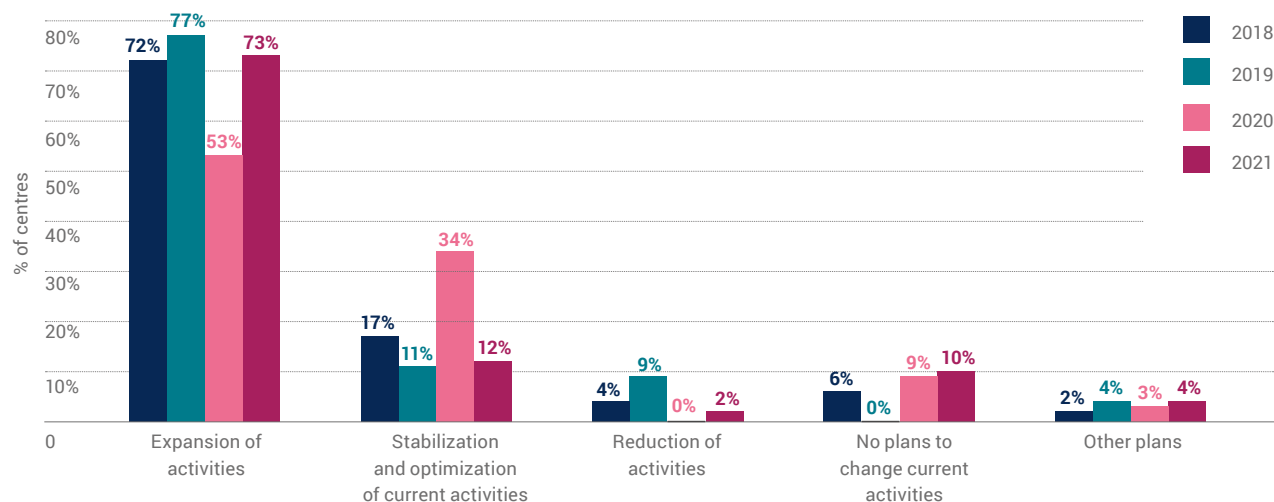
Out of the 73% of the centres that plan to grow in the next 2 years, the majority plan to fuel this growth by new activities (81% of centres). Compared to 2020, there is also a significant increase in the share of centres, which plan to drive their growth through servicing new regions (63% of centres that plan to expand).

### Areas that will be driving the expansion of the business services centres



Source: ABSL Survey 2020 - 2021

## Business services centres' plans to expand/reduce operations in the upcoming 2 years



Source: ABSL Survey 2018 - 2021

## SCOPE & MATURITY OF SERVICES DELIVERED

### Fostering innovation through maturity and complexity of services provided

The overall maturity of services provided by Czech business service centres continues to grow. In terms of volume of work, 80% of all services are now provided at advanced or partner level, compared to 73% and 72% in 2020 and 2019 respectively. The increase in maturity is fuelled mostly by providing services changing from the developing stage to advanced. This means that the centres are growing their expertise in the areas in which they already provide services, many of which become specialised hubs fostering innovation.

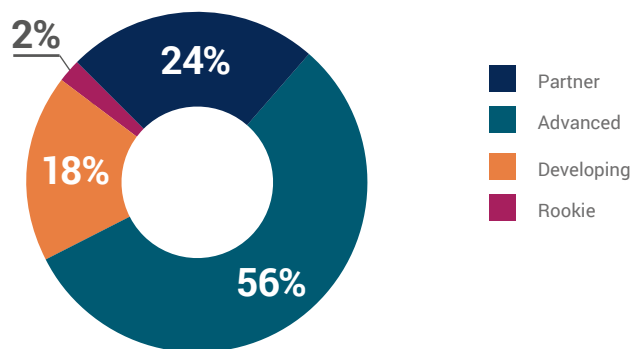
In terms of the number of centres, 60% of centres now provide some services on the partner level and 96% of centres provide some advanced services.

#### LEGEND

Rookie	Design and initial implementation in place
Developing	Some processes transferred; majority of processes not standardized
Advanced	Centralization completed as planned, processes standardized, continuous improvement in place
Partner	Optimization and Automation across organization, Business Outcomes focus & Partnership with clients



## Share of services provided at various maturity levels by Czech business services



Source: ABSL Survey 2021

## Beyond Tech-Driven Change: Knowledge-based activities on the rise

Centres continue to perform a higher share of knowledge-based activities, defined as complex tasks that require expertise. Digitalisation, automation and even artificial intelligence technologies are being implemented, replacing transaction activities defined as simple repetitive tasks.



**80%**

of processes are now being delivered in the advanced or partner level  
+19% compared to 2016



**60%**

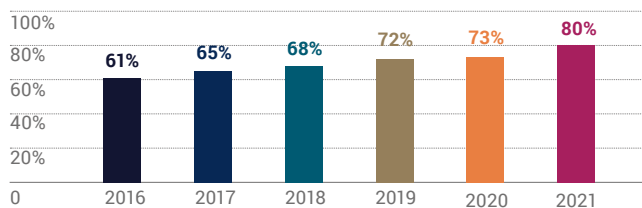
of centres provide some services on partner level



**52%**

of activities performed are knowledge-based

## Percentage of processes within Czech business services centres delivered in the advanced or partner stage



Source: ABSL Survey 2021

## TOP 10 SERVICES PROVIDED ON PARTNER LEVEL



1. HR: Mobility



6. Customer Operations: Sales &amp; Account Management Support



2. IT Services: Enabling Services



7. IT Services: Infrastructure Management / Support



3. Research &amp; Development: IT



8. Business Process Transformation



4. Project Management Office



9. Customer Operations: Customer Helpdesk



5. IT Services: Application Lifecycle Management / bespoke, gradual and software development



10. IT Services: Cybersecurity &amp; Information Security &amp; IT Services: Automatization / Optimization of Service Delivery (cost, quality)

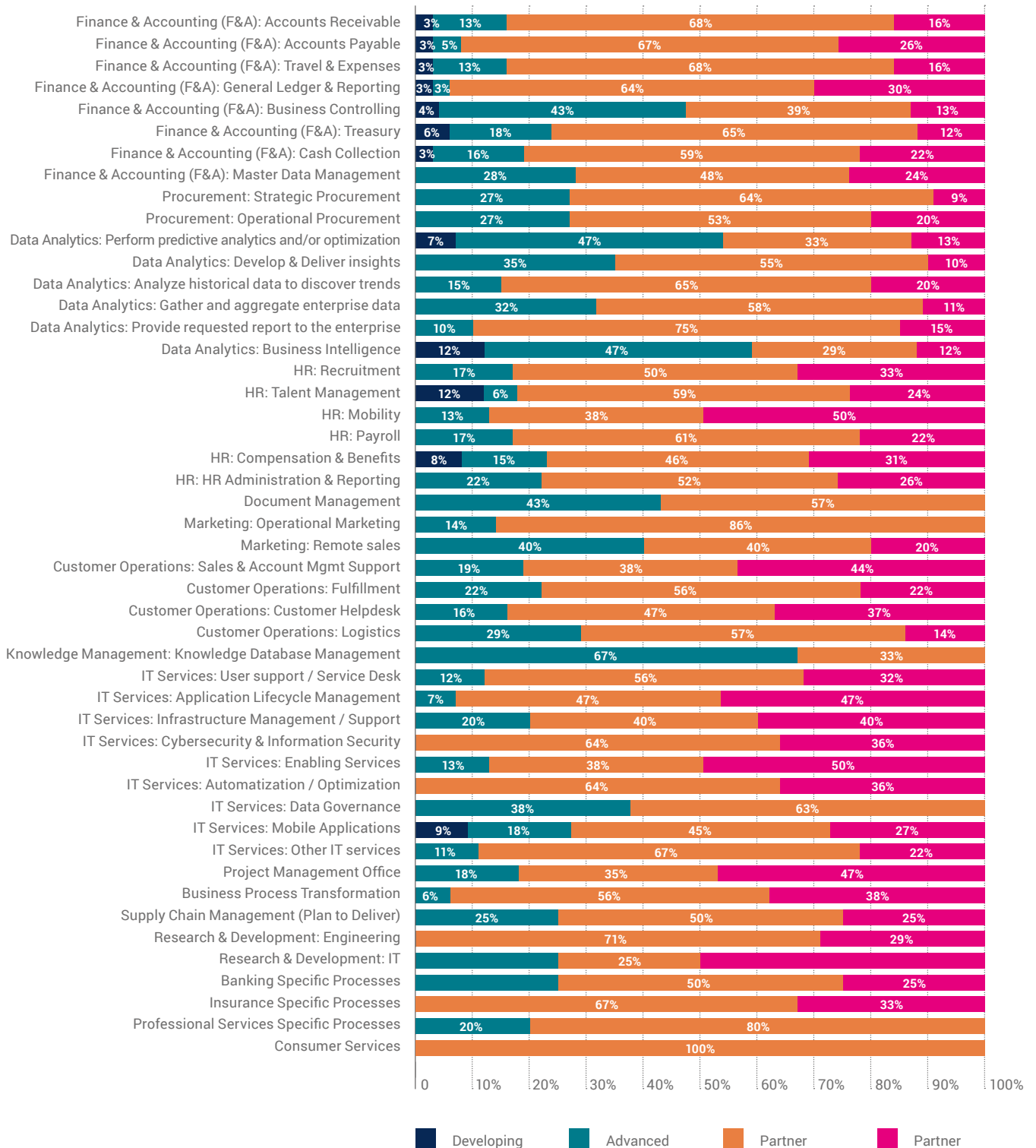
ABSL DIAMOND WINNER 2021  
IN CUSTOMER INITIATIVE

In the Customer Initiative category, the award was won by Comdata Czech, which created a new automated customer care solution Care24 for smaller companies. Its emergence was triggered by current market needs. The large increase in online shopping after the outbreak of the pandemic also brought a significant increase in the number of customer queries but e-shops did not have time to respond to them.

Thanks to the new service, companies will receive almost immediately professional customer service, including not only communication with customers but also detailed daily reporting, thanks to which the company's management can react in time if necessary. The Care24 service works as a call centre-as-a-service, the customer can choose when he wants to use customer care and when he can do it on his own. The service is currently being expanded to other countries in which Comdata operates.



## List of selected processes at business service centres - maturity level



## Top services on the rise delivered on the most advanced level

Technical capabilities and IT expertise has enabled the centres to develop into very innovative and digital hubs. Expert data mining and analytics help centres develop and deliver services more efficiently, focusing highly on business intelligence, enterprise master data and predictive analytics.

### TOP 5 SERVICES ON THE RISE IN 2021



1. F&A: Cash Collection



2. Data Analytics: Gather and aggregate enterprise data



3. Data Analytics: Business Intelligence



4. Data Analytics: Develop & Deliver insights to help leaders run the business more effectively



5. Data Analytics: Provide requested report to the enterprise

### TOP 5 SERVICES ON THE RISE OVER THE LAST 4 YEARS



1. Data Analytics: Gather and aggregate enterprise data



2. IT Services: User support / Service Desk



3. Data Analytics: Develop & Deliver insights to help leaders run the business more effectively



4. Data Analytics: Analyse historical data to discover trends



5. IT Services: Infrastructure Management / Support



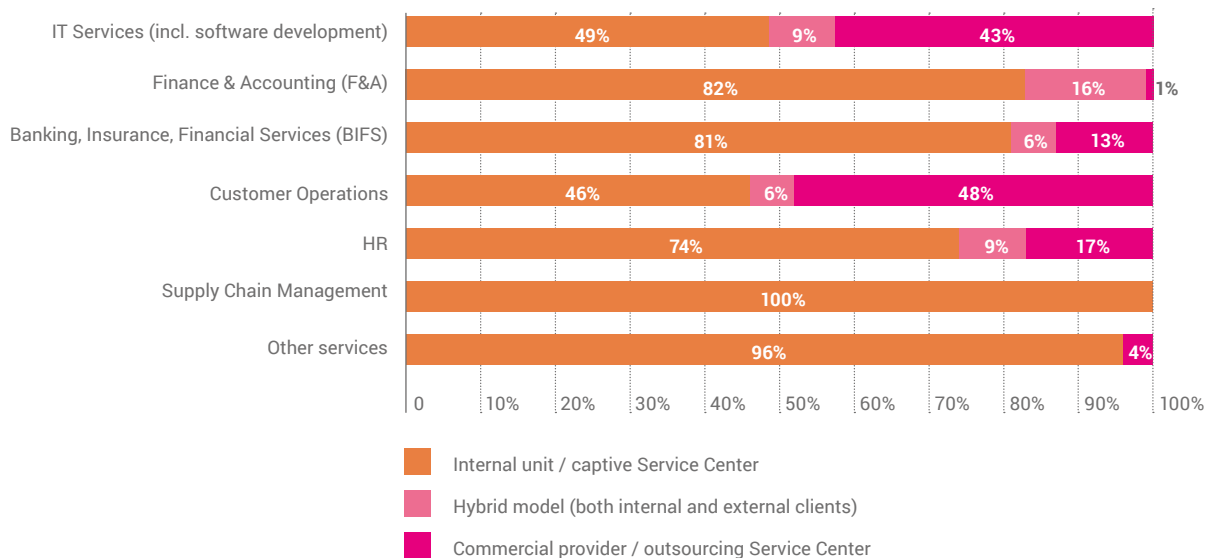


## ABSL DIAMOND WINNER 2021 IN VALUE CREATION

ABInBev Prague Digital Hub, which focuses on developing innovations for Anheuser-Busch InBev, a major global producer and seller of beer and soft drinks, was awarded for their unique approach. In 2020 and 2021, the company implemented a series of innovations based on data analysis and using machine learning or artificial intelligence technologies. The centre's data scientists analyse live data and based on their outputs, program the tools used in the company's daily work, such as upselling or smart inventory management. Thanks to the versatility of this technology, almost every part of the company value chain benefits from this innovation, from stock storage to shipping to the end customer. The estimated benefit is millions of USD per year. Due to the wide and global scope of the ABInBev analytical team, the Prague centre offers support and assistance in the implementation of analytical projects and the development of tailor-made solutions for other business service providers.

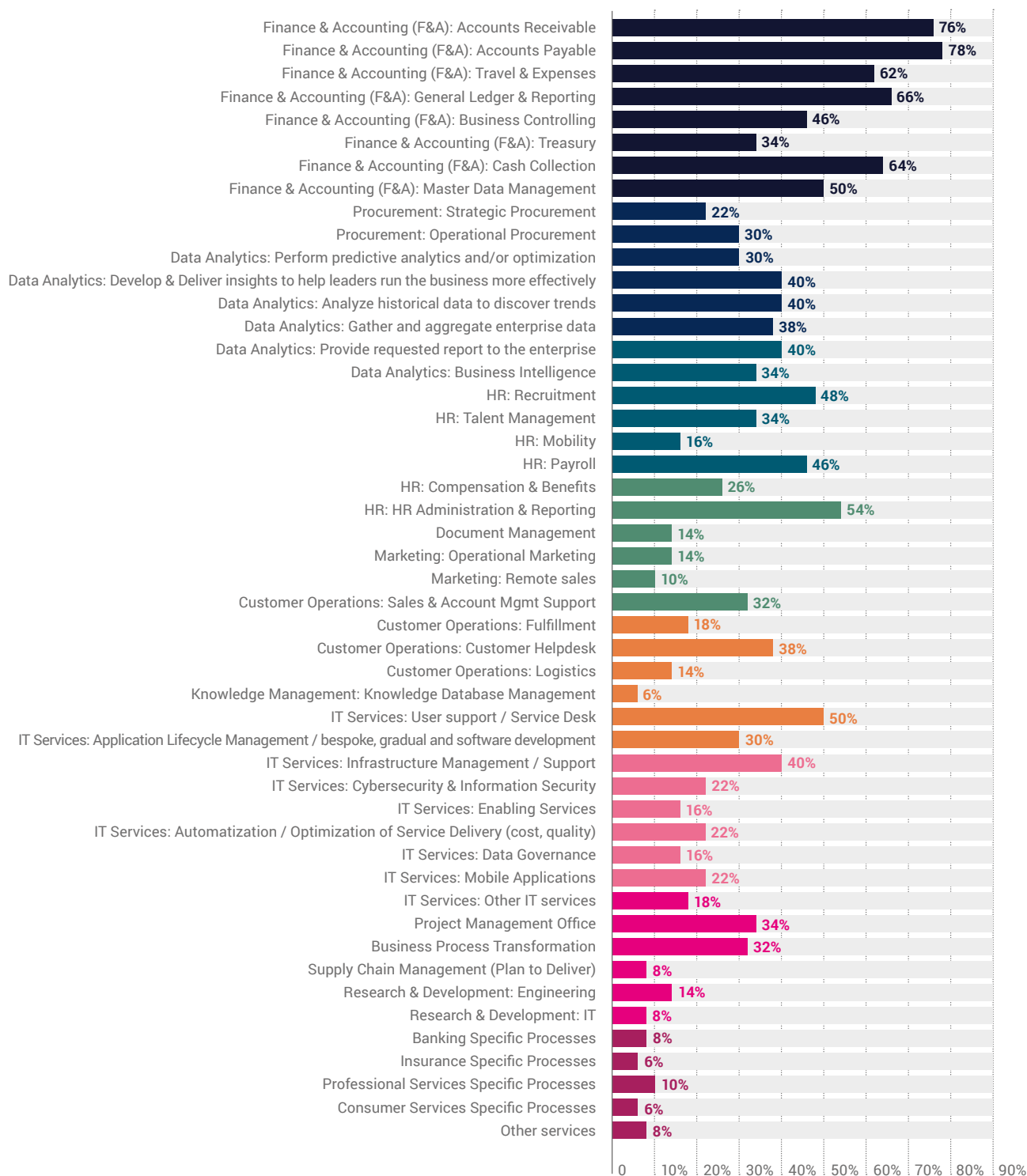


## Structure of employment in business service centers by categories of supported business processes



Source: ABSL Survey 2021

## Scope of services provided by Business Service Centers in the Czech Republic



Source: ABSL Survey 2021

## Transforming into Global Business Services: Reach of services provided by business services centres

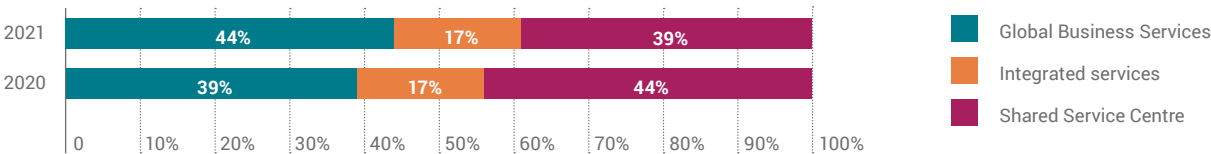
The business services centres in the Czech Republic continue to expand their reach of provided services, managing their transformation into GBS centres smoothly, taking over some of the workload of other Central European countries.



44%

of services are provided  
as global business services











### Reach of services provided



Source: ABSL Survey 2021

### TOP 10 SERVICES MOST OFTEN DELIVERED AS GBS

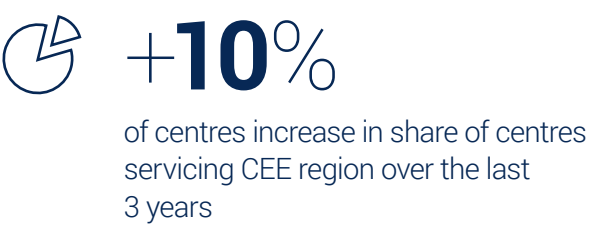
	1. Research & Development: IT		6. IT Services: Cybersecurity & Information Security
	2. Banking Specific Processes: e.g. corporate payments, loans, mortgage, fraud-risk management, deposits management etc.		7. Data Analytics: Gather and aggregate enterprise data
	3. Data Analytics: Perform predictive analytics and/or optimization		8. Data Analytics: Provide requested report to the enterprise
	4. Knowledge Management: Knowledge Database Management		9. HR: Mobility
	5. Consumer Services (Media, Retail, Travel & Leisure) Specific Processes: e.g. loyalty management, campaign management, social media monitoring, fare filing		10. Business Process Transformation

TOP 10 SERVICES MOST OFTEN DELIVERED AS SSC	
	1. Finance & Accounting (F&A): Travel & Expenses
	6. Finance & Accounting (F&A): Accounts Receivable
	2. Finance & Accounting (F&A): General Ledger & Reporting
	7. Finance & Accounting (F&A): Treasury
	3. HR: HR Administration & Reporting
	8. Document Management
	4. HR: Recruitment
	9. Finance & Accounting (F&A): Business Controlling
	5. Finance & Accounting (F&A): Cash Collection
	10. HR: Payroll

### Global regions supported by Czech Business Services

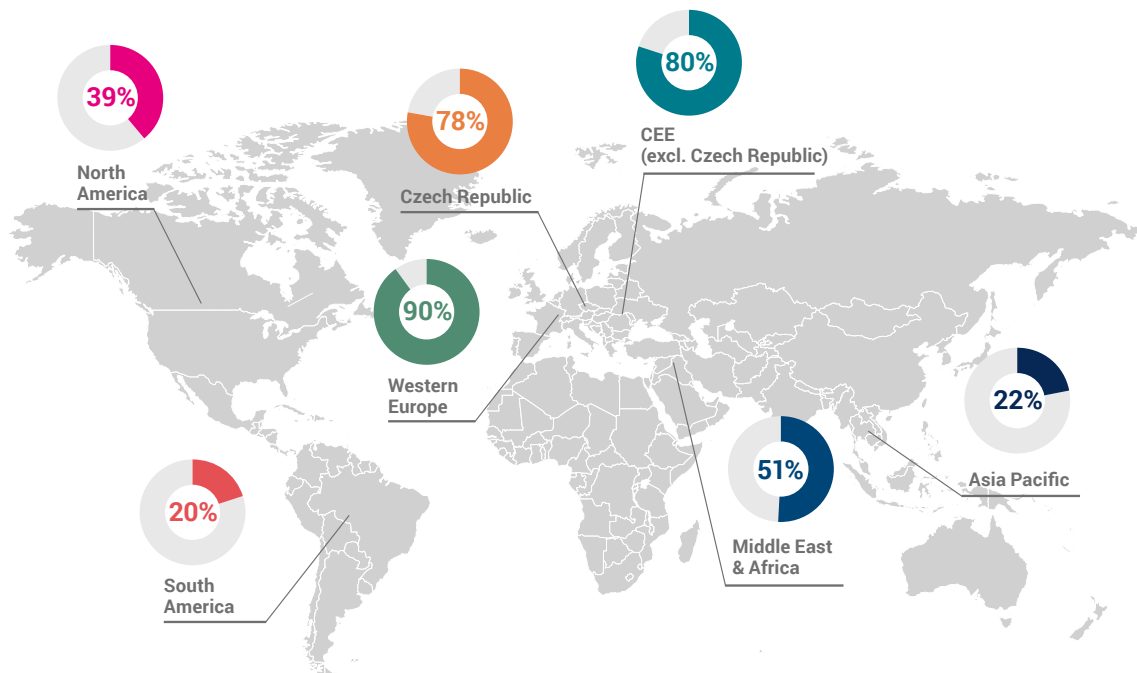
Compared to 2020, 5% more centres now serve clients in Western Europe, Middle East & Africa and North America. However, there is a slight decrease in centres that provide their services to Asia Pacific and South America (by 9% and 8% respectively).

Over the last 3 years, there has been a 10% increase in the share of centres servicing CEE, making it now the second most widely serviced region after Western Europe.





## Proportion of business services centres supporting the selected regions



Source: ABSL Survey 2021



# INTERAXIS

BUSINESS SERVICES COMPANY POWERED BY ABINBEV

BRINGING THE  
BEST OF **ABInBev**  
TO THE WORLD



**WHAT WE DO**

We work with you to find high-value opportunities and implement one of our validated solutions to deliver value for your business

## OUR ANALYTICS SOLUTIONS

We combine advanced data analytics with our tradition of operational excellence to 16x ROI for our business

### INTERNALLY PROVEN PRODUCTS

Our solutions have driven \$200Mio+ in value for ABInBev Globally

### CROSS-FUNCTIONAL TEAMS

We combine advanced Data Science and functional experts to operationalize

### VALUE CAPTURE FRAMEWORK

Our unique framework validates actual value capture: we profit only when you do

#### FINANCE ANALYTICS PRODUCTS

- Cashflow Forecasting Engine
- Smart Collections
- Duplicate Payment Detection

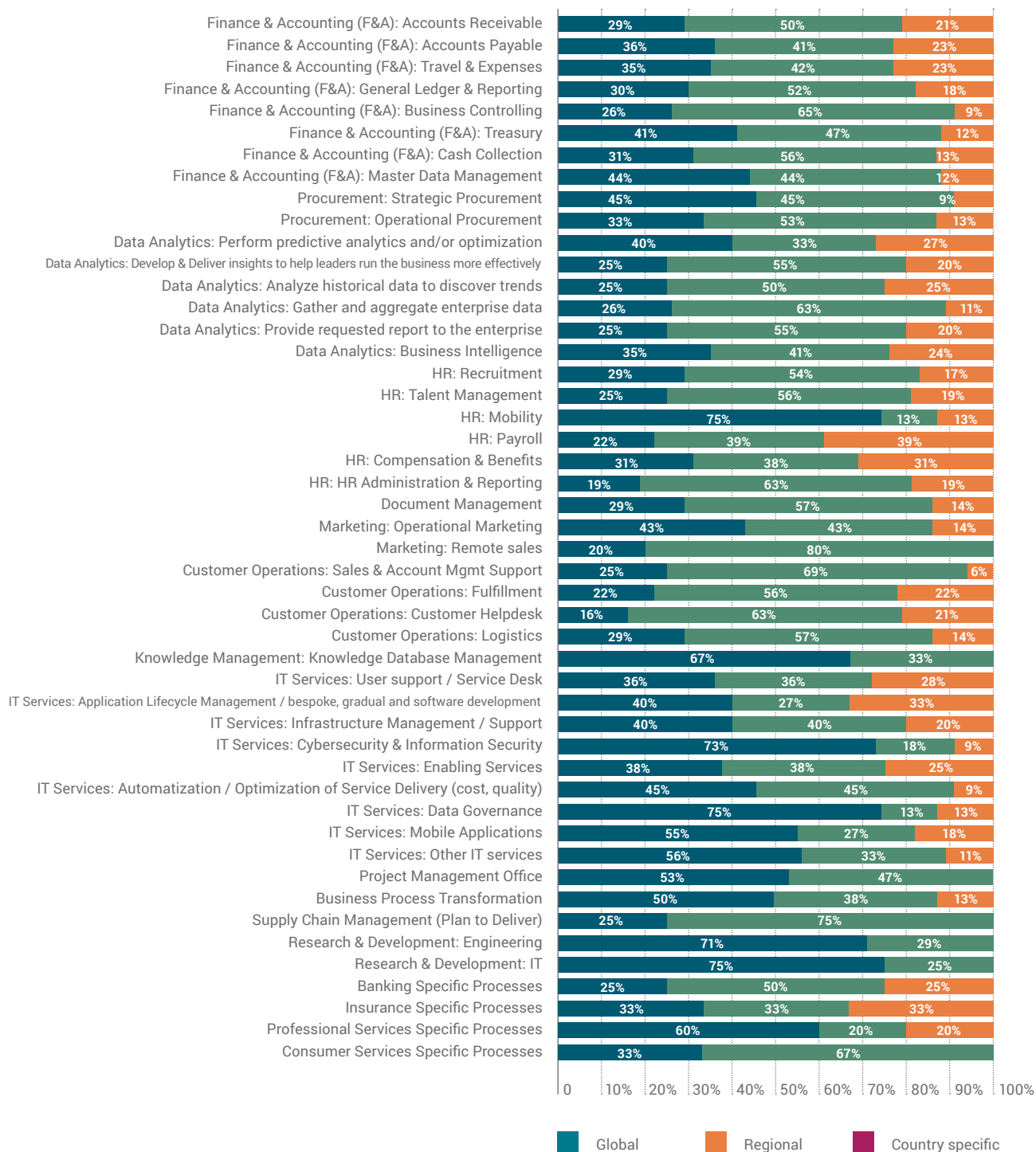
#### COMMERCIAL ANALYTICS PRODUCTS

- Upsell Recommender
- Whitespace Analytics
- Trade Marketing Optimization

**CONNECT TO US  
TO SEE WHAT WE  
CAN DELIVER FOR  
YOUR BUSINESS**




## List of selected processes at business service centres - process owner



Source: ABSL Survey 2021

Chapter Content Provider: ABSL

# 4

## PEOPLE & TALENT MANAGEMENT

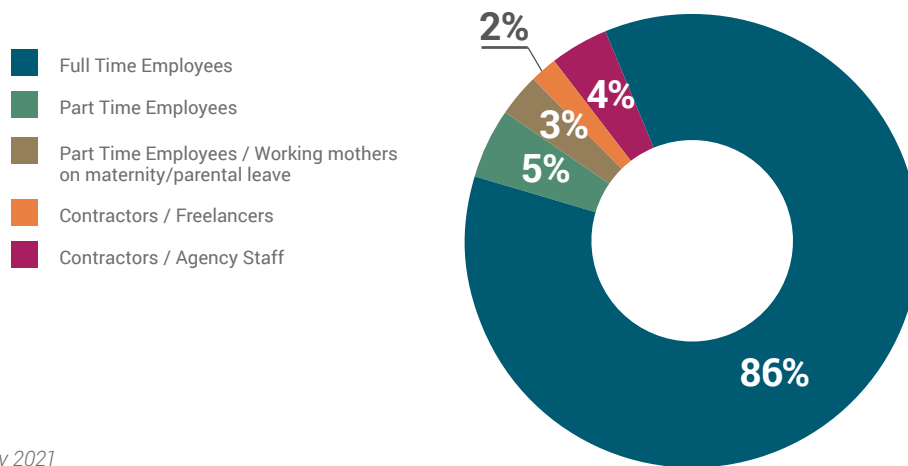




## FLEXIBLE HOURS AND PART-TIME ON THE RISE

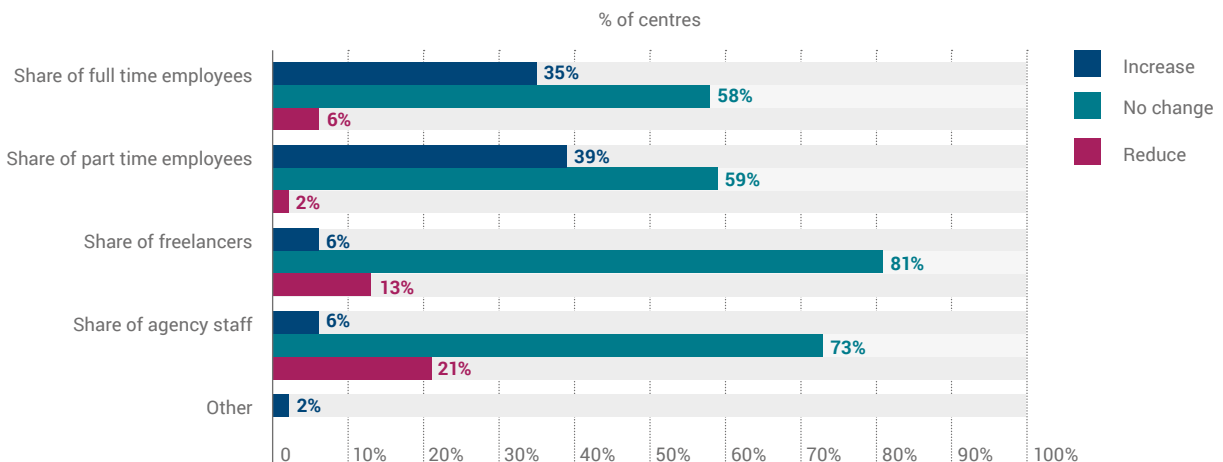
Flexible positions, including part time employees, freelancers and agency staff now represent 14% of the business services workforce, 2% increase compared to the previous year. However, this may soon change. 39% of centres report that they plan to increase their share of part time workers in the next 12 months. The share of freelancers and agency staff may, however, decrease with 13% and 21% of centres respectively reporting plans to reduce these types of employment.

### Structure of employment in the business services centers according to the employment status



Source: ABSL Survey 2021

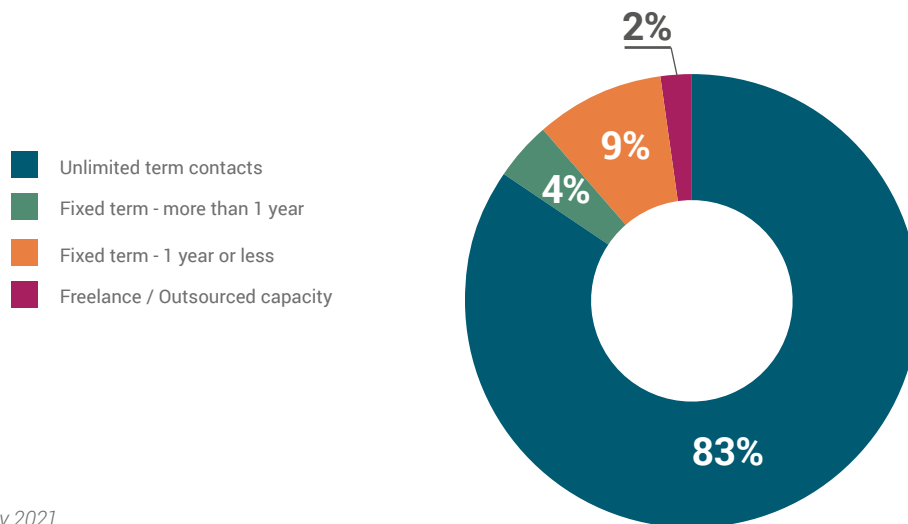
### Centres' plans to change the structure of their employment in the next 12 months



Source: ABSL Survey 2021



## Structure of employment according to the contract type



Source: ABSL Survey 2021

## EMPLOYING FOREIGN WORKFORCE & WORKING FROM ABROAD

The business services sector has been one of the few sectors that was the least impacted by the pandemic in terms of recruitment activities in the past year. Many centres continued to recruit, even after 2 years of international travel bans and restrictions and qualified foreign workforce continues to represent 44% of the workforce of business services, three quarters of them being from other EU countries. 17% of centres also report that they have employees working from abroad, mainly in other EU countries.

 **44%**

~ 57,000 of employees of Czech business services are foreigners

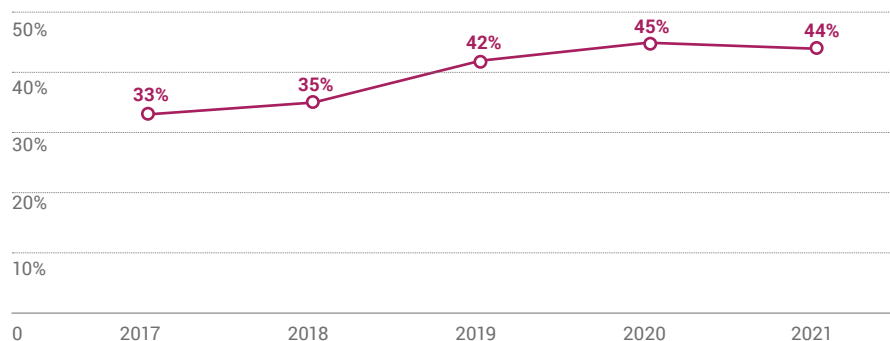
 **31%**

of centres employ more foreigners than local staff

 **74%**

of foreigners are from other EU countries

## Share of foreigners employed in business services in the Czech Republic



Source: ABSL Survey 2021



# 17%

of centres have employees working from home abroad

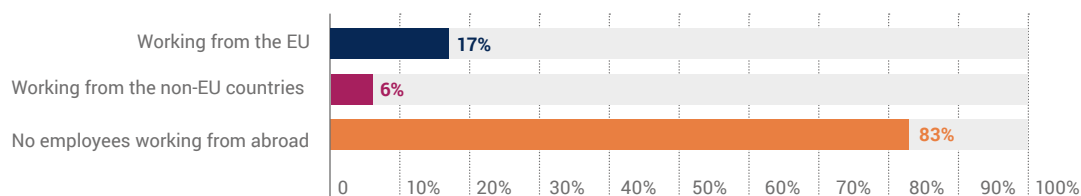


# 36%

of centres\* consider employing foreigners from abroad in the future

\*ABSL Work from Home Survey (March 2021)

## Share of centres with employees working from home abroad



Source: ABSL Survey 2021

## Impact of COVID-19 on recruitment and retention of Foreigners

In order to recruit and keep foreign talent, the Czech business services centres quickly adapted to the global pandemic. Over 30% of the centres report an increased effort in recruitment activities in the local talent pool as well as an increased support of their current foreign employees. Centres also noticed some positive impacts of the pandemic, specifically a slight reduction in the attrition of foreign workforce.

The ABSL Survey 2021 further supports the notion that the pandemic has not caused a major withdrawal of foreigners from the Czech business services because it shows no correlation between a centres' attrition rate and their share of employed foreigners.

Looking at the negative impact of COVID-19 and the centres' response shows a remarkable data mirror image:

### Negative impact of COVID-19

**31%**

of centres report increase in attrition of employed foreigners

**36%**

of centres report a reduction in the number of foreign applicants for open positions

### Centres' response

**31%**

of centres increased their support of current employees foreigners to motivate them to stay

**36%**

of centres increased their effort to fill in open positions with domestic employees



# 7%

of centres report a slight reduction  
in the attrition of employed foreigners



# 15%

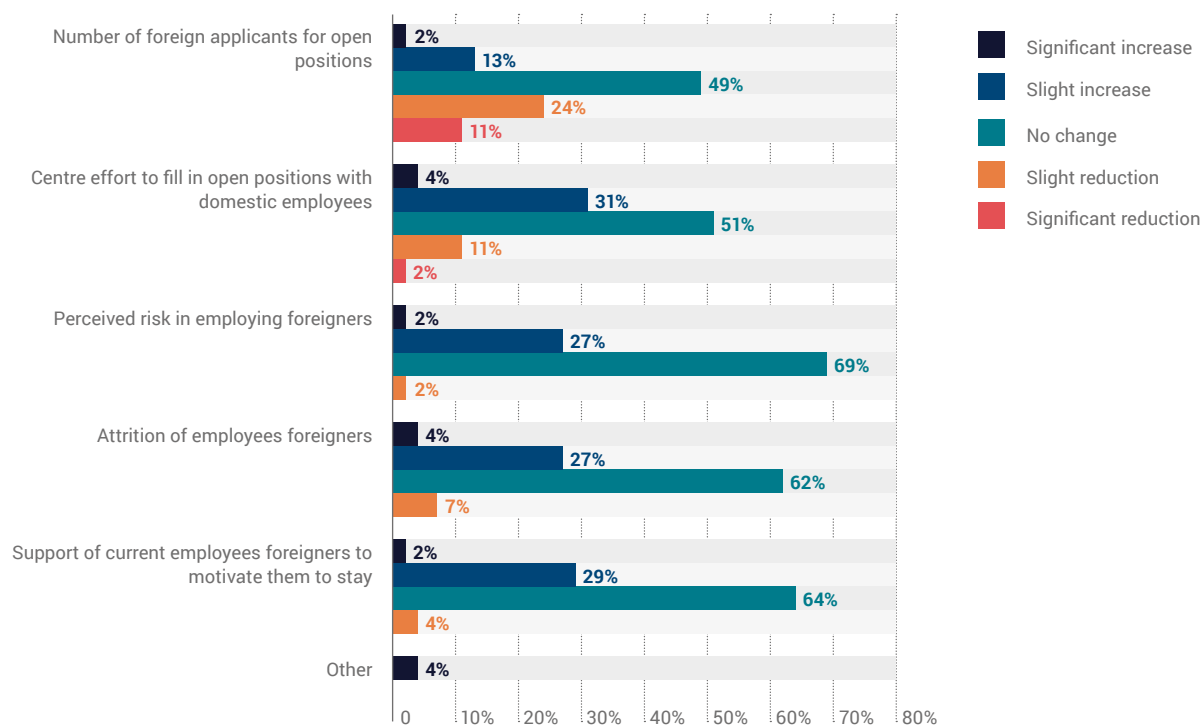
of centres report an increase  
in the number of foreign applicants  
for open positions



# 12

weeks average recruitment lead  
time from EU countries (excl. CZ)  
+3 compared to 2020

## Impact of COVID-19 pandemic on the recruitment of foreigners



Source: ABSL Survey 2021

## MOST USED LANGUAGES: YES, ANO, JA, OUI

The most widely used language in business services in the Czech Republic, apart from English, continues to be Czech, which is used to deliver services by 22% of the people within the sector. This shows that the sector continues to support local businesses on top of foreign clients.

The third most commonly used language is German. 26 000 people deliver services in German, which is 18% of the whole sector. This is 5% more than in 2020 pushing higher the demand for German speakers.



# 8

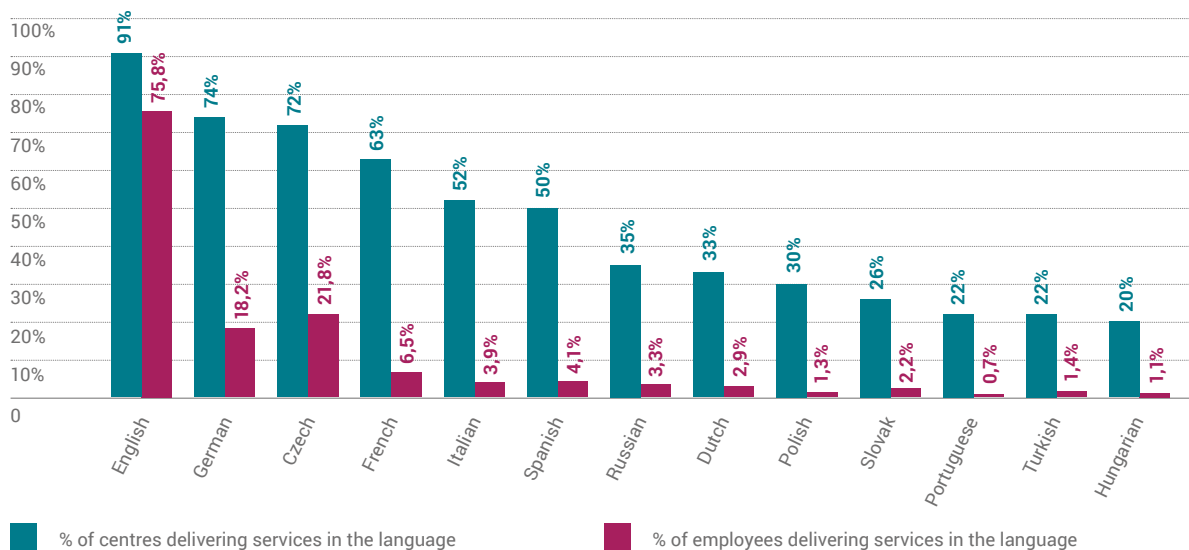
average number of languages used  
in a business services centre



# 29

the highest number of languages  
used by one centre

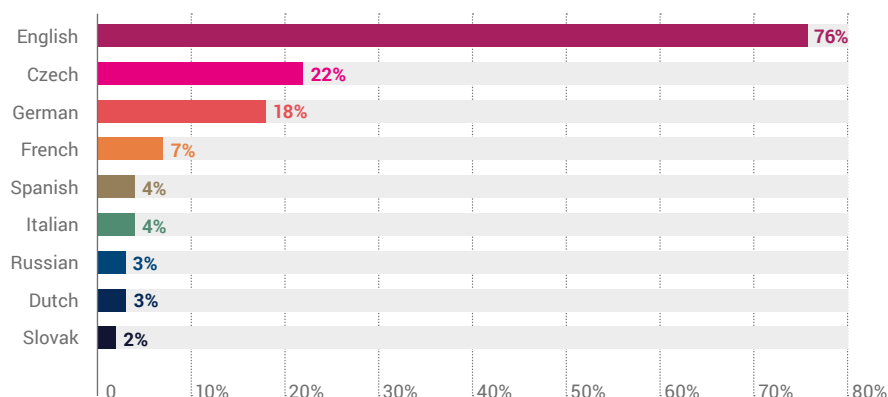
### Most commonly used languages in business services in the Czech Republic



Source: ABSL Survey 2021



## % of employees in business services using the following languages to deliver services



Source: ABSL Survey 2021



### DO THE CZECH COMPANIES HAVE THEIR BUSINESS SERVICES CENTERS OR ARE THERE ONLY CENTERS OF FOREIGN COMPANIES?

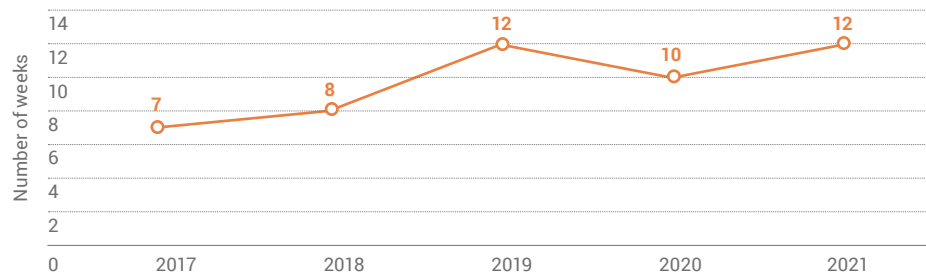
Czech companies also profit from the benefits of centralizing of some business processes and activities, and this trend is intensifying with the development of digitization. So yes, Czech companies also have their business services centers. Most often, they are companies from the financial sector such as banks or insurance companies, as well as companies in the sector of e-commerce.

Source: ABSL Battlecard 2021

## RETHINKING RECRUITMENT

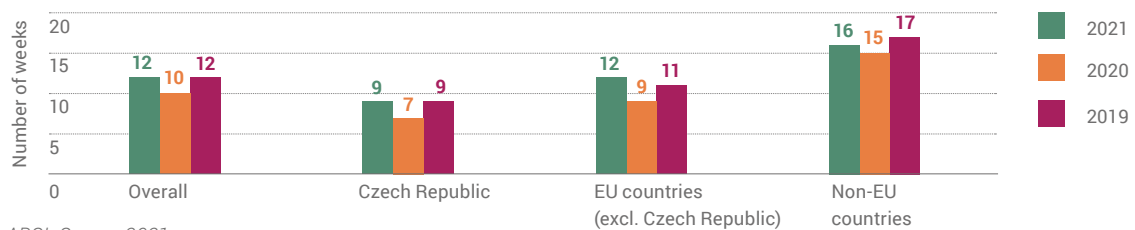
After the much-welcomed dip in recruitment lead time in 2020, attracting and recruiting new talent is taking Czech business centres 2 weeks longer in 2021 than in 2020, returning to its pre-covid level of 12 weeks. After maximizing the most popular channel - recommendation of employees - the centres had to rethink their recruitment with a bigger focus on agencies and head-hunters, or advertising to expats and foreigners abroad.

## Overall recruitment lead time in Czech business services



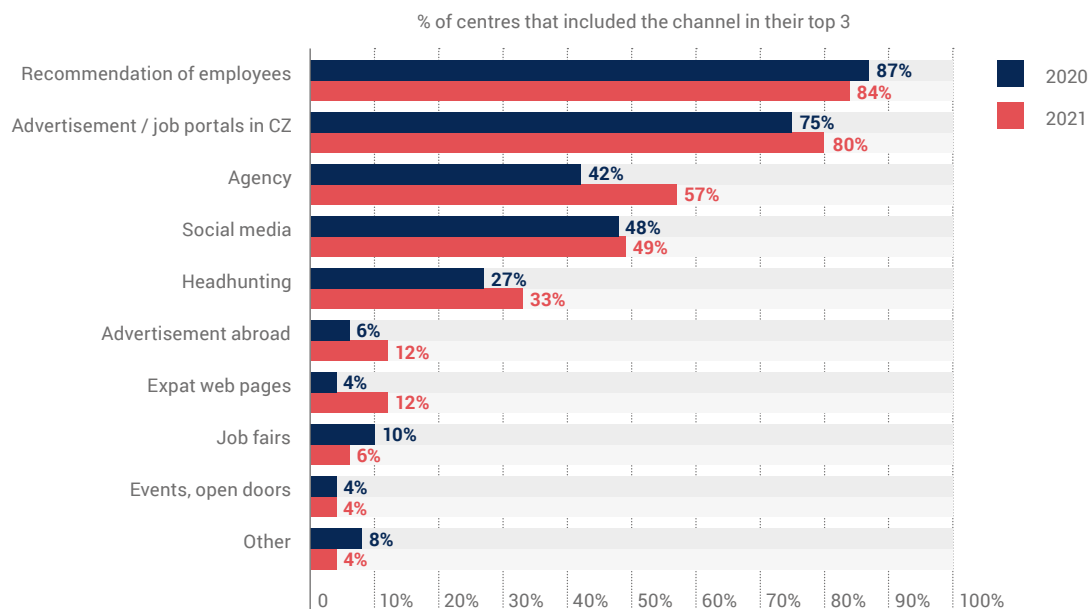
Source: ABSL Survey 2017 - 2021

## Recruitment lead time according to the region from which candidates are being recruited



Source: ABSL Survey 2021

## The most successful recruitment channels for business services centres



Source: ABSL Survey 2020 - 2021

## Recruiting methods currently in place in business services centres in reaction to COVID-19

**38%**

of centres have a digital online recruiting process (no personal contact)

**60%**

of centres use hybrid recruiting - combination of online and face to face interviews

**2%**

of centres run face to face interviews

**GOODCALL****ExxonMobil**

### ABSL DIAMOND WINNER 2021 IN CATEGORY EMPLOYER BRANDING AND PEOPLE ENGAGEMENT

GoodCall and ExxonMobil were awarded for their joint project, which was focused on supporting the ExxonMobil employer brand in the Czech Republic. The main idea was to connect the brand, its story, and values with Formula 1 and the Red Bull Racing and to organize a competition for a trip to England to visit the Red Bull Racing factory. The content on social networks gained an incredible 2 million views in 7 months and 500 people took part in the competition. All with minimal costs and the involvement of internal employees and their creativity.



## STABILIZED ATTRITION RATE

Almost all categories of Czech business services have benefited from a lower attrition rate than in 2020 suggesting that people tend to stay with their employers. Customer Operations is the only category that has seen a considerable increase in attrition succeeding its figures from 2019.

In terms of centre size, medium-sized centres see only a small number of employees leave, while small-sized centres tend to have the most leavers per total employees.

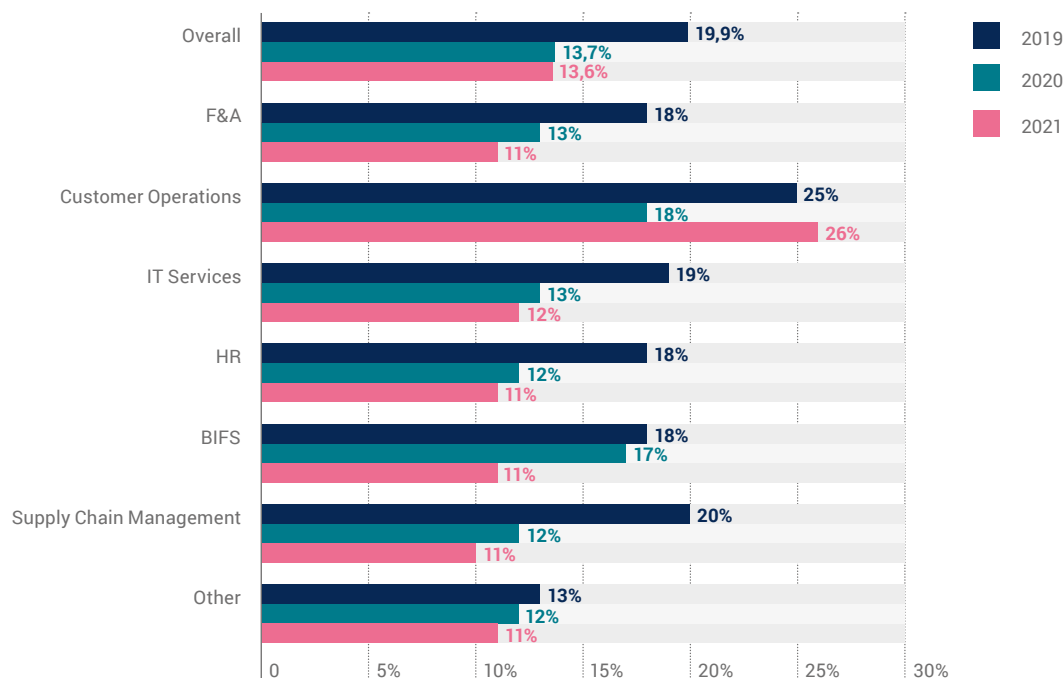
Remote work practices may have contributed to the decreasing attrition by helping to keep employees, who may not necessarily need to leave the company if they need to change location due to various personal reasons. By deploying flexibility as a long-term work from home strategy, these employees should be easier to retain, leading to saving on recruiting costs, eliminating the need to retrain new joiners and thus maintaining internal capabilities.



# 13,6%

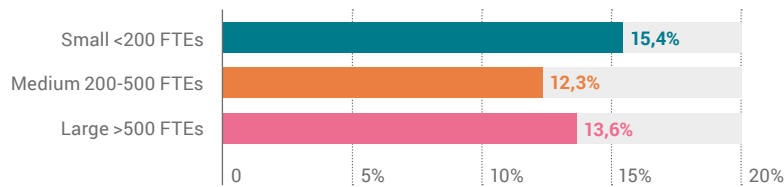
Overall attrition in 2021

### Attrition by categories of supported business processes



Source: ABSL Survey 2021

### Attrition by centre size



Source: ABSL Survey 2021

## RETENTION, SALARIES & EMPLOYEE BENEFITS

In 2022, Czech business service centres still managed to retain employees for an average of 3 years and 2 months - identical to 2021 figures. According to the ABSL Survey data the salary increase in 2021 was slightly lower than the year before, and the centres put an equal focus on several retention measures at once: strong company culture, work hour flexibility and a focus on employee engagement and experience.



# 38 months

Average retention  
same as in 2020



# 4,5%

Average salary increase in 2021  
compared to 4,7% in 2020

### Focus on retention in the pandemic time: strong company culture, well-being and flexibility

Most of the centres report the urge to focus on building company culture in terms of improving their retention rate. Centres provide flexible work hours and work from home as an almost standard benefit, focusing on improving employee experience and well-being. During the pandemic time, mental and physical health of employees also became one of the top priorities for over 45 % of centres.



# 80%

of centres focus on  
strong company  
culture



# 80%

of centres provide  
work hours  
flexibility

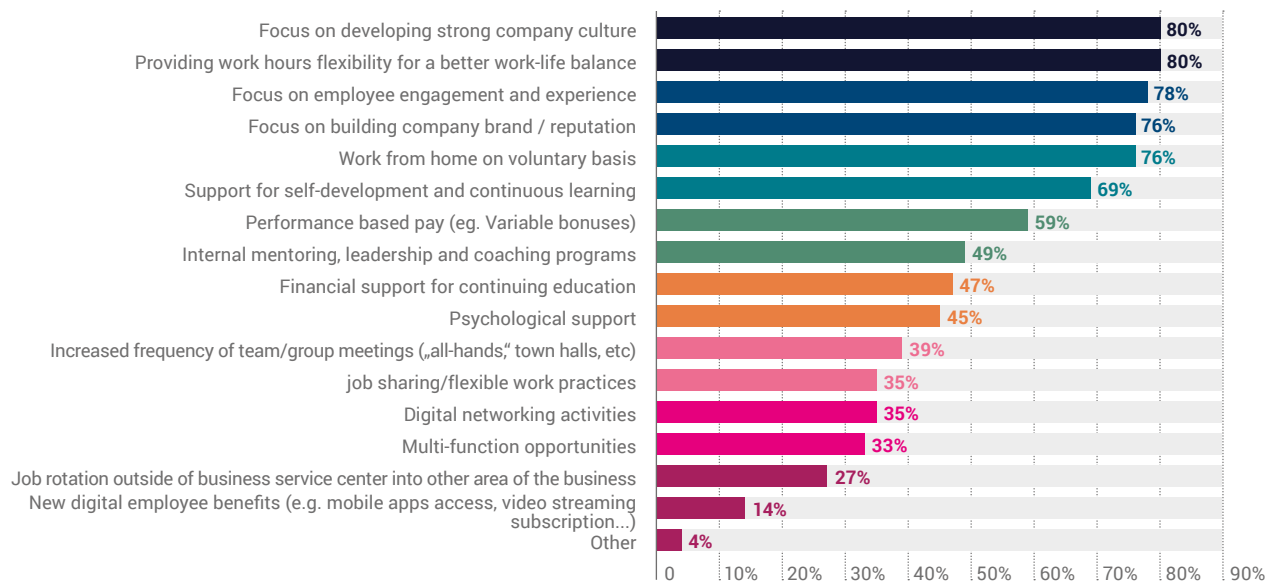


# 45%

of centres provide  
mental health  
support



## Measures introduced by business services in the Czech Republic to improve retention



Source: ABSL Survey 2021



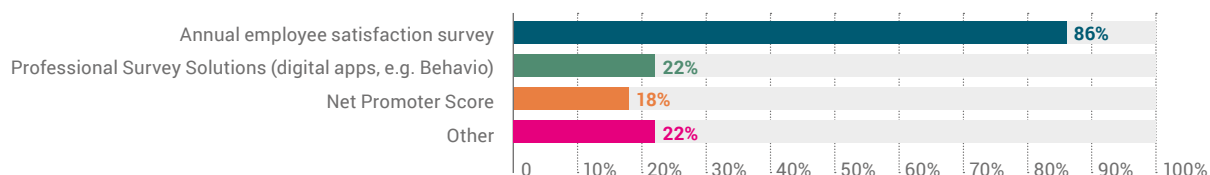
### ABSL DIAMOND WINNER 2021 IN CATEGORY EMPLOYER BRANDING AND PEOPLE ENGAGEMENT

Deutsche Telekom Services Europe Czech Republic involved their employees in the communication of their brand and the promotion of the entire sector of business services. Thanks to their creativity and digital content, which they created for a whole range of communication channels, they managed to significantly increase the number of followers on social networks and increase the commitment and satisfaction of current employees. Fluctuation fell to 8 % and 91 % of employees expressed their overall satisfaction with working for Deutsche Telekom Services Europe Czech Republic.



## Employee Experience and Satisfaction

### Methods used by business services centres to assess employee engagement, satisfaction and mental health

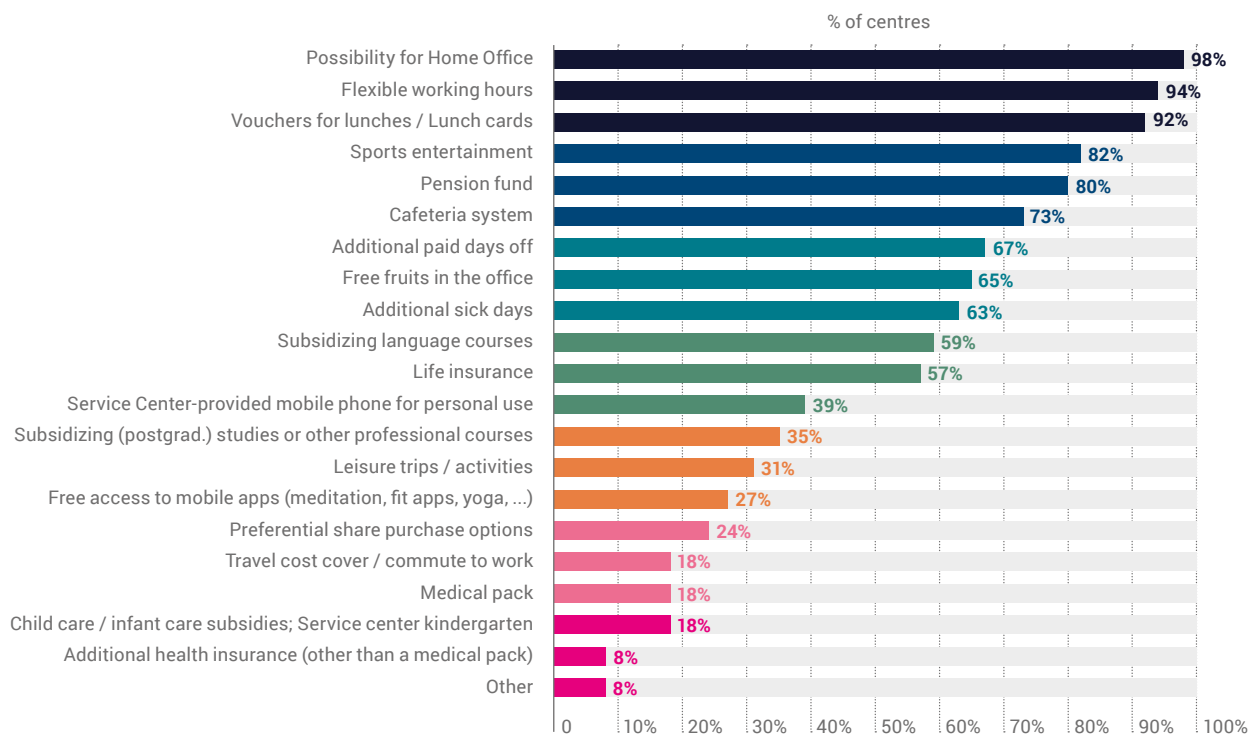


Source: ABSL Survey 2021

## Reshaping company benefits during the pandemic

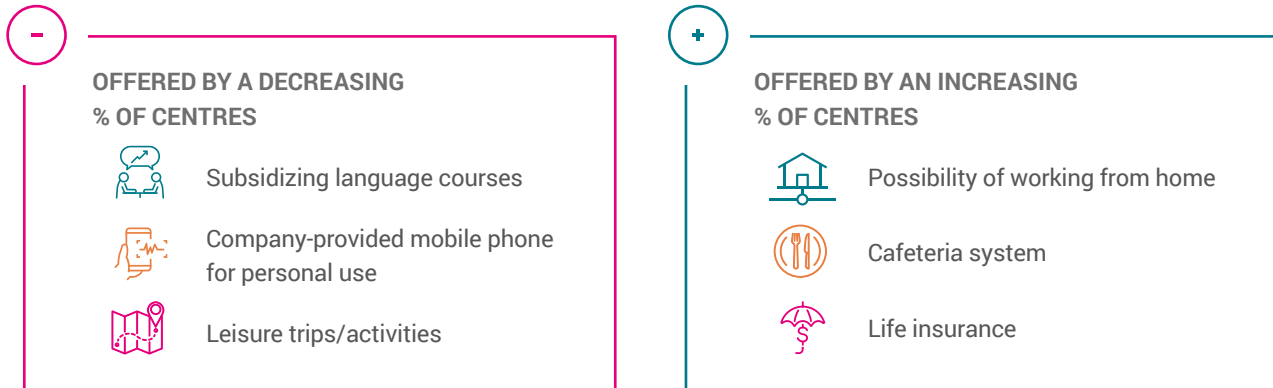
Work from home and flexible work hours continue to be the predominant benefits offered by the majority of the centres, reflecting the challenges in the context of Covid-19. Emerging trends such as paid mobile apps (fitness, movies, music, etc), sports vouchers and paid childcare are on the rise.

## Employee benefits offered by business services centres in the Czech Republic



Source: ABSL Survey 2021

## Benefits on the rise and on the go over the last 3 years



Source: ABSL Survey 2021

## DIVERSITY AND INCLUSION

Women continue to represent an increasing majority (59%) of the workforce in Czech business services. Even in IT, an area traditionally dominated by men, women make up 50% of the workers. However, there continues to be a gap in representation of women in senior management. Over the last 4 years, the share of women in senior management continues to stay at around 40%.

### Gender



**59%**

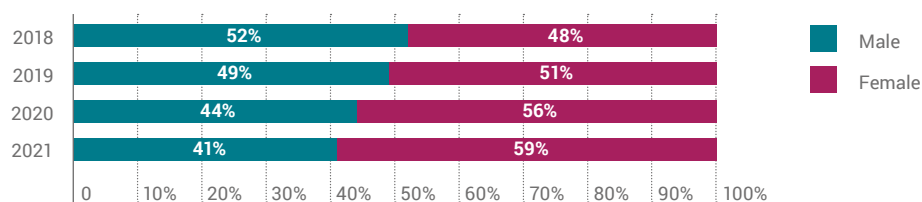
of employees are women



**38%**

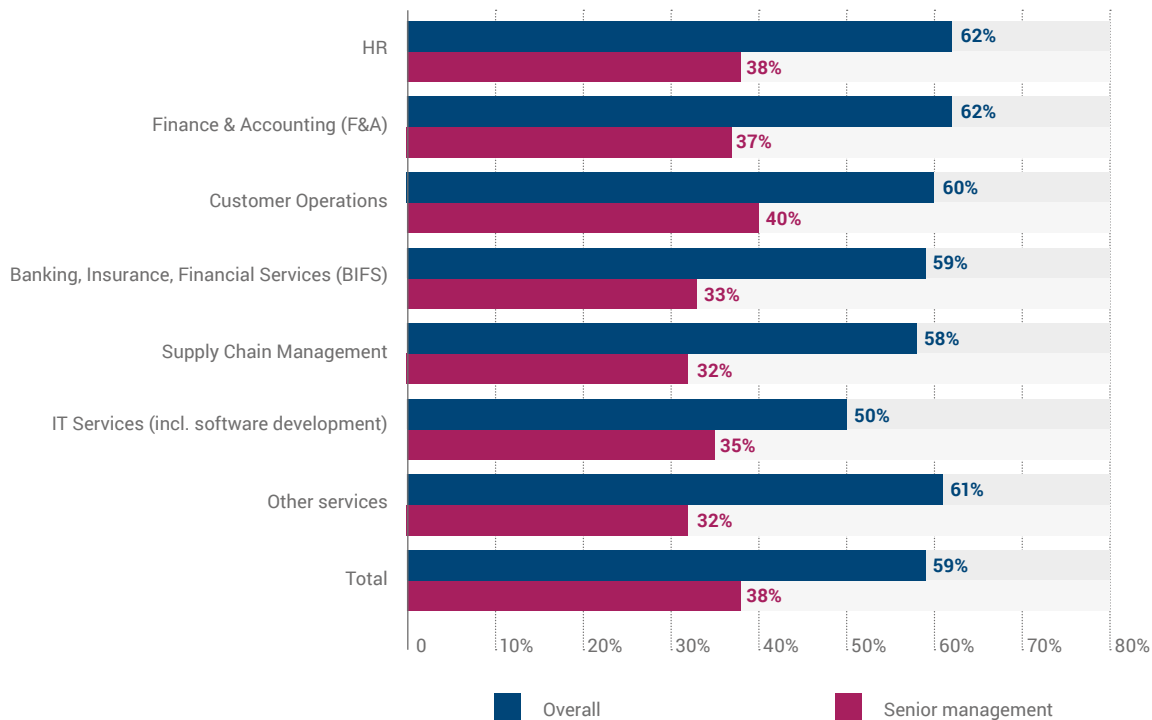
of senior management are women

### Gender split in business services in CZ



Source: ABSL Survey 2018 - 2021

## Women in business services according to process category



Source: ABSL Survey 2021

## Demographics

The business services in the Czech Republic employ a variety of age groups. The average employee age is 36, which is only 1 year more compared to the level from the years 2018-2020. The sector continues to attract young people. More than half of the workforce are millennials. However, even graduates increasingly join the sector because their share within business services has doubled over the last 2 years. Now employees who are 20-26 years old make up almost a quarter of the sector's workforce.



# 36

years the **average**  
age of employees



# 76%

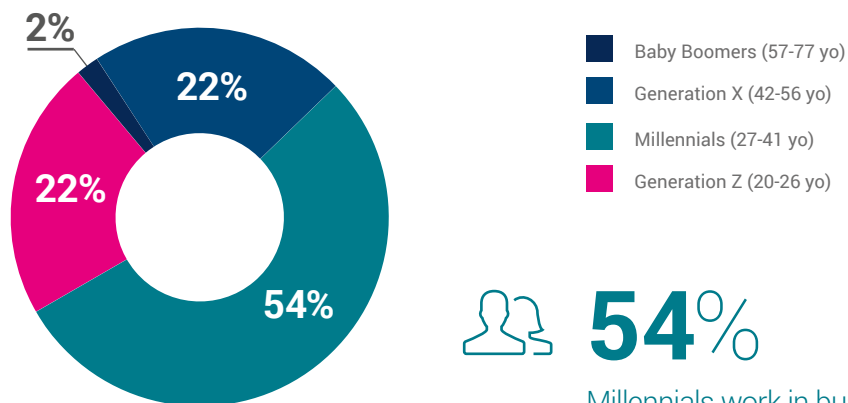
of the sector's  
workforce are  
employees **under**  
**41 years** of age



# 22%

share of employees  
who are **Generation Z**  
(20-26 years old)  
double compared  
to 2019 levels

## Demographic distribution within business services in the Czech Republic



Source: ABSL Survey 2021



### WHY ARE YOUNG PEOPLE INTERESTED IN BUSINESS SERVICES SECTOR?

Simply because it is a modern sector of the future. It is a sector that is stable and growing despite crises. It is a sector that is innovative and offers interesting career opportunities and professional development.

Employees of Czech centers often evaluate their work as creative, offering them space for education and growth. They like being a part of an international team and they like the dynamic that this multicultural environment creates.

Source: ABSL Battlecard 2021





## COMMUNITY ENGAGEMENT AND SOCIAL RESPONSIBILITY

For many centres, giving back to the community increased in priority. 82% of centres invest into CSR activities. One third of the centres invest annually more than 500,000 CZK making the business services a strong power helping Czech communities.

The most common area of CSR activities continues to be environment and animal protection. Naturally, more than half of the centres also included healthcare in their 2021 CSR activities. The centres provide support mostly by organizing volunteering days for employees or by direct financial support.



# 82%

of centres invest into CSR activities



# 45%

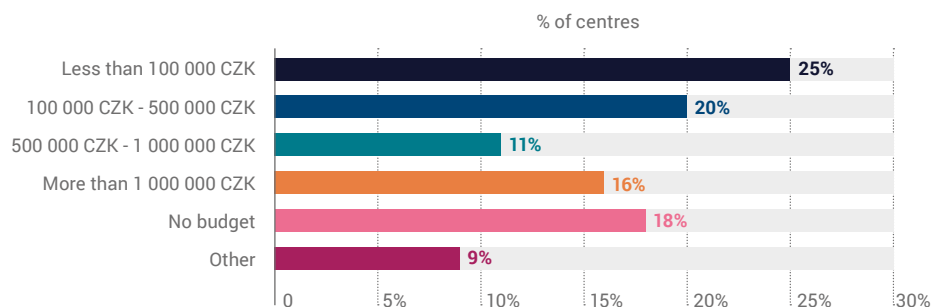
of centres support workplace diversity (LGBTQ+, disabilities)



# 27%

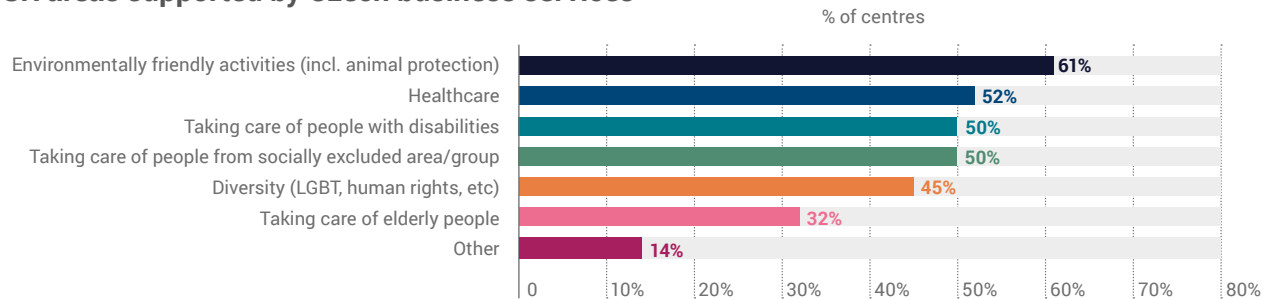
of centres invest annually more than 500,000 CZK into CSR activities

### Investments of business services centres into CSR activities



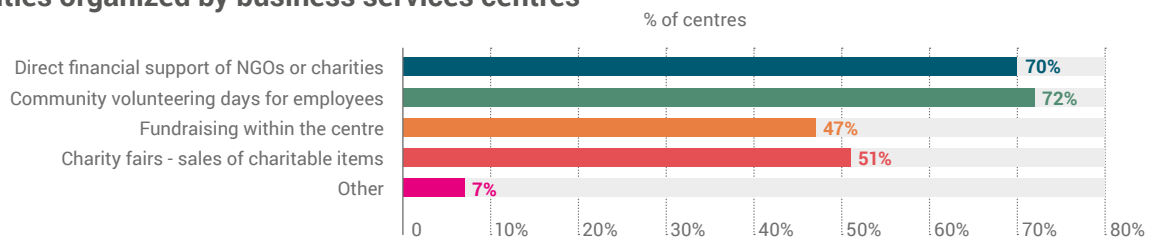
Source: ABSL Survey 2021

## CSR areas supported by Czech business services



Source: ABSL Survey 2021

## CSR activities organized by business services centres



Source: ABSL Survey 2021



### ABSL DIAMOND WINNER 2021 IN COMMUNITY AND CITIZEN SUPPORT

Since the outbreak of the pandemic, Johnson & Johnson Global Business Services has been able to carry out a huge number of activities in supporting employees and their families and communities, their health, and well-being, charity, and environmental protection. In 2020, there were a total of 80 initiatives, which continue this year and are complemented by other current programs, such as helping Moravian families affected by the tornado. The company described the importance and values of all implemented activities in a report, which can be an inspiration for the entire sector. The great benefit of all programs was, among other things, strengthening the company's relationship with employees, supporting their commitment and satisfaction, and a good feeling of helping those in need.



Chapter Content Provider: Grafton Recruitment and GI Group

# 5

## LABOUR MARKET AND SALARIES IN BUSINESS SERVICES



## BUSINESS SERVICES HAVE CHANGED

---

Text provided by: Kristina Svobodová, Branch Manager Grafton Business Services

The end of tedious transactional and repetitive work, a higher degree of automation, a boom in innovation, and the arrival of new highly qualified jobs. Transition to a hybrid way of working and growth of salaries

for multilingual speakers and IT experts. These are the consequences of the pandemic in the business services sector.

### New roles and more qualified work emerge

Over the last few years, in the Business Services sector, some positions tended to fade away. Some processes have been automated or robotized and transactional work moved from our region to the East, mainly to Asia, or became redundant and disappeared. These trends were further boosted by the pandemic. On the other hand, the Czech Republic has become a hotspot of qualified work and innovation. As a result, we noticed some new roles being created. More strategic and complex positions and roles combining IT and Finance knowledge and skills arise as well as many positions in business analysis after companies took some time to re-evaluate their

organization structure and other strategic decisions. In connection with the adoption of new technologies, many new IT positions are being created, which, for example, focus on the security of the use of new technologies, and on the implementation of the most effective and innovative solutions possible. Some positions, which were not usually established in GBSs such as Marketing and Sales roles, are also rising. Finally, and mainly due to the pandemic, some pharmaceutical or medical jobs were moved to business centers across the country as well.

### Newcomers and Leavers

Despite the problems with the pandemic, the Czech Republic remains an attractive destination for investors in the sector of business services. The proof are the new centers that started operations even during the past year. Because a few GBS have also left the Czech market,

the demand stays the same. The most quickly growing fields in the Business Services sector have been IT, and senior financial or strategic roles, to the detriment of junior financial or junior customer service positions.

### The shortage of multilingual speakers and senior IT expert is growing, their salaries too

COVID19 has created a huge gap between the supply and demand in terms of the number of open vacancies for multilingual speakers. Many expats left, and others fight the dilemma of whether to move abroad or not, during these unstable and uncertain times. The Business Services sector has been heavily impacted by this negative trend, as nearly half of the employees are foreigners. Therefore, we could expect a slight increase in salaries for positions with specific language needs.

A similar situation has been observed in IT services. The amount of jobs has increased, encouraged by a year of remote work – yet, the market being saturated already, global business centers are struggling to find senior candidates with relevant technical experience. The interest in the sector is definitely growing, but it will still take some years before the supply equals the demand. We could, therefore, expect an increase in salaries as well, and a very competitive market.



## Foreign talents: Career opportunity motivates

Three-quarters of foreigners working in the business service centers are citizens of the European Union. In the sector, a total of thirty languages are spoken and there are representatives of 80 nationalities. Foreigners come to the Czech Republic for many reasons. As for the Western countries, such as Spain,

Portugal, Italy, and France, the main reasons are career opportunities which are few in the home countries with high unemployment for young talents. For others, it is often interesting life experience or high quality of life that they will be able to afford in the center of Europe.

## Hybrid offices are about to expand

The two years of the pandemic and working from home changed peoples' work habits, as well as the function of corporate offices. Despite their sceptical expectations, most of the employers from the Business Services sector have faced a quite positive experience during the Home Office months. Employers found out that it did not have an enormous impact on productivity, and, if it did, it would be a positive one, rather than negative. In the long term, however, employees were reluctant to keep working remotely on a full-time basis, once they had the opportunity to go back to the office. They felt

they needed to socialize more, to interact with others, to discuss work related topics, and also for the purpose of faster and more efficient communication with their colleagues.

For what we consider a „post-COVID19“ era, employers will be much more open towards combining work in the corporate offices with remote work (3/5 and 2/5 in most cases). Offices are about to be places where employees meet, share information, and experience and collaborate, and provide a background for a hybrid way of working.

## BENEFITS: DIFFERENCES BETWEEN SUPPLY AND DEMAND

---

This year's survey conducted by Grafton Recruitment showed that employees of the business services sector consider bonuses and annual wage increases based on inflation to be the most popular benefits. About 96% of survey respondents would like these two benefits. A leave beyond the statutory 20 days and 13<sup>th</sup>/14<sup>th</sup> salary are at about the same level, but in the case of this benefit, there is the biggest difference between the demand of employees and the supply of employers – almost 95% of respondents are interested in it, but only 22% actually receive it.

The demand of employees also exceeds the employers' offer in the area of benefits that appeared in response to the pandemic and the changes it brought over the past year. It is mainly the adjustment of wages to their normal value in the ordered quarantine, a benefit that up to 62% of employees would like, but only a fifth can draw it. The situation is similar in the case of the adjusting wages to their normal value for care-giver's allowance due to closed schools.

---

**BENEFITS WITH THE GREATEST DIFFERENCE BETWEEN DEMAND AND SUPPLY**


---



13<sup>th</sup> or 14<sup>th</sup> salary



Individual budget for personal growth



Christmas bonuses (other than performance based)



Reimbursement of costs for international exams/certifications



Accommodation/Housing allowance

---

Source: Grafton Salary Survey 2021

## Covid is changing employees' preferences

The coronavirus pandemic has brought changes in almost all areas of private and professional life. It is no wonder that it has also affected the world of remuneration and benefits. The vast majority of employees in the field of business services have been working from their home offices since almost two

years. New ways of work have brought new needs and priorities for employees. With the expansion of the work from home, for example, interest in benefits in the form of a company car or parking space decreases, and on the contrary, the demand for quality home office equipment or benefits for health support increases.

## Support when working from home: from laptop to babysitting

With the move to the home working environment, the need arose for employers to provide their people with proper technical equipment. These were most often laptops, which were given to up to 87% of employees. Other necessary equipment included a monitor, which was given to 64% of employees, or a mobile phone with a data tariff. Almost 30% of employees could

also borrow office furniture from their employer, but a lot more employees would like to use this benefit. In the home office, they very often lacked healthy sitting. 6% of employees received a meal allowance from their employers, 3% of employees were provided with a cleaning service and 2% with babysitting.



## Growing interest in health benefits

As a result of the pandemic, employees are now more interested in the benefits that will help them protect their health. Interest is obvious, for example, in above-standard health care or in vitamins to support health, which up to 64% of employees are interested in, but only 14% receive.

About half of employees are interested in mental health support programs, but they are only available to 22% of employees. If the employer could offer vaccinations against Covid-19, 66% of business services employees would use this benefit.

## Employees and employers are aware of the importance of the training and development

The business services industry puts growing emphasis on training and developing its employees, who are also more and more aware of this need. More than 90% of these employees are interested in training and courses, payment for international exams and certifications, or language courses. Corporate training is provided

by employers to 41% of employees, while international certifications are paid for to only 25% of them. More than 90% of employees are interested in an individual budget for professional growth, but only 20% of them receive it in the benefits package.

## WHAT AMOUNT WILL YOUR COMPETITION NEED TO “STEAL” YOUR EMPLOYEES?

Fierce recruitment processes are nothing new on the Czech labour market, and the business services sector is no exception. As this sector sees growth despite the pandemic and, at the same time, deals with the departure of many foreign employees back to their home countries, competition in the area of human resources is getting tougher. Business service centers are doing what they can to attract potential employees by offering benefits, bonuses or new-hire bonuses and to “steal them from competitors”. Departures of experienced employees are unpleasant and costly. What does a company have to do to avoid them? Surveys of the preferences of Czech employees show that higher salary is among the most frequent reasons for job changes. Therefore the answer to the aforementioned question can be found in proper base pay settings, as base pay is the most understandable data that potential employees consider.

Grafton's survey focused on the maximum basic salary for new hires in four selected positions in regions where the demand for employees is the highest. Detailed maps show company managers whether the basic salary their company offers is competitive, which would mean they do not need to worry as much about losing trained employees to competitors. The amounts represent gross basic salary without variable components, overtime or any contributions which may differ for each employer.

These are salaries a company is prepared to offer to a “made person” – i. e. a candidate who, upon recruitment, is almost (or nearly almost) prepared to start working at the position in question at full speed without extensive training or onboarding. Has an employer invested time and money in the training and improved qualification of an employee, the employee's value on the market would increase. Oftentimes the original employer does not offer

a raise based on newly acquired knowledge, know-how and increasing experience. By doing so the company risks losing the employee to competitors who may be willing to pay the amount from the very beginning.

The values of the maximum gross basic salary for new employees ought to be monitored throughout the country, not just within the given region. In the event of major

differences in individual locations an employee may even consider moving or working remotely for a more attractive employer.



Customer Service Representative, Customer Account Manager (short experience)



Praha 45,000 CZK



Brno region 35,000 CZK



Ostrava region 30,000 CZK



Senior GL Accountant



Praha 90,000 CZK



Brno region 60,000 CZK



Ostrava region 48,000 CZK



Financial Controller



Praha 50,000 CZK



Brno region 60,000 CZK



Ostrava region 45,000 CZK



IT Architect



Praha 100,000 CZK



Brno region 80,000 CZK



Ostrava region 70,000 CZK

Source: Grafton Salary Survey 2021

# OUR SOLUTIONS IN BUSINESS SERVICES



Employer branding



Competence models



Outsourcing of recruitment services



Individual diagnostics



Training and development



Diagnostics and optimization  
of HR processes



Outplacement

## OUR SECTOR'S EXPERTISE

- Sales
- Supply Chain
- Human Resources
- Finance and Accounting
- Customer Operations
- IT
- Procurement



**Kristina Svobodová**  
Branch Manager, Grafton Business Services  
kristina.svobodova@grafton.cz  
[www.grafton.cz](http://www.grafton.cz)



**Group**  
YOUR JOB, OUR WORK

**grafton**  
business services

PRAGUE		
BUSINESS SERVICES CZECH REPUBLIC		
CUSTOMER OPERATIONS	Min	Max
Customer Service Manager, Service Ops Manager	70,000 CZK	90,000 CZK
Customer Service Team Leader	50,000 CZK	70,000 CZK
Customer Service Representative, Customer Account Manager (more than 6 months of experience)	39,000 CZK	45,000 CZK
FINANCE & ACCOUNTING	Min	Max
Finance Manager/Finance Lead	130,000 CZK	200,000 CZK
RTR	Min	Max
GL Manager	80,000 CZK	100,000 CZK
GL Team Leader	70,000 CZK	90,000 CZK
Senior GL Accountant	55,000 CZK	75,000 CZK
GL Accountant (1-2 years of experience)	45,000 CZK	55,000 CZK
Intercompany Accountant	35,000 CZK	50,000 CZK
Tax Manager	80,000 CZK	100,000 CZK
Tax Accountant/Consultant	60,000 CZK	80,000 CZK
P2P	Min	Max
AP/P2P Manager	70,000 CZK	90,000 CZK
AP/P2P Team Leader	60,000 CZK	80,000 CZK
AP Accountant/Specialist (more than 2 years of experience)	45,000 CZK	55,000 CZK
Travel & Expense Specialist	35,000 CZK	42 000 CZK
O2C	Min	Max
AR/OTC Manager	70,000 CZK	90,000 CZK
AR/OTC Team Leader	50,000 CZK	75,000 CZK
AR Accountant/OTC Specialist (more than 6 months of experience)	40,000 CZK	45,000 CZK
Credit Controller	40,000 CZK	50,000 CZK
Credit Analyst	35,000 CZK	45,000 CZK
COMPLIANCE	Min	Max
Compliance Lead	70,000 CZK	90,000 CZK
REPORTING, CONTROLLING AND ANALYSIS	Min	Max
Controlling Lead	60,000 CZK	100,000 CZK
Financial Controller	55,000 CZK	90,000 CZK
Financial Analyst (more than 2 years of experience)	50,000 CZK	65,000 CZK
Business Analyst (more than 2 years of experience)	50,000 CZK	65,000 CZK
Data Analyst	45,000 CZK	55,000 CZK
OTHER	Min	Max
Portfolio Manager	80,000 CZK	130,000 CZK

Payroll Manager/Team Leader	70,000 CZK	90,000 CZK
Payroll Specialist (more than 1 year of experience)	45,000 CZK	65,000 CZK
Process manager	80,000 CZK	100,000 CZK
Master Data Specialist	40,000 CZK	50,000 CZK
Transition Manager	100,000 CZK	130,000 CZK
Process Improvement Specialist	60,000 CZK	80,000 CZK
<b>HUMAN RESOURCES</b>	Min	Max
HR Manager	70,000 CZK	120,000 CZK
HR Business Partner	60,000 CZK	80,000 CZK
Recruitment Specialist	35,000 CZK	55,000 CZK
HR Team Leader	50 000 CZK	70,000 CZK
HR Administrator (more than 1 year of experience)	38,000 CZK	45,000 CZK
HR Data Management	35,000 CZK	43,000 CZK
<b>SUPPLY CHAIN MANAGEMENT</b>	Min	Max
Procurement Manager	80,000 CZK	110,000 CZK
Procurement Team Leader	45,000 CZK	70,000 CZK
Procurement Specialist	35,000 CZK	45,000 CZK
Contract Specialist	37,000 CZK	45,000 CZK
Buyer (more than 1 year of experience)	45,000 CZK	50,000 CZK
Logistics Planner	40,000 CZK	50,000 CZK
<b>IT SERVICES</b>	Min	Max
IT Manager	100,000 CZK	150,000 CZK
IT Project Manager	80,000 CZK	100,000 CZK
Business Intelligence Analyst	60,000 CZK	80,000 CZK
Automation Expert	70,000 CZK	80,000 CZK
IT Architect	80,000 CZK	110,000 CZK
Security and Privacy Specialist	90,000 CZK	120,000 CZK
Technical Support Team Leader	60,000 CZK	100,000 CZK
Helpdesk/IT Support 1st line (more than 1 year of experience)	40,000 CZK	50,000 CZK
<b>SALES</b>	Min	Max
Key Account Manager	50,000 CZK	60,000 CZK
Lead Generation	40,000 CZK	50,000 CZK
Sales Analyst/Data Analyst	40,000 CZK	55,000 CZK
Sales Support Specialist/Administrative Sales Support/Sales Order Administrator	35,000 CZK	40,000 CZK
Inside Sales Team Leader	50,000 CZK	60,000 CZK
Inside Sales Specialist	35,000 CZK	40,000 CZK

Job roles, in which active use of German, Dutch, French or Nordic languages is required usually offer a higher salary by 7,000 CZK, especially in junior positions. In senior positions the language skills do not make a significant difference.

IT SECURITY	Min	Max
Security Officer / Manager	120,000 CZK	180,000 CZK
Cyber-Security Engineer	80,000 CZK	130,000 CZK
Security Consultant	45,000 CZK	90,000 CZK
IT DEVELOPMENT	Min	Max
C/C++ Developer inc. Embedded	55,000 CZK	90,000 CZK
Java Developer	65,000 CZK	130,000 CZK
Android/iOS Developer	55,000 CZK	100,000 CZK

## BRNO REGION

BUSINESS SERVICES CZECH REPUBLIC		
CUSTOMER OPERATIONS	Min	Max
Customer Service Manager, Service Ops Manager	65,000 CZK	90,000 CZK
Customer Service Team Leader	45,000 CZK	60,000 CZK
Customer Service Representative, Customer Account Manager (more than 6 months of experience)	28,000 CZK	36,000 CZK
FINANCE & ACCOUNTING	Min	Max
Finance Manager/Finance Lead	120,000 CZK	180,000 CZK
RTR	Min	Max
GL Manager	75,000 CZK	90,000 CZK
GL Team Leader	50,000 CZK	70,000 CZK
Senior GL Accountant	45,000 CZK	65,000 CZK
GL Accountant (1-2 years of experience)	40,000 CZK	50,000 CZK
Intercompany Accountant	35,000 CZK	45,000 CZK
Tax Manager	60,000 CZK	80,000 CZK
Tax Accountant/Consultant	40,000 CZK	50,000 CZK
P2P	Min	Max
AP/P2P Manager	70,000 CZK	85,000 CZK
AP/P2P Team Leader	45,000 CZK	60,000 CZK
AP Accountant/Specialist (more than 2 years of experience)	40,000 CZK	50,000 CZK
Travel & Expense Specialist	30,000 CZK	40,000 CZK
O2C	Min	Max
AR/OTC Manager	65,000 CZK	80,000 CZK
AR/OTC Team Leader	45,000 CZK	65,000 CZK
AR Accountant/OTC Specialist (more than 6 months of experience)	30,000 CZK	40,000 CZK



Credit Controller	40,000 CZK	50,000 CZK
Credit Analyst	35,000 CZK	45,000 CZK
COMPLIANCE	Min	Max
Compliance Lead	55,000 CZK	80,000 CZK
REPORTING, CONTROLLING AND ANALYSIS	Min	Max
Controlling Lead	60,000 CZK	90,000 CZK
Financial Controller	50,000 CZK	75,000 CZK
Financial Analyst (more than 2 years of experience)	45,000 CZK	60,000 CZK
Business Analyst (more than 2 years of experience)	50,000 CZK	60,000 CZK
Data Analyst	40,000 CZK	50,000 CZK
OTHER	Min	Max
Portfolio Manager	55,000 CZK	80,000 CZK
Payroll Manager/Team Leader	65,000 CZK	80,000 CZK
Payroll Specialist (more than 1 year of experience)	35,000 CZK	45,000 CZK
Process manager	60,000 CZK	80,000 CZK
Master Data Specialist	40,000 CZK	45,000 CZK
Transition Manager	80,000 CZK	110,000 CZK
Process Improvement Specialist	50,000 CZK	70,000 CZK
HUMAN RESOURCES	Min	Max
HR Manager	70,000 CZK	120,000 CZK
HR Business Partner	55,000 CZK	80,000 CZK
Recruitment Specialist	35,000 CZK	50,000 CZK
HR Team Leader	45,000 CZK	60,000 CZK
HR Administrator (more than 1 year of experience)	30,000 CZK	40,000 CZK
HR Data Management	30,000 CZK	40,000 CZK
SUPPLY CHAIN MANAGEMENT	Min	Max
Procurement Manager	70,000 CZK	90,000 CZK
Procurement Team Leader	45,000 CZK	70,000 CZK
Procurement Specialist	35,000 CZK	45,000 CZK
Contract Specialist	35,000 CZK	40,000 CZK
Buyer (more than 1 year of experience)	35,000 CZK	40,000 CZK
Logistics Planner	35,000 CZK	40,000 CZK
IT SERVICES	Min	Max
IT Manager	80,000 CZK	120,000 CZK
IT Project Manager	70,000 CZK	100,000 CZK
Business Intelligence Analyst	50,000 CZK	80,000 CZK
Automation Expert	50,000 CZK	80,000 CZK

IT Architect	50,000 CZK	80,000 CZK
Security and Privacy Specialist	50,000 CZK	80,000 CZK
Technical Support Team Leader	60,000 CZK	80,000 CZK
Helpdesk/IT Support 1st line (more than 1 year of experience)	35,000 CZK	45,000 CZK
<b>SALES</b>	Min	Max
Key Account Manager	50,000 CZK	60,000 CZK
Lead Generation	40,000 CZK	50,000 CZK
Sales Analyst/Data Analyst	40,000 CZK	50,000 CZK
Sales Support Specialist/Administrative Sales Support/Sales Order Administrator	30,000 CZK	35,000 CZK
Inside Sales Team Leader	45,000 CZK	55,000 CZK
Inside Sales Specialist	35,000 CZK	40,000 CZK
Job roles, in which active use of German, Dutch, French or Nordic languages is required usually offer a higher salary by 7,000 CZK, especially in junior positions. In senior positions the language skills do not make a significant difference.		
<b>IT SECURITY</b>	Min	Max
Security Officer / Manager	90,000 CZK	150,000 CZK
Cyber-Security Engineer	65,000 CZK	95,000 CZK
Security Consultant	40,000 CZK	65,000 CZK
<b>IT DEVELOPMENT</b>	Min	Max
C/C++ Developer inc. Embedded	50,000 CZK	90,000 CZK
Java Developer	65,000 CZK	110,000 CZK
Android/iOS Developer	45,000 CZK	80,000 CZK

## OSTRAVA REGION

<b>BUSINESS SERVICES CZECH REPUBLIC</b>		
<b>CUSTOMER OPERATIONS</b>	Min	Max
Customer Service Manager, Service Ops Manager	65,000 CZK	90,000 CZK
Customer Service Team Leader	45,000 CZK	60,000 CZK
Customer Service Representative, Customer Account Manager (more than 6 months of experience)	28,000 CZK	35,000 CZK
<b>FINANCE &amp; ACCOUNTING</b>	Min	Max
Finance Manager/Finance Lead	120,000 CZK	170,000 CZK
<b>RTR</b>	Min	Max
GL Manager	70,000 CZK	85,000 CZK
GL Team Leader	45,000 CZK	60,000 CZK
Senior GL Accountant	40,000 CZK	55,000 CZK
GL Accountant (1-2 years of experience)	35,000 CZK	45,000 CZK
Intercompany Accountant	35,000 CZK	45,000 CZK

	Tax Manager	60,000 CZK	80,000 CZK
	Tax Accountant/Consultant	35,000 CZK	45,000 CZK
P2P		Min	Max
	AP/P2P Manager	70,000 CZK	80,000 CZK
	AP/P2P Team Leader	45,000 CZK	60,000 CZK
	AP Accountant/Specialist (more than 2 years of experience)	35,000 CZK	45,000 CZK
	Travel & Expense Specialist	30,000 CZK	38,000 CZK
O2C		Min	Max
	AR/OTC Manager	65,000 CZK	80,000 CZK
	AR/OTC Team Leader	45,000 CZK	65,000 CZK
	AR Accountant/OTC Specialist (more than 6 months of experience)	30,000 CZK	40,000 CZK
	Credit Controller	40,000 CZK	50,000 CZK
	Credit Analyst	35,000 CZK	45,000 CZK
COMPLIANCE		Min	Max
	Compliance Lead	50,000 CZK	80,000 CZK
REPORTING, CONTROLLING AND ANALYSIS		Min	Max
	Controlling Lead	60,000 CZK	90,000 CZK
	Financial Controller	50,000 CZK	80,000 CZK
	Financial Analyst (more than 2 years of experience)	45,000 CZK	55,000 CZK
	Business Analyst (more than 2 years of experience)	50,000 CZK	60,000 CZK
	Data Analyst	40,000 CZK	45,000 CZK
OTHER		Min	Max
	Portfolio Manager	55,000 CZK	80,000 CZK
	Payroll Manager/Team Leader	65,000 CZK	80,000 CZK
	Payroll Specialist (more than 1 year of experience)	35,000 CZK	45,000 CZK
	Process manager	60,000 CZK	80,000 CZK
	Master Data Specialist	40,000 CZK	45,000 CZK
	Transition Manager	80,000 CZK	110,000 CZK
	Process Improvement Specialist	45,000 CZK	65,000 CZK
HUMAN RESOURCES		Min	Max
	HR Manager	60,000 CZK	100,000 CZK
	HR Business Partner	50,000 CZK	80,000 CZK
	Recruitment Specialist	35,000 CZK	50,000 CZK
	HR Team Leader	45,000 CZK	60,000 CZK
	HR Administrator (more than 1 year of experience)	30,000 CZK	35,000 CZK
	HR Data Management	30,000 CZK	35,000 CZK

SUPPLY CHAIN MANAGEMENT	Min	Max
Procurement Manager	80,000 CZK	100,000 CZK
Procurement Team Leader	40,000 CZK	60,000 CZK
Procurement Specialist	35,000 CZK	45,000 CZK
Contract Specialist	35,000 CZK	40,000 CZK
Buyer (more than 1 year of experience)	35,000 CZK	40,000 CZK
Logistics Planner	30,000 CZK	40,000 CZK
IT SERVICES	Min	Max
IT Manager	80,000 CZK	110,000 CZK
IT Project Manager	70,000 CZK	100,000 CZK
Business Intelligence Analyst	50,000 CZK	80,000 CZK
Automation Expert	50,000 CZK	80,000 CZK
IT Architect	50,000 CZK	80,000 CZK
Security and Privacy Specialist	50,000 CZK	80,000 CZK
Technical Support Team Leader	60,000 CZK	75,000 CZK
Helpdesk/IT Support 1st line (more than 1 year of experience)	35,000 CZK	40,000 CZK
SALES	Min	Max
Key Account Manager	50,000 CZK	60,000 CZK
Lead Generation	40,000 CZK	50,000 CZK
Sales Analyst/Data Analyst	40,000 CZK	50,000 CZK
Sales Support Specialist/Administrative Sales Support/Sales Order Administrator	30,000 CZK	35,000 CZK
Inside Sales Team Leader	45,000 CZK	55,000 CZK
Inside Sales Specialist	33,000 CZK	40,000 CZK
Job roles, in which active use of German, Dutch, French or Nordic languages is required usually offer a higher salary by 7,000 CZK, especially in junior positions. In senior positions the language skills do not make a significant difference.		
IT SECURITY	Min	Max
Security Officer / Manager	70,000 CZK	100,000 CZK
Cyber-Security Engineer	60,000 CZK	80,000 CZK
Security Consultant	40,000 CZK	55,000 CZK
IT DEVELOPMENT	Min	Max
C/C++ Developer inc. Embedded	50,000 CZK	80,000 CZK
Java Developer	65,000 CZK	90,000 CZK
Android/iOS Developer	45,000 CZK	65,000 CZK

# 6

## GOING HYBRID: WORK FROM HOME & EMERGING WORKPLACE SOLUTIONS





## Work-from-home strategies

Over 100 000 employees of business services in the Czech Republic continue to work from home all week and optionally come to the office. This represents 72% of the Czech business services workforce.

Looking back at the times before the pandemic, only 18% of people worked from home half of their time or more. Now it is 91% of people. However, this reflects the reality of 2021 with a number of pandemic waves that forced centres and employees to keep social distancing in place.

### What impact will this have long-term?

As a long-term solution, 84% of centres plan to let their employees work from home for at least 2 days per week. Of those 12% will even allow their employees to work from home fully and come back to the office only optionally. This means that 18 000 jobs within the sector are expected to remain fully remote and come to the office on an irregular basis.

## Currently



**91%**

of employees work from home at least 2 days per week



**72%**

of employees work from home all the time and optionally come to the office

## Long-term



**84%**

centres plan to implement long-term policy to work from home for at least 2 days per week



**71%**

centres plan long-term policy to work from home for 2-4 days per week

Source: ABSL Survey 2021



# URBAN WORK AND LIVING

## Vlněna

Brno's newest office, retail and lifestyle campus, bridging Brno's historical centre with the developing South Brno commercial zone.

[vlnena.eu](http://vlnena.eu)



## Ponávka

A dynamic, modern business park in downtown Brno, with a unique mix of tenants, students, building styles, and now an on-site exercise park.

[ponavka.eu](http://ponavka.eu)

PONÁVKA

## Spielberk

Brno's premium business address. Spielberk, with its large central lake, exclusive hotel and bustling community attracts the most prestigious companies.

[spielberk.eu](http://spielberk.eu)

SPIELBERK



Brno is a magnet for knowledge-based software, R&D and tech businesses.

With calm, landscaped campuses, smart buildings, and fully customisable offices, CTP's premium office parks are home to many of the world's most well known high-tech companies. Rated BREEAM Excellent or above, our parks are designed for the well being and overall health of the office community. Now, with our own Community Management team, our parks are also lively, thriving hubs of activity. Find out which office best suits your business.

## Clubco

CTP's new modern co-working and community centre at Vlněna. Modern design infused with nature makes a unique atmosphere for developing businesses and workers on the go.

[clubco.cz](http://clubco.cz)



## Domeq

Domeq I, II & III are a new living concept providing affordable and stylish accommodation for young professionals, couples and students within a dynamic social community. Crisp and neat interiors are designed with an accent on purity of space and combined industrial elements.

[domeq.cz](http://domeq.cz)



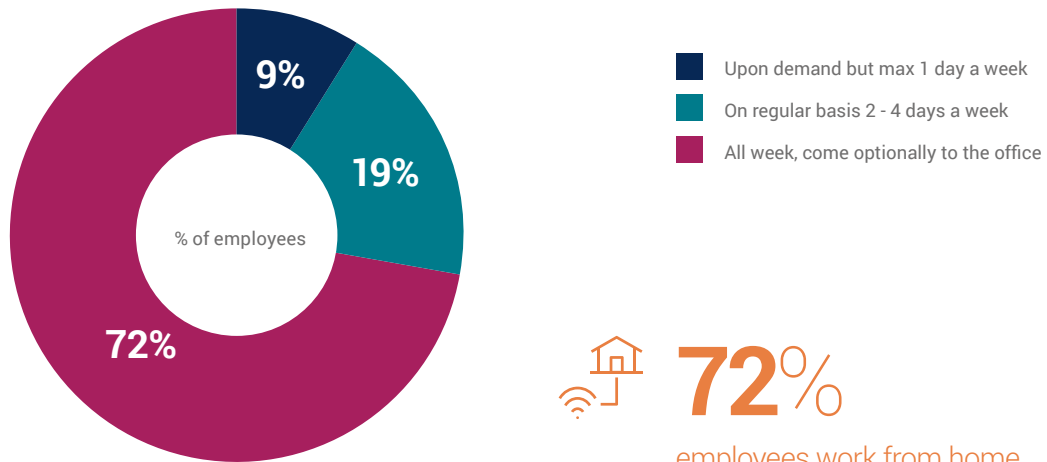
All of CTP's office developments are built sustainably to BREEAM Excellent or better certification.



★★★★☆

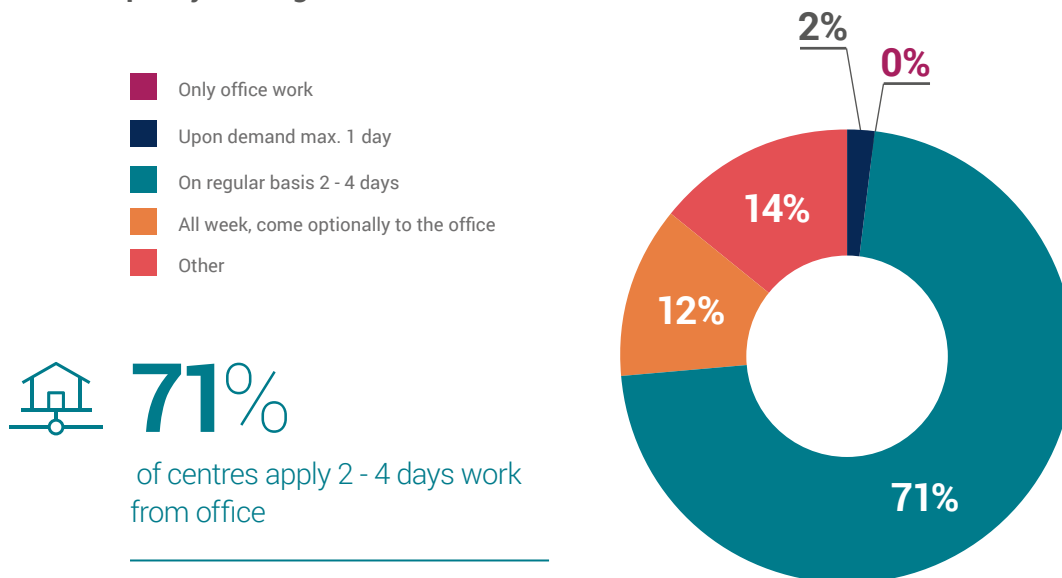
by  
CTP.

## Share of employees that currently work from home



Source: ABSL Survey 2021

## Share of centres that plan to implement the following weekly home office policy as long-term solution



Source: ABSL Survey 2021



## ABSL DIAMOND WINNER 2021 IN INNOVATIVE WORKPLACE AND REMOTE WORKING

Novartis won an award for their project called Reimagine Workplace, which is unique in its comprehensive approach to designing a future work model based on employee feedback. This project combines office space with an emphasis on new technologies that enable quality collaboration from a remote environment and, within the Choice with Responsibility program, an innovative and very open approach in providing flexibility to employees who can determine how they will work including whether they want to work from home or office. Among other things, employees can work from abroad for 2 months in 12 months during their private trip. The project also includes testing of a compressed working week, whereby agreement within the teams and by managers, employees can work 4 working days a week twice a month, which can bring unique results for other companies on the market when considering this flexible model. The project has increased employee satisfaction, of which 77 % feel good and supported by Novartis.



## Motivation & Obstacles of working from home

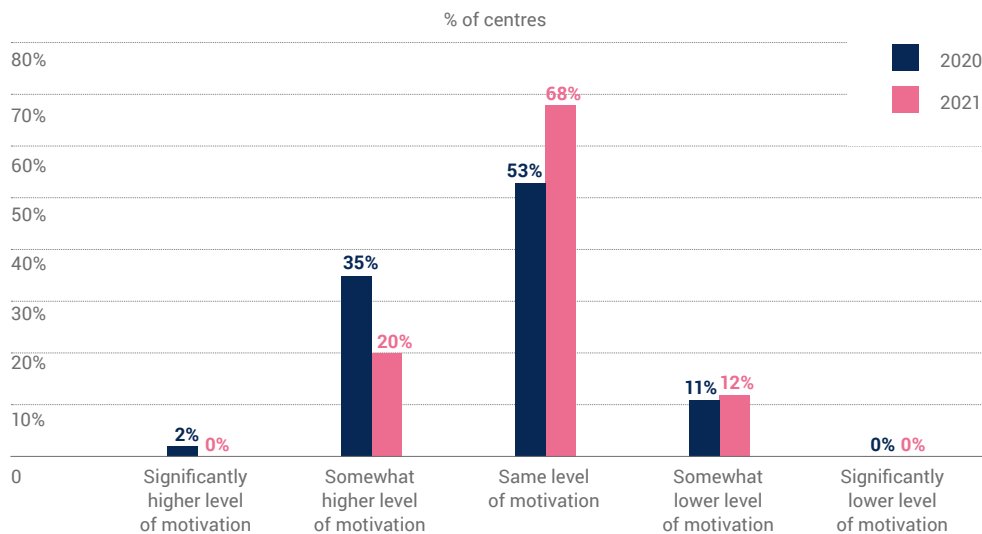
In 2020 the move to home office seemed to not only keep stable productivity as before the pandemic, but one third centres even observed a higher level of employee motivation. This effect seems to begin eroding in 2021. Still, 20% of centres see higher motivation when working remotely compared to being in the office and a higher share of centres report the same level of motivation when working both from the office and from home.



# 88%

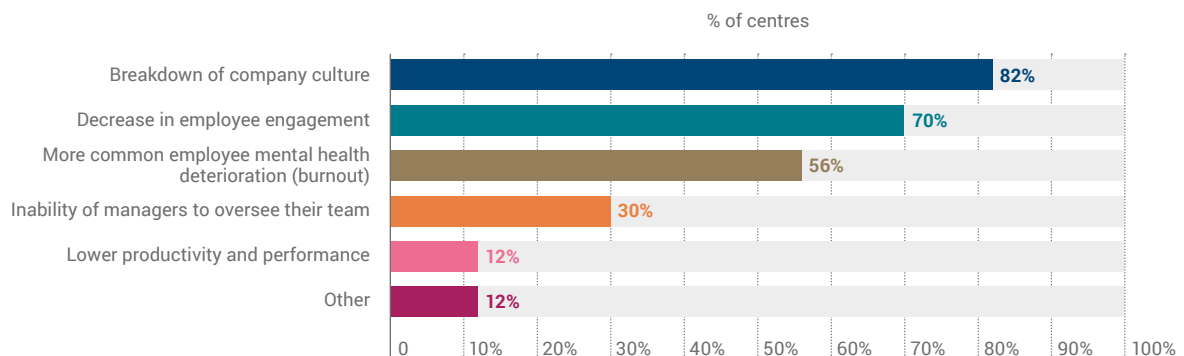
of centres report same or higher level of motivation of employees working from home compared to those in the office

## Motivation of employees working from home compared to those in the office



Source: ABSL Survey 2021

## The biggest challenges perceived by business services centres when working remotely



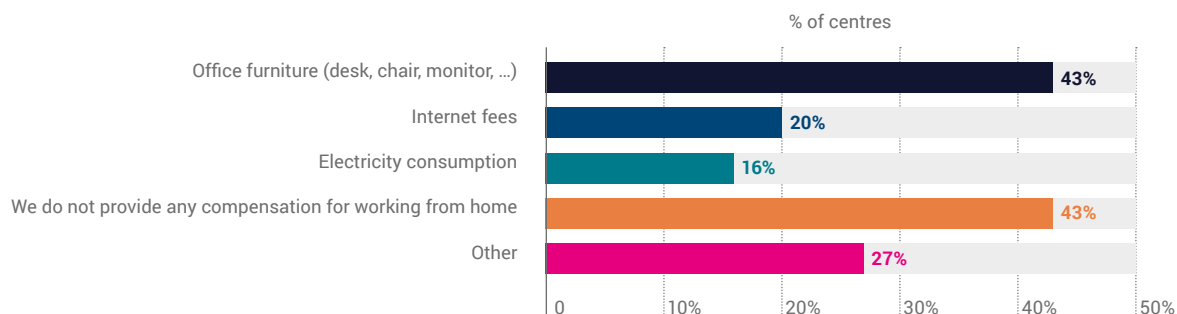
Source: ABSL Survey 2021

## Compensation for working from home

 **57%**

of centres provide some compensation or contribution towards costs to employees working from home

## Compensation or contribution towards cost provided by business services centres to employees working from home



Source: ABSL Survey 2021

## Impacts on workplace solutions

As a response to the long-term use of home office for a large share of employees, the centres are revisiting their workplace strategies. 61% of centres plan to increase their use of workstations sharing, which is 11% more than in 2020. This enables them to optimize their leased area and as a result, 43% of centres plan to reduce their total office, which is 10% more than in 2020. Furthermore, 14% of centres plan to reduce the number of office locations they have in the Czech Republic, while in 2020 it was only 4%.



# 43%

of centres plan to reduce their total office space area  
+10% compared to 2020



# 61%

of centres plan to increase their use of workstations sharing  
+11% compared to 2020



# 57%

of centres plan to keep or even increase their total office space area

The priorities for the majority of the companies include the fact that offices will remain the backbone of their business. However, the function of the offices will reflect the accelerated change in working style. As hybrid and remote work will continue to be the future standard, centres are considering either change in the size of their offices or the layout of the office space.



# Shaping sustainable workplaces

25 years in the Czech Republic

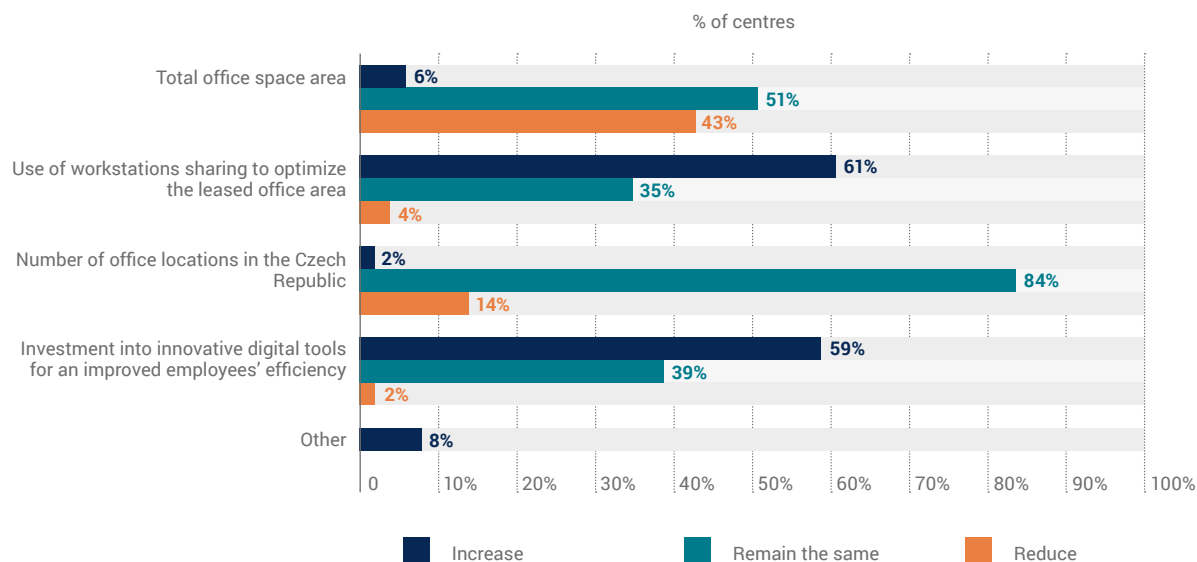


Scan to explore our award-winning offices



Port7 project, Prague

## Workplace changes introduced or planned by business services centres in the Czech Republic due to COVID-19

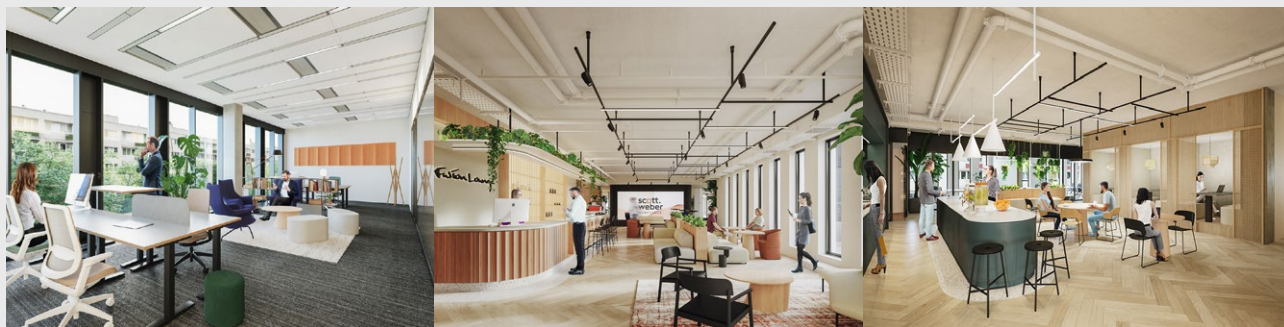


Source: ABSL Survey 2021



## INNOVATIVE AND INSPIRING FLEXI WORKSPACE SOLUTIONS TO MOTIVATE YOUR EMPLOYEES AND ENHANCE THEIR PERFORMANCE

Text provided by: Scott.Weber Workspace



People all over the world are starting to return to offices, demonstrating their continued irreplaceable role in the working lives of many employees. According to a recent JLL survey, up to 87% of employees still want the option to work from the office.

The main drivers for this are connections and cooperation between employees, socialization, personal participation in training sessions and meetings, but also a change of environment from the home office in which many employees have spent more time in recent months. 83% of employees confirmed that they miss human interaction with colleagues when working from home, and up to 46% wish to return to the office for more than half a week.

Because the majority of people value the opportunity to meet their colleagues in person, the demand for so-called coworking space is increasing. People are seeking an attractive environment with diverse workspaces, as well as flexible seating in order to be inspirational and meet the needs of every individual and project. This applies to collaboration itself as well as informal meetings in community spaces. 62% of employees working from classic offices stated that they would appreciate the possibility of working from a coworking space or serviced office located closer to their home. In addition to the standard ergonomic facilities, the most attractive aspect of such spaces was the community atmosphere.



**Monika Mašková**, Workplace Consultant, added:

“Changeable and inspiring coworking spaces support communication, team relationships and efficiency. Employees will be enthusiastic to return to work in such an atmosphere and employee satisfaction is closely linked to their performance.”



**Scott.Weber Workspace** is constantly researching employee and client needs when designing their new centers. In April 2022, the company's continuously expanding portfolio will grow yet again with its

ninth center opening in the timeless **BLOX building** in the premium business and residential area of Dejvice, Prague 6.



„The center is designed with regard to the new standard of office environment, which encompasses contemporary requirements for functionality, layout and design. The shared space of the center, with a total area of 450 m<sup>2</sup>, aims to support communication, innovation and the development of our members.“ explains **Adam Zvada**, owner of Scott.Weber Workspace.



The company is also already working on its tenth center to be opened within the **Port7** project, which features a port on the river in the popular Holešovice district of

Prague. This unique location will focus on the well-being of employees and a healthy work-life balance.



You can book your place now! If you are interested, contact **Martin Holý**, Head of Growth by e-mail at: [holy@scottweber.cz](mailto:holy@scottweber.cz) or by phone at +420 725 746 984.



Survey source: Online survey of 4,407 employees in 77 companies in the Czech Republic, implemented by JLL in April 2021

**Scott.Weber Workspace**, the largest provider of flexible offices and coworking spaces in Prague, offers a variety of solutions for a flexible office environment. With 10 Prague locations, 27,770 m<sup>2</sup> of total area, 3810 workstations and the team's expertise, Scott.Weber can help every client reach the right decision for a new modern workspace to inspire and motivate their employees. Whether they are independent professionals or start-ups who often thrive in coworking spaces, or smaller companies requiring serviced fully equipped offices or large corporations with hundreds of employees who require their own branded private floors or Office Suite solutions, Scott.Weber Workspace can cater to the needs of them all.

Where work becomes an experience  
[www.scottweber.cz](http://www.scottweber.cz)



Chapter Content Provider: ABSL, The Hackett Institute

# 7

## TRAINING & EDUCATION



The business service centres in the Czech Republic require increasingly complex skills, which they largely develop in-house. This is reflected by the average number of training hours provided to each employee, which has risen to 50 hours per year. This means a 32% increase over the last 4 years illustrating the investment into the professional development that the centres make in order to support their growth with a qualified workforce.



# 50

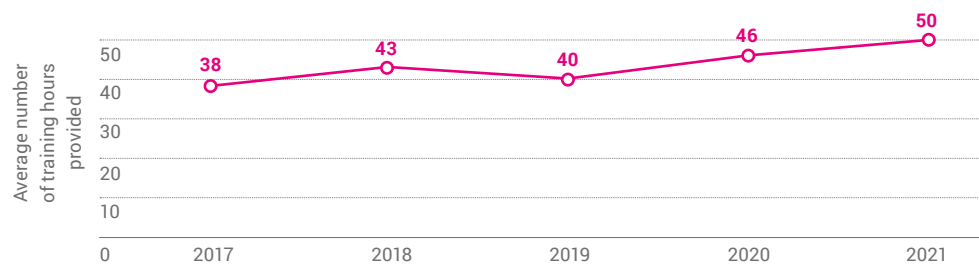
average number of training hours  
per year provided by business  
services centres to their employees  
+32% increase since 2017



# 98%

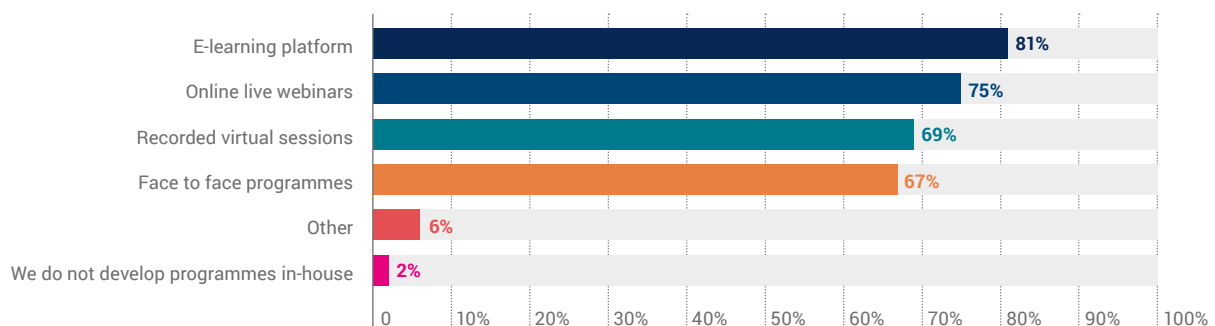
of centres develop training  
programmes in-house

## Average number of training hours provided to an employee per year



Source: ABSL Survey 2017 - 2021

## Training programmes developed by the centres in-house



Source: ABSL Survey 2017 - 2021

## SKILLS DEFICIT

The skills deficit experienced by the business services centres in the Czech Republic increased virtually in all areas but most notably in the fields of data analytics, technology / automation, customer centricity, leadership and innovation. Compared to 2020, an additional 38% of centres report a deficit of data analytics skills. In terms of customer centricity, an additional 56% of centres report a deficit compared to a previous year. The vast majority of the centres plan to develop the skills they lack internally by training their current employees.



# 75%

of centres report  
**data analytics**  
skills deficit  
+38% of centres  
more than in 2020



# 74%

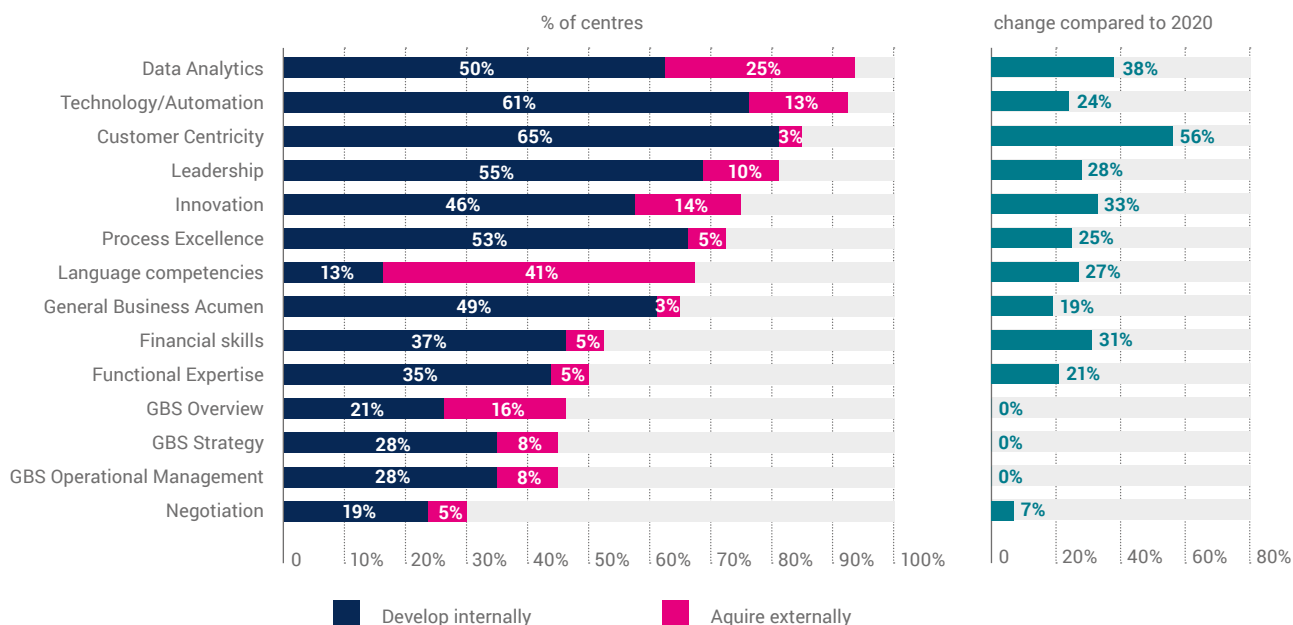
of centres report  
technology/  
**automation skills**  
deficit  
+24% of centres  
more than in 2020



# 68%

of centres report  
**customer centricity**  
skills deficit  
+56% of centres  
more than in 2020

## Skills deficit & methods by which centers plan to aquire these skills



Source: ABSL Survey 2021

---

### TOP 5 SKILLS INCREASINGLY IN DEFICIT

---



1. Customer Centricity



2. Data Analytics



3. Innovation



4. Financial skills



5. Leadership

---

## NEW ROLES PLANNED IN THE NEXT 2-3 YEARS

---

The future is data. Three quarters of centres plan to introduce the role of Data Scientist / Analyst in the next 2-3 years. That is 12% more than in 2019 and it further supports the fact that data analysis is becoming a focus of an increasing number of centres. Out of these, 69% of centres plan to develop some of the data analysis capability in-house.

The second role, which the centres plan to introduce the most often, is RPA Engineer / Trainer. While 57% of centres plan it, out of these 90% plan to develop some of the skills in-house, while only 20% centres plan to hire externally to gain some of their RPA engineer capability.

---

### TOP 3 NEW ROLES PLANNED TO BE INTRODUCED BY BUSINESS SERVICES CENTRES

---



1. Data Scientist / Analyst



2. RPA Engineer / Trainer

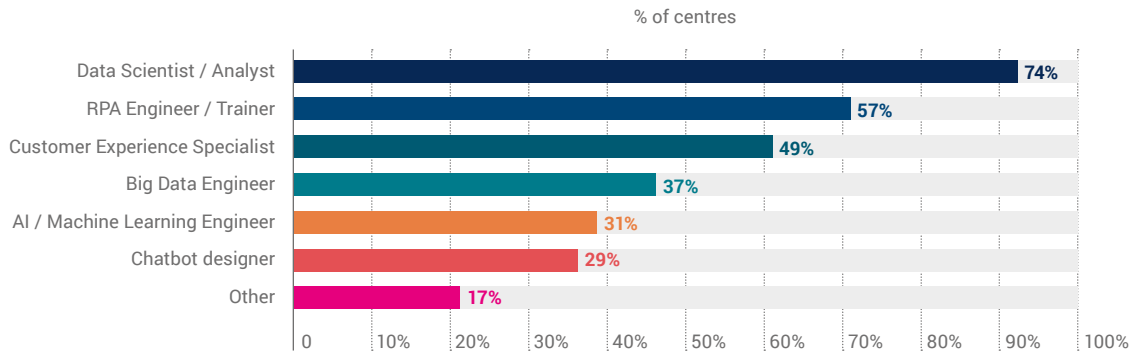


3. Customer Experience Specialist

---



## New roles planned to be introduced in business services in the next 2-3 years



Source: ABSL Survey 2021



### ABSL DIAMOND WINNER 2021 IN CATEGORY EDUCATION

Pfizer received an award for a program aimed at expanding employees' knowledge and skills and increasing their attractiveness in building a career with a new employer. In 2020, it was decided at the global level that the GBS division of Pfizer would move to a new location by the end of 2021. The company's extraordinary responsibility to employees has been reflected in the offer of many training initiatives, mainly related to expanding digital skills, mentoring, and the opportunity to obtain a global ACCA qualification and Hackett certification, as well as providing insight on trends and the future evolution of Business Services in the Czech Republic. 70% of Pfizer employees took advantage of these opportunities. The company has invested 75,000 Euros in this program.



## UNIVERSITY COOPERATION

While the Czech Republic prides itself on high quality graduates in areas such as economics, information technology or finance, the centres seem to suggest that there is a room for improvement. 21% of centres say that the universities do not prepare candidates effectively for a career in their centre, 76% of centres report that they prepare them somehow effectively.

Interestingly, only 42% of centres cooperate with universities on various levels such as recruiting or research projects. Therefore, there seems to be a potential for a greater cooperation between business services and the local universities.



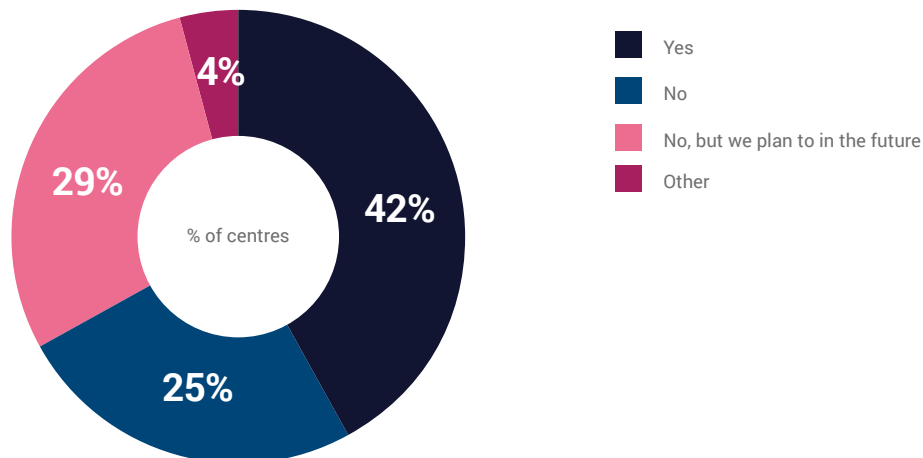
# 71%

of centres currently cooperate with the local universities or plan to in the future



Section of ABSL Survey focusing on universities was designed in cooperation with SAP

### Do you cooperate with local universities?



Source: ABSL Survey 2021

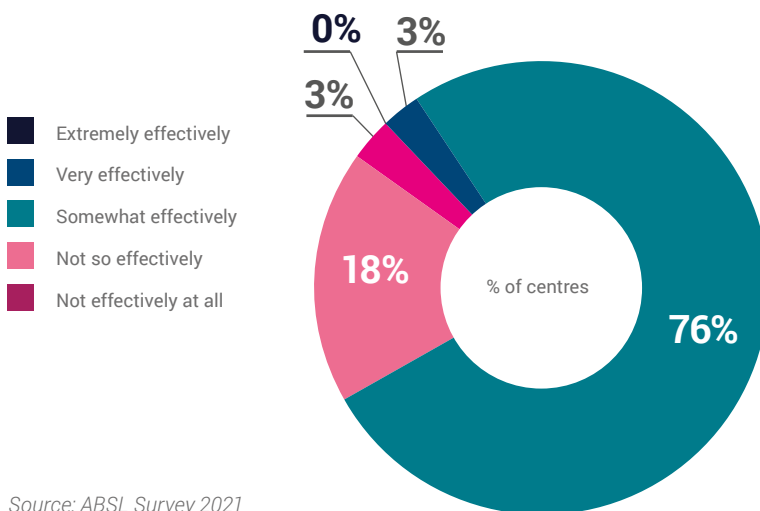
## kyndryl

### ABSL DIAMOND WINNER 2021 IN CATEGORY EDUCATION

Kyndryl received one of the awards in the Education category for a very comprehensive approach to educating their employees and working with talent since their school years. It also includes cooperation with schools and universities on the content support of study plans, which would be better able to prepare students for their future careers in IT. Training in the company is based on the involvement of the employees themselves. Over the past 18 months, 180 experts have participated in educational programs, courses, mentoring, and other events and they have supported 5,100 students.



### How effectively do universities prepare candidates for a career in your centre?



# 21%

of centres report that the universities do not prepare candidates effectively for a career in their centre

Source: ABSL Survey 2021



## WHAT IS THE SECTOR'S VIEW OF CZECH EDUCATION?

Well-technically and linguistically educated employees are absolutely crucial to the success of the business services sector. One of the main reasons why the Czech Republic became a popular destination for business services centers 15 years ago was the historically strong education system.

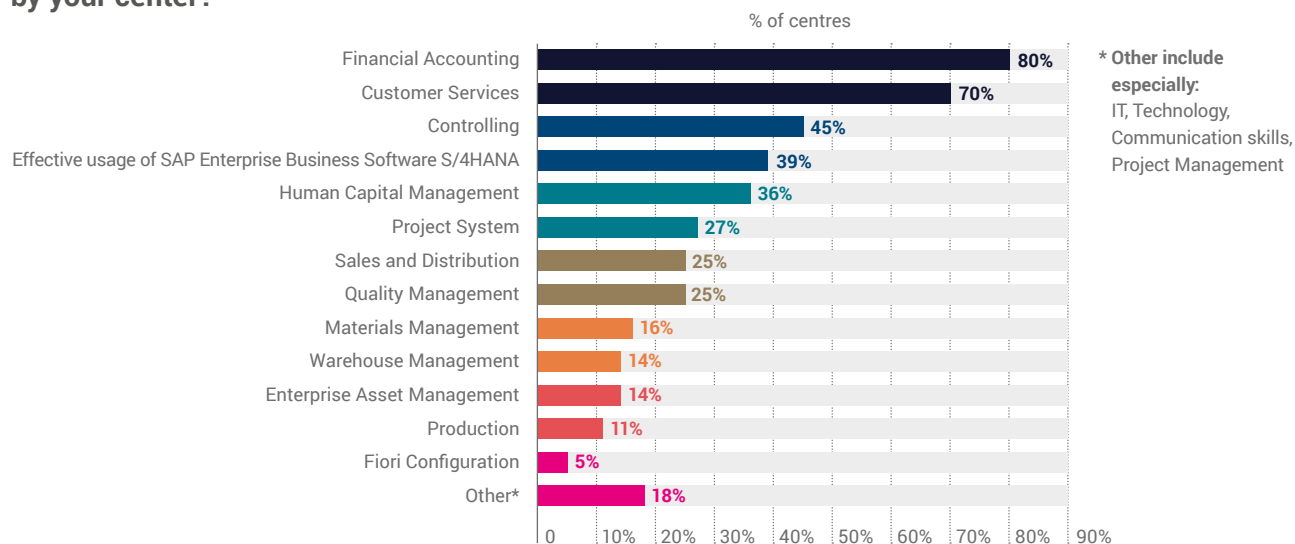
Currently, the situation in Czech education is not ideal for the sector, especially due to the very rapid development that the sector is going through. Czech education is unable to respond to it quickly enough and to flexibly include new necessary fields of study and subjects. In particular, the teaching of technology and foreign languages is insufficient, as well as the general preparation of graduates for professional life.

ABSL actively communicates with the Czech educational system and strives to better align the needs of employers with educational programs. A large part of companies has established direct cooperation with individual universities and many companies replace insufficient education with their own educational programs.

ABSL has also developed own educational program (Fusion) for its members, as well as an MBA program focused on business services. Learn more at [www.absl.cz](http://www.absl.cz).

Source: ABSL Battlecard 2021

## What specific areas of business processes should graduates understand to be appreciated by your center?



Source: ABSL Survey 2021

## ABSL FUSION: PROFESSIONAL QUALIFICATIONS FOR BUSINESS SERVICES

As a reaction to a growing demand for professional development programmes tailored to the business services sector, ABSL has successfully launched a suite of 3 qualifications: ABSL Professional, ABSL Leader and MBA in GBS.

ABSL Fusion is the only one of its kind for the business services sector and is open exclusively for ABSL members only.

### Leader & Professional Qualifications



Entry is available at any level for candidates with suitable experience and role.



## ABSL Fusion in numbers



# 3

programmes for various seniority levels



# 30

alumni companies



# 4

years on the market



# 12

unique sector case studies



# 100

graduates

## MBA in Global Business Services

As a next step in innovation for the sector ABSL Czech Republic has created a flagship, academic, global MBA program in partnership with leading providers in the education sector, University of New York in Prague and The Hackett Institute.

The duration of the MBA in GBS is 18 months starting this October. The teaching programme takes place over two weekends a month and is supported by extensive online learning, written assessments and group project work.

THE PROGRAMME CONSISTS OF:

**12 UNYP MBA Modules** /live & online/

Business practices in Strategy, Finance, Leadership, Marketing and Entrepreneurship

**10 Advanced Diploma GBS Modules** /online/

Delivered on the global Hackett Institute online platform  
From Strategic alignment to Service management,  
Process Transformation & Organisational governance

WITH THE ADVANCED BENEFIT OF:

**10 ABSL Fusion Sessions**

Hot GBS topics, shared best practices and the latest from the ABSL Event Calendar

Learn more about MBA in GBS at [www.absl.cz/mba](http://www.absl.cz/mba)



“The programme provides you with an end to end understanding of business and moves you forward to the next step of your career.”

**Veronika Ben Mansoura**

Senior Event Operations Manager EMEA,  
Covidien / Medtronic



## ABSL Fusion education programmes community

The following companies have already joined the Fusion programmes or MBA in GBS creating a strong graduate and student community:





"The program reached my expectations and gave me a clear overview of the history of Business Service Centres, BSC can evolve to Global SSC. I see the Fusion program as a quality source of information valuable for management and also for talents from the company."

**Kamil Borovička,**  
Process Specialist, Knorr-Bremse  
ABSL Fusion Professional 2021, ABSL Fusion Leader 2022



"Being part of ABSL Fusion Leader was a great experience for me. The opportunity to meet leaders from other GBS organizations and to work with them over the course of this year helped me to learn a lot from their best practices and to expand my ABSL network. I was really proud to be part of the team together with so many inspiring individuals."

**Jiří Klimas,**  
Record to Report Director, Pfizer  
ABSL Fusion Leader 2021



"ABSL Fusion Professional helped me to get more insight in GBS and its different functions and it is very useful for the future career development."

**Petra Stehliková,**  
Senior Accountant, Monster  
ABSL Fusion Professional 2021



"Not only comprehensive industry learning but also a program with specific outcomes which support further growth of Business Services in the Czech Republic ... and Networking which creates friendship."

**David Böhm,**  
Managing Director, Knorr-Bremse  
ABSL Fusion Leader 2021





## PROFESSIONAL DEVELOPMENT PROGRAMMES

THE FIRST LEADERSHIP & PROFESSIONAL DEVELOPMENT PROGRAMMES  
TAILORED FOR BUSINESS SERVICES

ABS FUSION launched exclusively for ABSL Members, leveraging ABSL network of visionary leaders across the sector to help develop future leadership talent.

BUILDING OUR FUTURE TOGETHER.

For more information visit our website [www.absl.cz/fusion](http://www.absl.cz/fusion)



In cooperation with



# World-class performance is powered by world-class talent



The quality of workforce talent and skills is widely recognized as a critical part of the formula for business success. Aligned to this, a reduction in task-oriented work allows organizations to elevate their services and deliver more value to the business, enabling organizations that have advanced talent management capabilities to demonstrably excel at producing outstanding talent and business outcomes.

The Hackett Institute's unique programs enable your organisation to address the growing need for specialised talent through our flagship programmes:

- **Certified GBS Professionals** – improve service quality and boost productivity up to 40%
- **Robotic Process Automation Master Classes** – accelerate the benefits of smart automation
- **Working Capital Excellence Master Class** – create a cash-aware culture

Our curriculums enhance the knowledge and capabilities of business services professionals and, by extension, their organizations – helping them to apply Hackett-Certified™ best practices that correlate with Digital World Class™ performance. These programs operationalize professional development and enable both upward and lateral career mobility.

Rooted in both action and academics, courses are grounded in real-world implementation experiences and informed by unmatched intellectual property derived from our benchmarking data, proprietary research and Best Practices Intelligence Center™.

More than 450 companies and 10,000 students globally have participated in The Hackett Institute's training and certification programs. Have you?

## Begin your journey to Digital World Class.

Call us today to learn more about how The Hackett Institute can deliver the knowledge your organisation needs: +44 20 7398 9100.  
Or visit us at: [www.thehackettgroup.com/institute](http://www.thehackettgroup.com/institute)

**All ABSL Czech Republic members receive incentivised pricing.**

 **The Hackett Institute**  
PROFESSIONAL DEVELOPMENT FROM THE HACKETT GROUP

 **ABSL**  
STRATEGIC PARTNER



## HIRE FOR ATTITUDE, TRAIN FOR SUCCESS

---

Text provided by: The Hackett Institute

According to The Hackett Group's research, accelerated innovation, including technology and a shift to digital delivery channels, will be the most common and enduring post-pandemic characteristic of business (Extreme Uncertainty Poll, The Hackett Group, August 2020). To achieve the significant performance improvement benefits of digital transformation, global business services (GBS) organizations need to transform their workforce into one with critical skills such as agility, data and technology savviness, analytics, service design, creativity, versatility, critical thinking, business acumen, and customer focus.

In view of these significant changes to essential skill sets, organizations cannot rely primarily on acquiring these new skills from outside the company. They must also invest in reskilling existing staff, equipping them to handle new responsibilities. According to the World Economic Forum,

50% of employees will need reskilling, while 40% of current workers' core skills are expected to change in the next five years (Future of Jobs Report 2020, World Economic Forum). These are truly staggering numbers, and GBS executives must act now to prepare their workforce so that it can deliver on the digital agenda.

Digital transformation has had a profound influence on enterprise priorities. To remain competitive and meet their objectives, GBS organizations will need to prioritize cost, digital transformation and value delivery. But according to The Hackett Group's research (Key Issues Study, The Hackett Group, 2021), these are also the areas where GBS organizations have the most serious capability gaps. In fact, projected GBS workload growth in 2021 far exceeds anticipated increases in resources, so the challenge is how to do more with less.

### A new talent profile

As digital transformation automates tasks and enables new possibilities, tomorrow's business services employees will perform dramatically different activities with both their functions and cross-functional and self-directed work teams. They will partner with the business, model data and analytics to predict business performance, and redefine the digital architecture to build stronger capabilities within their function and across the enterprise. They will become problem solvers, develop agile ways of working, and identify and deliver on continuous innovation and new performance improvements.

This is not just a matter of adding new roles such as data scientists, process automation specialists, service and solutions designers, and people and culture specialists. Organizations will also need to change and upskill staff affected by automation as digital transformation progresses. At the same time, they will also create new roles such as "retraining" robots when the organization introduces new policies and procedures, managing digital service delivery platforms, and supporting a virtual workforce.

While technology savviness is certainly critical as the adoption of digital platforms advances, most of the core skills of a digitally enabled workforce are not necessarily digital in nature. In fact, these roles require advanced human skills and competencies such as business acumen, customer focus, agility, curiosity, creativity, and innovation.

Further, staff at all levels and in all roles will need a more strategic mindset, and must be comfortable working and telling a story with data – that is, turning data into competitive intelligence and insights rather than just reporting the news. These skills are still missing in many business functions and GBS organizations today, but they are essential as work pivots to activities around process improvement, service design, customer focus, and transformation management.

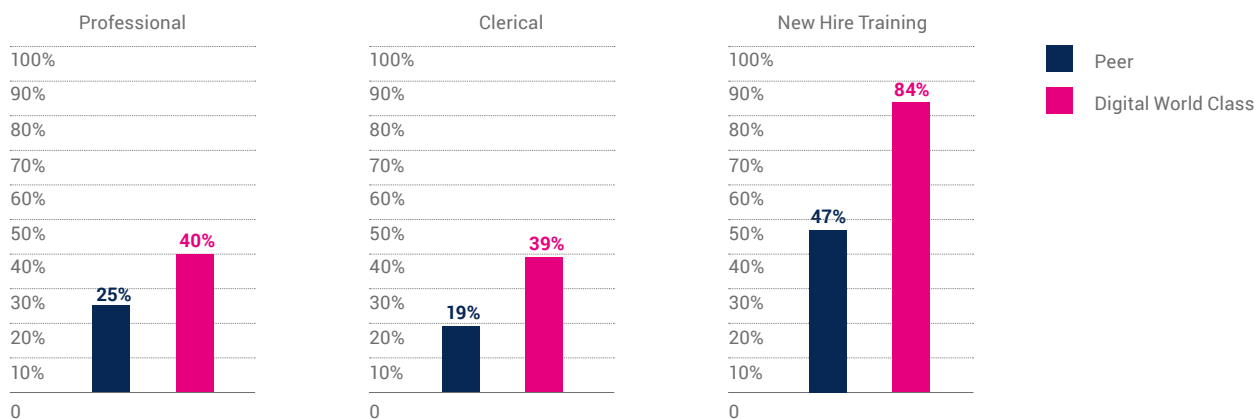
Advanced skills, such as strategic thinking, continuous innovation, analytics and process improvement, are scarce and expensive. Until supply begins to approach demand

(which will take time), GBS organizations have no choice but to prioritize the reskilling and redeployment of existing resources to fill critical gaps.

What remains essential for organizations is to recognize the importance to recruit based on attitude and then

develop the skills required. Digital World Class™ companies recognize this. They spend significantly more time than peers on training and upskilling their employees to make sure they have the right skills and capabilities to achieve strategic goals.

## Average Number of Training Hours Completed Annually



Source: Global Business Services Benchmark, The Hackett Group, 2021

Are you ready to embrace this new hiring and learning culture?

## About The Hackett Institute

The Hackett Institute is the professional development arm of The Hackett Group®. We offer professional education in traditional and emerging business areas. Our professional education courses include our flagship offering,

the Certified GBS Professionals® program, plus our stand-alone master classes designed for specialized professional development in other business services functions.



<https://www.thehackettgroup.com/the-hackett-institute/>

For more information on professional education programs by The Hackett Institute contact directly ABSL at [absl@absl.cz](mailto:absl@absl.cz) or **Ben Hartfield**, Senior Director at The Hackett Institute, [bhartfield@thehackettgroup.com](mailto:bhartfield@thehackettgroup.com)



# 8

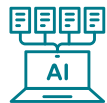
## TECH-DRIVEN CHANGE



The workload performed by automation reached 13 000 FTEs in 2021. This is more than triple the amount of 2018. The growing automation workforce requires the management of an increasing number of experts, of which the sector currently employs 4,200 and it is planned to increase this number to 6,800 within the next 3 years. The majority of this robotics and automation capability is being built in-house, which means that many centres have become training hubs for advanced technologies.

## ROBOT & AUTOMATION WORKFORCE

Robot and automation provide work equivalent to:



**9%**

of workforce RPA & other automation



**52**

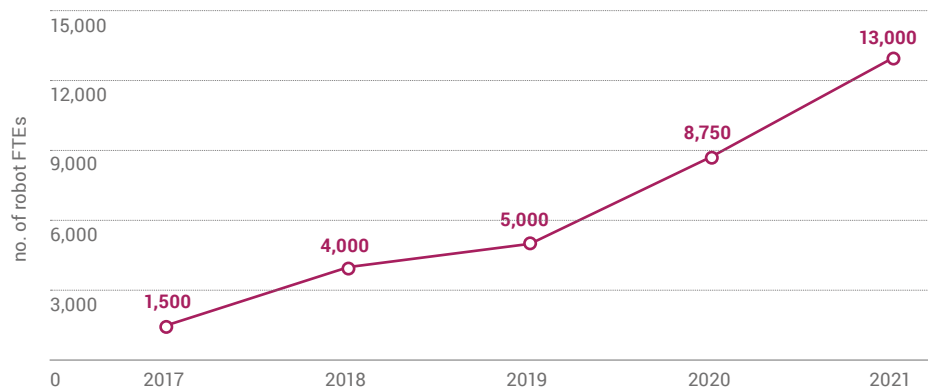
Average number of robot/automation FTEs per centre in CZ



**13,000** FTEs

equivalent robot/automation workforce in the sector

### Equivalent number of robot & automation FTEs within business services in CZ



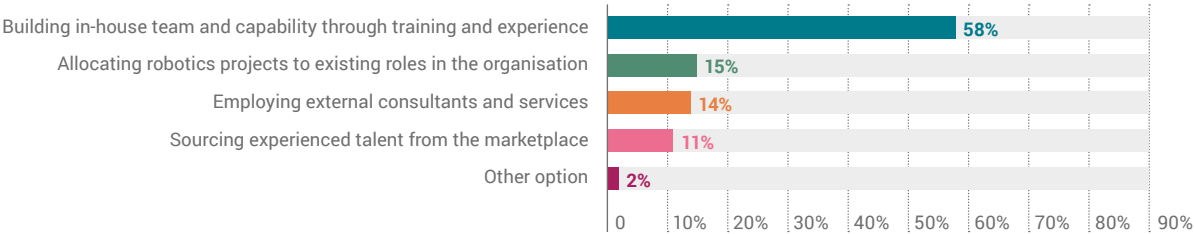
Source: ABSL Survey 2021

AUTOMATION EXPERTS WITHIN THE SECTOR

	NOW	PLANNED WITHIN 3 YEARS
Automation experts (FTEs)	4,200	6,800
Average number of automation experts per centre (FTEs)	12	17

73%  
of the centres build their robotics and automation capabilities in house

Methods used by centres to build robotics and automation capability



Source: ABSL Survey 2021



ABSL DIAMOND WINNER 2021 IN CATEGORY BUSINESS INNOVATION

Atlas Copco Services was awarded for its smart travel cost audit project, which was invented and implemented by the team from Brno to reduce manual tasks during the travel costs control for the company’s employees (more than 20,000 employees in 14 EMEA countries and NASA). Thanks to the use of automation and smart technologies, 30 % of employees’ time was saved, which allowed the centre to expand its scope. At the same time, it has contributed to more effective detection of errors or illegit claims. Thanks to the significant benefits of the solution, its global adoption is being prepared for the remaining regions (especially Asia).



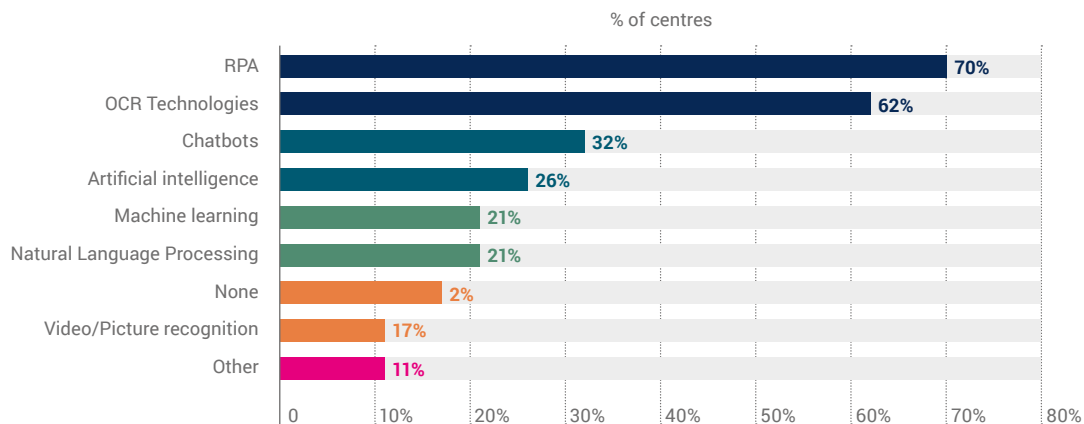
## AUTOMATION METHODS IMPLEMENTED IN THE CZECH CENTRES



# 83%

of centres have already implemented some methods of automation

### Share of business services centres that implemented specific automation methods



Source: ABSL Survey 2021

### TOP 3 METHODS OF AUTOMATION ON THE RISE IN 2021

Increase in % of centres that implemented the method compared to 2020



OCR Technologies

**+9%**



Natural Language Processing

**+9%**



Artificial Intelligence

**+4%**





## ABSL DIAMOND WINNER 2021 IN CATEGORY BUSINESS INNOVATION

Conectart was awarded for their Smart IVR project on Samsung's customer line. This automated voice signpost significantly streamlines the work of the contact centre. It can respond to the current occupancy of the line, obtain the necessary information from customers and thus facilitate the work of human operators. Process innovation and automation using artificial intelligence is a harbinger of a trend that the company would like to profile in the coming years.



## IMPACT OF COVID-19 ON THE IMPLEMENTATION OF AUTOMATION AND DIGITALIZATION

Since the onset of the COVID-19 pandemic, the impact it has on the implementation of automation in Czech business services is shifting. While in 2020 the most impacted was digitalization and the development of new automation projects, a year later the centres report a larger impact on the implementation of other technologies too, such as RPA, AI and chatbots.

### Impact of COVID-19 on the implementation of automation and digitalization

	% of centres		
	Accelerated	No impact	Slowed down
Implementation of digitalization	58%	40%	2%
Development of new digitalization projects	54%	44%	2%
Development of new automation projects	49%	46%	5%
Implementation of RPA	33%	60%	7%
Implementation of OCR Technologies	19%	79%	2%
Implementation of AI	18%	83%	0%
Implementation of chatbots	20%	80%	0%
Other	9%		

HIGHLIGHTS: IMPACT OF COVID-19 ON TECHNOLOGY IMPLEMENTATION OVER 2020 AND 2021

Most accelerated



Digitalization - Implementation and development of new projects

Least impacted



AI and chatbots

Most slowed down



RPA (although not significantly, only 8% and 7% of centres reported slowing down due to COVID-19 in 2020 and 2021 respectively)







# One-stop-shop for all your office needs

- Refresh your knowledge about office market trends and activity
- Investigate new ways of working and implement them through structured change management
- Optimise your costs connected to the office and workplace
- Turnkey services for your workplace design and fit-out



Office Agency



Design & Build Services



Workplace Advisory



Building Consultancy Services



Chapter Content Provider: Colliers

# 9

## REAL ESTATE AND OFFICE MARKET



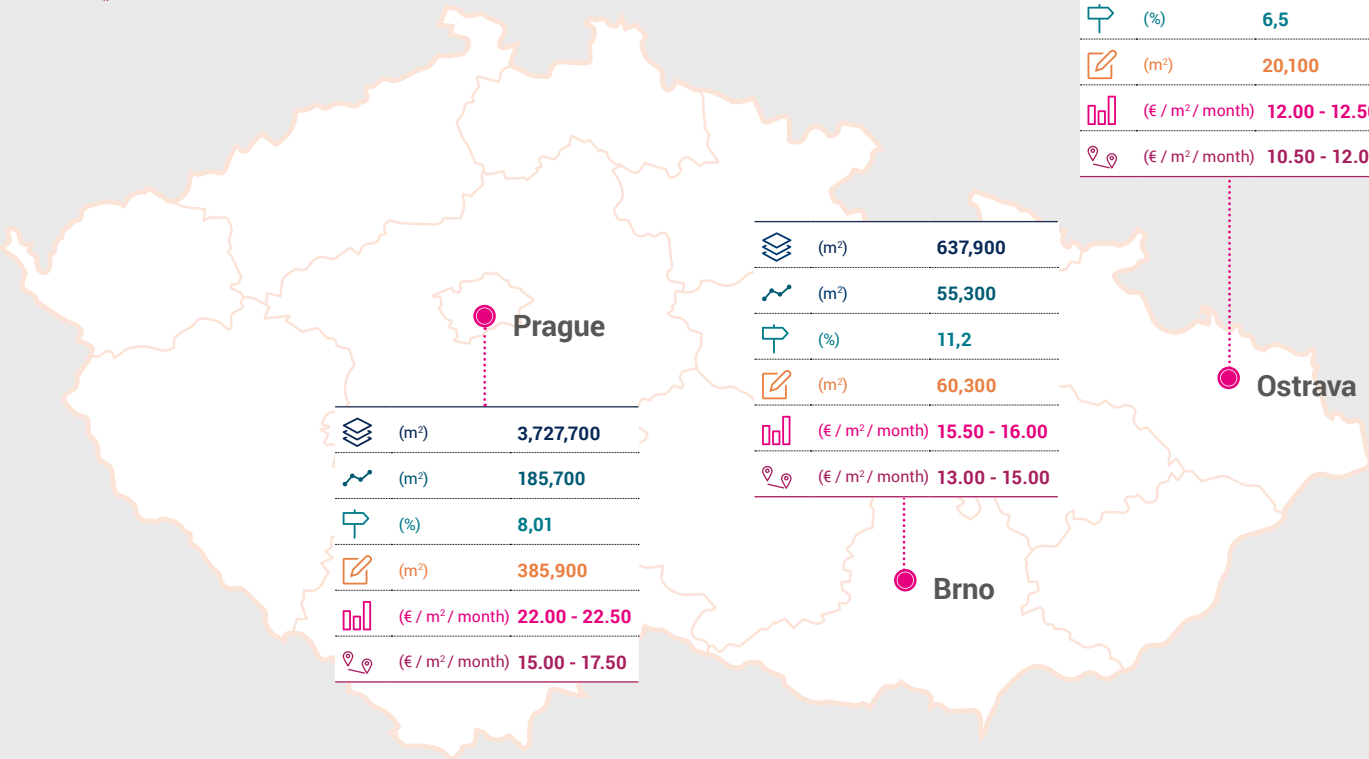
# OFFICE MARKET IN THE CZECH REPUBLIC

The Czech real estate market, in particular the office and industrial sectors, has survived the recent, challenging years. Thanks to the highly skilled and talented professionals across a broad range

of sectors, plus the market’s strategic location within Europe, we expect to see continued growth towards a sustainable and modern business environment.

## Office Market in the Czech Republic

- Stock (m²)
- Under Construction (m²)
- Vacancy Rate (%)
- Gross Demand (last 12 months) (m²)
- Prime Rents (€ / m² / month)
- Average Rents (€ / m² / month)



Source: Colliers, PRF, RRF - Q3 2021



## PRAGUE

Prague, as the economical centre of the country, naturally has the largest office market. Currently, there is slightly over 3.7 million m<sup>2</sup> of modern office space, divided into 10 districts. Most of the offices can be found in Prague's 4 and Prague 5, followed by Prague 8 and Prague 1. Other districts of Prague also have micro locations which are attractive from an occupier's point of view, thanks to

# 185,000 m<sup>2</sup>

Over 185,000 m<sup>2</sup> of modern offices are currently under construction in Prague



the proximity of airport, highway connection or simply the genius loci of such locations. Important office hubs can usually be found within several minutes walking distance from the metro, which is a crucial means of public transport for the city and office employees.

The market has experienced a continuous increase of available space since the historical lows in 2019, when there was very little to choose from for new occupiers

coming to the market, or those looking for a change of scenery. Not only thanks to the pandemic, but we also now experience a bit more of a neutrally positioned market, where every occupier has several options to choose from if the move is timed well ahead. A vacancy rate of 8.0% was recorded at the end of Q3 2021, but several locations, especially within the most established submarkets, can still lack the availability of larger units.

The limited number of office projects completed during 2021 helped to keep the vacancy rate increase at a decent level and as a result, the Prague market did not experience any major shock of sudden availability. This can, on the other hand, be perceived as double edged and limited new construction will limit the number of choices that companies have when looking for new offices on the market. Nevertheless, the future of the Prague office

market is not gloomy.

Despite the shortage in 2021 and a similar forecast for 2022, the construction of several large and long-awaited prime projects commenced construction during late 2021 and are currently offered for lease from 2023 onwards.

The cost of prime office space in Prague is between €22.00 and €22.50 per m<sup>2</sup> / per month. But as the year 2021 came close to an end, several ambitious projects were significantly above this

level with several clients already pre-secured. Therefore, we are sure the prime rents will increase towards €25.00 rapidly. Looking away from the city centre, costs per square meter of between €15.00 and €17.50 are more common for the most modern space in established office locations.

## BRNO

With 638,000 m<sup>2</sup> of modern offices, Brno is the second largest market with modern office space and can be compared in size to some Polish regional city markets such as Poznan, Lodz or Katowice. The popular part of Brno's city centre also includes several office properties, but most of the truly modern office space is located in hubs around the centre and on several spots on the outskirts, which benefit from proximity to the universities or industrial facilities. Occupiers present in Brno are very often branches of larger companies acting as business service centres or research & development facilities.

Despite the market being active with moves and new tenant entries, a vacancy rate of 11.4% was recorded at the end of Q3 2021. A rate of between 10.0% and 12.0% can be considered as a standard level for the city. As the market is relatively small, every space vacated by a move of large occupier can take a longer time to absorb.

Construction activity in Brno is ambitious and usually led by locally focused developers, who are well aware of the needs of the local market. Since 2019, approximately 89,500 m<sup>2</sup> of modern offices were delivered and there are over 200,000 m<sup>2</sup> in various planning stages. Similar to Prague, several large developments and locations like Nová Zbrojovka or Dornych are closer to becoming a real choice for occupiers. Especially with Nová Zbrojovka, where the development is planned in a number of phases and will create a whole new multipurpose district on the largest brownfield site in the city.

Office costs in Brno have increased over the past several years thanks to the increasing quality of the developments and increasing demand. In comparison to Prague, Brno is considerably cheaper, but this gap is narrowing, especially regarding the current situation with the rising costs of construction materials and labour. Cost per square meter

# 41,000 m<sup>2</sup>

Almost 41,000 m<sup>2</sup> of modern offices in Brno are planned for delivery during 2022



in prime projects in Brno are currently around €16.00 per m<sup>2</sup> / per month, but some exclusive units or projects can be marketed for higher prices. In general, occupiers should be able to find A class space for prices between €13.00 to €15.00 m<sup>2</sup> / per month.

## OSTRAVA

The stock of modern offices in Ostrava accounted for approximately 219,000 m<sup>2</sup> and represents the third largest office market in the country. Modern properties are spread around the city, but the area surrounding the shopping mall Forum Nová Karolína and the historical core can be considered as the prime office locations, with the most modern properties located here.

The amount of available space for lease has decreased over the past two years and currently accounts for approximately 14,200 m<sup>2</sup> or just 6.5%. The vacant space is being slowly absorbed and it can, in some cases, be difficult to find a unit of a desired size, in some locations.

There has been a shortage of construction activity over the past several last years in Ostrava. It is not that the city does not attract the developers, but lengthy permitting, combined with lower demand and absorption on the market makes development more difficult. Moreover, the focus of investors is currently on the industrial sector, which is booming around Ostrava.

The cost of prime offices in Ostrava increased recently to approximately €12.50 per m<sup>2</sup>/ per month, driven by the development of the new Organica building, which

exceeds most of Ostrava's properties in many ways.

The majority of offices currently available in Ostrava can be leased for between €10.50 and €12.00 m<sup>2</sup>/ per month and while these can be considered as stable, an increase is highly probable.

# 20,000 m<sup>2</sup>

Organica will deliver over 20,000 m<sup>2</sup> of space to Ostrava's market and become the city's prime office property



## Other regional cities

There are more locations to discover in the Czech Republic other than the three largest cities we have mentioned. In recent years, many companies have chosen alternative regional cities for their headquarters, often in search of talent, outside of the more competitive larger markets. The number of choices for modern properties gradually

grow larger and larger as new projects emerge in cities such as Olomouc, Pilsen and České Budějovice, to name a few. It is again more common that local developers are willing to invest more into these less established, but promising markets.



Chapter Content Provider: Colliers

# 10

## WORK REVOLUTION



There are dramatic socio-economic, technological and business forces emerging which will impact the Future of Work – defining an imminent Work Revolution.

The scale of these shifts requires an interconnected approach to organizational problem solving.

We have identified seven significant Future of Work challenges. Here are recommendations for how real estate, workplace and facilities can play a role in solving them.



## MEETING THE CHALLENGES OF AN EVOLVING WORKFORCE, WORKPLACE AND WORKSPACE

---

Many emerging workforce, workplace and workspace trends accelerated and evolved during the COVID-19 pandemic. These challenges across industries and markets are being met by services and tools combined in a dynamic mosaic:

### People

The demand for skilled and diverse talent is intensifying the need to create a work culture that doesn't just value diversity and accommodate new talent but serves as a magnet for the best talent in the market.

Understanding demographic preferences for work environment, flexibility and location is essential to attracting and retaining your future workforce.

### Place

From headquarter offices to flex facilities, the workplace is being redefined. With lessons learned from a year of remote and revised work practices, all companies now have customized intelligence to inform back-to-work and Future of Work possibilities.

Virtual work, as well as changing workforce and consumer geographic preferences, is opening new opportunities to revise everything from office location criteria to sustainable supply chain design. Also, innovative technologies are enabling workflow automation and facilities management solutions that are smart, responsive and minimize environmental impact.

### Space

Creating engaging, collaborative and efficient work environments - that reflect company culture, and which are technology enabled, is more critical than ever.

Whether redesigning an office to accommodate increased hoteling, or team building, or developing an R&D lab, that can be flexibly reconfigured, every workspace can be optimized to promote innovation, productivity and employee satisfaction while reflecting your company's unique DNA.

## MOSAIC FRAMEWORK

### The Work Revolution Playbook



**The Work Revolution** demands that real estate and workplace become key enablers for successful business transformation.

**Colliers offers Mosaic** – an integrated suite of diagnostic tools and advisory services that combine to examine and meet the challenges of the evolving workforce, workplace and workspace.

**Our cross-functional approach** allows you to diagnose and define your company's Future of Work vision, while

resolving today's back-to-work occupancy and operational challenges. No matter what the scope, we recommend integrated services, configured to inform decision-making across disciplines, supported by data and insight. We seek to span boundaries of traditional service offerings and recommend a multi-disciplinary approach to help solve the work and real estate challenges that lie ahead.

## NEW WAYS OF MEASURING VALUE

To meet Work Revolution challenges, explore measures and KPIs that will be impactful to the business and not simply real estate.

Real estate organizations have traditionally measured performance based on metrics that relate back to focused organizational cost, efficiency and use metrics. Future-

focused metrics will seek to measure how engaged employees are and the impacts of a more meaningful work experience.

Given the scale of the emerging challenges, now is the time to define the value CRE can play to the overall organization. Success measures need to illustrate that added value:



### Talent Attraction & Retention

How does the business improve by implementing people, place and space solutions? Measure the pre and post implications of these metrics by analyzing the ability to attract and retain more diverse employee populations.



### Innovation

It is proven that organizations with increased diversity enjoy higher degrees of collaboration, develop more innovative solutions and succeed in greater overall growth. Develop measures that illustrate how real estate and facilities are driving more innovation through place and space changes.



### Knowledge Transfer

With the advent of more distributed workforces, it is critical to ensure that the collaboration and transfer of organizational knowledge in business units improves and remains seamless. Develop a strategy to measure how real estate plans enable smooth transfer of information in remote and onsite work.



### Workflow Improvement

With the advent of increased machine learning and automated task workflows, work with operations, HR and IT to measure the impacts of improved adjacencies. Ensure remote workers have the guidance and resources needed to be connected and productive.



### Collaboration

Enabling collaboration is critical to decision speed and achieving business success. Measure how work strategy, technology and space design enable employees to focus when they need to and collaborate for the generation of new ideas, information transfer and evaluation.



### Belonging

Employees will want to understand how they fit within the organization and align with the collective culture. It is important to measure the value the office and facilities foster which creates a sense of belonging and inclusion. Social interaction will be a key driver in engaging employees in the office.



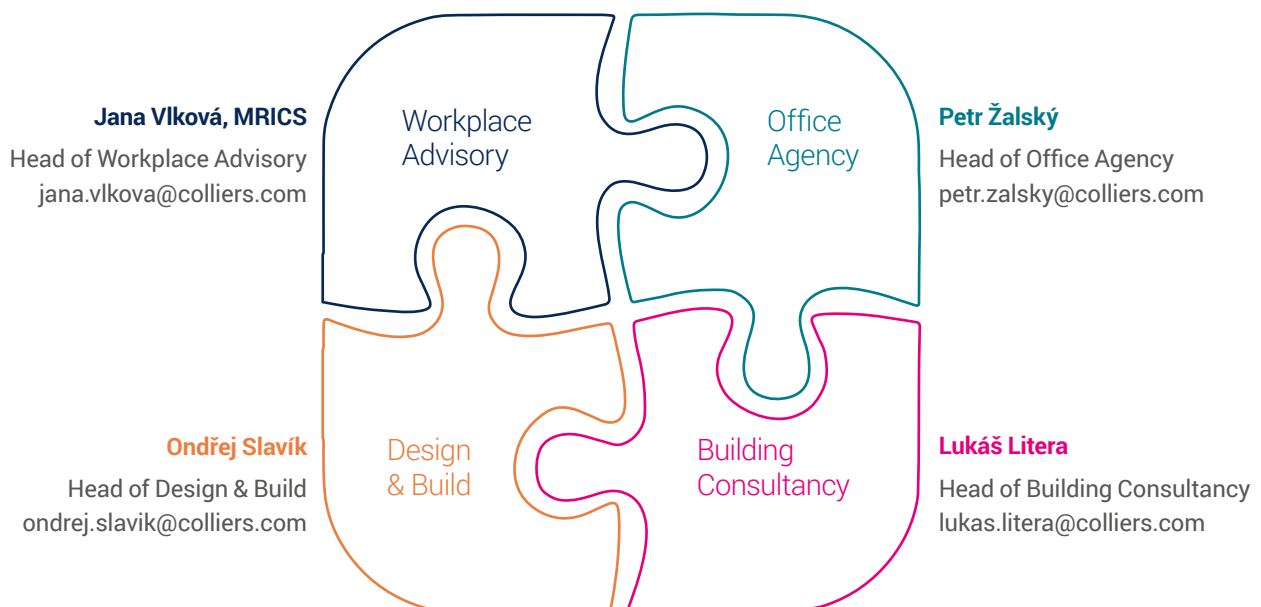
## OCCUPIER SERVICES IN THE CZECH REPUBLIC

---

### About Colliers

Colliers is a leading professional services and investment management company. With operations in 66 countries, our more than 15,000 enterprising professionals work collaboratively to provide expert advice to real estate occupiers, owners and investors. For more than 25 years, our experienced leadership with significant insider ownership has delivered compound annual investment returns of almost 20% for shareholders. With annualized revenues of \$3.3 billion (\$3.6 billion including affiliates) and \$45 billion of assets under management, we maximize the potential of property and accelerate the success of our clients and our people.

Connect with our regional team of experts to discuss the seven significant Work Revolution challenges



# 11

## KEY TERMS



TERM	DEFINITION
Business services sector	Activities and processes that a company needs to operate its main line of business, ie the sale of products or services. These are not only traditional activities such as accounting, HR, IT, customer support, purchase of materials, marketing, but often also research or development of new products and the introduction of innovations.
Business Services Centre	An organizational unit, usually a separate legal entity that oversees business services, centralizes them, standardizes them, and seeks to make them more efficient. The unit usually takes the form of a separate company with its own offices and is often located in a location that offers access to skilled workers, has a good infrastructure, and is cost-effective.
Shared Services Centre	An older name for a business service centre.
Outsourcing	Separation of support and ancillary activities of the company (for example, business services) and its contractual transfer to another company specialized in the relevant activity. It is a type of division of labour, the activity is not provided by the company's employees, but based on a contract with an external supplier.
Traditional business services	Activities that companies allocate to business service centres first. These are activities and processes that are usually transactional, have high workloads, and are clearly defined. For example, accounting, human resources, or customer support.
Work with higher added value	Activities (work) that are not transactional and repetitive, and that require a higher degree of independent decision-making based on advanced education or knowledge of advanced technologies. In business services, more than 73% of work falls into the category of work with higher added value.
AI (artificial intelligence)	Artificial intelligence is the ability of a machine/computer to handle the activities that humans usually do. In business services, artificial intelligence is often used to improve existing robots that work under clearly defined conditions ("if-so").
Machine learning	Machine learning is a sub-area of artificial intelligence, dealing with algorithms and techniques that allow a computer system not only to rely on precisely defined conditions ("if-so") but to improve its decision-making based on past decisions and other information.

Source: ABSL Battlecard 2021

Download the practical document ABSL Battlecard to find out more about the key facts, terminology & main visions of business services here: <https://drive.google.com/drive/u/0/folders/1tqhQVIXQzMtMFPI5iyHSptzu4fNafb3G>











