



BUSINESS SERVICES SECTOR

IN THE CZECH REPUBLIC

2026





Report prepared by

Association of Business Services Leaders in the Czech Republic (ABSLS)

in cooperation with: Grafton Recruitment & GI Group, Colliers, The Hackett Institute



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With special thank you for the content contribution to **all members that completed our survey, the ABSLS Board of Directors, partners and supporting members.**

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ABSL INTRODUCTION

Chapter provider: ABSL



FOREWORD

The ABSL Report 2026 captures a sector that continues to grow in confidence, capability, and strategic relevance. This year's findings show an industry that has moved well beyond operational efficiency into a new phase defined by digital maturity, stronger talent foundations, and a clear focus on innovation. Automation and AI, including rapidly expanding GenAI use, are reshaping how centres operate and deliver value. What once felt experimental is now part of everyday business, with organisations investing more in internal expertise and smarter, integrated solutions. At the same time, the human side of our sector is stronger than ever. Retention is improving, teams are more experienced and international, and companies are doubling down on skill development to meet rising expectations in technology, analytics, and leadership.

Workplace models are stabilising, ESG commitments are expanding, and Czechia continues to be viewed as a reliable and attractive hub for high-value services. Yet the report also highlights the importance of agility. The agility in public administration, talent mobility, and the education system to ensure we keep our competitive edge.

I want to thank all ABSL members and partners for contributing to this year's survey and report. Your insights help shape the direction of our sector and strengthen our community's voice. As we look ahead, I am confident that Czech business services will continue to innovate, elevate their capabilities, and play an increasingly strategic role in the global economy.



Jonathan Appleton
Managing Director
ABSL Czech Republic

This report is the outcome of a detailed review of the survey responses provided by centres across the Czech business services community. My role was to analyse the data, draw out the key trends, and bring the findings together into a clear and coherent overview of the sector's current position and future direction.

I would like to thank all the companies that participated in the survey and shared their experience. Your contributions form the foundation of this report and make it possible to reflect the realities, progress, and challenges of our sector with accuracy and depth.

I hope that the insights presented here will support informed decision making and contribute to the continued development of the Czech business services sector.

Adela Pilatova
Project Manager

ABOUT THIS REPORT

The ABSL Report 2026 provides a comprehensive overview of the Czech business services sector, capturing its current state, key trends, and future direction. Drawing on extensive survey data from Czech-based centres, as well as expert insights from our partners, the report maps the sector's development across talent, technology, operations, workplace practices, sustainability, and investment attractiveness. Readers will find an updated picture of employment trends, the scope and maturity of services delivered, the evolution of digital and automation capabilities, and the growing role of AI across organizations. The report also examines workforce dynamics, from recruitment and retention to skills gaps and new roles emerging in response to digital transformation.

In addition, it highlights changes in work models, ESG practices, and the competitive positioning of Czech cities as business services locations. Finally, it outlines the priorities shaping the sector's next phase of growth and the support needed to keep the Czech Republic competitive in the global landscape.

Together, these insights present a clear and data-driven summary of where the sector stands today and where it is heading next.



INTRODUCING ABSL

Established in 2013, the Association of Business Service Leaders (ABSL) in the Czech Republic stands as the largest association of companies operating within 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 about 100 member companies.



The ABSL Board of Directors



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Manager



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Finance & Admin Support

ABSL HIGHLIGHTS & ACHIEVEMENTS IN 2025



2,000+

event participants



36+

ABSL Fusion Graduates



150+

speakers



60

live sessions



62+

diamond nominees



20

webinars



2025: Stronger Together in a Transforming Sector

2025 has been a year of true transformation, growth, and resilience for us and our members. The sector evolved, our community became even tighter and our members showed up at our events more than ever.

We saw record registrations at the AI & Digital Forum at Microsoft, the Prague Summer Party, and the ABSL Conference: Next Horizons. We strengthened our community through the second successful year of ABSL Fusion Digital program, enhanced our cozy Clubs to reflect the everyday challenges employees of the sector face, introduced a brand new Tax Chapter meetings, and celebrated 10 prestigious ABSL Diamonds.

2025 brought a wave of new energy. We added to our network new faces, new members, new talent.

MEDIA COVERAGE:

ABSL made a significant impact in the media landscape, publishing 225 pieces of coverage in top Czech media, reaching nearly 8 million readers, and achieving a record media value of CZK 25,720,000. Our activities gained strong visibility for the sector across national Czech TV, the CEO Inspiration podcast, and leading media such as Forbes.cz, MF Dnes, iDNES, Hospodářské noviny, Newstream, Expats.cz, and more. Our LinkedIn presence was equally impressive, generating over 180,000 impressions 4,500 reactions, 180 comments, and 100 reposts. These online marketing efforts drive awareness and engagement in the Czech business services sector.

Leadership Projects driving transformation in the sector

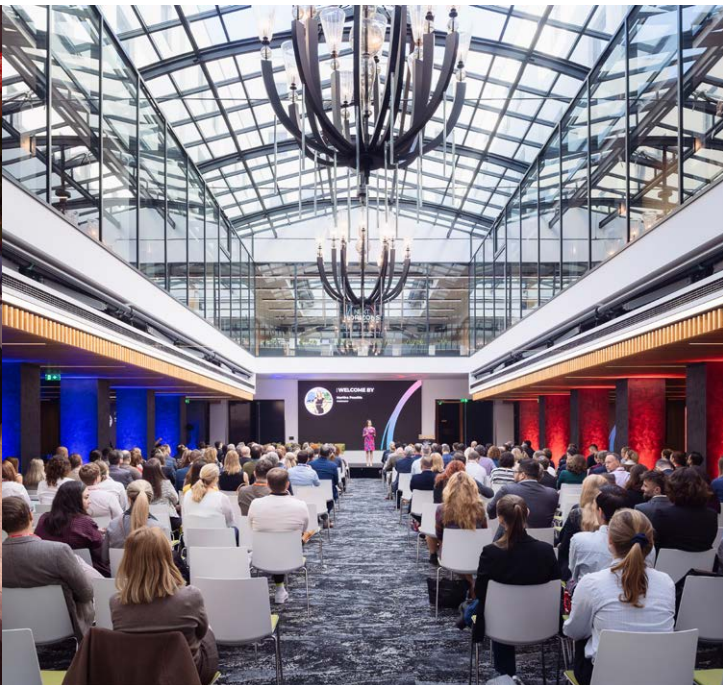
ABSL Fusion Programs: ABSL continued to raise future leaders through its **Fusion leadership programs**. 16 Fusion Digital Graduates, 11 Fusion Leaders, 6 Fusion Professionals, and 3 MBA GBS students graduated from 10 successful companies. These programs are key in driving transformation via education within the sector.



ABSL CONFERENCE 2025 - NEXT HORIZONS

The ABSL Conference 2025 brought our community together for two focused days of learning, discussion, and collaboration. It was held under the auspices of the Mayor of the City of Brno, in one of Czechia’s fastest growing and most innovative regions - Brno. The exquisite Hotel Passage served as the conference venue. With five parallel content streams, more than 100 speakers, 450+ participants, 30 partners, over 800 saved in-app contacts, and most sessions rated 5/5, it became one of our strongest editions to date.

Across five rooms, delegates explored the future of leadership, digital transformation, AI, talent development, sustainability, and the evolving landscape of global business services. Czech business. Global excellence. Shared progress.



Let the Conference Delegates Speak...

.....
“Almost each panel involved a woman – most even had their own masterclass!”
Martina Pouchlá, Czech Radio
.....

“Perfectly organized, with surprising activities like virtual reality showing the villages Doctors Without Borders help.”
.....

.....
“It was our pleasure to be a Diamond partner.”
Olga Cilečková, PwC
.....

“The conference was full of inspiration, valuable insights and meaningful connections.”
.....



.....
"I really appreciate meeting incredible people and hearing about their experiences and our possible future together."
.....

"We had great diversity on stage and a rich, varied discussion with senior execs from top IT and R&D centers."
.....

"What happens when the business services community comes together? The ABSL Conference – learning, sharing and getting inspired."
.....

"Our GBS community is becoming more BOLD, more DIGITAL, more TECH SAVVY – and more HUMAN and COLLABORATIVE."
.....

"Two days of pure inspiration in the spirit of #NextHorizons."
.....



Thank you to conference partners

Diamond Partner



Hotel Partner



Mobility Partner



Strategic Partners



Platinum Partners



Conference Partners



Key Supporters



Media partners



ABSL DIAMOND AWARDS 2025

The ABSL Diamond Awards celebrated projects that are shaping the future of business services in our country. This year's 62 nominations showed how the sector is adapting to a new era of work driven by disruptive technological change, and proving that it can not only keep pace, but thrive. We saw advances in AI automation, smart service tools, agile transformation, talent development, sustainable IT, and modern workplace design. At the new City Hall of Brno, we recognized not only eight winning innovative projects, but also the Emerging Leader of the Year and the Business Services Center of the Year. These initiatives demonstrate just how powerful, innovative, and resilient the sector has become.



62

innovative projects



10

diamonds



BUSINESS INNOVATION

Siemens GBS CEE

SIEMENS**CUSTOMER & OPERATIONAL EXCELLENCE**

Siemens GBS CEE

SIEMENS**EMPLOYEE ENGAGEMENT & DEVELOPMENT**

Commerzbank

BlueLink International


BLuelink
L'art de la Relation
EMPLOYER BRANDING

Envista

**EMERGING LEADER OF THE YEAR**

Martin Michalsky, Siemens GBS CEE

**SIEMENS****ESG STRATEGY**

Infosys

Infosys®

WORKPLACE INNOVATION

Aeven

aeven**TECHNOLOGY INNOVATION**

Kyndryl

kyndryl.**CENTRE OF THE YEAR**

ADP



More details on all Diamond Winners are provided in the relevant sections of this report and on our website: <https://absl.cz/diamond-awards>

EXECUTIVE SUMMARY

Key Takeaways from the ABSL Report 2026

DIGITAL MATURITY STRENGTHENS, WITH AI AT THE FOREFRONT

Centres continue to deepen their digital capabilities, with AI now the most widely deployed technology across the sector. Traditional RPA remains important, but organisations are increasingly shifting from high bot volumes to more integrated, intelligence-driven automation. The focus is clearly moving toward smarter, sustainable digital ecosystems rather than legacy automation scaling.

SKILLS GAPS WIDEN IN TECHNOLOGY AND ADVANCED CAPABILITIES

The most pronounced talent deficits are now in technology and automation, software design, programming, and data analytics, alongside persistent gaps in critical thinking and problem-solving. Although learning activity remains high, many training portfolios still over-index on general management skills, leaving a gap between workforce development and emerging digital needs.

NEW ROLES REFLECT A MORE FUTURE ORIENTED SECTOR

Hiring plans highlight the industry's pivot toward next-generation capabilities. Centres expect to grow roles such as AI/ML Engineers, Data Scientists, Prompt Engineers, Cybersecurity Analysts, and Digital Transformation Leads. This shift signals a clear recognition that future competitiveness hinges on advanced technical and analytical expertise.

AUTOMATION UNDERGOES A STRATEGIC RESET

While automation remains central, the sector is entering a new phase. Many centres consolidated or modernised their RPA estates, reducing robot volumes but increasing the sophistication and business impact of automation. Investments are shifting from bot deployment to internal automation teams, architecture, and GenAI-enabled solutions.

WORKFORCE MATURITY AND STABILITY IMPROVE

Attrition continues to decline, and employees are staying longer, creating a more experienced, resilient workforce. However, the rising complexity of services, and the rapid adoption of AI means that capability building is now an urgent strategic priority. Centres are increasingly relying on internal academies and targeted upskilling to keep pace.

HYBRID WORK STABILISES, BUT MOBILITY REMAINS LIMITED

Hybrid models are now the norm, with most companies defining clearer on-site expectations to support collaboration and culture. Interest in working from abroad is high, but limited by compliance and tax constraints, leaving international mobility as a future opportunity rather than a current standard.

ESG BECOMES MORE EMBEDDED ACROSS ORGANISATIONS

More centres are integrating ESG metrics into reporting and leadership goals, and inclusion efforts continue to expand. Particularly around gender balance, support for parents, and broader diversity initiatives. Environmental progress is slower but moving in a positive direction.

STEADY SECTOR GROWTH DRIVEN BY SCOPE EXPANSION

The sector remains on a stable upward trajectory, with most centres planning to expand their activities and take on more complex work. Growth is driven by rising process maturity, stronger capability expectations from global HQs, and continued confidence in Czechia as a strategic delivery hub.

KEY NUMBERS AND TREND AT A GLANCE

200,000

total number of jobs



214,000

expected number of jobs in 2026



7%

employment growth in the year 2025
5% expected growth for the year 2026



380

total number of business services centres

THE CENTRES' PLAN FOR THE NEXT 2 YEARS

67%

centres plan to expand



27%

centres plan to stabilise and optimise

DIVERSITY & INCLUSION

50% Women

in business services



35% Women

in senior management

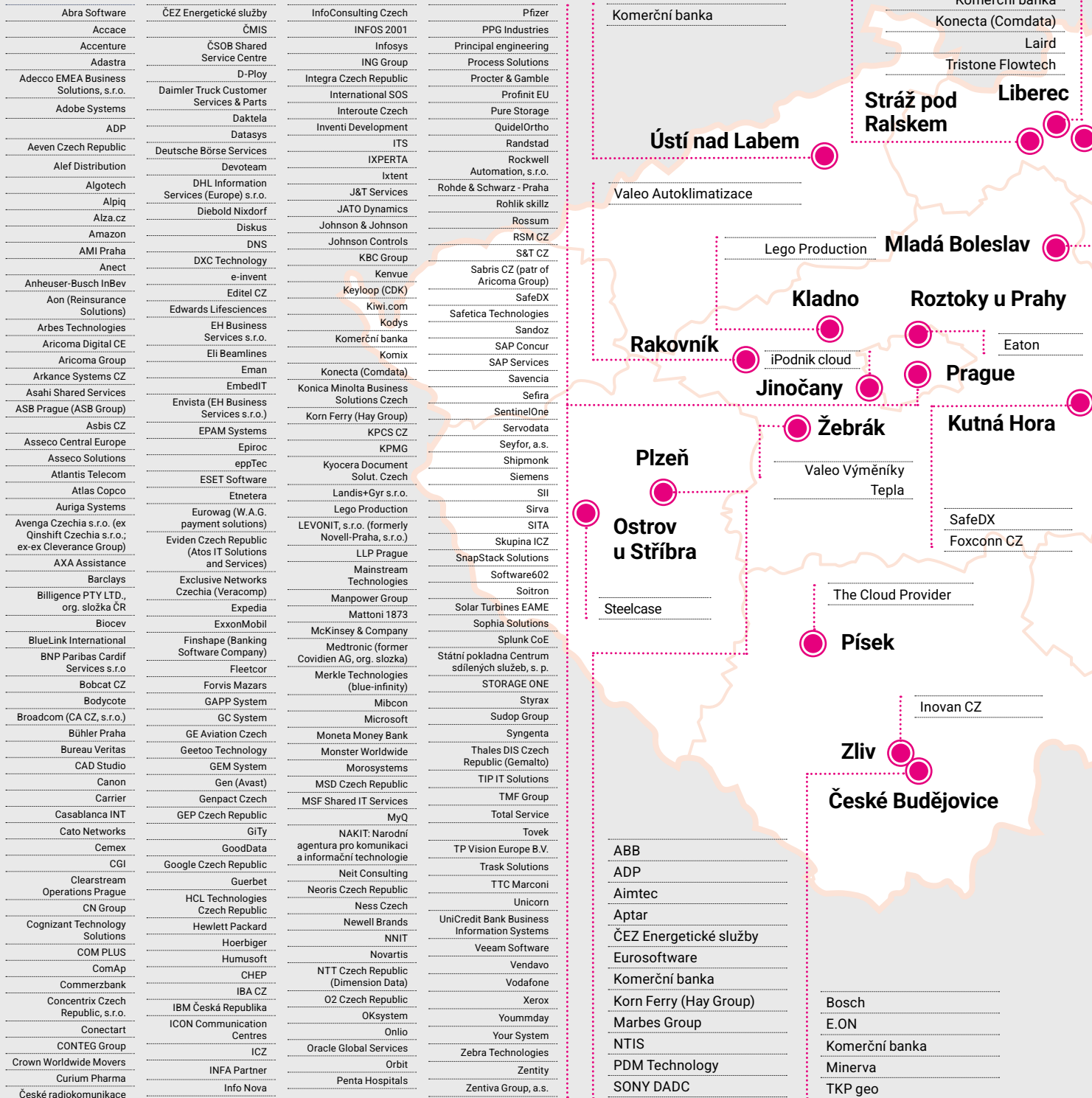


SNAPSHOT OF BUSINESS SERVICES IN THE CZECH REPUBLIC

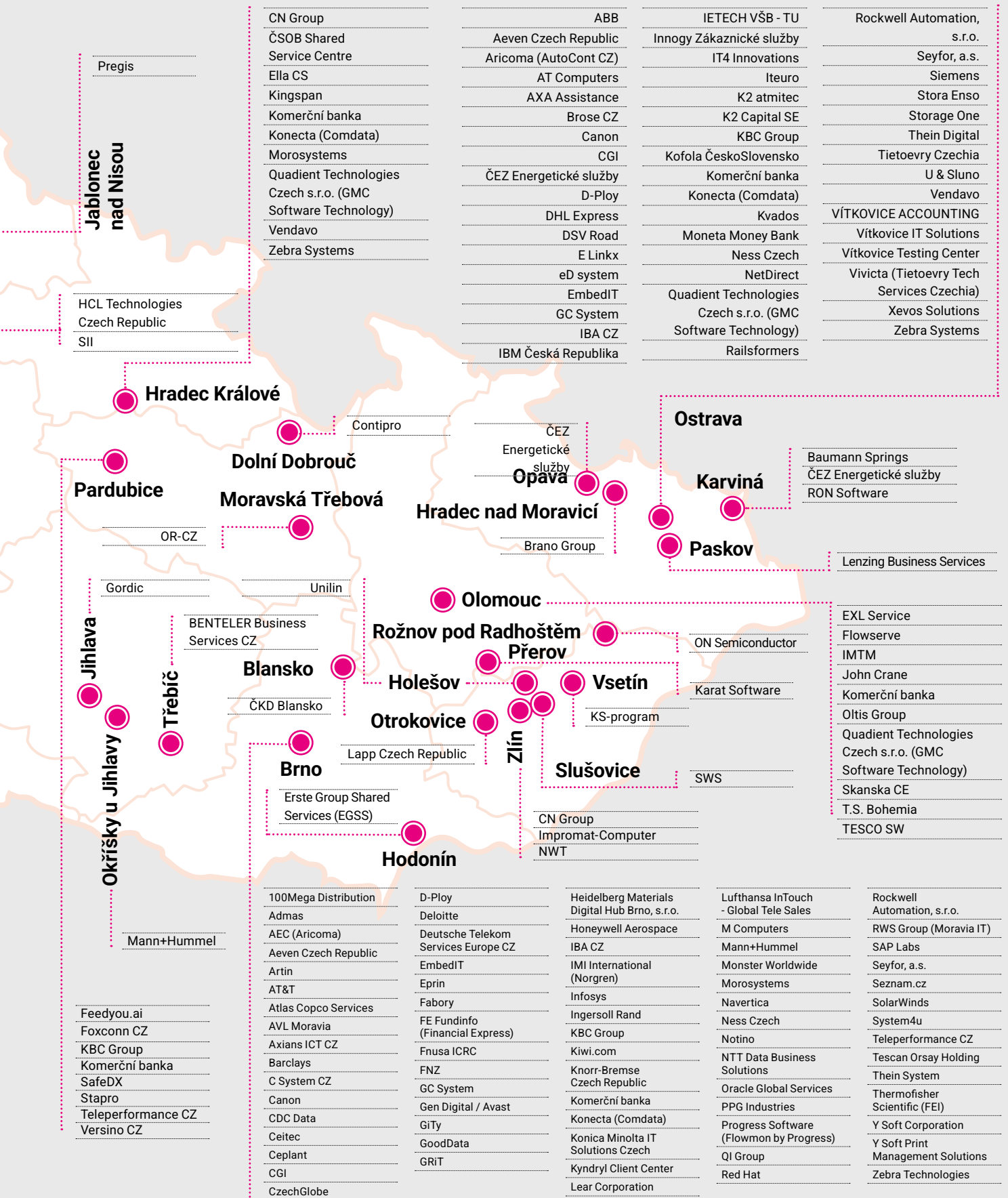
Chapter provider: ABSL

Snapshot of Business Services in the Czech Republic

Overview of business services centres in the Czech Republic



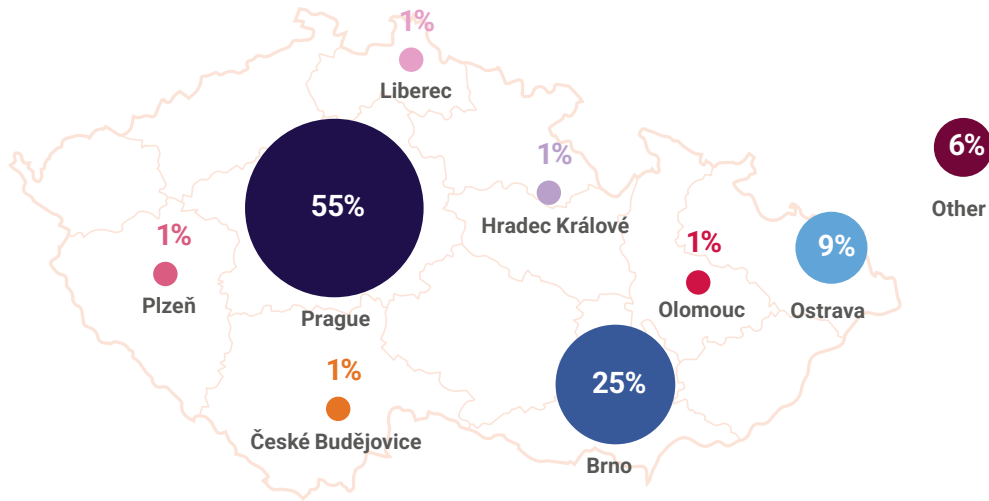
Source: ABSL's own study



Snapshot of Business Services in the Czech Republic

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 and Ostrava. There are few emerging locations within the Czech Republic apart from Plzeň and Olomouc, also Liberec and Hradec Králové.

Proportion of employees in business service centres according to location

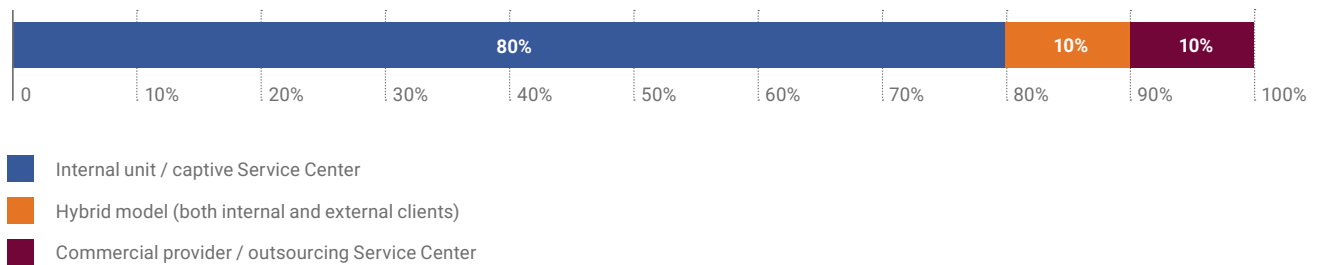


Source: ABSL's own study

Types of business services centres

The captive model continues to dominate the Czech business services landscape, with 80% of centers operating internally. Only 20% engage in external delivery, split evenly between hybrid models and fully commercial providers.

Type of business service centres



Source: ABSL Survey 2025

LOCATION ATTRACTIVENESS & COMPETITION ASSESSMENT

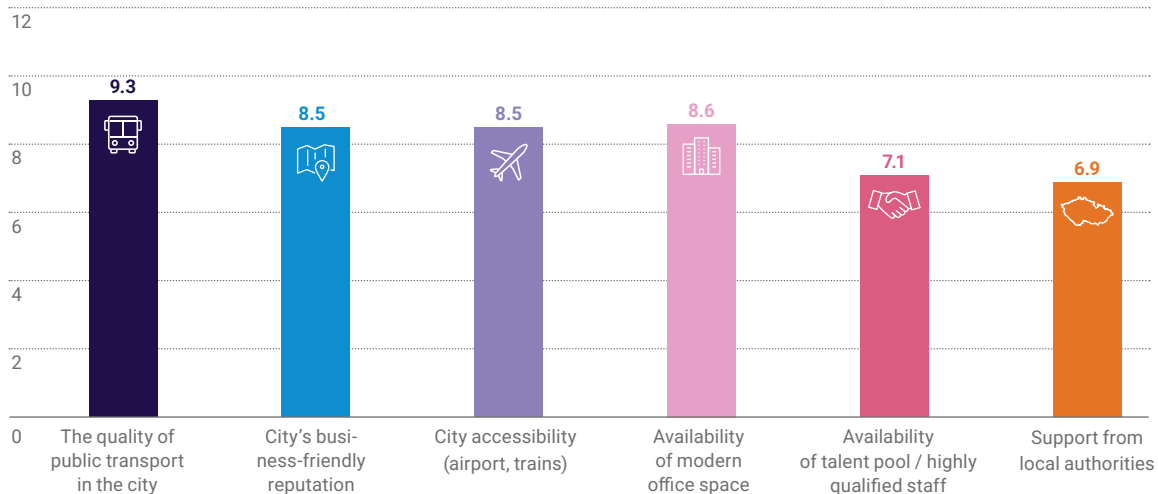
Assessment of local markets as an attractive location for business services

Czech cities continue to score strongly as business-friendly locations, with **public transport, modern office availability, and overall accessibility** rated as the country's top advantages. These factors reinforce Czechia's position as a stable and mature hub for global business services.

At the same time, lower ratings for **talent availability** and **support from local authorities** show where expectations are rising. As centres shift toward more specialized, digitally enabled services, access to advanced skills and streamlined administrative processes remains essential.

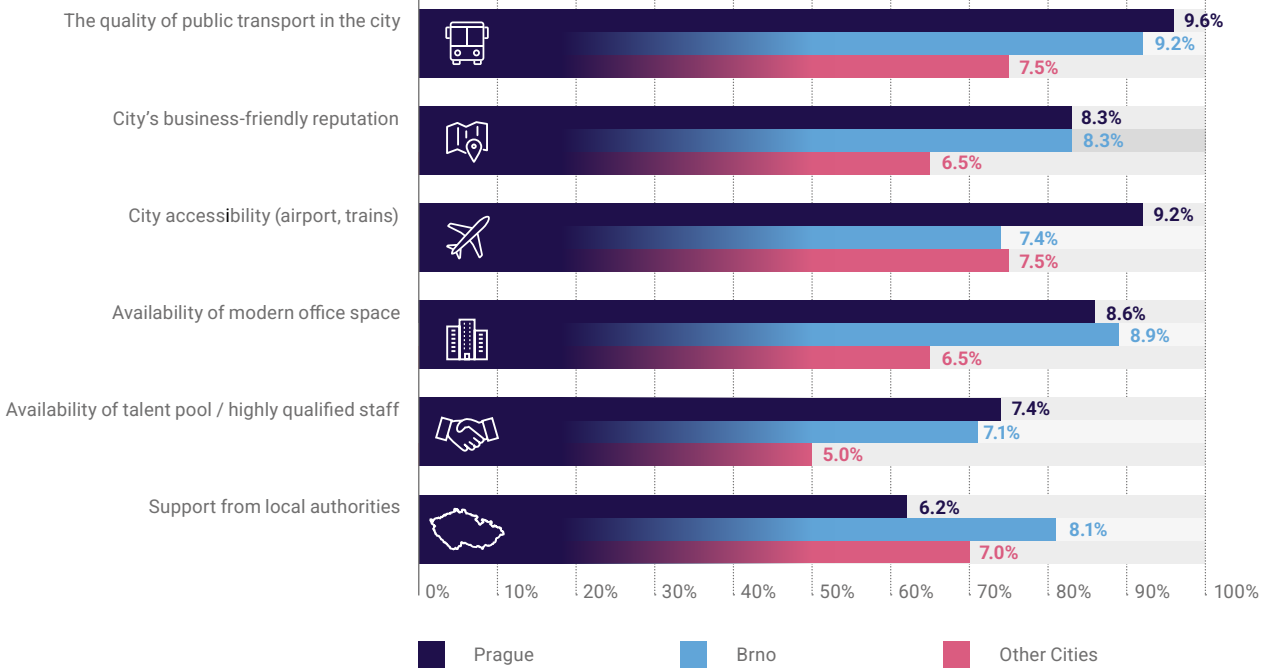
Across regions, the competitive landscape is becoming more defined: **Prague** leads in infrastructure and investor perception, **Brno** excels in talent access and city cooperation, and **other regional cities** offer targeted benefits with increasing potential for diversification. Together, these results illustrate a market that is strong, differentiated, and well positioned for continued growth.

Assessment of local markets as place to do business



Source: ABSL Survey 2025

Location assessment



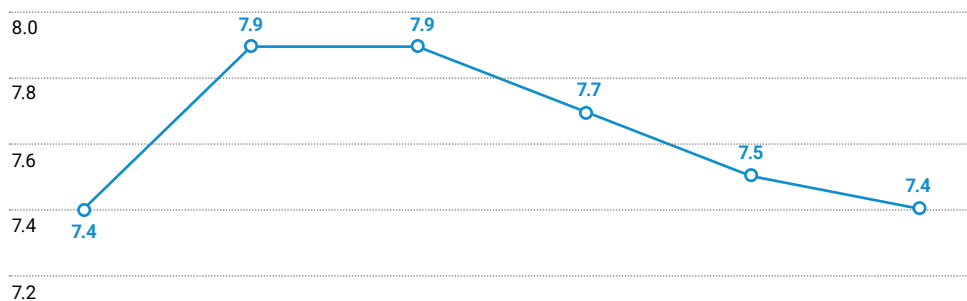
Source: ABSL Survey 2025

Competition on the local market

Competition in the Czech business services landscape remains strong, with the 2025 average score stabilizing at 7.4 out of 10. After peaking between 2021 and 2022, competitive intensity has eased slightly over the past three years, suggesting a market that is still dynamic but no longer overheated. This soft landing reflects a combination of factors: ongoing digitalization, more targeted hiring strategies, and a maturing sector where centres sharpen their specialization rather than expand at all costs.

7,4 / 10
average rate of competition among business services centres in local markets in 2025

Perceived competition on the local market



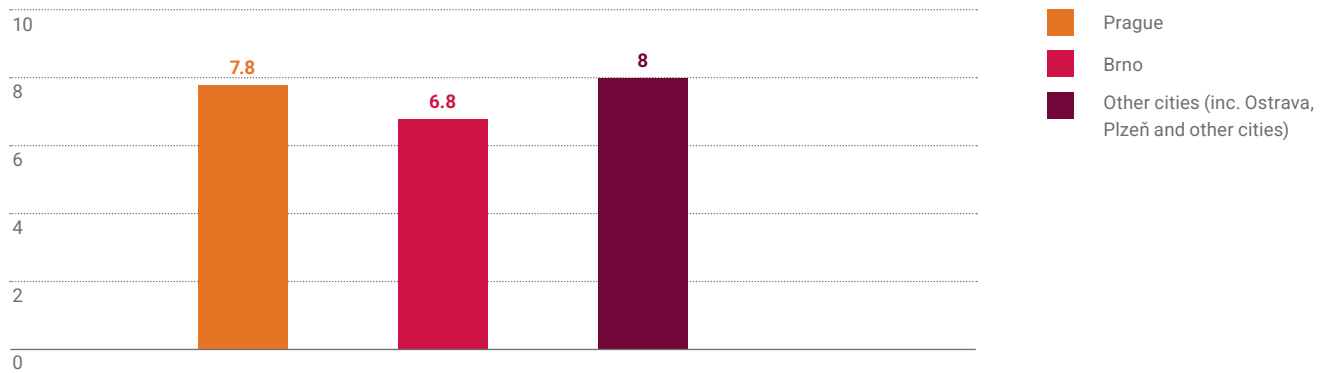
Source: ABSL Survey 2020 - 2025

The regional perspective shows the competitive landscape is not uniform.

- » **Prague** remains the most competitive hub, driven by its scale, talent concentration, and continued investor interest.
- » **Brno** maintains a solid second place with growing momentum—benefiting from strong university links, modern office space, and a collaborative local ecosystem.
- » **Other cities** (including Ostrava, Liberec, Plzeň and others) report **moderate competition**, reflecting their steady rise as complementary alternatives for expansion or talent diversification.

This distribution confirms that while Prague and Brno remain the flagship locations, regional cities are increasingly carving out their own value propositions, contributing to a more balanced national market.

Competition among business services centres per cities

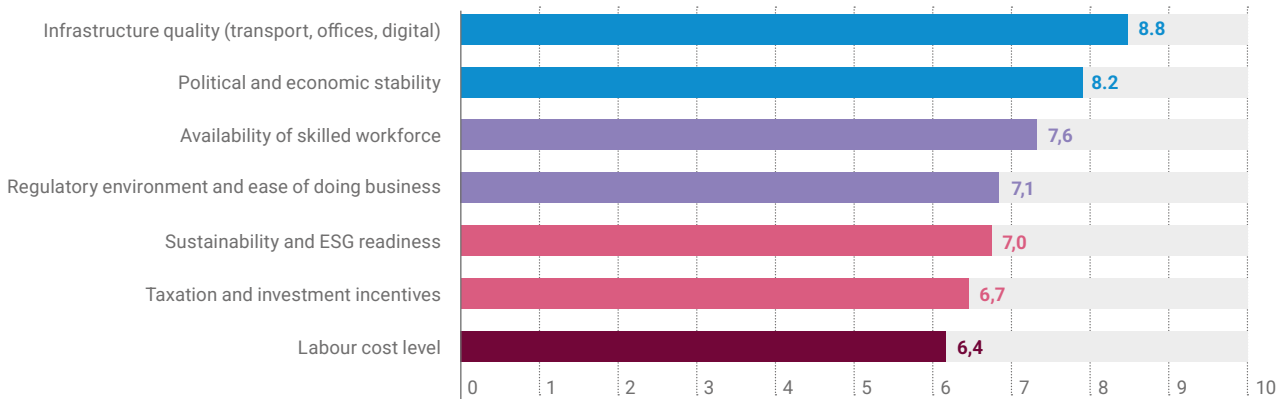


Source: ABSL Survey 2025

Attractiveness of the Czech Republic for new investments

The Czech Republic ranks as a highly attractive investment destination, scoring strongest in infrastructure (8.8) and overall stability (8.2). The skilled workforce also contributes to its competitiveness (7.6). While areas like taxation, incentives, and labour costs score lower, Czechia’s profile clearly positions it as a reliable, quality focused market for new investments.

Attractiveness of the Czech Republic for new investments in comparison to other countries

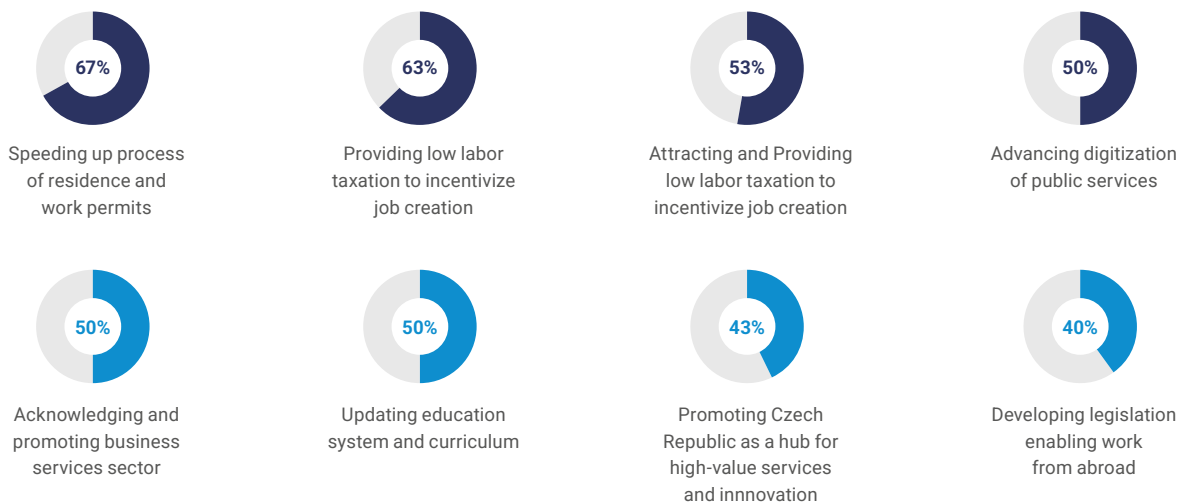


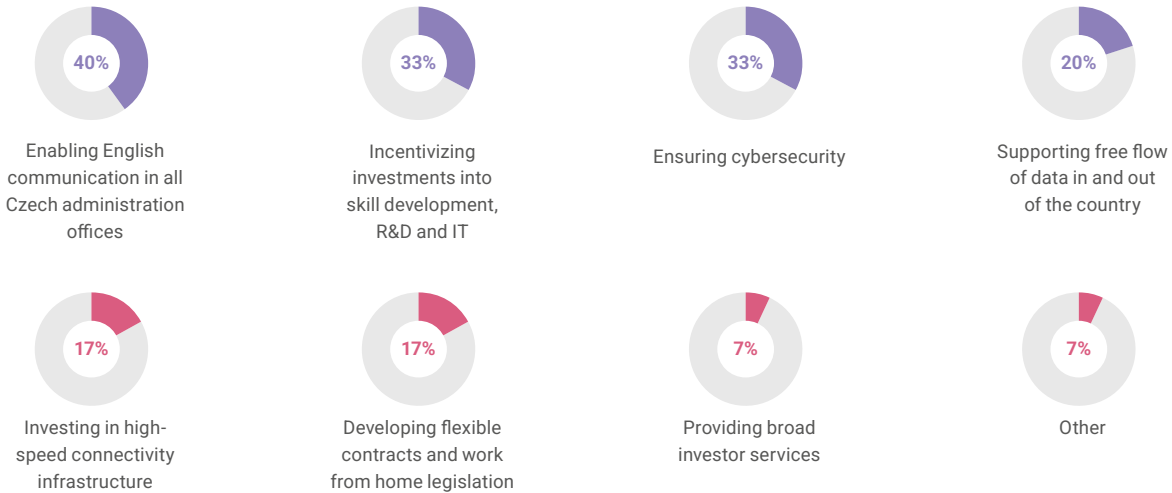
Source: ABSL Survey 2025

The Importance of Government Support and Activities

The results show that centres place the highest importance on measures that improve talent access and workforce flexibility. Faster processing of residence and work permits tops the list, followed closely by lower labour taxation and better conditions for attracting foreign talent. Digital progress also plays a major role, with increasing calls for more advanced digitization in the public sector, a modernized education system, and broader recognition of the Czech Republic as a hub for high-value services.

Supportive steps such as enabling English in public offices, clearer rules for working from abroad, and targeted incentives for skills, R&D, and IT are seen as important enablers of future competitiveness. Lower priority items, like infrastructure investments or broader investor service, signal that the fundamentals are largely in place. Overall, the sector is asking for a more agile, internationally aligned environment that strengthens Czechia’s ability to attract talent and grow higher value business services.





*Remaining an active member of EU
 Source: ABSL Survey 2025

BUSINESS SERVICES OF THE YEAR 2025

The Centre of the Year 2025 award went to ADP. A company that has grown over two decades into one of the largest and most innovative centres in the Czech Republic, making a significant contribution to the development of the entire industry.



The Future of Czech Business Services Centers

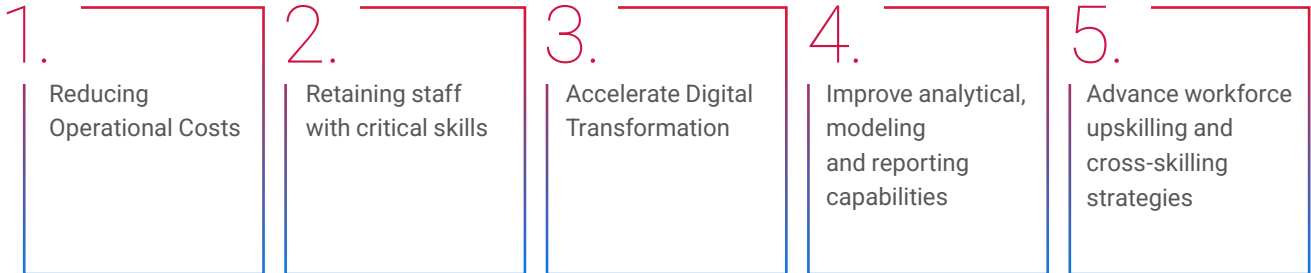
The future direction of Czech business services centres is defined by a strong push toward productivity, digital maturity, and resilience. With 80% of centres prioritizing cost reduction through increased automation, the sector is clearly shifting toward smarter, more scalable operating models. At the same time, retaining staff with critical skills remains a top priority, underscoring that automation and talent development must advance hand-in-hand.

Centres also plan to accelerate their digital transformation efforts, improve analytical and reporting capabilities, and invest more intentionally in upskilling and cross-skilling. Together, these priorities reflect a sector preparing for a more data driven and technology enabled future. One where competitive advantage will come from a blend of advanced capabilities, operational efficiency, and a highly skilled workforce.

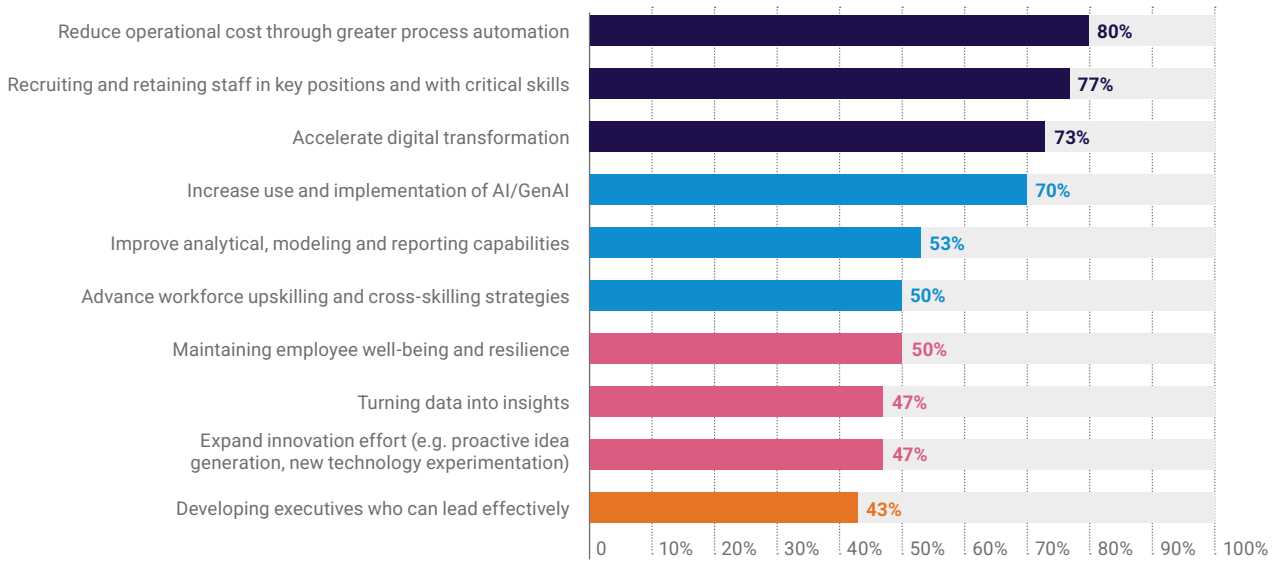
80%

of centres want to reduce operational costs through greater process automation

Top strategic priorities in 2025



Key priorities



Source: ABSL Survey 2025

Continuous Employment Growth

The Czech business services sector has expanded steadily from **130,000 jobs in 2021 to a projected 214,000 in 2026**, confirming its role as one of the country’s most dynamic industries. After two years of double-digit growth (13% in 2021 and 12% in 2022), the sector transitioned into a stable, maturity-driven phase with annual growth rates between 5–7%. The slight dip to **5% growth in 2023 and 2024** reflects rising automation and productivity, not a slowdown in demand. A mild uptick to **7% in 2025**, followed by an expected return to **5% in 2026**, shows predictable, sustainable expansion as centres increase complexity, digital capability, and scope of services.

Overall, the graph illustrates a sector moving from rapid scaling to smart, resilient growth, steadily adding jobs while evolving into higher-value operations.



employment growth in business services centres in 2025



200,000

number of jobs in business services in the Czech Republic in 2025



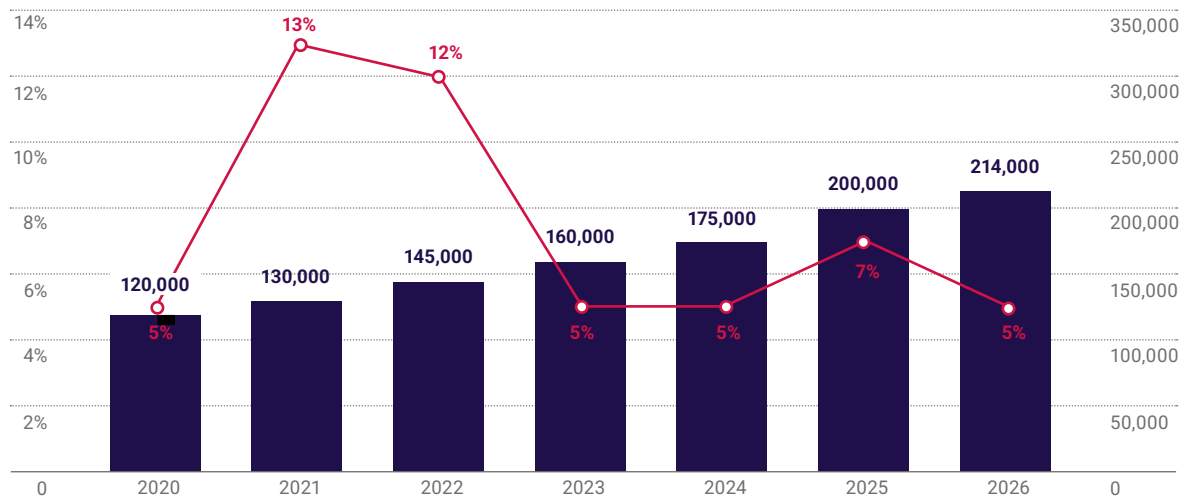
expected employment growth in business services centres in 2026



~214,000

expected number of jobs in 2026

Growth rate of business services in the CZ

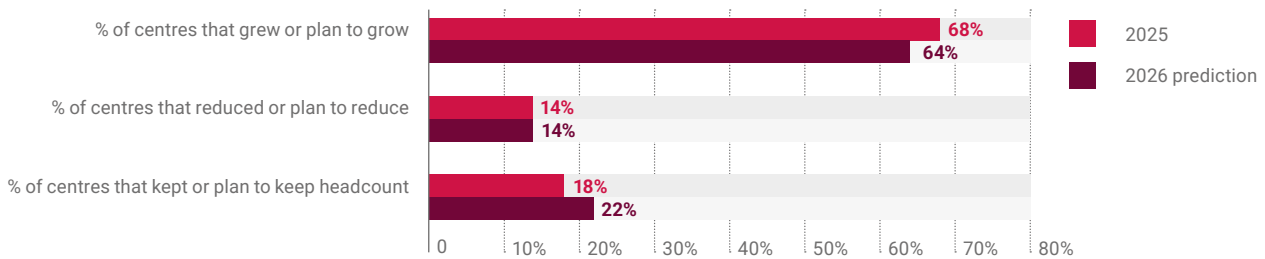


Source: ABSL Survey 2020-2025

The Czech business services sector continues to show stable and confident expansion. In 2025, **68% of centres increased headcount**, and the outlook for 2026 remains positive, with **64% planning further growth**. Only **14% reduced or expected to reduce** staff in both years, indicating minimal contraction across the industry. Meanwhile, a rising share of centres, **from 18% in 2025 to 21% by 2026**, anticipate maintaining steady headcount, reflecting growing process maturity, higher automation, and more efficient operations.

Overall, the data point to a sector that is still growing, increasingly optimized, and preparing for its next phase of higher-value expansion.

Growth & reduction of employee numbers in Czech centres in 2025



Source: ABSL Survey 2025



Expansion Outlook of Czech Business Services Centres

The Czech business services sector is entering another cycle of confident growth, with **67% of centres planning to expand their activities over the next two years**. A further **27% will focus on stabilizing and optimizing**, while only **3% plan reductions**, showing a remarkably resilient and future-oriented industry.

Expansion is primarily driven by scope growth rather than footprint growth. The number one catalyst is the **addition of new activities (63%)**, reflecting rising process maturity and increased mandates coming into Czech centres. **New customers (37%)** also play a significant role, while **geographical expansion (17%)** remains more selective, highlighting that centres are scaling depth before breadth.

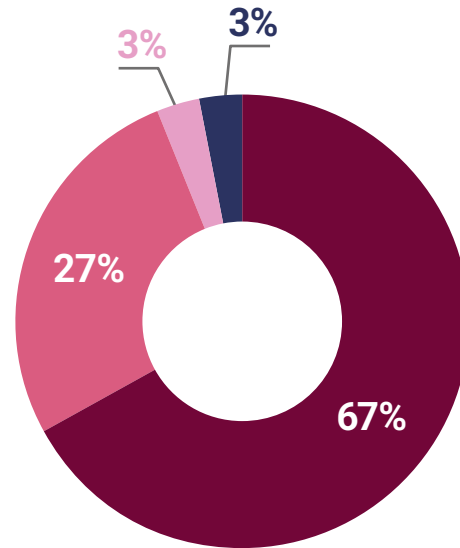
Behind these ambitions lies a mix of strong opportunities and real constraints. The single most influential factor is the **availability of skilled workforce (77%)**, closely followed by **labour cost developments (67%)**. Access to critical language skills and overall business operating costs (both 50%) also weigh heavily in decision making. At the same time, the **growing impact of automation and AI (40%)** is reshaping how centres think about workforce needs and future service portfolios.

In short, Czech business services are poised for meaningful expansion, driven by new scope, supported by strong demand, and shaped by workforce dynamics and accelerating digital transformation. The outlook is one of continued growth, increasing complexity, and rising strategic value.

67% of centres
plan to expand their activities
in the next 2 years

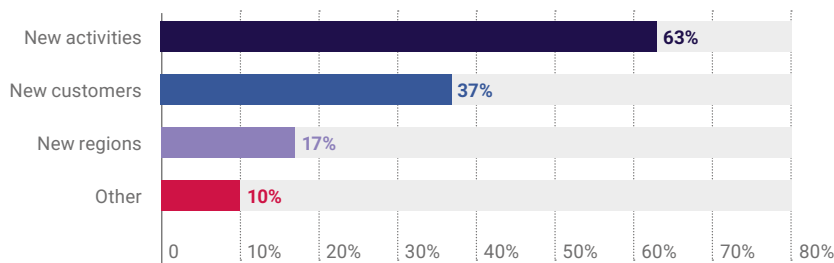
Centres' plans for the next 2 years

- Expansion of activities
- Stabilization and optimization of current activities
- Reduction of activities
- Other plans



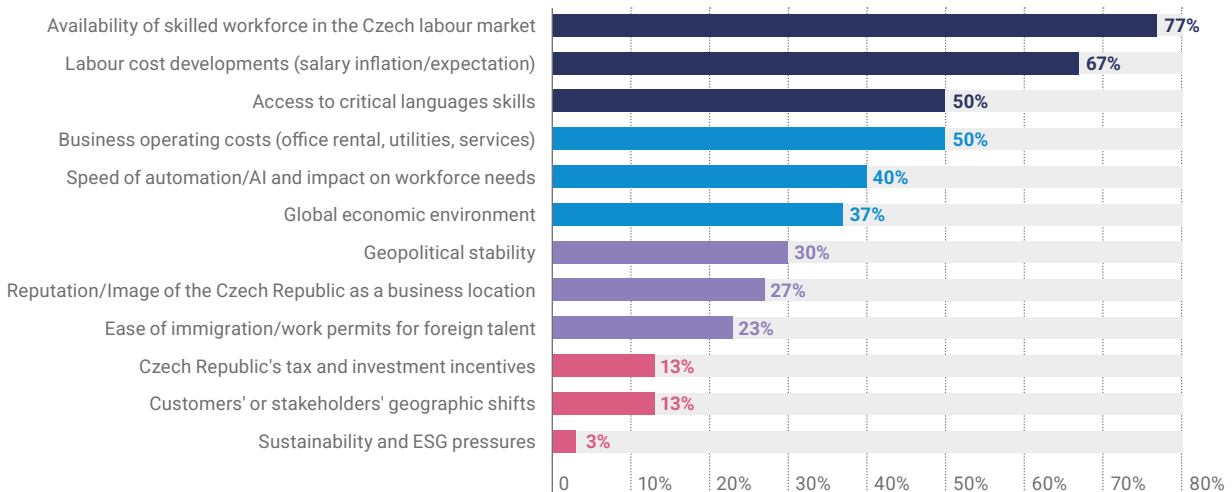
Source: ABSL Survey 2025

Drivers of expansion



Source: ABSL Survey 2025

External factors influencing decision to expand/stabilize/reduce activities



Source: ABSL Survey 2025

SCOPE & MATURITY OF SERVICES DELIVERED

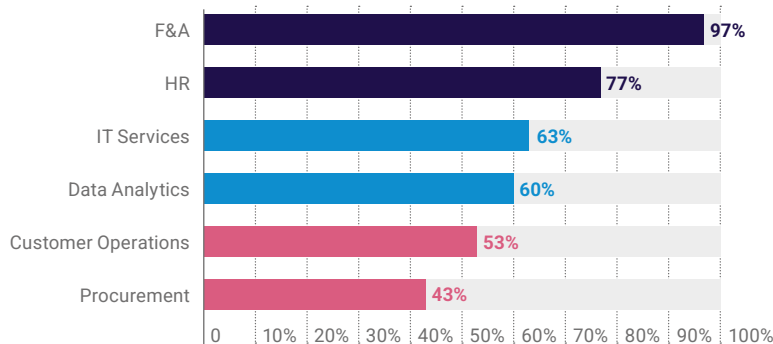
Czech business services sector is highly capable and mature delivery hub

Three quarters of all services are now delivered at the Advanced or Partner level. The dominance of **Advanced maturity (50%)**, supported by a strong **19% share at Partner level**, shows that centres are not only stabilizing operations but continuously refining and optimizing them. The very small portion of Rookie services (3%) highlights a sector long past its “setup phase” and firmly positioned in value creation mode.

In terms of scope, Czech centres continue to anchor global operations across a broad portfolio of functions. **Finance & Accounting (97%)** remains the backbone of service delivery, reflecting both historical strength and continued trust from global headquarters. At the same time, capabilities in **HR (77%)**, **IT Services (63%)** and **Data Analytics (60%)** confirm a clear shift toward knowledge-based and technology-enabled work. These areas are increasingly intertwined with digital transformation initiatives, positioning Czech teams as strategic partners rather than transactional processors.

Overall, the Czech Republic is no longer just a delivery location. It is a strategic hub where global companies place increasingly complex, digitally enabled and business critical activities.

Top service areas provided from the Czech Republic

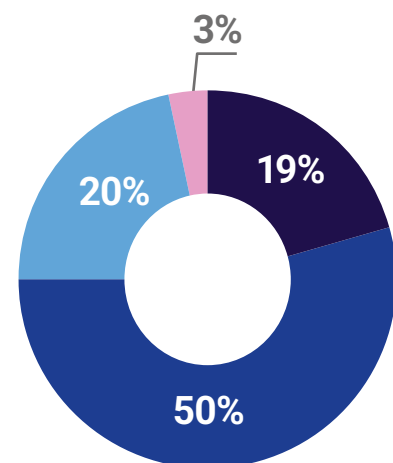
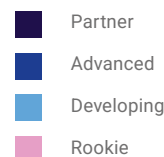


Source: ABSL Survey 2025

Maturity level

Legend:

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



Source: ABSL Survey 2025

Knowledge-based activities continue to grow

Czech business service centres have transitioned decisively into a high-value, expertise-driven phase.

Knowledge-based activities now represent 58% of all work, continuing a steady upward trend over recent years and confirming that centres are moving far beyond traditional transactional processing. This shift is closely linked to the growing maturity of service delivery: **three out of four services are already performed at Advanced or Partner levels**, demonstrating strong process excellence, digital enablement, and increasingly strategic roles within global organisations.

Across functions such as **Finance & Accounting, HR, IT Services, Data Analytics, Procurement and Customer Operations**, Czech teams are taking ownership of more complex activities, ranging from business controlling and talent management to advanced analytics, R&D support and end-to-end process transformation. The detailed maturity mapping shows a broad base of advanced capabilities and an expanding share of Partner level services, particularly in technology and specialised domains.

Together, these developments underline the Czech Republic's evolution into a trusted global hub for sophisticated, knowledge intensive work. Delivering not only efficiency, but true business impact.



76%

of processes are now being delivered in the advanced or partner level



58%

of activities performed are knowledge-based



13

average number of services provided in one centre

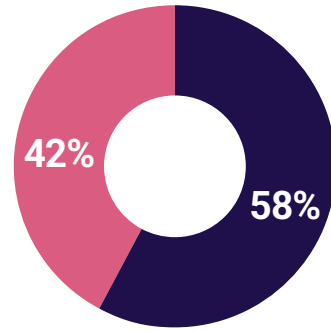
ABSL DIAMOND WINNER 2025 IN CATEGORY CUSTOMER & OPERATIONAL EXCELLENCE

In the **Customer and Operational Excellence** category, **Siemens Global Business Services** was recognized for its comprehensive three-year CEE Agile Transformation Journey program. Its goal is to streamline processes, improve customer experience, strengthen employee engagement, and initiate a change in mindset and acceptance of new innovative solutions. The program currently actively involves 127 participants from all Siemens Global Business Services (GBS) CEE business lines, working in 10 teams. The program is complemented by the CEE Hackathon, during which 80 participants from Siemens Global Business Services, customers, and third-party experts from across the region are able to develop specific solutions to real customer challenges in just 72 hours. As a result, 80% of the ideas implemented saved 6,600 hours of work and generated savings of over €561,000. The project shows that innovation and agility can go hand in hand with customer satisfaction and operational efficiency.



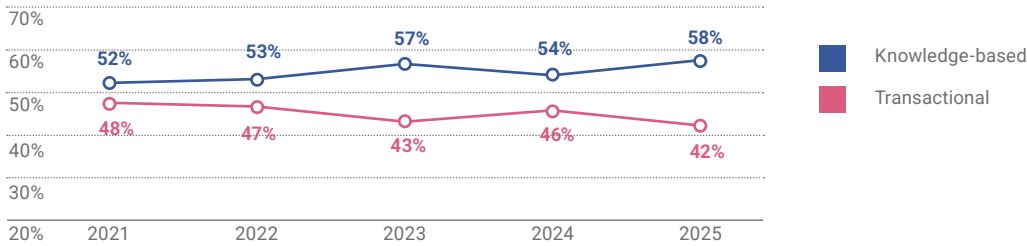
Transactional vs. knowledge based activities in business service centres in the Czech Republic

■ Knowledge-based
■ Transactional



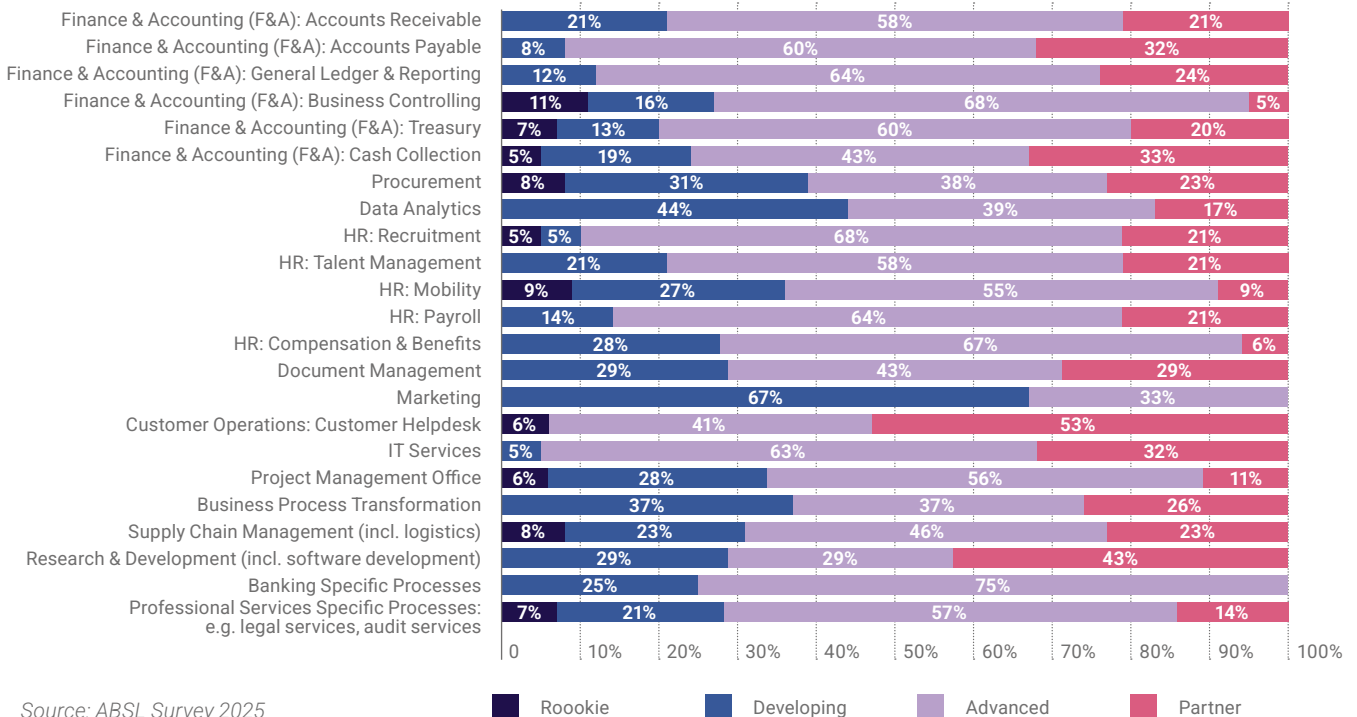
Source: ABSL Survey 2025

Transactional vs. knowledge-based activities trends



Source: ABSL Survey 2020-2021

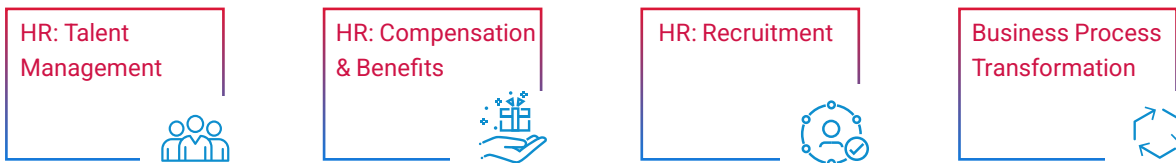
Level of maturity of services provided in business services centres in the Czech Republic



Source: ABSL Survey 2025

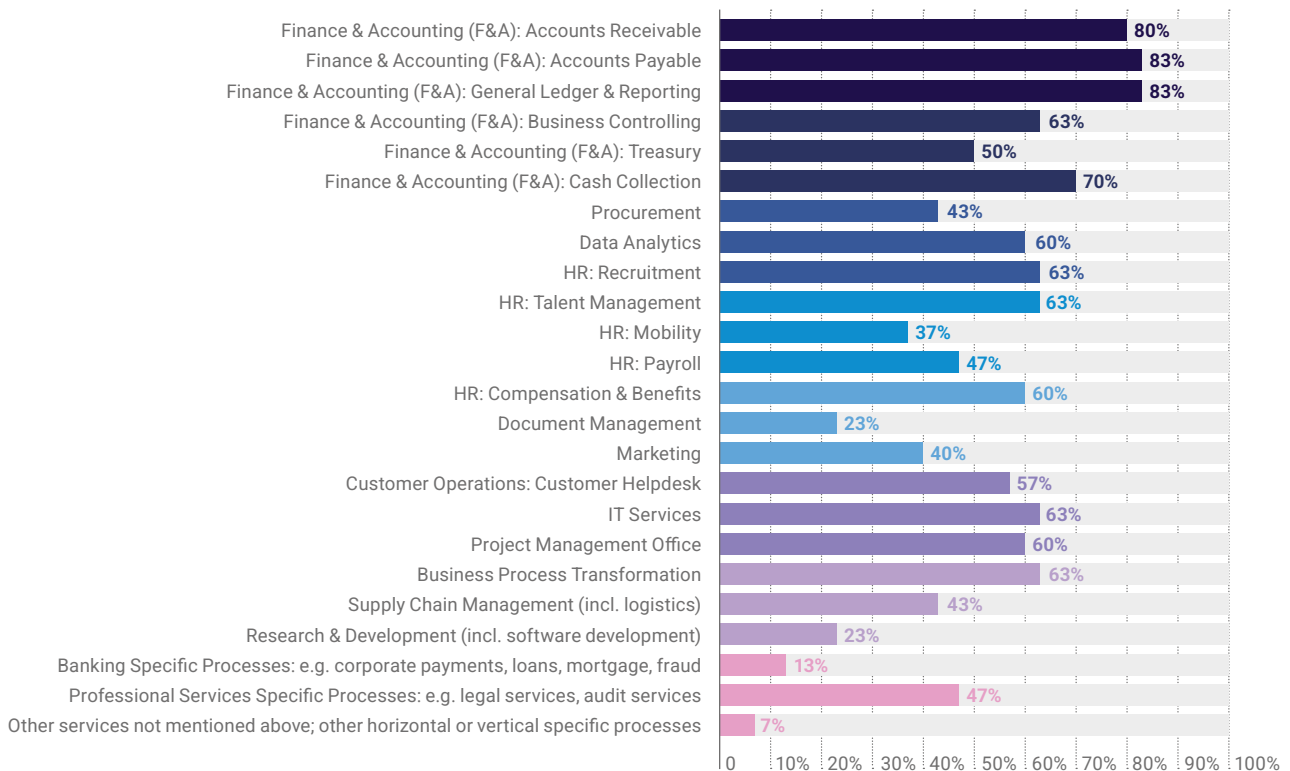
The strongest growth momentum for 2025 is concentrated in the HR domain, confirming the sector’s pivot toward more strategic people-related capabilities. **Talent Management, Compensation & Benefits, and Recruitment** lead the list of expanding services, reflecting rising demand for specialised expertise, workforce planning, and global talent support. Alongside HR, **Business Process Transformation** continues to gain traction as centres accelerate digitalisation, automation and end-to-end optimisation initiatives.

Top services on the rise in the year 2025



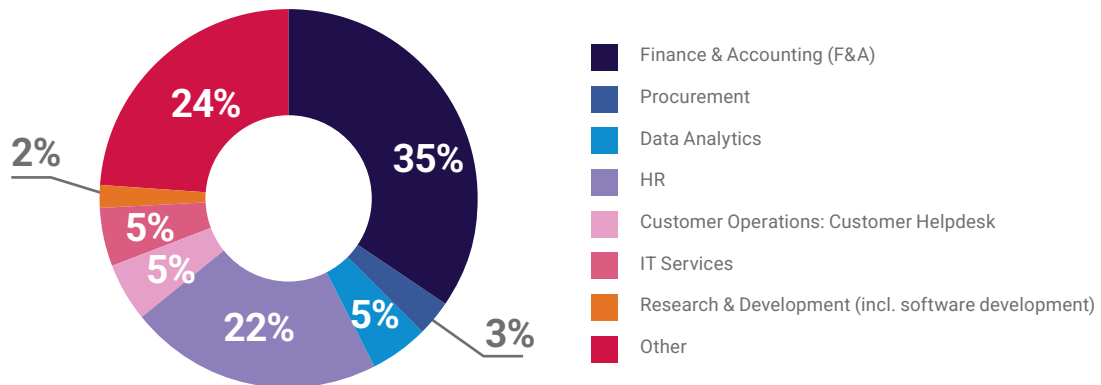
Czech business services centres now deliver an extensive and diversified portfolio, with **Finance & Accounting as the largest domain**, followed by strong capabilities in **HR, IT Services, Data Analytics, Customer Operations and Procurement**. This broad scope reflects the sector’s evolution from transactional support to a multifunctional, high-value hub serving complex global business needs.

Scope of services provided by business services in the Czech Republic



Source: ABSL Survey 2025

Scope of services



Source: ABSL Survey 2025

ABSL DIAMOND WINNER 2025 IN CATEGORY BUSINESS INNOVATION

In the **Business Innovation** category, the award went to **Siemens Global Business Services** for its Bionic Agent solution, representing a breakthrough in customer support. Customer service teams handle thousands of inquiries every day, generating millions of service tickets, emails, and documents each year that require manual processing. The cloud-based Bionic Agent solution now fully automates these repetitive tasks. It leverages generative artificial intelligence (AI), including the latest large language models (LLMs), agent-based AI, and natural language processing (NLP) to manage and interpret both structured and unstructured data from incoming requests.

It can process various queries, extract relevant information, initiate appropriate workflow processes, and autonomously provide responses to customers. The solution has been operating for several years as a virtual extension of the customer support team and is now used by 32 teams. To date, Bionic Agent has processed over 1.4 million requests and saved more than 70,000 hours of human work. It brings higher efficiency, lower costs, and an improved customer experience while paving the way for a new era of intelligent service automation.





PEOPLE & TALENT MANAGEMENT

Chapter provider: ABSL

3

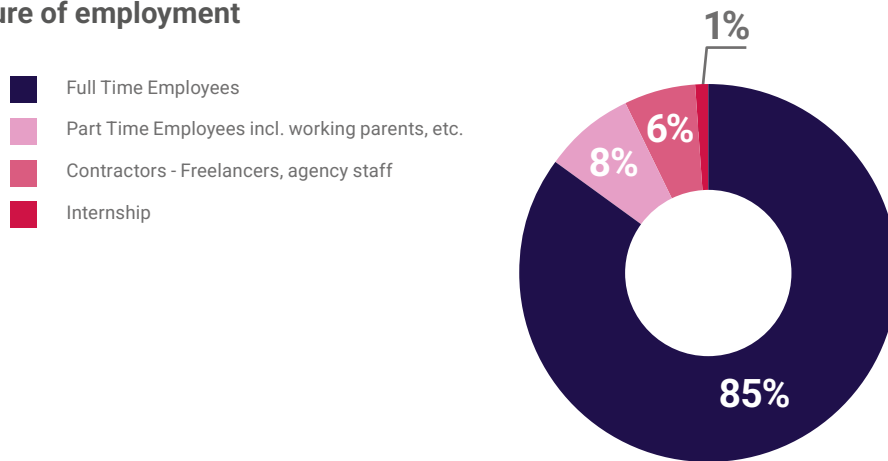
PEOPLE & TALENT MANAGEMENT

The Czech business services sector continues to be powered by a stable, experienced, and predominantly full-time workforce. **Full time employees account for 85% of all roles**, reflecting strong emphasis on long-term capability building and organisational continuity. The age structure shows a healthy and maturing talent pool: while **38% of employees are 25–34**, the largest share **41% is now in the 35–44 age group**, signalling growing seniority, leadership depth and domain expertise.

The structure of employment across process categories further highlights the sector’s evolution. **Finance & Accounting (28%)** and **IT Services (30%)** together represent the core of workforce demand, supported by significant talent pools in **HR (10%)**, **Customer Operations (8%)**, and a diverse mix of specialised areas including **Supply Chain, R&D, Data Analytics, and Banking/Financial Services**. This balanced distribution underscores the multifunctional nature of Czech centres and their shift toward more complex, digitally enabled and knowledge-intensive work.

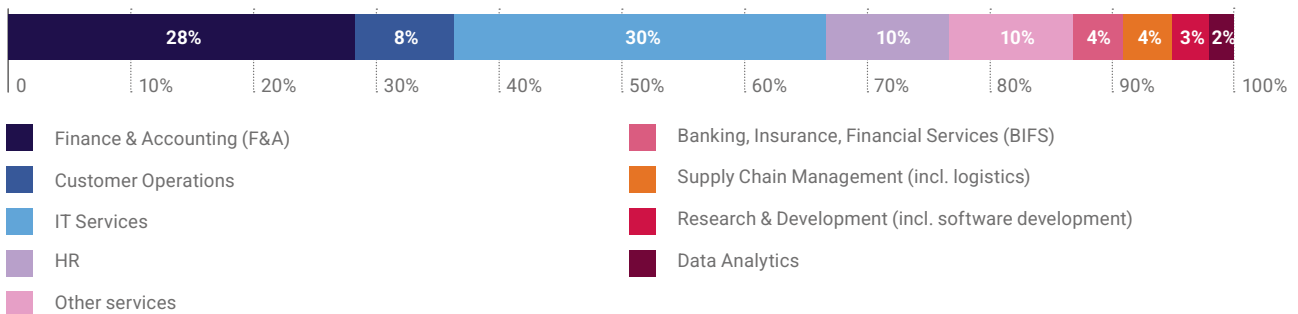
Overall, the talent landscape reveals a sector investing heavily in skills, experience, and functional breadth.

Structure of employment



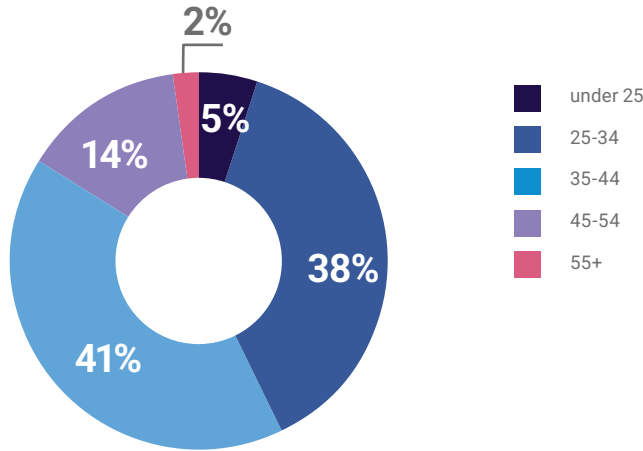
Source: ABSL Survey 2025

Structure of employment according to categories of processes



Source: ABSL Survey 2025

Share of the age groups of the workforce in business services centres in the Czech Republic



Source: ABSL Survey 2025

FOREIGN TALENT

Foreign professionals remain a cornerstone of the Czech business services workforce, accounting for **43% of all employees**—a share that highlights both the sector’s international character and its strong demand for multilingual, globally minded talent. In absolute terms, this represents **86,000 foreign specialists**, with centres employing an impressive average of **36 nationalities** each. The majority of foreign employees come from within the EU (**68% EU vs. 32% non-EU**), though cities such as Prague and Brno also attract substantial talent from outside Europe.

While the talent pool is diverse, companies continue to face legal and administrative hurdles when recruiting from certain countries. Out of these countries, the most in-demand, but simultaneously most difficult to onboard nationalities include **Ukraine, India, Serbia, and several South American countries**, where lengthy immigration and work-permit procedures slow down hiring.

43%

of employees of Czech business services are foreigners

Out of which 68% of foreigners are from EU countries and 32% of foreigners are from non-EU countries

86,000

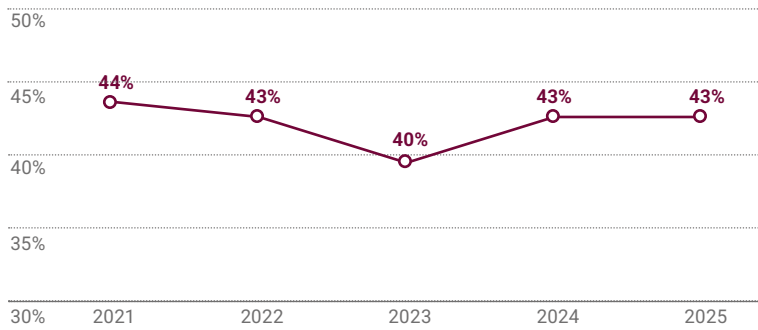
foreigners

Employed in Czech business services

36

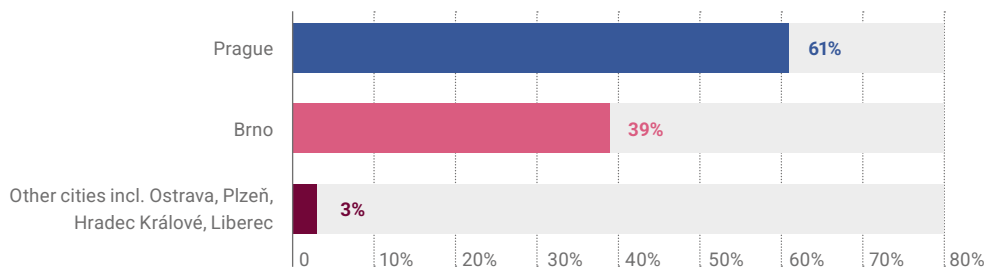
In average **nationalities** employed in Czech business services centres

Share of foreigners employed in business services in the Czech Republic



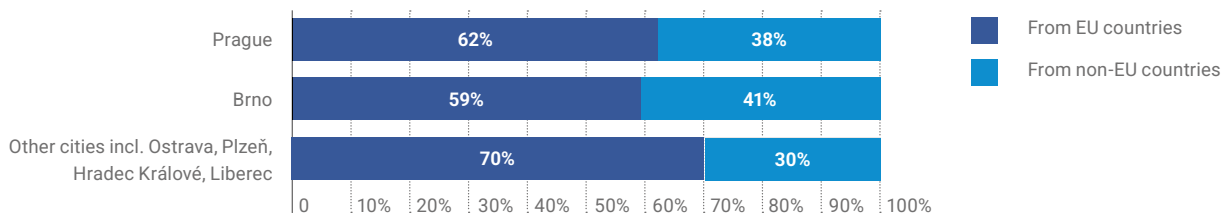
Source: ABSL Survey 2020-2021

Percentage of foreigners by cities



Source: ABSL Survey 2025

Foreigners by cities from EU vs. non-EU countries



Source: ABSL Survey 2025

Countries companies would like to recruit foreigners but difficulties due to legal procedures

1. UKRAINE
2. INDIA
3. SERBIA
4. SOUTH AMERICA

LANGUAGE CAPABILITIES

The sector’s strong international workforce is mirrored by equally impressive linguistic depth. Czech business services centres operate in an average of **9.5 languages**, with some managing processes in **up to 30 languages**, making the country one of Europe’s most multilingual service hubs.

Unsurprisingly, **English is used by 100% of centres**, forming the backbone of daily operations. **Czech (73%), German (87%), Italian and French (both 70%), and Dutch (63%)** also feature prominently, reflecting the diverse European markets supported from the Czech Republic. In addition, many centres provide services in **Nordic languages (33%), Spanish (63%), Russian (23%),** and selected **Asian languages (10%)** further expanding their geographic reach.

This broad linguistic portfolio is a key competitive advantage, enabling Czech centres to support complex regional and global operations, meet diverse customer requirements, and attract high-value processes requiring both cultural and language specialization.



9.5

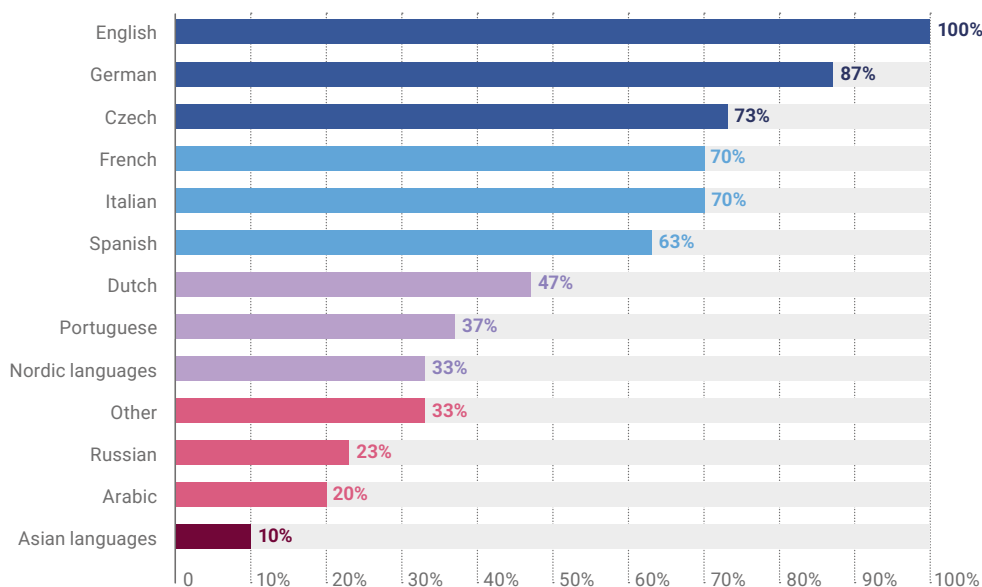
average number of languages used in a business services centre



30

the highest number of languages used by one centre

The Most Commonly Used Languages in Business Service in the Czech Republic



Source: ABSL Survey 2025

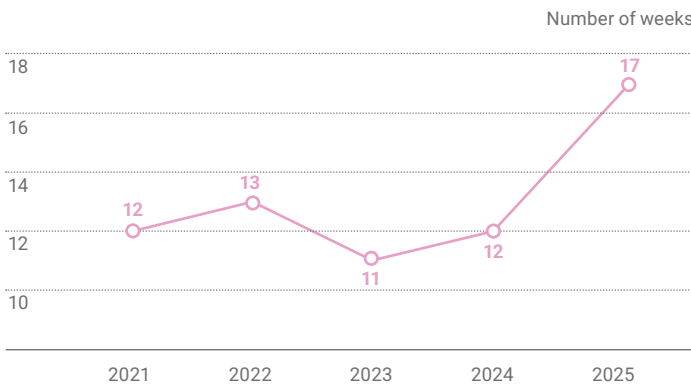
RECRUITMENT TRENDS

Recruitment has become an increasingly strategic challenge for Czech business services centres. After several stable years, hiring timelines have begun to stretch, with the **average recruitment lead time rising to 17 weeks in 2025**. The contrast between candidate groups is significant: while hiring from within the Czech Republic or the EU typically takes **11–15 weeks**, recruitment of **non-EU talent now extends to 23 weeks**, largely due to administrative and immigration-related delays.

In this competitive environment, centres rely heavily on proven, high-impact sourcing channels. **Employee referrals remain the single most successful route (83%)**, followed by **social media and LinkedIn (73%)**, and **Czech job portals (60%)**. Traditional agencies and headhunting still play a role, though with notably lower effectiveness.

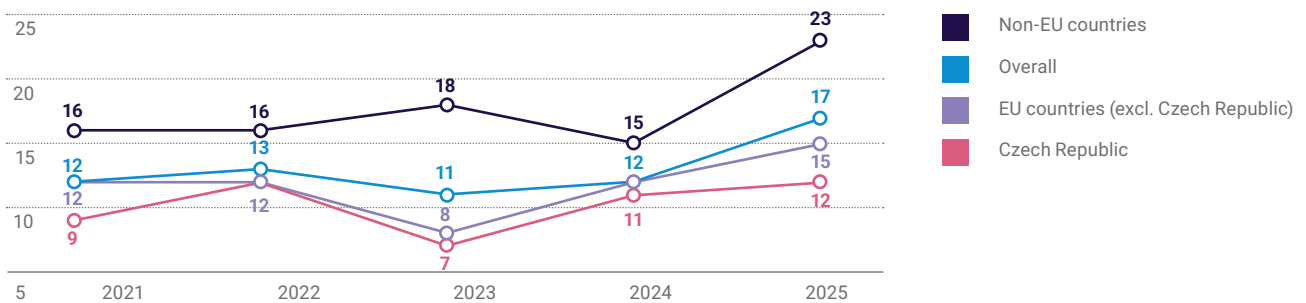
Together, these trends highlight a tightening talent market where speed, strong employer branding, and efficient sourcing strategies are becoming critical differentiators. The ability to attract both local and international talent will remain a key factor in the sector’s future growth.

Average recruitment lead time in Czech business services



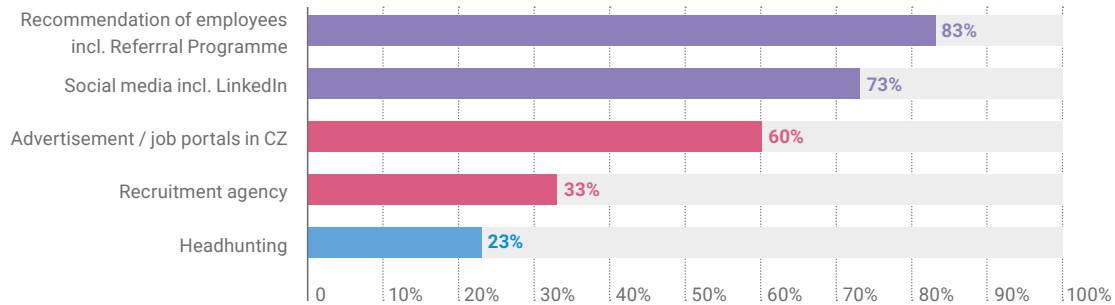
Source: ABSL Survey 2021-2025

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



Source: ABSL Survey 2021-2025

Top 5 most successful recruitment channels for business services centres in the Czech Republic



Source: ABSL Survey 2025

ABSL DIAMOND WINNER 2025 IN CATEGORY EMPLOYER BRANDING EXCELLENCE

In the **Employer Branding Excellence** category, the diamond award went to **Envista**, whose Prague centre launched its first-ever employer branding initiative on the Czech market this year. Without its own website, social media presence, or any external communication, the internal team managed to transform the company into a vibrant local brand. Envista took an unconventional approach, basing its strategy on the demographic composition of its employees and focusing on a modern, dynamic style of communication, including the use of reels on social media. The employees themselves played a key role, from participating in the preparation of key messages to actively collaborating on content creation. In just three months (in Q3 2025), it managed to get 1.4 million views. The initiative differs significantly from the traditional concept of employer branding in a corporate environment and, thanks to its authenticity, presents Envista as a modern and dynamic employer of choice. The central theme of the campaign was a smile, symbolically referring to the company's activities in the dental industry. Among other things, the campaign achieved a 600% increase in the number of French-speaking applicants, solving a critical recruitment problem for the company and significantly reducing its dependence on recruitment agencies.



ATTRITION, RETENTION, SALARY TRENDS & EMPLOYEE BENEFITS

Attrition in the Czech business services sector has continued its steady downward trajectory, reaching **10% in 2025**, the lowest level in five years. This stabilisation reflects a maturing workforce, stronger career pathways, and increasingly competitive people strategies across centres. The average employee now stays **4.1 years**, signalling growing loyalty and deeper institutional knowledge, both critical for higher-value, knowledge-based operations.

Salary dynamics have also moderated. After several years of elevated increases driven by market pressure and inflation, the **average annual salary growth has eased to 4.2% in 2025**. The alignment of lower attrition

and more sustainable salary growth suggests that the sector is entering a period of greater equilibrium, where employee expectations, labour market conditions, and organisational capabilities are more closely aligned.

Together, these trends indicate a healthier, more predictable talent environment, one where retention is strengthening and salary growth is stabilising without compromising competitiveness.



10%

Overall attrition in 2025



4.2%

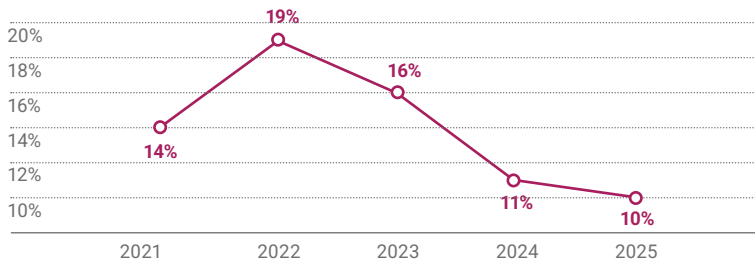
Average salary increase in 2025



4.1 years

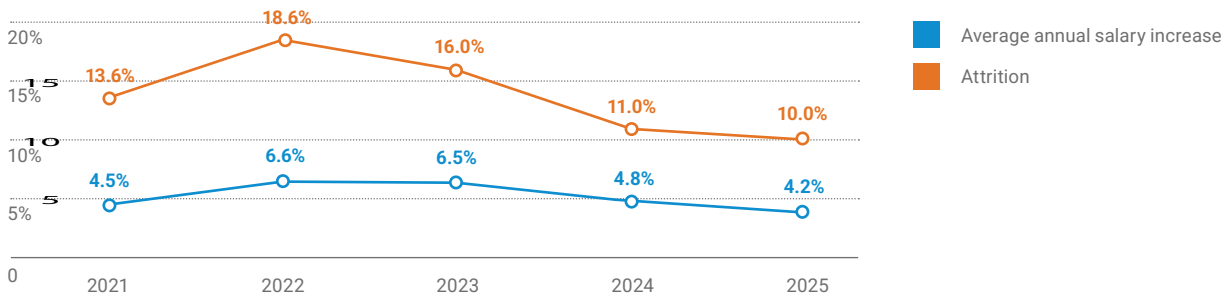
Average retention

Overall attrition rate



Source: ABSL Survey 2021-2025

Annual salary increase vs. attrition



Source: ABSL Survey 2021 - 2025

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ABSL DIAMOND WINNER 2025 IN EMPLOYEE ENGAGEMENT & DEVELOPMENT

The first company recognized in the **Employee Engagement and Development category** is **Commerzbank** received the first diamond for its **#Students4Students** project, which focuses on cooperation with secondary schools and aims to provide students with practical experience with technologies such as AI and cloud computing, teamwork, and presenting their own projects. The project is long-term in nature and actively responds to the specific needs of schools. Each year, approximately 12 students participate in the program, completing a two-phase paid internship and working with mentors from among university students, who thereby acquire management skills, and experts from the bank. Ten employees are involved in the project, dedicating their time beyond their regular work. **#Students4Students** develops a new generation of IT professionals, strengthens the community, and builds Commerzbank's reputation as an innovative and socially responsible employer.



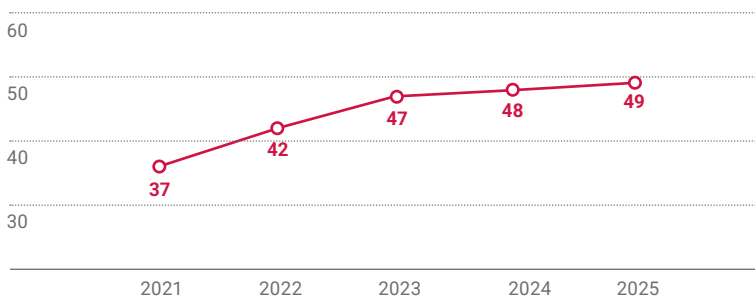
Retention Improvements & Company Benefits

Czech business services achieve strong retention, supported by a robust benefits package focused on flexibility, wellbeing, and continuous development.

Retention in Czech business services continues to strengthen, with employees now staying an average of **49 months**. This stability is supported by a comprehensive benefits ecosystem: nearly all centres provide **meal vouchers and pension contributions (both 96%)**, alongside widely adopted programs such as **flexible working hours (89%)**, **cafeteria/benefit systems (79%)**, **additional paid days off (79%)**, and **subsidised language or learning programs (79%)**.

Health, wellbeing, and security benefits are also firmly embedded, including **employee assistance programs (75%)**, **training (71%)**, **life insurance (64%)**, and **additional sick days (64%)**. While more progressive perks such as **sabbaticals, ESOPs, unlimited holidays, or on-site childcare** remain less common, the overall package demonstrates a strong commitment to long-term employee satisfaction, development, and work-life balance.

Average retention rate (Nr. of months) in business services centres in the Czech Republic



Source: ABSL Survey 2025

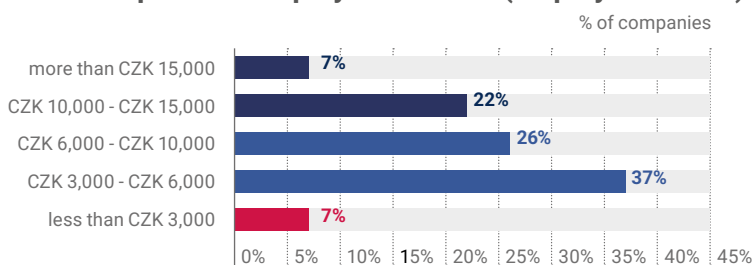
Employee benefits offered by the business services Centres in the Czech Republic

Meal contribution / vouchers / lunch cards	96%
Pension contributions	96%
Well-being & Work-Life Balance: Flexible working hours	89%
Financial & Lifestyle Support: Cafeteria / Benefit points system	79%
Additional paid days off	79%
Learning & Personal Development: Subsidised language courses	79%
Employee assistance programme (medical, psychological, legal, etc.)	75%
Employee training programmes	71%
Life insurance	64%
Additional sick days	64%
Sports & entertainment benefits	64%
Annual inflation-adjusted salary increase	61%
Subsidised studies or professional certification	61%
Paid parental leave	50%
Leisure trips, social activities	50%
Substitute pay during incapacity for work	39%
Medical pack	36%
Free access to wellness & fitness apps	36%
Transportation subsidies (commute, travel pass)	29%
Sabbaticals / extended unpaid leave	29%
Individual budget for personal growth and learning	25%
Preferential share purchase options	14%
Employee Ownership Program (e.g. ESOP)	14%
Other*	7%
Unlimited holidays	4%
Compressed work week (e.g. 4-day week)	4%
Family & Community Support: Child care / infant care subsidies	4%
On-site kindergarten / Service Center nursery	4%

*Other: Maternity leave pay for initial 6 weeks to level up to 100% pay, the same for paternity leave - 1 week, Family building benefits

Source: ABSL Survey 2025

Amount spend on employee benefits (employee/month)



Source: ABSL Survey 2025

ABSL DIAMOND WINNER 2025 IN CATEGORY EMPLOYEE ENGAGEMENT & DEVELOPMENT

The second diamond in the category **Employee Engagement and Development** went to **BlueLink International CZ** for its innovative **STEP Horizon** project. The project, which uses artificial intelligence in the Microsoft 365 environment, is transforming the way employees engage, learn, and grow. It enables strategic and personalized professional development for everyone, from new employees to executives, while providing automated talent mapping. Each employee takes ownership of their self-development, thus engaging them. The catalogue of training programs is created in collaboration with leading providers such as Coursera, Udemy, edX, and Kokoroe. The output can be micro-certificates as well as advanced certifications. The project is actively shared around the world, where it inspires other BlueLink International centers.




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ESG CHAPTER

Chapter provider: ABSL

DIVERSITY AND INCLUSION POLICIES

The Czech business services sector benefits from a **well-balanced overall gender split (50/50)**, but this balance is not yet fully reflected in leadership structures. Women hold **45% of middle-management roles** and **35% of senior positions**, showing that while progress is being made, there is still room to strengthen the pathway for women into higher levels of responsibility.

Centres continue to invest in a broader range of inclusion initiatives, with growing emphasis on **support for parents, women in leadership**, and **LGBTQ+ inclusion**, alongside increasing attention to **employees with disabilities, ethnic minorities, and workers 55+**.

Overall, the sector is moving in a positive direction, but the leadership representation figures highlight an important opportunity: to ensure that the strong gender balance seen across the workforce is increasingly mirrored at the top.



50%

of employees are women



35%

of senior management are women



63%

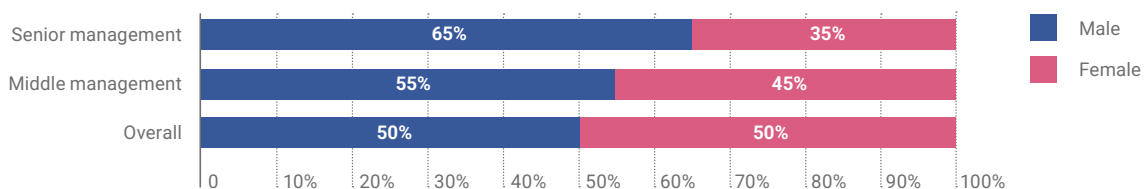
of centres support inclusion of parents on/after parental leave



53%

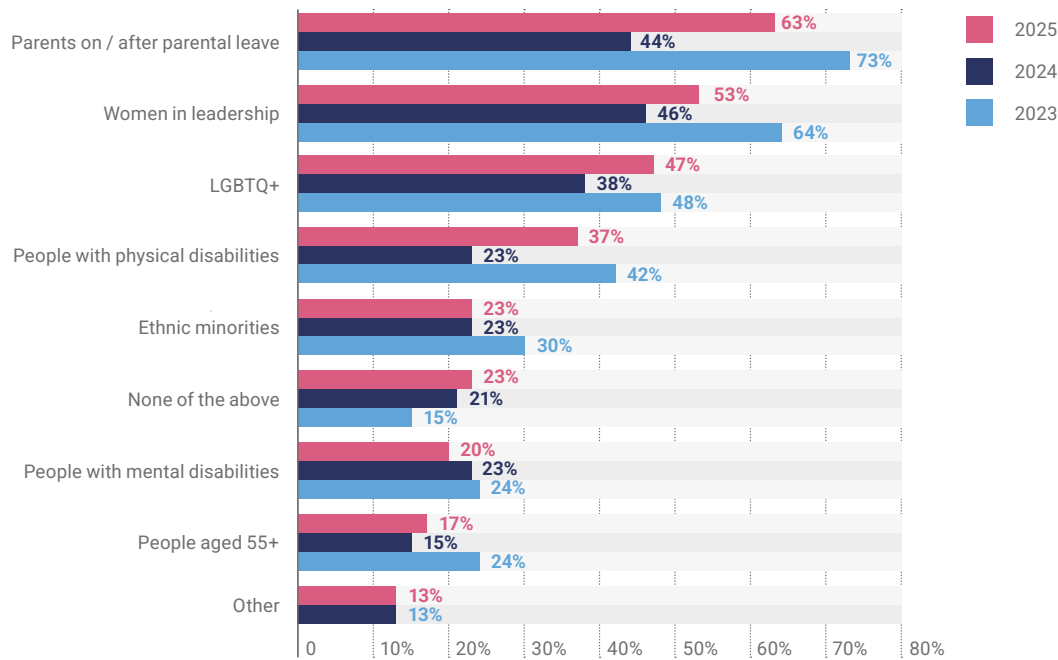
of centres support women in leadership roles

Gender split in business services in the Czech Republic



Source: ABSL Survey 2025

Implemented policies to promote inclusion



Source: ABSL Survey 2025

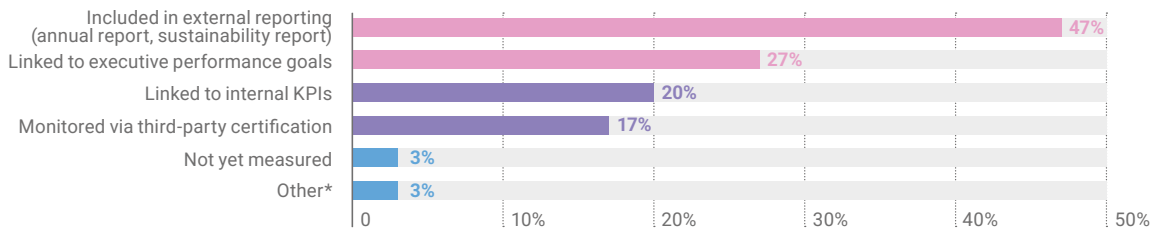
ESG MEASUREMENT, RESPONSIBILITY & PROGRESS

ESG is steadily gaining traction within Czech business services, though the maturity of implementation varies widely across organisations. Nearly half of centres (47%) already include ESG metrics in external reporting, while others are integrating sustainability into **executive goals (27%)** or **internal KPIs (20%)**. Responsibility for ESG sits primarily with **global headquarters (43%)**, followed by shared ownership models across departments, reflecting a gradual shift toward more embedded, organisation-wide accountability.

When it comes to tangible progress, centres report the strongest results in **workforce diversity (+19%)**, with more modest improvements in areas such as **energy and water consumption (5%)**, **carbon emissions (4%)**, and reductions in office waste. These early achievements show positive movement, but also highlight that environmental initiatives remain in the early stages for much of the sector.

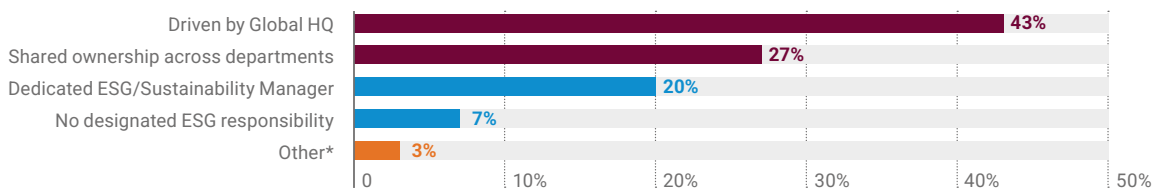
Overall, the data suggests a sector that is building a foundation for ESG but still has significant room to grow.

Measurement of ESG in business services in the Czech Republic



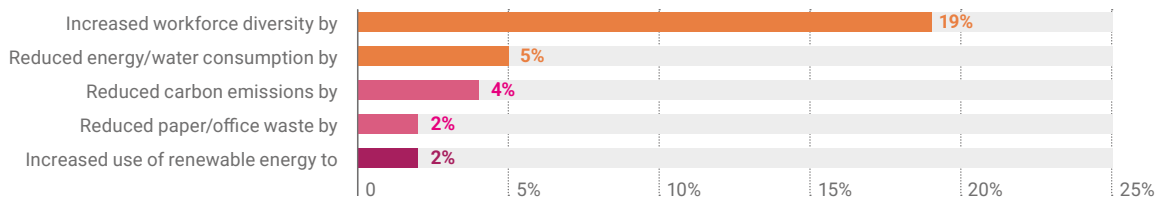
*exec. performance goals, external reporting
Source: ABSL Survey 2025

Responsibility for ESG



*all of the above
Source: ABSL Survey 2025

Overall progress within ESG in business services in the Czech Republic



Source: ABSL Survey 2025

ABSL DIAMOND WINNER 2025 IN ESG CATEGORY

In the ESG Strategy category, the highest rating went to Infosys Czech Republic's Empower with Care project, which focuses on women returning from parental leave. By introducing flexible working models and empathetic support systems, the company has enabled women who are trying to balance family responsibilities with work to continue their careers and develop further. This initiative promotes a more inclusive, resilient, and sustainable workforce within the company and, more broadly, across the business services industry. Activating and retaining talented women has resulted in, among other things, a reduction in recruitment costs in the millions of crowns. The program also introduced the option of extended unpaid leave to further promote work-life balance. A supportive ecosystem has been built around the workplace, including a children's corner and affordable, ready-made meals. In cooperation with the business park, services such as delivery and laundry have been introduced to facilitate everyday logistics.





WORK PRACTICES

Chapter provider: ABSL

5

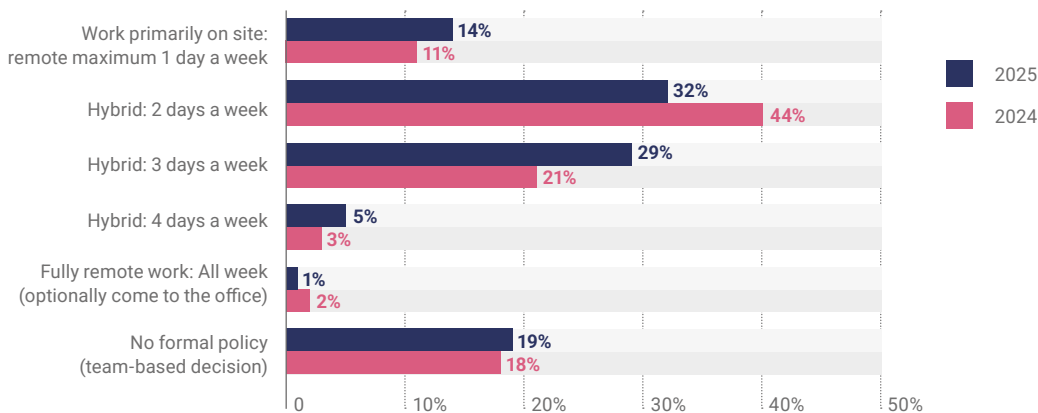
WORK POLICIES, HYBRID MODELS & MANDATED OFFICE PRESENCE

Workplace policies in Czech business services continue to evolve toward structured hybrid models, though the balance is gradually shifting toward more on-site expectations. The dominant setup remains **hybrid work**, with most employees working **2–3 days a week from home**. However, the share of employees working from home two days a week has decreased from **44% in 2024** to **32% in 2025**, signalling a moderate move toward greater office presence.

At the organisational level, the majority of companies (**73%**) now **mandate some form of return to the office**, while only 27% leave attendance fully voluntary. Among those with mandates, the most common model is a **company-managed hybrid schedule (35%)**, followed by **team-managed presence (26%)**. Only **9%** require a full five-day return, reflecting a broad recognition that flexibility remains essential for talent attraction and retention.

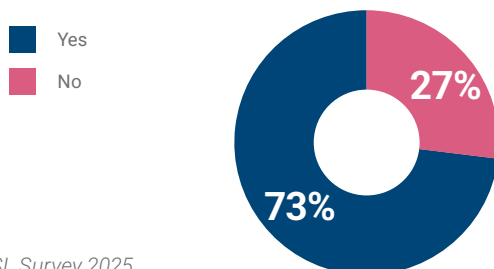
Overall, the data shows a sector searching for a balanced approach: maintaining the benefits of hybrid work—autonomy, flexibility, and productivity—while re-establishing in-person collaboration, culture-building, and team cohesion. The trend suggests that hybrid is here to stay, but with clearer boundaries and expectations than in previous years.

Share of employees and work policies



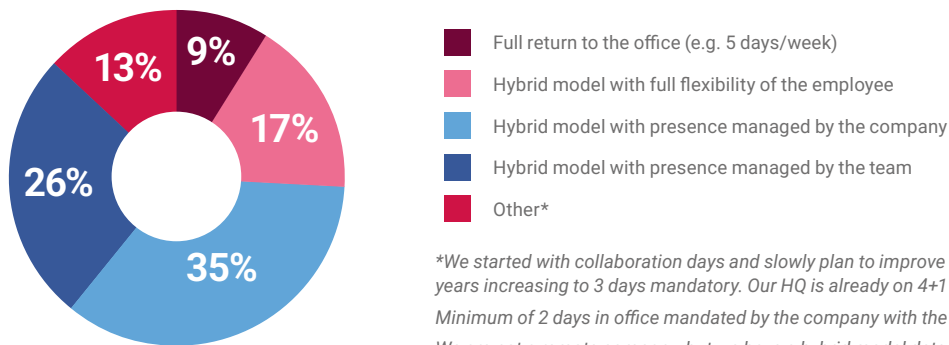
Source: ABSL Survey 2025

Percentage of companies that mandate / not mandate return to the office



Source: ABSL Survey 2025

Nature of the mandated office presence



*We started with collaboration days and slowly plan to improve to 2 days mandatory and in 2 years increasing to 3 days mandatory. Our HQ is already on 4+1 model (4 from the office).
Minimum of 2 days in office mandated by the company with the team flexibility to balance within team.
We are not a remote company, but we have a hybrid model determined by department, functions, managers but we are typically 2 days in the office with flexibility

Source: ABSL Survey 2025

Working from abroad

Working from abroad remains an emerging but carefully managed practice within Czech business services. While the majority of centres still **do not allow employees to work from outside the Czech Republic (67%)**, the share of organisations enabling some form of cross-border remote work is gradually increasing. Most commonly, centres allow short-term arrangements, with **46% permitting 1–30 days per year**, while longer stays of **1–3 months** are still limited (4%).

If flexibility is offered and supported by law, companies show strong interest: **36% would prefer the option of 1–30 days abroad**, and **32% would welcome 1–3 months**, confirming that international mobility is a highly valued benefit particularly in a sector with a large global workforce.

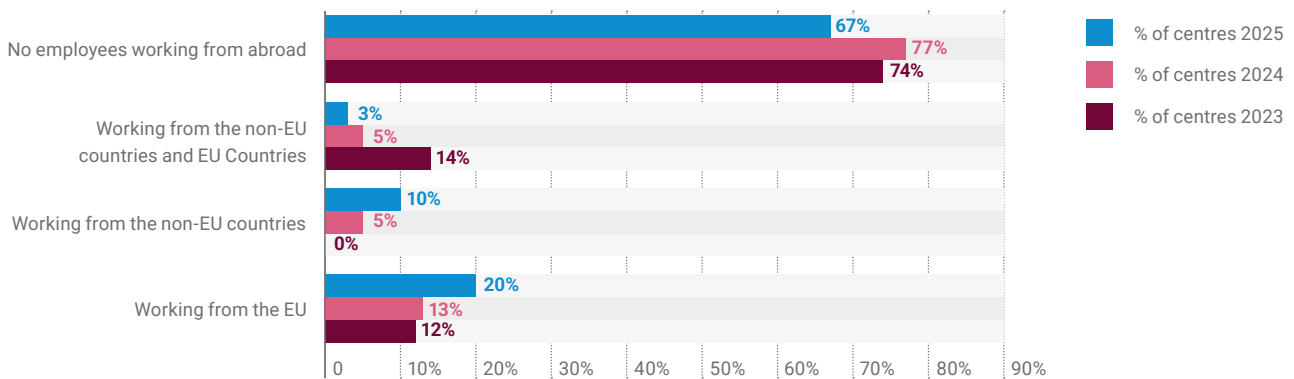
However, companies highlight that the challenges behind these policies are substantial. As one centre noted, *“Taxation plays a major role here, when 70% of your workforce is foreign, flexibility is appreciated, but issues like sickness, maternity, and health insurance become difficult to manage effectively.”* These operational and compliance risks might be the reasons why many organisations keep policies restrictive or manage them on a **case-by-case basis (12%)**.

Some companies are exploring more generous global benefits, including **“4 weeks from anywhere”** models, indicating that the market may evolve toward greater mobility as frameworks mature.

Overall, working from abroad is clearly desired by employees and companies, but cautiously adopted. It is shaped heavily by legal, tax, and insurance complexities.

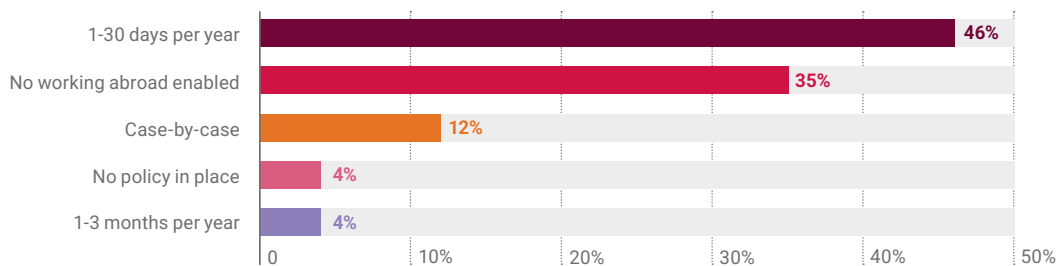
Work Practices

% of employees working remotely from abroad (outside the Czech Republic)



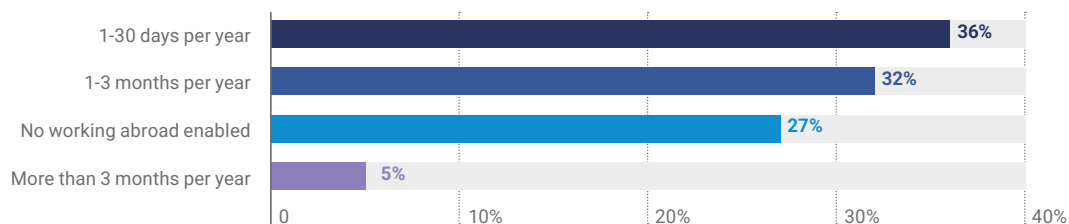
Source: ABSL Survey 2025

Allowing employees working from abroad - current status



Source: ABSL Survey 2025

Allowing employees working from abroad - preferred if enabled



Source: ABSL Survey 2025

Workplace changes in 2025

Most workplace parameters in 2025 remain stable, with centres largely keeping their **office space, number of locations, and shared environments unchanged**. Where changes occur, they trend toward **more flexible and collaborative setups**: one-third of centres are increasing **desk sharing, meeting rooms, internal coworking zones, and social/relax areas**. Investments are also rising in **digital tools for hybrid work (20%) and sustainability upgrades (20%)**, reflecting ongoing modernisation.

Only a small share is reducing capacity or space, often due to specific operational reasons. For example, reallocating shared zones into customer-dedicated rooms or planning for future office relocation. Overall, 2025 brings measured, targeted improvements rather than large-scale workplace transformations.

What workplace changes have you introduced or do you plan to introduce by the end of 2025?

	Increase	Remain the same	Reduce
Total office space area	23%	63%	13%
Use of desk sharing/hot desking	33%	60%	3%
Number of office locations in the Czech Republic	7%	87%	3%
Use of external coworking space	7%	33%	13%
Share of meeting rooms	33%	63%	0%
Share of internal coworking environment	33%	57%	3%
Share of social and relax zones	23%	63%	0%
Investment into digital tools improving hybrid work	20%	67%	3%
Sustainability upgrades to the workplace (e.g. green certification, energy savings)	20%	63%	3%

Other: We are planning to relocate our office in 2026. No changes planned for this year. The number of shared places was reduced because new dedicated rooms were built specifically for customer use.

Source: ABSL Survey 2025

ABSL DIAMOND WINNER 2025 IN WORKPLACE INNOVATION

Aeven Czech Republic, which employs four hundred specialists focused on critical IT infrastructure operation and advisory in Czechia, was successful in the **Workplace Innovation category**. In connection with its expansion and efforts to offer its people a truly premium working environment, the company opted for new offices covering an area of 1,575 m² in the innovative Port7 campus in Prague’s Holešovice district, which combines modern design, sustainability, and wellbeing. Instead of the traditional static office model, a dynamic and people-oriented space has been created that balances productivity, collaboration, and wellbeing—while remaining true to the company’s Scandinavian roots, inspired by Danish design. Based on feedback from employees, a new concept of work zones, flexible seating, and digital tools supporting hybrid collaboration has been introduced, enabling smoother connections between teams across locations. This approach allows employees to co-create their own working environment – from themed meeting rooms and quiet zones to community spaces that reflect their real needs. Investments in smart booking systems, ergonomic equipment, and employee wellbeing programs have resulted in higher engagement, more efficient use of space, and greater sustainability. Surveys and data on office use also confirm a significant improvement in satisfaction, collaboration, and work-life balance.



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TRAINING & EDUCATION

Chapter provider: ABSL & The Hackett Group



Training remains a strategic priority for Czech business services, with the average number of training hours per employee rising again to **50 hours in 2025**, the highest level in four years. This increase reflects the sector's continued shift toward knowledge-based work and the growing need for advanced skills across all functions.

At the same time, the **annual training budget per employee has dropped noticeably**, from nearly **18,000 CZK** in previous years to **10,000 CZK in 2025**. The data suggests that centres are working to provide more learning opportunities while becoming more cost-efficient. Leveraging internal academies, digital learning platforms, and more focused development programs.

Overall, the trend shows a sector committed to upskilling and continuous learning, even as budgets tighten. Highlighting both the importance of education and the need for smarter, scalable training approaches.

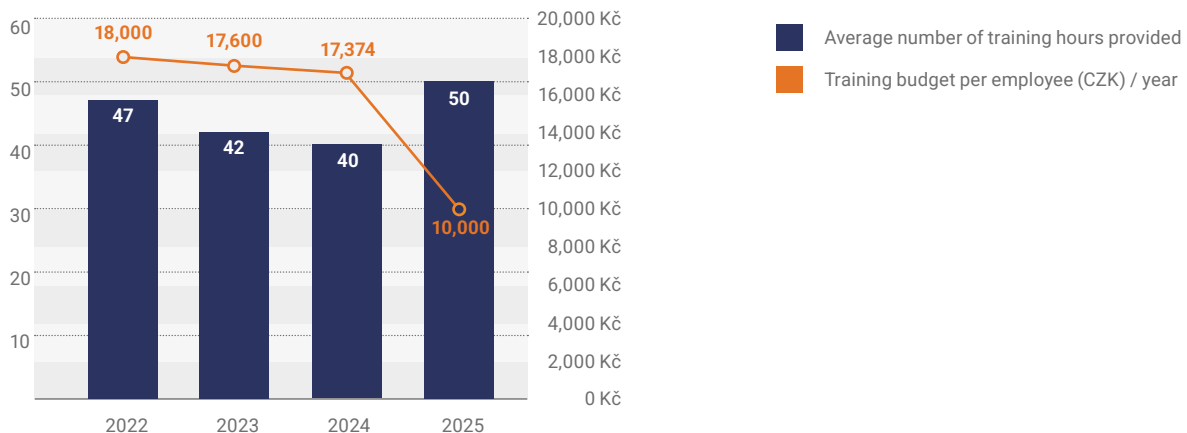
 **50** hours

average number of training hours per year provided by business services centres to their employees

Approx.  **10,000** CZK

Training budget per employee/year

What workplace changes have you introduced or do you plan to introduce by the end of 2025?



Source: ABSL Survey 2025

The data highlights a clear difference between the availability of training and the actual uptake among employees.

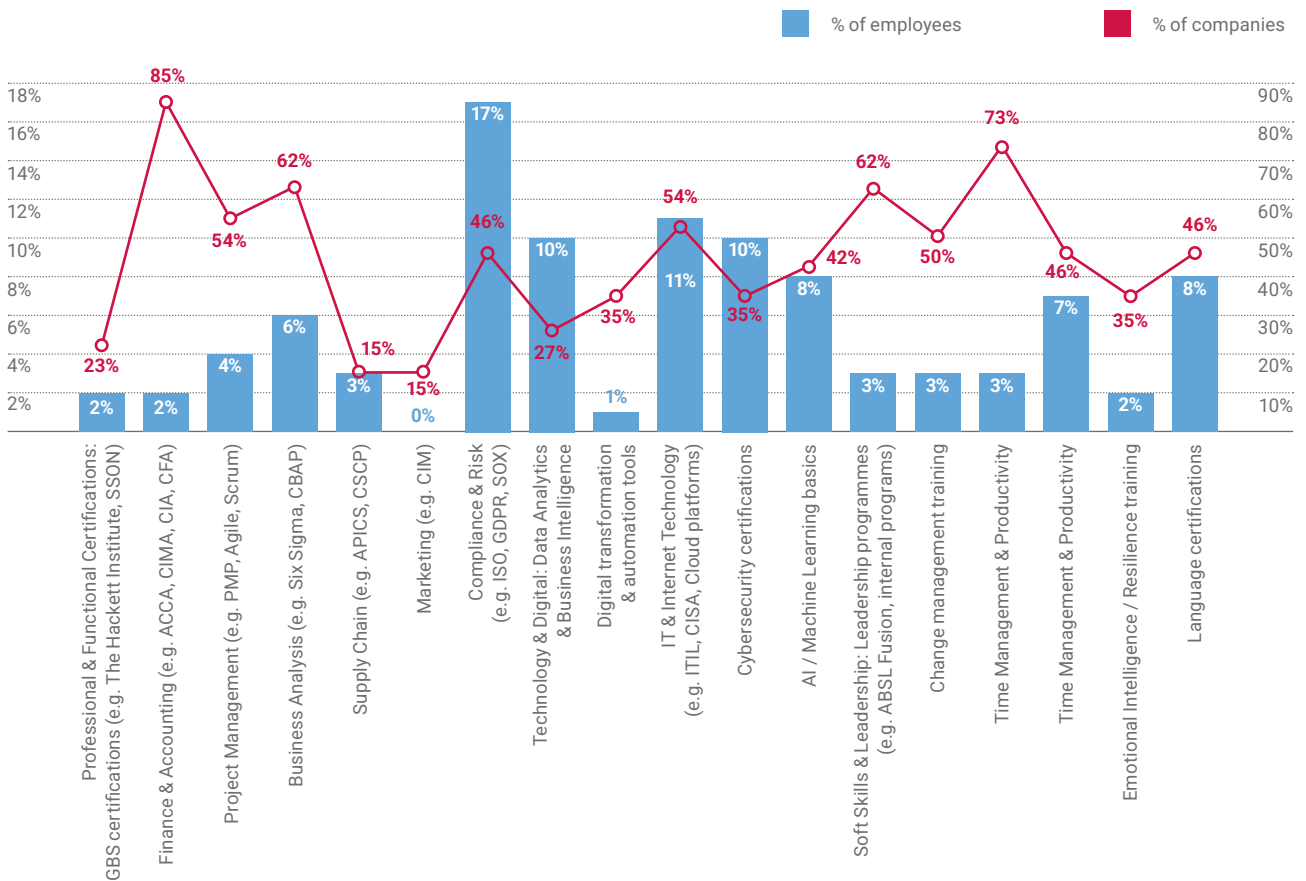
While many centres offer a broad portfolio of programs, from project management and language training to digital skills and professional certifications, the share of employees who actively participate remains comparatively low in most areas.

The highest uptake is seen in **change management**, where over one-fifth of employees have studied or completed training, despite only about half of companies offering such programs. This suggests strong demand for this skillset within centres undergoing ongoing transformation.

In contrast, areas such as digital education, cybersecurity and professional certifications are widely available but attract only a small proportion of employees. This mismatch points to a potential barrier in access, relevance, or prioritisation, and highlights an opportunity for centres to better align training provision with emerging skill gaps, especially in technology and automation.

Overall, the graph shows that **the breadth of training offerings is strong, but employee engagement varies significantly**, signalling a need for more targeted communication, clearer development pathways, and programs that respond directly to the sector’s evolving capability needs.

Proportion of employees in training vs. proportion of companies providing such trainings



Source: ABSL Survey 2025



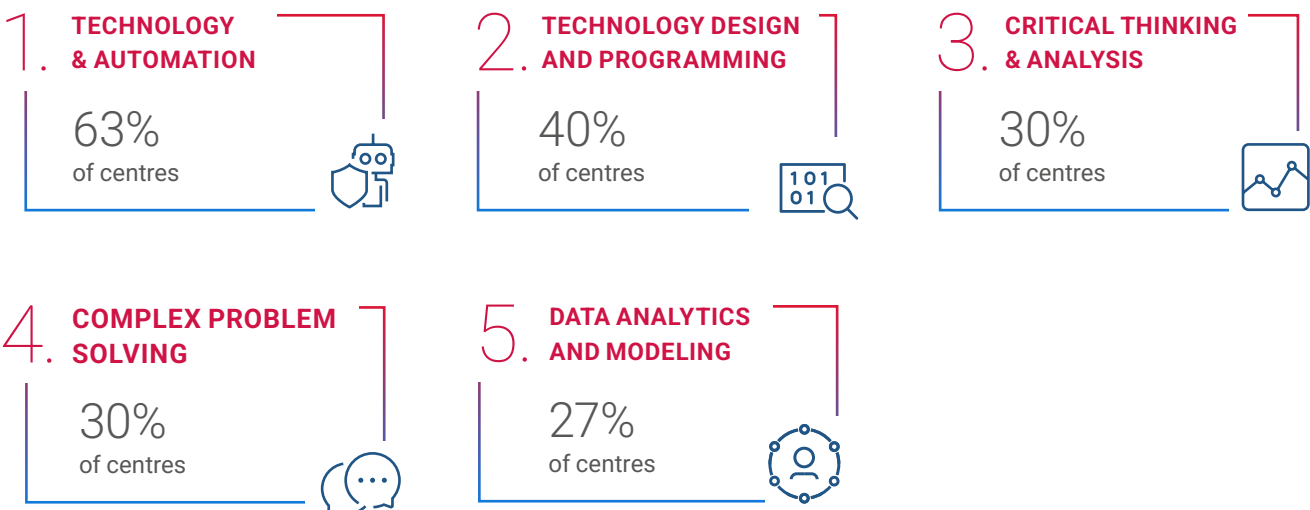
SKILLS DEFICIT

The skills gaps reported for 2025 reinforce a clear message: Czech business services are facing their strongest shortages in **technology-driven capabilities**. Deficits in **technology and automation** have surged to **63%**, nearly doubling from last year, while shortages in **technology design and programming (40%)**, **data analytics (27%)**, and **RPA programming (23%)** highlight the accelerating demand for digital and analytical talent.

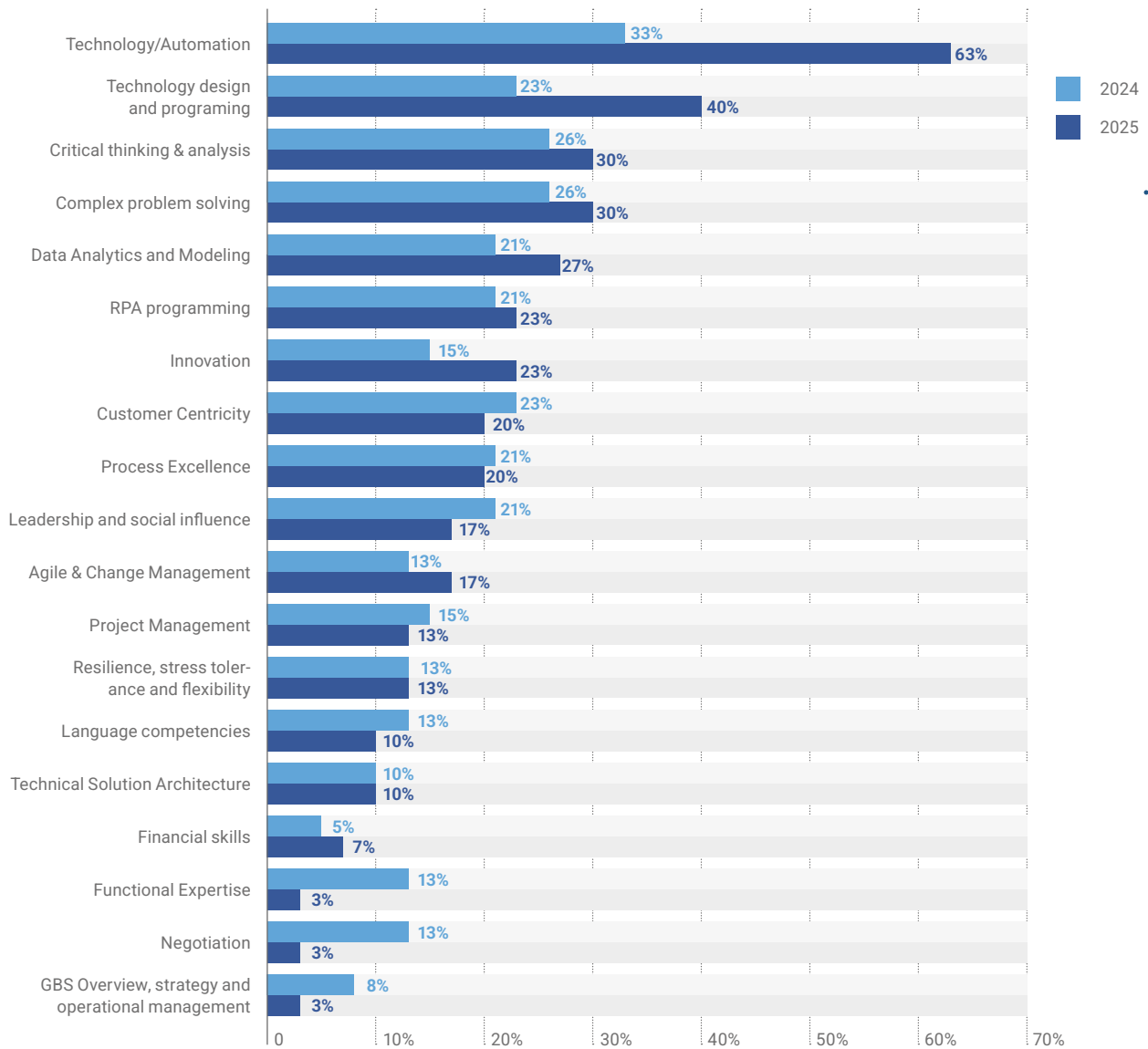
At the same time, core cognitive and leadership capabilities remain in short supply. **Critical thinking, complex problem-solving (both 30%), leadership and social influence (17%), and customer centricity (20%)** all continue to rank high, showing that as processes become more automated, human skills are becoming even more essential.

Overall, the data points to a widening gap between the sector's rapidly evolving digital agenda and the available talent. The combination of rising tech deficits and persistent shortages in strategic thinking and leadership underscores the need for targeted upskilling, smarter development pathways, and stronger partnerships across education, industry, and learning ecosystems.

Top 5 skills in deficit by Czech business services



Skills deficit in respective areas



Source: ABSL Survey 2024 - 2025

NEW ROLES PLANNED IN NEAR FUTURE

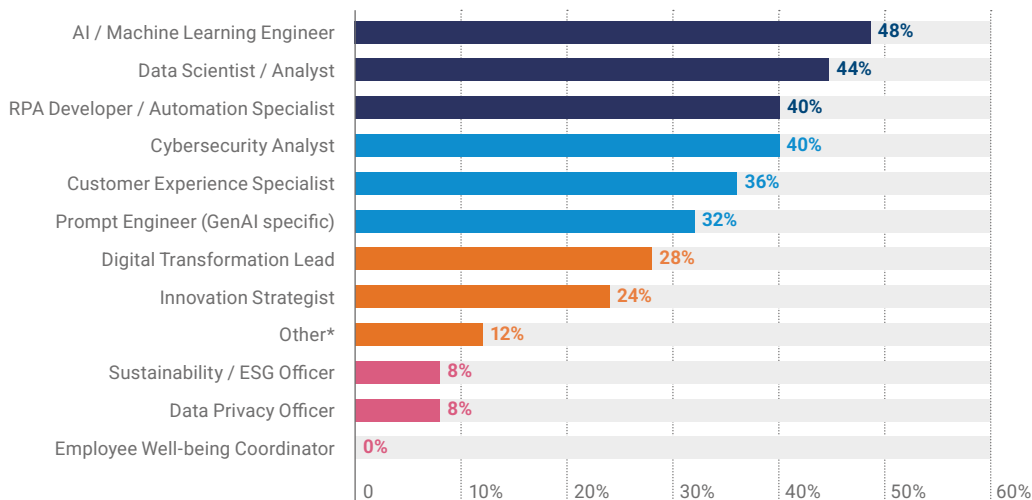
Czech business services are preparing for a significant shift in their talent landscape, with many centres planning to introduce new, future-oriented roles over the next two years. The strongest demand is concentrated in **AI and data**, with nearly half of centres planning to hire **AI/Machine Learning Engineers (48%)** and **Data Scientists or Analysts (44%)**. This underscores the sector’s accelerating push toward automation, predictive insights, and GenAI adoption.

Roles tied to digital transformation and security also feature prominently. **RPA Developers and Automation Specialists (40%), Cybersecurity Analysts (40%), and Digital Transformation Leads (28%)** reflect the growing need for resilient, automated, and secure operations. Meanwhile, demand for **Prompt Engineers (32%)** highlights a rapid transition into GenAI-enabled workflows.

Beyond tech, companies are also strengthening customer and innovation capabilities, with **Customer Experience Specialists (36%)** and **Innovation Strategists (24%)** gaining traction. Smaller but notable shares plan to introduce roles supporting compliance and sustainability, including **ESG Officers (8%)** and **Data Privacy Officers (8%)**.

Overall, the next wave of hiring confirms a clear direction: Czech business services are evolving into more digital, analytical, and innovation-driven organisations.

Share of centres planning to introduce following roles



*Other: *IT Developer, Delivery Lead, Azure Architects, IT Support, Supply Chain, Logistics, IT
 Source: ABSL Survey 2025

ABSL DIAMOND WINNER 2025 IN EMERGING LEADER OF THE YEAR

The **Emerging Leader of the Year** award, which aims to support new talents who have a strong impact and motivation to shape the future of the business services industry, was presented to **Martin Michalský** from **Siemens Global Business Services**. Martin Michalský leads the **Smart Analytics Projects** team, which under his leadership has expanded from 6 to 30 members across three countries and delivers over 50 projects annually for Siemens branches worldwide. He helps develop talents, actively trains and mentors colleagues, and, with his team, created a Microsoft Power BI training program attended annually by more than 600 experts from around the world.





BUILDING THE GBS OF 2030 STARTS NOW: RESET THE MANDATE FOR ENTERPRISE VALUE

From efficiency to enterprise enablement

Global Business Services (GBS) will be the operating backbone of the enterprise by 2030. GBS will shape decisions, mitigate risks and drive resilience in real-time. Cost efficiency will remain a foundation, but it will no longer be the primary reason enterprises invest in GBS.

This shift is already underway. According to The Hackett Group® 2026 GBS Key Issues Study the traditional single-function shared services model is rapidly declining. Only around a quarter of GBS organizations still operate according to this model. That figure is expected to fall to single digits within the next two to five years. In contrast, multifunction GBS models – particularly those where services are fully integrated under a single GBS leader – are projected to account for nearly half of all GBS organizations.

This evolution reflects a broader enterprise reality. As business models become more interconnected, fragmented service delivery structures increasingly act as a constraint rather than a strength. GBS is therefore being repositioned as an enterprise enablement platform, not a back-office construct.

Seamless integrated operations at scale

By the end of the decade, leading GBS organizations will operate with end-to-end accountability across core processes spanning finance, HR, IT and supply chain. The movement toward aggregator-style GBS models – where all delivered services report through a single GBS leadership structure – is a clear signal of this direction.

Also, although only 18% of organizations operate according to such models today, The Hackett Group® 2026 GBS Key Issues Study shows that five years from now that number is expected to be 44%. This change is not simply structural; it represents a shift toward integrated operations, unified service catalogues and consistent global experiences for the business.

As integration deepens, visibility becomes a strategic advantage. Real-time performance insight enabled by process intelligence and advanced analytics will allow GBS leaders to move from reporting outcomes to actively shaping them. The focus will shift from monitoring service levels to anticipating issues, optimizing flow and simplifying how work gets done across the enterprise.

What boards and executives will expect

C-suite and board expectations of GBS will rise materially by 2030. Cost and productivity will remain important, but increasingly they will be viewed as baseline capabilities. Executives will expect GBS to demonstrate direct impact on working capital, risk management, compliance and experience metrics.

The data already points in that direction. Enterprises are accelerating the adoption of technologies that support both efficiency and insight. The Hackett Group® 2026 GBS Key Issues Study shows that nearly 90% of organizations expect AI to significantly impact structured GBS activities by 2026, and 65% expect AI to play a major role in interaction-based services. Importantly, the fastest growth is expected in unstructured activities, where nearly 60% of organizations anticipate material impact within the next few years.

But along with this expansion comes heightened scrutiny. Boards will demand that GBS embed strong governance around data, cybersecurity and ethical AI use. Resilience will no longer be a separate agenda; it will be an inherent expectation of the GBS operating model.

The emerging role of the GBS leader

As the mandate of GBS expands, the role of the GBS leader will undergo fundamental changes. Operational excellence will remain essential, but leadership effectiveness will increasingly be judged according to enterprise-wide influence.

Future GBS leaders will act as strategic orchestrators, embedding their organizations into business planning, transformation and execution. They will operate as internal advisors, using data-driven insights to challenge assumptions and guide priorities. Innovation will be expected, but not in isolation – leaders will be accountable for converting experimentation into scaled outcomes that matter to the business.

This requires a different leadership profile, one that blends operational discipline with commercial judgment, change leadership and the ability to wield influence at senior levels.

Building foundations and investing in people

Technology alone will not define the future of GBS. People and skills will be equally decisive. As automation and AI absorb transactional work, the GBS workforce will shift toward roles focused on analytics, digital operations, process design and transformation delivery.

The Hackett Group® 2026 GBS Key Issues Study highlights strong momentum behind self-service solutions and low-code/no-code development, with more than half of organizations already seeing material impact and adoption expected to accelerate sharply. This places new expectations on capability building, continuous learning and talent mobility within GBS.

Organizations that invest early in upskilling and create clear, attractive career pathways will be best positioned to compete for scarce digital and analytical talent.

Defining and strengthening the GBS identity

Perhaps the most critical shift on the path to 2030 is how GBS defines its purpose. Many organizations continue to view GBS primarily as a cost-efficiency function, making it difficult to articulate the broader enterprise value it can deliver. Future-ready GBS organizations will have a clear enterprise identity, one that is tightly aligned to strategic objectives and understood across the business.

They will communicate value through a combination of data, insight and narrative – demonstrating how GBS enables growth, resilience and transformation. In doing so, GBS secures its place not as a support function, but as a trusted enterprise partner at the center of how the organization operates and evolves.

Conclusion and call to action

The question for the next five years is not whether GBS will evolve, but whether GBS leadership will deliberately design its role within the enterprise. By 2030, GBS will either be a fully integrated enablement platform – shaping decisions, managing risk and driving resilience – or it will remain a fragmented service construct struggling to stay relevant. The organizations that will win are those that act now – clarifying accountability, investing in skills and data, and redefining how GBS creates enterprise value.

CXOs and GBS leaders must face this stark reality: if GBS is not measurably improving outcomes beyond cost – working capital, resilience, risk and experience – then it is not future-ready. The time to reset the GBS mandate is now, not in 2030.

Roy Singh

Senior Director,
Program Leader GBS Operations Advisory Europe,
The Hackett Group



To find out more about The Hackett Group® 2026 GBS Key Issues Study and our GBS Advisory programs please contact either the author of this article, Roy Singh - roypinkeshwar.singh@thehackettgroup.com or Ben Hartfield - bhartfield@thehackettgroup.com

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WORKSPACE

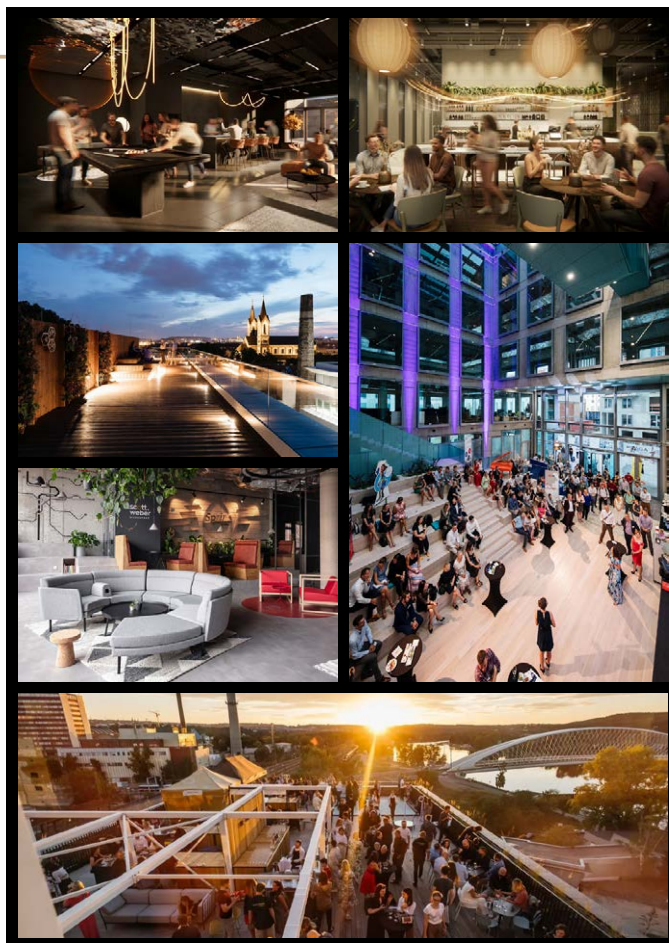
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ABSL FUSION EDUCATION PROGRAMS

Overview of tailored qualifications for business services leaders and professionals

ABSL Fusion is a unique education platform designed specifically for global business services professionals. It bridges the expertise brought by The Hackett Institute, the University of New York in Prague, and Coaching Systems, as well as the extensive ABSL business services leaders and the best digital experts' network. The ABSL Fusion suite is one of its kind in the CEE region, and all programs are open to ABSL members only.

ABSL Fusion programmes in numbers



230+

graduates



42

Alumni companies



4

education programs for various focus levels to advance business services professionals' career



7

years on the market



25

sector case studies



ABS FUSION Digital Program

Your must for transformation and implementing innovations

PROGRAM SCOPE:

Program starts in April 2026, 6-month journey with 8 hybrid ABSL sessions with top digital experts

100+ hours of curated learning, projects, and site visits with real centres

Collaboration via the Fusion digital platform, plus an ABSL Conference ticket and invites to expert events

Why join the Fusion Digital program?

Main benefits:

- › Master digital transformation of your team and centre with ready-to-implement scenarios from real Czech centre leaders & experts.
- › Gain hands-on experience that sets you apart as a forward-thinking Czech business innovator.
- › Decode digital transformation and apply proven best practices to real cases. Learn from the mistakes others have made.

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Participating companies in 2025

Asahi Business Services

Atlas Copco Group

CURIUM[®]
LIFE FORWARD

Envista

Johnson & Johnson

Landis+Gyr⁺
manage energy better

SAVENCIA
FROMAGE & DAIRY SERVICES EUROPE

SIEMENS

ABSL Fusion Digital Experts and Speakers



Asahi Business Services



What do ABSL Fusion Digital program graduates say?



Tereza Milsimerova

Senior Manager Payments EMEA
at JNJ Global Business Services

"I enjoyed the program very much, lovely people and relevant topics. For instance, the HPE session was very eye-opening and helped me realise that IT frameworks are incorporated in every business process within global services. I also loved how structured the session was and how skilled the presenter was."



Tomas Voracek

Head of P2P Delivery Optimization -
Process Excellence at Siemens GBS CEE

"I'm happy to have been part of the ABSL Fusion Digital program. I really appreciated the opportunity to connect with people facing similar challenges and to learn how they approach them."



Gordon MacIntosh

Senior E-invoicing Specialist
at JNJ Global Business Services

"I really enjoyed the opportunity to learn about new digital tools on the market and to collaborate with people from different shared service centres. It was valuable to see how others are using these tools and to exchange practical perspectives."



ABSL Fusion Leader Program

Learn to Lead!

PROGRAM SCOPE:

Starts every January, yearly program, MBTI and 1:1 coaching

40 hrs self-learning
Diploma in GBS

25+ hours of program
live meet-ups

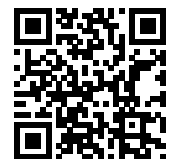
100+ hours
group work

Why join the Fusion Leader program?

Main benefits:

- › Enhance your leadership, teamwork, and problem-solving skills through impactful GBS projects, 1-on-1 executive coaching, and self-awareness tools like MBTI.
- › Boost your time management skills and organizational abilities. Share knowledge, inspire others, and learn from each other.
- › Apply insights from MBTI to communicate effectively with different personalities.
- › Acquire GBS skills and earn a Diploma in GBS (40 hrs self-paced online via Hackett Institute) to drive strategic results.
- › Enjoy exclusive benefits: ABSL events, 2026 conference ticket, and access to ABSL and Hackett Institute networks.

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Participating companies in 2025



What do ABSL Fusion Leader program graduates say?



Gabriela Kleinova
HR Director and Global HR IT lead
at Curium Pharma

"Proud graduate of the ABSL Future Leaders Program—a great experience learning from inspiring professionals from different companies."



Lucie de Ruiter
Manager Payments EMEA at JNJ
Global Business Services

"An amazing journey full of new experiences, inspiration, and plenty of fun."



Lionel Gras
Business Operations Manager
at Envista

"An incredible year-long journey filled with learning and networking."



Vaclav Jizdny
O2C manager in Savencia
Services Europe

"It was a year of intensive development that provided me with deeper insight into the world of GBS, the latest digital trends, and most importantly, helped me advance my leadership skills. I look forward to applying the acquired knowledge and skills in practice and contributing to the further success of our team and company!"



Evgeni Paunov
GS Total Rewards-Benefits Lead EMEA
at JNJ Global Business Services

"An inspiring journey of growth, learning and connection, with the opportunity to learn from talented professionals across different companies. Thank you, ABSL Czech Republic for the guidance, inspiration, and for creating such a valuable experience for leaders."



Study for an MBA in Global Business Services

Maximise your qualification and expertise

Join this cutting-edge program to enhance your career opportunities - as this is the only MBA on the education market specialising in Global Business Services in CEE.

The 18-month study program under the ABSL umbrella is developed from the International MBA curriculums run by the University of New York in Prague and is also reinforced by the Advanced Diploma qualification offered by The Hackett Institute. Students also have a great opportunity to become part of the ABSL network of future leaders in business services - contributing to their personal and professional growth.

MBA in GBS in numbers (since 2022)

Ten delegates from leading companies, including Novartis, JNJ GBS, Runecast Solutions, Medtronic and Alpiq, successfully graduated from the MBA in GBS program at the prestigious University of New York in Prague. Through this intensive program, participants enhanced their expertise in leadership, finance, marketing, and coaching while earning a valuable certificate from the Hackett Institute. Beyond academic knowledge, they acquired practical, life-long skills that have elevated their careers and professional impact.

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What do MBA in GBS program graduates say?



David Garrett

Freelance - Consultant Strategic
Foresight / AI Audit / Architecture,
Former Head of IT shared Services
at Alpiq Services CZ

"Graduating from the MBA in GBS at the University of New York in Prague was more than a milestone. Balancing intense professional demands with academic depth created moments where theory met reality and frameworks turned into action. What began as a degree became something far richer and more human. We arrived as students and leave as alumni, a diverse, multi-generational class that grew together and now steps forward with confidence, purpose, and better questions."



Lenka Lipert

Site Operations Lead NOCC Prague
at Novartis Czech Republic

"Completing my MBA means a lot to me, not just because of the academic journey, but because of what it took to get here. I started the program while pregnant, continued attending classes with a newborn in my arms, and wrote my thesis late at night. There were moments of exhaustion, doubt, and overwhelm, but also motivation, growth, and resilience. Motherhood didn't slow me down, it reminded me why I started. I'm proud of this milestone and deeply grateful to my family, professors, and classmates for their support."

ABSL Fusion Professional Program

Kick-start your career and gain GBS fundamentals



The Hackett Institute
PROFESSIONAL DEVELOPMENT FROM THE HACKETT GROUP

PROGRAM SCOPE:

6 months online journey

30 hrs self-learning Certificate in GBS

7 live online Chat & Learn webinars

Starts every January

Why join the Fusion Professional program?

Main benefits:

- › Build strong overview and knowledge of Business Services.
- › Master core GBS concepts and confidently use the terminology and processes that power shared service excellence.
- › Share knowledge, inspire others, and learn from each other.
- › Advance your career with a globally recognized qualification
- › Acquire GBS skills and earn a Certificate in GBS (30 hrs self-paced online via Hackett Institute)
- › Join the ABSL Fusion network and connect with professionals backed by seven years of proven success.
- › Enjoy exclusive access to ABSL events year-round and access to ABSL and Hackett Institute networks.

VISIT US AT



Participating companies in 2025



UPSKILLING FOR YOU & YOUR TEAM

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CONTACT US

For more information or to schedule a meeting, please contact our Education Programs Manager at jarmila.drastikova@absl.cz or apply directly at absl.cz/fusion.



TECHNOLOGY AND DIGITAL MATURITY

Chapter provider: ABSL

25 Targetwarp JS Header.js JS Map.js JS Guestbook

```
1 out_undo_partial_alloc;
2 while (--i >= 0) {
3   free_page((unsigned long)group_info->blocks[i]);
4 }
5 kfree(group_info);
6
7 return NULL;
8 }
9
10 EXPORT_SYMBOL(groups_alloc);
11
12 void groups_free(struct group_info *group_info)
13 {
14   if (group_info->blocks[0] != group_info->small
15       && group_info->small)
16     kfree(group_info->small);
17 }
18
19
20
```

Problems Output Debug Console Terminal

Live link is active. You can now view guestbook in your browser.

Local: <http://localhost:3000>
On your network: <http://192.80.72.55:3000>

Development mode has not been optimized yet...

UNRAUTBL SHOTS 1 11:12 11

AUTOMATION, ROBOTICS & THE DIGITAL WORKFORCE

Automation continues to play a transformative role in Czech business services, though 2025 marks a notable recalibration. Robots and automated workflows currently deliver the equivalent work of **4% of the total workforce**, representing around **8,000 FTEs across the sector**. While still substantial, this figure is **6% lower than last year**, the first significant decline after years of steady growth. Several factors likely contributed: consolidation of automations, replacing legacy RPA with more efficient AI-driven tools, reprioritisation of budgets, and the shift toward GenAI-powered automation rather than traditional RPA bots.

At the centre level, the **average number of robot FTEs dropped from 74 in 2024 to 38 in 2025**, suggesting that many organisations are rationalising, modernising, or decommissioning older automations. Despite this adjustment, investment into automation teams is expected to rise. Centres currently employ an average of **21 automation FTEs**, with plans to expand to **27 FTEs within the next three years**, reflecting a shift toward higher-value automation engineering rather than simply increasing bot volumes.

How centres build these capabilities also shows a clear strategic preference.

61% develop automation internally through **in-house teams and upskilling**,

18% allocate automation projects to existing roles,

15% rely on external consultants, and

only **6%** hire ready-made automation talent from the market.

This indicates that organisations increasingly view automation as a capability to **grow**, not just **buy**.

Overall, the data suggests a sector in transition: moving from traditional RPA scaling toward more selective, smarter automation supported by GenAI, stronger internal teams, and more sustainable long-term operating models. The decline in robot FTEs is not a retreat, it's a reset, paving the way for a more advanced and integrated digital workforce.

Robots and automation provide work equivalent to:



4%

of workforce
RPA & other automation



38 FTEs

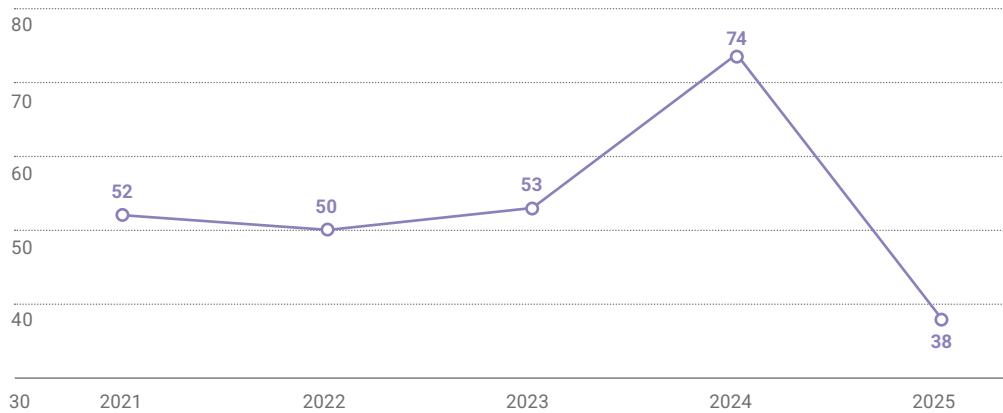
Average number of robot/automation
FTEs per centre in CZ



8,000 FTEs

equivalent robot/automation workforce
in the sector

Average Number of Robot Employees per Centre (FTEs)



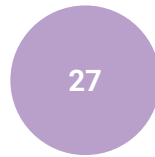
Source: ABSL Survey 2021 - 2025

Automation experts within the sector

Average number of automation experts per centre (FTEs)



Now

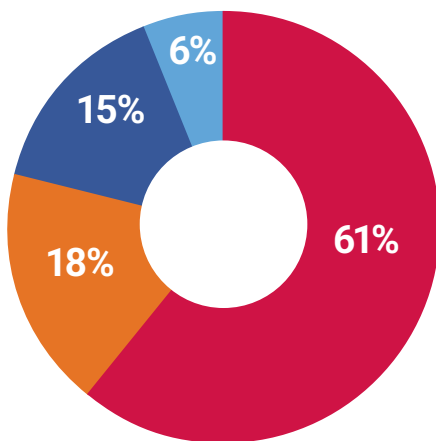


Planned within 3 years

79%

of the centres build their robotics and automation capabilities in-house

Methods used by centres to build robotics and automation capability



- Building in-house team and capability through training and experience
- Allocating robotics projects to existing roles in the organisation
- Employing external consultants and services
- Sourcing experienced talent from the marketplace

Source: ABSL Survey 2025

TECHNOLOGY DEPLOYMENT IN CZECH BUSINESS SERVICES

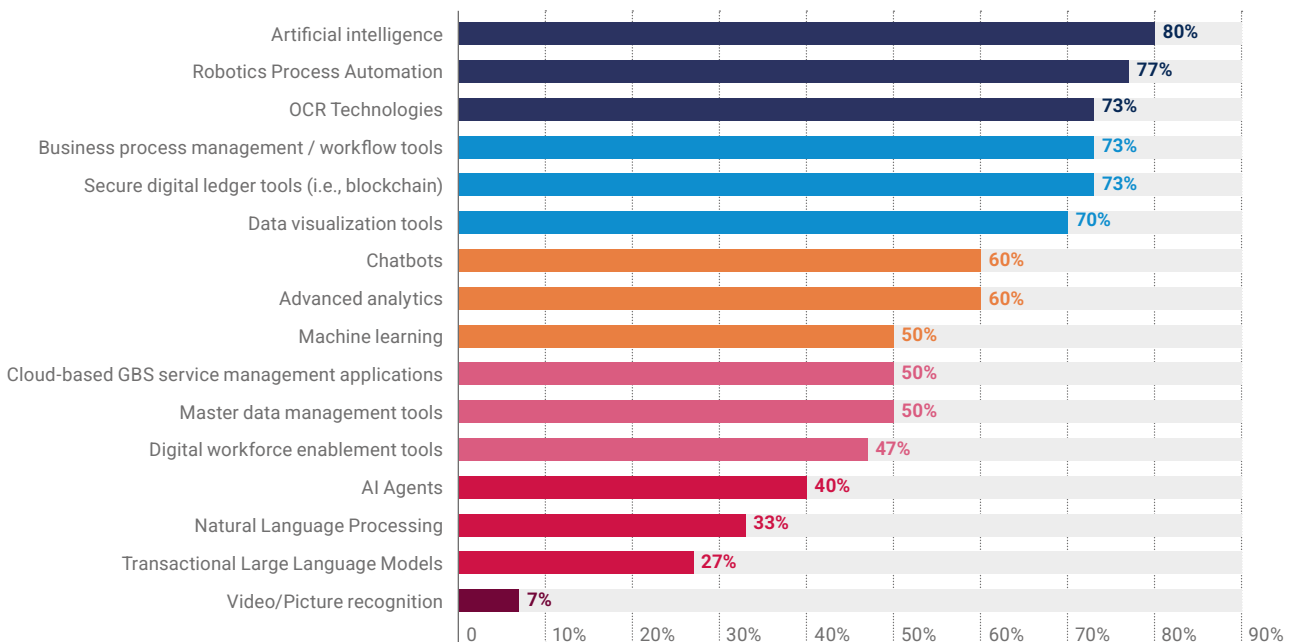
Technology adoption in Czech business services is both broad and increasingly advanced, with **AI now deployed by 80% of centres**, making it the most widely adopted technology across the sector. Automation remains a strong pillar, with **Robotic Process Automation (77%)** and **OCR technologies (73%)** deeply embedded in operational workflows. Similarly high adoption levels for **workflow tools, secure ledger systems, and data visualization tools (all around 70–73%)** signal a shift toward more integrated, data-driven operations.

Customer and analytics oriented tools show strong presence as well, with **chatbots and advanced analytics at 60%** adoption. Half of centres already use **machine learning, cloud-based GBS platforms, and master data management tools**, while **digital workforce enablement tools (47%)** and **AI agents (40%)** are emerging as the next wave of capability enhancement.

More specialized technologies, such as **natural language processing (33%)**, **large language models (27%)**, and **video/picture recognition (7%)** are still in earlier stages but gaining traction as GenAI and automation strategies mature.

Overall, the data shows a sector rapidly expanding its digital backbone, with widespread adoption of core automation and analytics tools and growing investment in next-generation AI capabilities.

Percentage of deployed technologies in business services in the Czech Republic



Source: ABSL Survey 2025

GENERATIVE AI ADOPTION - USE CASES, SCALE AND GOVERNANCE

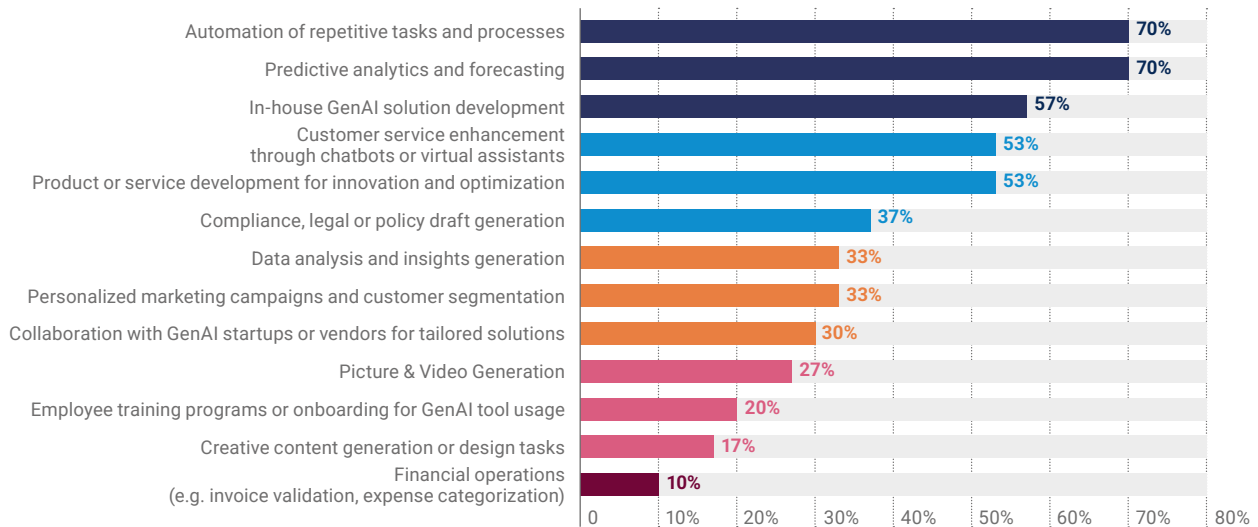
GenAI has moved from experimentation to real operational impact across Czech business services. The most widely deployed use cases focus on **automation of repetitive tasks (70%)** and **predictive analytics (70%)**, confirming that centres are using GenAI to boost efficiency and decision-making. More advanced applications are also gaining ground: **in-house solution development (57%)**, **chatbots and customer experience improvements (53%)**, and **product or service innovation (53%)**. Early-stage but promising areas, such as **compliance/legal drafting (37%)**, **data insights (33%)**, and **AI-driven marketing (33%)**, show how quickly GenAI is expanding beyond pure operations.

Adoption levels vary, but momentum is clear: **37% of centres** have **1–5 use cases in pilot**, **30%** already run **1–5 use cases in daily operations**, and a growing **26%** operate **5 or more use cases**. **20%** of centres are still in the exploration phase.

Governance maturity is developing in parallel. Nearly half of centres (**47%**) have a GenAI policy **in progress**, and **23%** have fully implemented frameworks. However, **17%** still operate without any formal governance, underscoring the need for clearer guidelines as use cases scale. Another **7%** plan to introduce governance structures within this year.

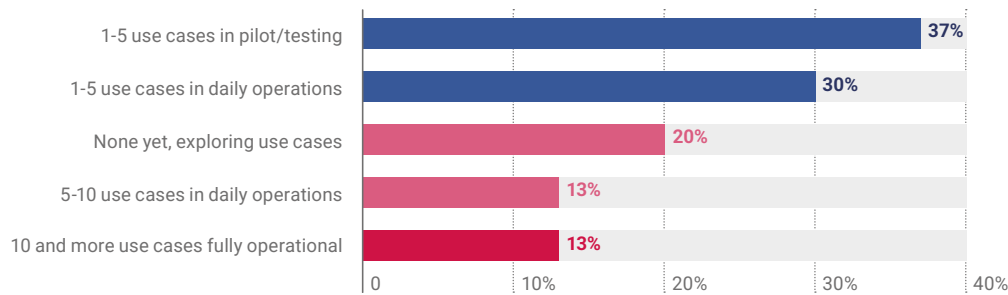
Overall, the data shows a sector rapidly embracing GenAI and expanding from automation to innovation while actively building the governance needed to manage risks, ensure safe deployment, and unlock the next wave of productivity gains.

Implemented/utilized use cases of GenAI technologies



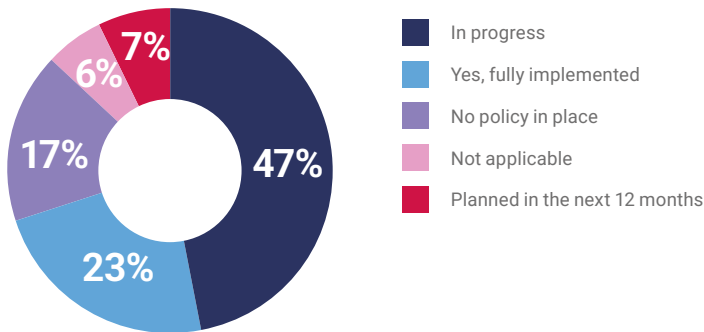
Source: ABSL Survey 2025

Number of GenAI Use Cases Implemented in Business Service Centres in the Czech Republic



Source: ABSL Survey 2025

Implementation of policy or governance framework for GenAI



Source: ABSL Survey 2025

SECURITY, PREPAREDNESS AND BUSINESS CONTINUITY IN A CHANGING WORLD



The global security environment has fundamentally changed. Europe now operates in a persistent “new normal” shaped by geopolitical tension, hybrid and cyber threats, pressure on energy, transport and digital infrastructure, climate-related disruptions and societal stress. According to NATO and EU assessments, these risks are increasingly combined and amplified, with crises rarely occurring in isolation. In this context, preparedness and resilience are no longer solely the responsibility of the state: business plays a critical role in maintaining essential services, employment,

1 NATO, *Strategic Concept 2022* and subsequent threat assessments, <https://www.nato.int>
European Commission, *EU Preparedness Union Strategy and Niinistö Report “Safer Together – Strengthening Europe’s Civil and Military Preparedness”*, <https://commission.europa.eu>



infrastructure and trust. The decisive factor is therefore not the existence of risk, but the capacity of a country and its business ecosystem to anticipate, absorb and recover from disruption.¹

Is Czechia still a secure location for global business services?

Despite recent political turmoils, yes. At the national level, most crisis management institutions remain strong and stable, including the **Integrated Rescue System** (coordinating emergency responses across services) or **National Cyber and Information Security Agency (NÚKIB)**, state's central authority on cyber security), and implements EU directives such as **Critical Entities Resilience (CER)**, **NIS2 cybersecurity directive**, and the **upcoming Cyber Resilience Act**, which push both the public and private sectors to manage risk, report incidents and plan for continuity. While these frameworks strengthen critical and digital infrastructure and promote public–private cooperation, vulnerabilities remain: **coordination gaps between sectors, limited private-sector crisis awareness, local-level resource constraints, and potential hybrid or cyber disruption.**

This matters for an economy of 10.8 million people and around 570,000 companies.

Businesses operating in Czechia should therefore integrate these realities into continuity and resilience planning.²

Key Actions to Strengthen National Resilience

But no location is without risk, especially in the current geopolitical setup. For business, the key question is whether your own operations are ready. Table-top simulations conducted by CIS show why this is urgent: disruptions often come in combinations (cyber incident + outage + information chaos + staffing constraints). Teams that have practised recover faster and reduce operational and reputational losses.³

Businesses should be integrated into national crisis management through sectoral platforms for sharing experience and best practices. Awareness of legal rights and obligations during different crisis states, supported by incentives and guidance from authorities, will ensure smoother coordination and stronger resilience. Organisations with clearly defined roles, trained leadership and tested procedures consistently demonstrate faster recovery and lower operational and reputational impact during crises.⁴

The Czech Republic in turn should ensure clear, coordinated strategic and crisis

² European Commission, *CER Directive, NIS2 Directive, Cyber Resilience Act*, <https://digital-strategy.ec.europa.eu/>; National Cyber and Information Security Agency (NÚKIB), <https://www.nukib.cz>

³ CIS, internal tabletop exercises and security simulations (2023–2025)

⁴ OECD; World Economic Forum, resilience and business continuity best practices, <https://www.oecd.org/>; <https://www.weforum.org>

communication (so companies get fast, trusted facts and less disruption from hostile information activities) and maintain a single national framework for crisis scenarios with regular cross-sector exercises that test coordination across sectors.

Conclusion

The current European security environment requires a shift from reactive crisis response to systematic preparedness and resilience building. Czechia combines strong institutional anchoring, growing crisis-management maturity, an active civil society and a capable business sector. While no country is risk-free, Czechia shows a high capacity to anticipate, absorb and recover from disruption, making it a secure and reliable location for business operations in an increasingly complex world.



Andrea Michalcová
Director
Centre for an Informed Society

www.informedociety.cz

The Centre for an Informed Society focuses on preparing society for crises. Get involved at www.pripravmese.cz

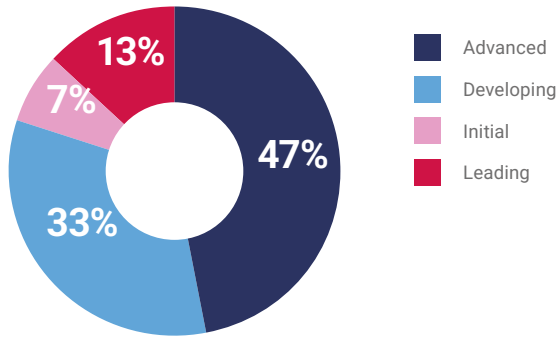
DIGITAL MATURITY & BARRIERS TO TRANSFORMATION

Almost half of Czech business services centres (**47%**) consider themselves to be at an **Advanced level** of digital maturity, reflecting growing confidence in their digital capabilities. A further **33%** place themselves in the **Developing** category, showing steady progress but with room to scale. Only a small portion view their maturity as **Initial (7%)**, while **13%** believe they have already reached a **Leading** digital position.

Despite this positive self-assessment, several barriers continue to slow down digital transformation efforts. The most frequently cited obstacles include the **high cost of implementation (60%)** and **IT/security constraints (57%)**, both of which limit the pace of adoption. Many centres also point to **limited internal expertise** and **uncertain ROI** (both 40%), making it challenging to prioritise or justify investments. Legal and compliance limitations affect over a third of organisations, while cultural and organisational hurdles, such as resistance to change or lack of executive buy-in remain secondary but notable.

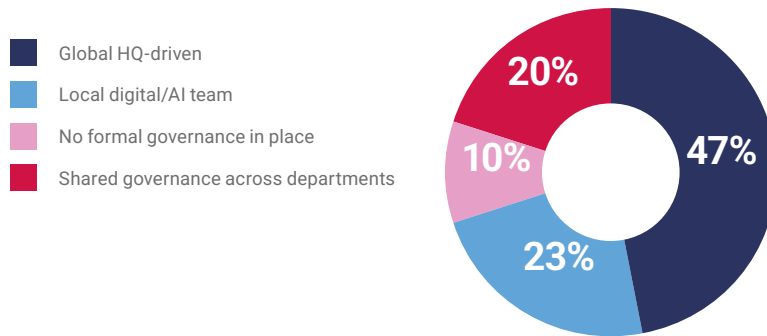
Overall, while organisations feel increasingly confident in their digital maturity, the path forward is still influenced by financial, technical, and regulatory constraints that must be addressed to unlock further progress.

Digital maturity of Czech business services centres



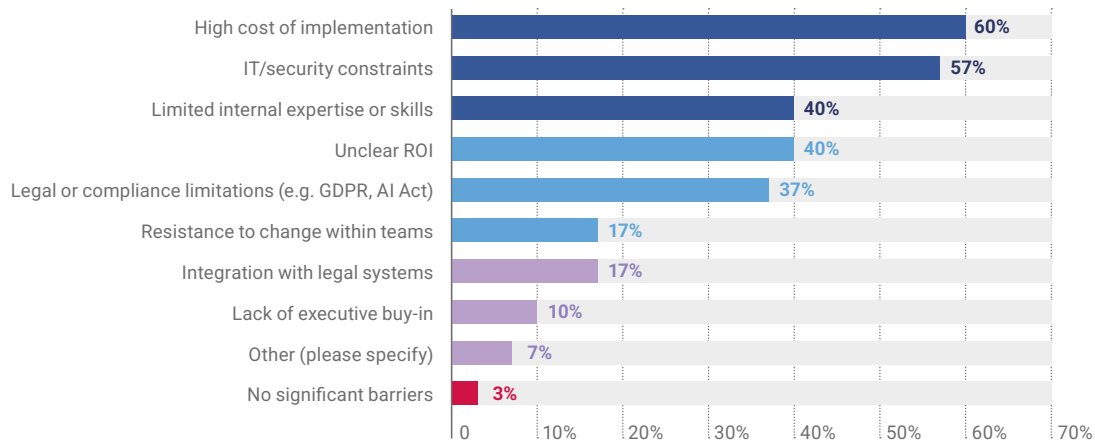
Source: ABSL Survey 2025

Governance and management of digital/AI initiatives



Source: ABSL Survey 2025

Barriers slowing down digital transformation



Source: ABSL Survey 2025

ABSL DIAMOND WINNER 2025 IN CATEGORY TECHNOLOGY INNOVATION

In the **Technology Innovation category**, the jury was most impressed by **Kyndryl's EcoOps** project. It is a smart solution based on artificial intelligence and rules that transforms traditional IT operations into an intelligent, sustainable, and future-ready ecosystem. Without the need to replace existing tools and implement additional systems, EcoOps connects to monitoring, automation, and ticketing platforms, reducing noise, suppressing false alerts, and triggering intelligent automation when needed. At the same time, it tracks CO₂ savings, energy consumption, and cost impact in real time, transforming IT metrics into measurable ESG indicators. In just six months of testing, EcoOps reduced tickets by 662, saved 9,500 kWh of energy, and reduced CO₂ emissions by 1,500 kg, while simplifying the work of IT teams. The solution was developed in-house using an open architecture that ensures flexibility, security, and full control. As a plug-in, it works in legacy, hybrid, and cloud environments, making IT operations leaner, greener, and more efficient. EcoOps is a practical, patent-protected step toward digital sustainability, proving that green IT can go hand in hand with greater efficiency, savings, and employee satisfaction.



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LABOUR MARKET AND SALARIES IN BUSINESS SERVICES

Chapter provider: Grafton Recruitment & GI Group



GRAFTON RECRUITMENT **SALARY GUIDE FOR BUSINESS SERVICES**

Despite a slight increase in unemployment, the labour market in the Czech Republic remains highly competitive. This is particularly evident in the business services sector, where companies have long struggled to find qualified employees with the necessary language skills.

Nevertheless, companies in this field remain ambitious and plan further employee growth seeking for white-collar workers with a variety of areas of expertise, ranging from IT and finance to HR, logistics, data analytics, cybersecurity and research and development. As these profiles are often in short supply, employers must continue to develop robust internal recruitment strategies and attractive offers for candidates.

Given the language requirements imposed on their employees, it is evident that the business services sector will be unable to function in the future without foreign employees. Foreign nationals currently account for 43% of all employees in this sector. Two-thirds of these employees come from EU countries and one-third come from so-called third countries, where recruitment still encounters difficulties associated with visa processes. These slow down recruitment and increase the cost of acquiring candidates.

In addition to recruiting new talent, retaining employees with key skills is one of the centres' main strategic priorities this year. Team stability and development are essential prerequisites for further growth. Companies are also intensifying their efforts in the area of digital transformation to help them streamline operations and respond flexibly to the changing needs of customers and employees. Other important topics include reducing operating costs, supporting innovation, and focusing strongly on diversity and inclusion.

Alongside employment growth, salaries in the Czech Republic's business services sector continue to rise slightly, most commonly by 3–5%. This increase is particularly evident in expert roles and positions requiring knowledge of less common languages. Companies in this sector also set a strong example to the rest of the market with their approach to equal pay. They show that the new legislation requires preparation from two perspectives: correctly and defensibly setting salaries and its impact on company culture.

As the expectations of candidates and their potential employers do not always align, it is becoming increasingly important for both parties to have access to relevant data to help them set realistic expectations regarding salaries, benefits and working conditions.

For a more detailed view of salary levels, check out the overview of the latest Grafton Salary Survey which was conducted during Q3 2025 in the 3 main hubs of Business Services Centers in the Czech Republic and covers over 120 job roles. The figures quoted in the survey are mainly based on the starting salaries of candidates for whom Grafton has arranged employment, as well as enquiries from companies to find employees. These are the usual gross monthly salaries in Czech crowns, which include variable components.

PRAGUE

BUSINESS SERVICES CZECH REPUBLIC		
CUSTOMER OPERATIONS	Min	Max
Customer Service Manager, Service Ops Manager	70,000 CZK	110,000 CZK
Customer Service Team Leader	60,000 CZK	85,000 CZK
Customer Service Representative, Customer Account Manager (more than 1 year of experience)	50,000 CZK	60,000 CZK
FINANCE & ACCOUNTING	Min	Max
Finance Manager/Finance Lead	135,000 CZK	220,000 CZK
RTR	Min	Max
GL Manager	95,000 CZK	130,000 CZK
GL Team Leader	90,000 CZK	110,000 CZK
Senior GL Accountant	75,000 CZK	85,000 CZK
GL Accountant (1-2 years of experience)	65,000 CZK	72,000 CZK
Intercompany Accountant	50,000 CZK	60,000 CZK
Tax Accountant/Consultant	70,000 CZK	85,000 CZK
VAT Analyst	75,000 CZK	85,000 CZK
P2P	Min	Max
AP/P2P Manager	85,000 CZK	110,000 CZK
AP/P2P Team Leader	75,000 CZK	85,000 CZK
AP Accountant/Specialist (more than 2 years of experience)	55,000 CZK	65,000 CZK
Travel & Expense Specialist	45,000 CZK	55,000 CZK
O2C	Min	Max
AR/OTC Manager	90,000 CZK	115,000 CZK
AR/OTC Team Leader	75,000 CZK	85,000 CZK
AR Accountant/OTC Specialist (1-2 years of experience)	50,000 CZK	55,000 CZK
Credit Controller	52,000 CZK	70,000 CZK
Credit Analyst	50,000 CZK	65,000 CZK
TREASURY	Min	Max
Treasury Manager	90,000 CZK	130,000 CZK
Treasury Specialist / Treasury Analyst (more than 2 years of experience)	65,000 CZK	80,000 CZK
COMPLIANCE	Min	Max
Compliance Lead	90,000 CZK	105,000 CZK
REPORTING, CONTROLLING AND ANALYSIS	Min	Max
Controlling Lead	85,000 CZK	150,000 CZK
Financial Controller	75,000 CZK	105,000 CZK

Labour Market and Salaries in Business Services

Financial Analyst (more than 2 years of experience)	60,000 CZK	80,000 CZK
Business Analyst (more than 2 years of experience)	70,000 CZK	100,000 CZK
Business Analyst (less than 2 years of experience)	55,000 CZK	70,000 CZK
Data Analyst	65,000 CZK	100,000 CZK
Reporting Specialist	50,000 CZK	75,000 CZK
OTHER	Min	Max
Payroll Manager	90,000 CZK	130,000 CZK
Payroll Specialist (more than 2 years of experience)	50,000 CZK	80,000 CZK
Payroll Specialist (less than 2 years of experience)	50,000 CZK	55,000 CZK
Master Data Specialist	55,000 CZK	70,000 CZK
Transition Manager	105,000 CZK	130,000 CZK
Process Improvement Specialist	60,000 CZK	80,000 CZK
HUMAN RESOURCES	Min	Max
HR Manager	85,000 CZK	150,000 CZK
HR Business Partner	70,000 CZK	120,000 CZK
HR Specialist	45,000 CZK	60,000 CZK
Internal Communications Specialist	50,000 CZK	80,000 CZK
Learning Coordinator	65,000 CZK	80,000 CZK
Recruitment Specialist	50,000 CZK	70,000 CZK
HR Team Leader	60,000 CZK	85,000 CZK
HR Administrator (more than 2 years of experience)	50,000 CZK	60,000 CZK
HR Data Management Specialist	40,000 CZK	50,000 CZK
SUPPLY CHAIN MANAGEMENT	Min	Max
Procurement Manager	90,000 CZK	120,000 CZK
Procurement Team Leader	65,000 CZK	80,000 CZK
Sourcing/Procurement Analyst	45,000 CZK	55,000 CZK
Procurement Specialist	50,000 CZK	70,000 CZK
Contract Specialist	45,000 CZK	70,000 CZK
Technical Buyer	60,000 CZK	70,000 CZK
Buyer (more than 1 year of experience)	55,000 CZK	70,000 CZK
Logistics Planner	48,000 CZK	60,000 CZK
IT SERVICES	Min	Max
IT Manager	105,000 CZK	160,000 CZK
IT Project Manager	95,000 CZK	130,000 CZK
Business Intelligence Developer	85,000 CZK	120,000 CZK

Business Intelligence Analyst	70,000 CZK	110,000 CZK
ERP/SAP Consultant	90,000 CZK	140,000 CZK
Automation Expert	75,000 CZK	95,000 CZK
IT Architect	90,000 CZK	160,000 CZK
Security and Privacy Specialist	80,000 CZK	120,000 CZK
Technical Support Team Leader	80,000 CZK	110,000 CZK
Helpdesk/IT Support 1st line (more than 1 year of experience)	47,000 CZK	55,000 CZK
SALES	Min	Max
Sales Manager	75,000 CZK	100,000 CZK
Sales Analyst/Data Analyst	55,000 CZK	80,000 CZK
Supervisor/Sales Coach	70,000 CZK	80,000 CZK
Sales Support Specialist/Administrative Sales Support/Sales Order Administrator	45,000 CZK	50,000 CZK
Inside Sales Specialist	42,000 CZK	52,000 CZK
IT SECURITY	Min	Max
Security Officer/Manager	120,000 CZK	200,000 CZK
Cyber-Security Engineer (more than 5 years experience)	90,000 CZK	120,000 CZK
Security Consultant	80,000 CZK	130,000 CZK
DEVELOPMENT	Min	Max
Embedded C++ Developer	85,000 CZK	130,000 CZK
C/C++ Developer	80,000 CZK	140,000 CZK
Java Developer	85,000 CZK	180,000 CZK
Android/iOS Developer	70,000 CZK	120,000 CZK
Database Developer (SQL, Teradata, Oracle)	80,000 CZK	130,000 CZK
ANALYSIS	Min	Max
Data Scientist	80,000 CZK	130,000 CZK
Data Analyst	75,000 CZK	100,000 CZK
AI/MACHINE LEARNING	Min	Max
AI/ML Software Developer	90,000 CZK	140,000 CZK
Machine Learning Engineer	90,000 CZK	140,000 CZK

Positions that also require active use of German, Dutch, French and Nordic languages usually offer a bonus that is around CZK 5,000 CZK monthly.

Labour Market and Salaries in Business Services

BRNO REGION		
BUSINESS SERVICES CZECH REPUBLIC		
CUSTOMER OPERATIONS	Min	Max
Customer Service Manager, Service Ops Manager	70,000 CZK	90,000 CZK
Customer Service Team Leader	55,000 CZK	65,000 CZK
Customer Service Representative, Customer Account Manager (more than 1 year of experience)	40,000 CZK	48,000 CZK
FINANCE & ACCOUNTING	Min	Max
Finance Manager/Finance Lead	135,000 CZK	180,000 CZK
RTR	Min	Max
GL Manager	85,000 CZK	105,000 CZK
GL Team Leader	70,000 CZK	80,000 CZK
Senior GL Accountant	55,000 CZK	70,000 CZK
GL Accountant (1-2 years of experience)	48,000 CZK	55,000 CZK
Intercompany Accountant	40,000 CZK	45,000 CZK
Tax Accountant/Consultant	50,000 CZK	60,000 CZK
VAT Analyst	55,000 CZK	65,000 CZK
P2P	Min	Max
AP/P2P Manager	80,000 CZK	95,000 CZK
AP/P2P Team Leader	60,000 CZK	70,000 CZK
AP Accountant/Specialist (more than 2 years of experience)	48,000 CZK	55,000 CZK
Travel & Expense Specialist	37,000 CZK	42,000 CZK
O2C	Min	Max
AR/OTC Manager	80,000 CZK	95,000 CZK
AR/OTC Team Leader	60,000 CZK	70,000 CZK
AR Accountant/OTC Specialist (1-2 years of experience)	45,000 CZK	50,000 CZK
Credit Controller	50,000 CZK	60,000 CZK
Credit Analyst	50,000 CZK	60,000 CZK
TREASURY	Min	Max
Treasury Manager	90,000 CZK	120,000 CZK
Treasury Specialist /Treasury Analyst (more than 2 years of experience)	65,000 CZK	80,000 CZK
COMPLIANCE	Min	Max
Compliance Lead	75,000 CZK	85,000 CZK
REPORTING, CONTROLLING AND ANALYSIS	Min	Max
Controlling Lead	80,000 CZK	110,000 CZK
Financial Controller	65,000 CZK	95,000 CZK

Financial Analyst (more than 2 years of experience)	55,000 CZK	70,000 CZK
Business Analyst (more than 2 years of experience)	60,000 CZK	75,000 CZK
Business Analyst (less than 2 years of experience)	50,000 CZK	60,000 CZK
Data Analyst	50,000 CZK	70,000 CZK
Reporting Specialist	45,000 CZK	55,000 CZK
OTHER	Min	Max
Payroll Manager	75,000 CZK	90,000 CZK
Payroll Specialist (more than 2 years of experience)	45,000 CZK	55,000 CZK
Payroll Specialist (less than 2 years of experience)	40,000 CZK	45,000 CZK
Master Data Specialist	45,000 CZK	55,000 CZK
Transition Manager	90,000 CZK	110,000 CZK
Process Improvement Specialist	55,000 CZK	70,000 CZK
HUMAN RESOURCES	Min	Max
HR Manager	85,000 CZK	130,000 CZK
HR Business Partner	65,000 CZK	85,000 CZK
HR Specialist	45,000 CZK	55,000 CZK
Internal Communications Specialist	50,000 CZK	60,000 CZK
Learning Coordinator	50,000 CZK	60,000 CZK
Recruitment Specialist	45,000 CZK	55,000 CZK
HR Team Leader	60,000 CZK	70,000 CZK
HR Administrator (more than 2 years of experience)	40,000 CZK	45,000 CZK
HR Data Management Specialist	38,000 CZK	43,000 CZK
SUPPLY CHAIN MANAGEMENT	Min	Max
Procurement Manager	85,000 CZK	105,000 CZK
Procurement Team Leader	60,000 CZK	80,000 CZK
Sourcing/Procurement Analyst	45,000 CZK	55,000 CZK
Procurement Specialist	50,000 CZK	60,000 CZK
Contract Specialist	45,000 CZK	55,000 CZK
Technical Buyer	50,000 CZK	60,000 CZK
Buyer (more than 1 year of experience)	45,000 CZK	55,000 CZK
Logistics Planner	45,000 CZK	55,000 CZK
IT SERVICES	Min	Max
IT Manager	105,000 CZK	145,000 CZK
IT Project Manager	95,000 CZK	115,000 CZK
Business Intelligence Developer	75,000 CZK	100,000 CZK

Labour Market and Salaries in Business Services

Business Intelligence Analyst	65,000 CZK	95,000 CZK
ERP/SAP Consultant	90,000 CZK	130,000 CZK
Automation Expert	70,000 CZK	90,000 CZK
IT Architect	90,000 CZK	140,000 CZK
Security and Privacy Specialist	75,000 CZK	110,000 CZK
Technical Support Team Leader	80,000 CZK	110,000 CZK
Helpdesk/IT Support 1st line (more than 1 year of experience)	45,000 CZK	55,000 CZK
SALES	Min	Max
Sales Manager	70,000 CZK	90,000 CZK
Sales Analyst/Data Analyst	55,000 CZK	70,000 CZK
Supervisor/Sales Coach	65,000 CZK	75,000 CZK
Sales Support Specialist/Administrative Sales Support/Sales Order Administrator	40,000 CZK	45,000 CZK
Inside Sales Specialist	40,000 CZK	50,000 CZK
IT SECURITY	Min	Max
Security Officer/Manager	110,000 CZK	165,000 CZK
Cyber-Security Engineer (more than 5 years experience)	80,000 CZK	120,000 CZK
Security Consultant	70,000 CZK	100,000 CZK
DEVELOPMENT	Min	Max
Embedded C++ Developer	80,000 CZK	125,000 CZK
C/C++ Developer	70,000 CZK	115,000 CZK
Java Developer	85,000 CZK	145,000 CZK
Android/iOS Developer	65,000 CZK	105,000 CZK
Database Developer (SQL, Teradata, Oracle)	70,000 CZK	115,000 CZK
ANALYSIS	Min	Max
Data Scientist	70,000 CZK	110,000 CZK
Data Analyst	70,000 CZK	90,000 CZK
AI/MACHINE LEARNING	Min	Max
AI/ML Software Developer	80,000 CZK	130,000 CZK
Machine Learning Engineer	80,000 CZK	130,000 CZK

Positions that also require active use of German, Dutch, French and Nordic languages usually offer a bonus that is around CZK 5,000 CZK monthly.

OSTRAVA REGION

BUSINESS SERVICES CZECH REPUBLIC		
CUSTOMER OPERATIONS	Min	Max
Customer Service Manager, Service Ops Manager	70,000 CZK	90,000 CZK
Customer Service Team Leader	55,000 CZK	65,000 CZK
Customer Service Representative, Customer Account Manager (more than 1 year of experience)	37,000 CZK	47,000 CZK
FINANCE & ACCOUNTING	Min	Max
Finance Manager/Finance Lead	130,000 CZK	180,000 CZK
RTR	Min	Max
GL Manager	85,000 CZK	100,000 CZK
GL Team Leader	65,000 CZK	80,000 CZK
Senior GL Accountant	55,000 CZK	65,000 CZK
GL Accountant (1-2 years of experience)	45,000 CZK	55,000 CZK
Intercompany Accountant	40,000 CZK	45,000 CZK
Tax Accountant/Consultant	50,000 CZK	60,000 CZK
VAT Analyst	55,000 CZK	65,000 CZK
P2P	Min	Max
AP/P2P Manager	80,000 CZK	90,000 CZK
AP/P2P Team Leader	55,000 CZK	65,000 CZK
AP Accountant/Specialist (more than 2 years of experience)	48,000 CZK	58,000 CZK
Travel & Expense Specialist	35,000 CZK	40,000 CZK
O2C	Min	Max
AR/OTC Manager	80,000 CZK	90,000 CZK
AR/OTC Team Leader	60,000 CZK	70,000 CZK
AR Accountant/OTC Specialist (1-2 years of experience)	42,000 CZK	47,000 CZK
Credit Controller	50,000 CZK	65,000 CZK
Credit Analyst	50,000 CZK	55,000 CZK
TREASURY	Min	Max
Treasury Manager	90,000 CZK	115,000 CZK
Treasury Specialist / Treasury Analyst (more than 2 years of experience)	65,000 CZK	75,000 CZK
COMPLIANCE	Min	Max
Compliance Lead	70,000 CZK	85,000 CZK
REPORTING, CONTROLLING AND ANALYSIS	Min	Max
Controlling Lead	80,000 CZK	110,000 CZK
Financial Controller	65,000 CZK	85,000 CZK

Labour Market and Salaries in Business Services

Financial Analyst (more than 2 years of experience)	55,000 CZK	65,000 CZK
Business Analyst (more than 2 years of experience)	60,000 CZK	70,000 CZK
Business Analyst (less than 2 years of experience)	48,000 CZK	58,000 CZK
Data Analyst	55,000 CZK	65,000 CZK
Reporting Specialist	45,000 CZK	55,000 CZK
OTHER	Min	Max
Payroll Manager	75,000 CZK	85,000 CZK
Payroll Specialist (more than 2 years of experience)	45,000 CZK	55,000 CZK
Payroll Specialist (less than 2 years of experience)	40,000 CZK	45,000 CZK
Master Data Specialist	45,000 CZK	55,000 CZK
Transition Manager	85,000 CZK	110,000 CZK
Process Improvement Specialist	55,000 CZK	65,000 CZK
HUMAN RESOURCES	Min	Max
HR Manager	80,000 CZK	110,000 CZK
HR Business Partner	65,000 CZK	85,000 CZK
HR Specialist	45,000 CZK	55,000 CZK
Internal Communications Specialist	50,000 CZK	60,000 CZK
Learning Coordinator	50,000 CZK	65,000 CZK
Recruitment Specialist	45,000 CZK	55,000 CZK
HR Team Leader	55,000 CZK	65,000 CZK
HR Administrator (more than 2 years of experience)	40,000 CZK	45,000 CZK
HR Data Management Specialist	35,000 CZK	40,000 CZK
SUPPLY CHAIN MANAGEMENT	Min	Max
Procurement Manager	85,000 CZK	105,000 CZK
Procurement Team Leader	55,000 CZK	75,000 CZK
Sourcing/Procurement Analyst	40,000 CZK	50,000 CZK
Procurement Specialist	47,000 CZK	57,000 CZK
Contract Specialist	45,000 CZK	55,000 CZK
Technical Buyer	50,000 CZK	60,000 CZK
Buyer (more than 1 year of experience)	45,000 CZK	55,000 CZK
Logistics Planner	45,000 CZK	55,000 CZK
IT SERVICES	Min	Max
IT Manager	105,000 CZK	125,000 CZK
IT Project Manager	90,000 CZK	110,000 CZK
Business Intelligence Developer	75,000 CZK	95,000 CZK

Business Intelligence Analyst	65,000 CZK	95,000 CZK
ERP/SAP Consultant	85,000 CZK	120,000 CZK
Automation Expert	65,000 CZK	85,000 CZK
IT Architect	80,000 CZK	105,000 CZK
Security and Privacy Specialist	75,000 CZK	95,000 CZK
Technical Support Team Leader	70,000 CZK	90,000 CZK
Helpdesk/IT Support 1st line (more than 1 year of experience)	45,000 CZK	50,000 CZK
SALES	Min	Max
Sales Manager	70,000 CZK	90,000 CZK
Sales Analyst/Data Analyst	50,000 CZK	65,000 CZK
Supervisor/Sales Coach	60,000 CZK	70,000 CZK
Sales Support Specialist/Administrative Sales Support/Sales Order Administrator	37,000 CZK	42,000 CZK
Inside Sales Specialist	40,000 CZK	45,000 CZK
IT SECURITY	Min	Max
Security Officer/Manager	90,000 CZK	120,000 CZK
Cyber-Security Engineer (more than 5 years experience)	70,000 CZK	85,000 CZK
Security Consultant	60,000 CZK	65,000 CZK
DEVELOPMENT	Min	Max
Embedded C++ Developer	75,000 CZK	90,000 CZK
C/C++ Developer	80,000 CZK	95,000 CZK
Java Developer	85,000 CZK	105,000 CZK
Android/iOS Developer	65,000 CZK	75,000 CZK
Database Developer (SQL, Teradata, Oracle)	70,000 CZK	80,000 CZK
ANALYSIS	Min	Max
Data Scientist	65,000 CZK	80,000 CZK
Data Analyst	65,000 CZK	80,000 CZK
AI/Machine Learning	Min	Max
AI/ML Software Developer	70,000 CZK	110,000 CZK
Machine Learning Engineer	70,000 CZK	110,000 CZK

Positions that also require active use of German, Dutch, French and Nordic languages usually offer a bonus that is around CZK 5,000 CZK monthly.



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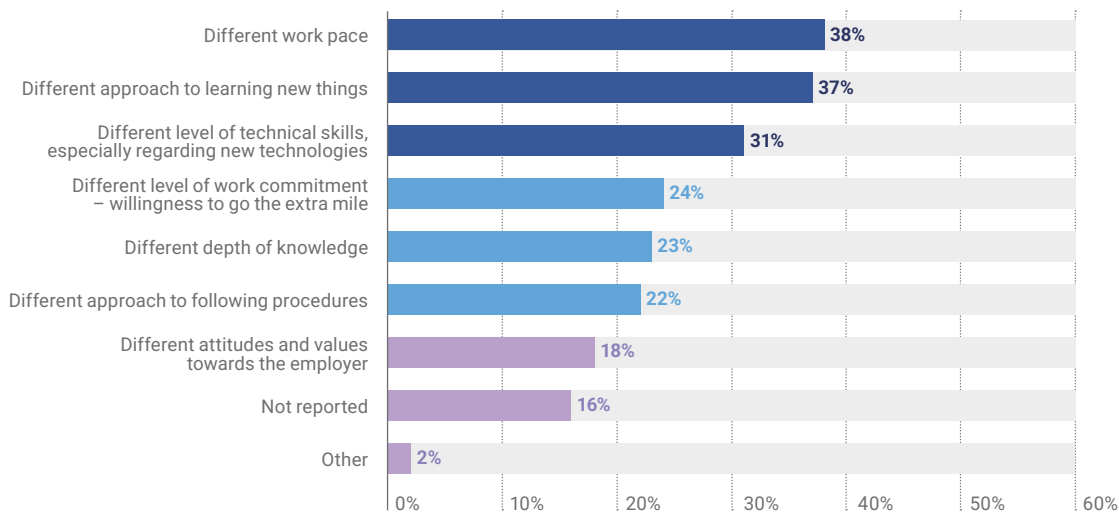
Multigenerational Teams as a Performance Driver in IT and Business Services

Multigenerational teams are increasingly seen as a strategic asset in IT and business services rather than a necessary compromise. According to Grafton Recruitment’s research, 40% of companies actively welcome intergenerational cooperation, while another 41% see clear benefits in mutual learning between age groups. Importantly, resistance is marginal—only around 1% of employers consider multigenerational teams a “necessary evil” or reject them altogether. This suggests that age diversity is no longer perceived as a risk, but as a source of added value, particularly in knowledge-driven service environments.

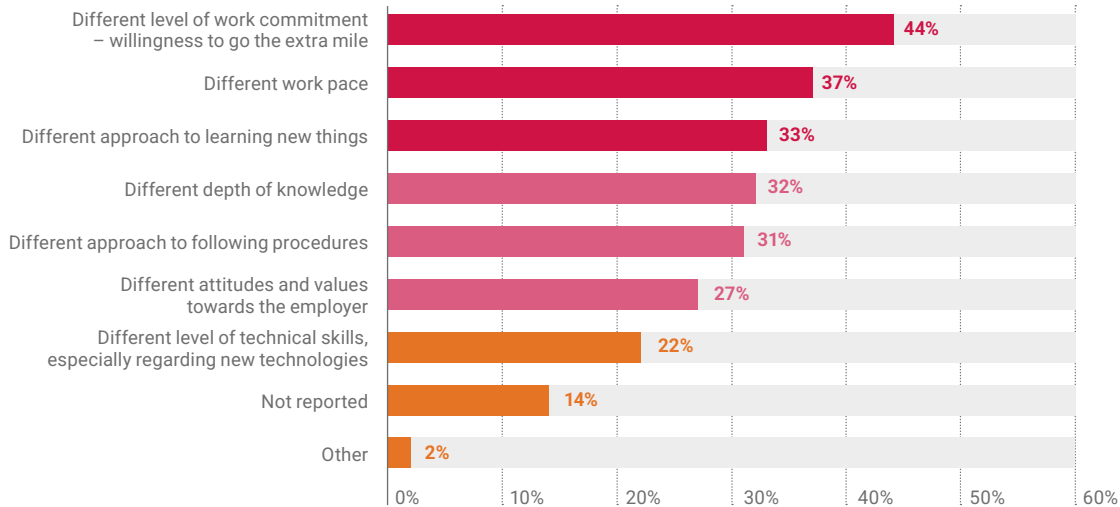
Employees’ views largely align with this perspective, although they highlight specific friction points. While 35% of employees identify mutual learning as the main benefit of multigenerational teamwork, differences in work pace and commitment remain the most frequently cited challenges. Data show a clear contrast: younger employees most often point to slower work pace when collaborating with senior colleagues, whereas older generations emphasize differing levels of work engagement or willingness to go the extra mile among younger staff. These findings underline that successful multigenerational collaboration is less about age itself and more about managing expectations, work rhythms and communication styles.

Crucially, companies are not embracing age diversity only because of labour shortages. As many as 82% of employers continue to recruit candidates aged 50+, reflecting a deliberate effort to retain experience, ensure continuity and strengthen know-how within teams. For IT and business services centres, this approach delivers tangible benefits: younger professionals bring digital skills and agility, while senior colleagues contribute deep process knowledge, contextual understanding and stability. When combined effectively, multigenerational teams support higher service quality, resilience and long-term sustainability—key success factors in an increasingly complex and fast-evolving business services landscape.

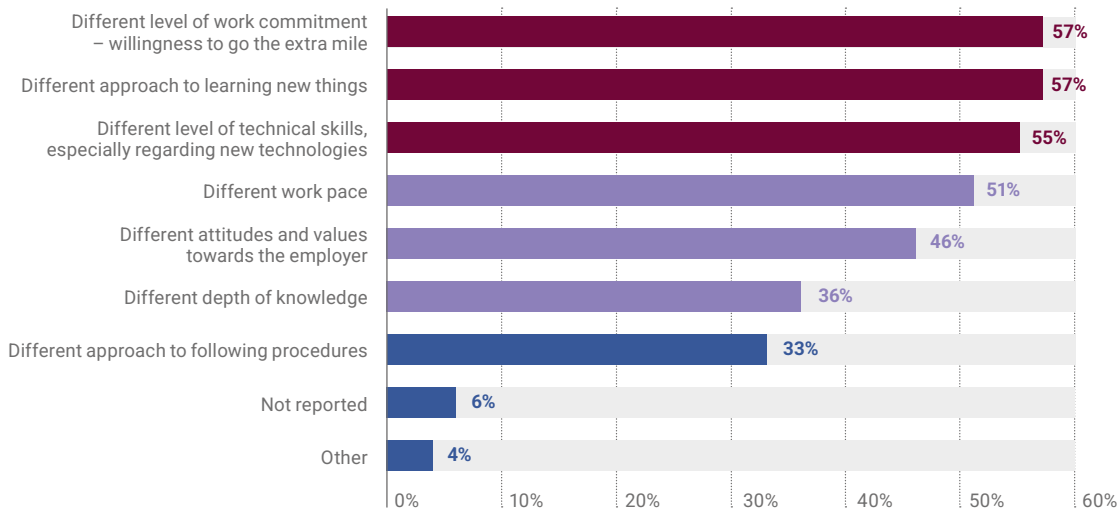
What do you consider the most challenging aspects of working together with older colleagues?



What do you consider the most challenging aspects of working together with younger colleagues?



What do they consider the most challenging aspects of working together with cross-generational collaboration?





REAL ESTATE AND OFFICE MARKET







Chapter provider: Colliers

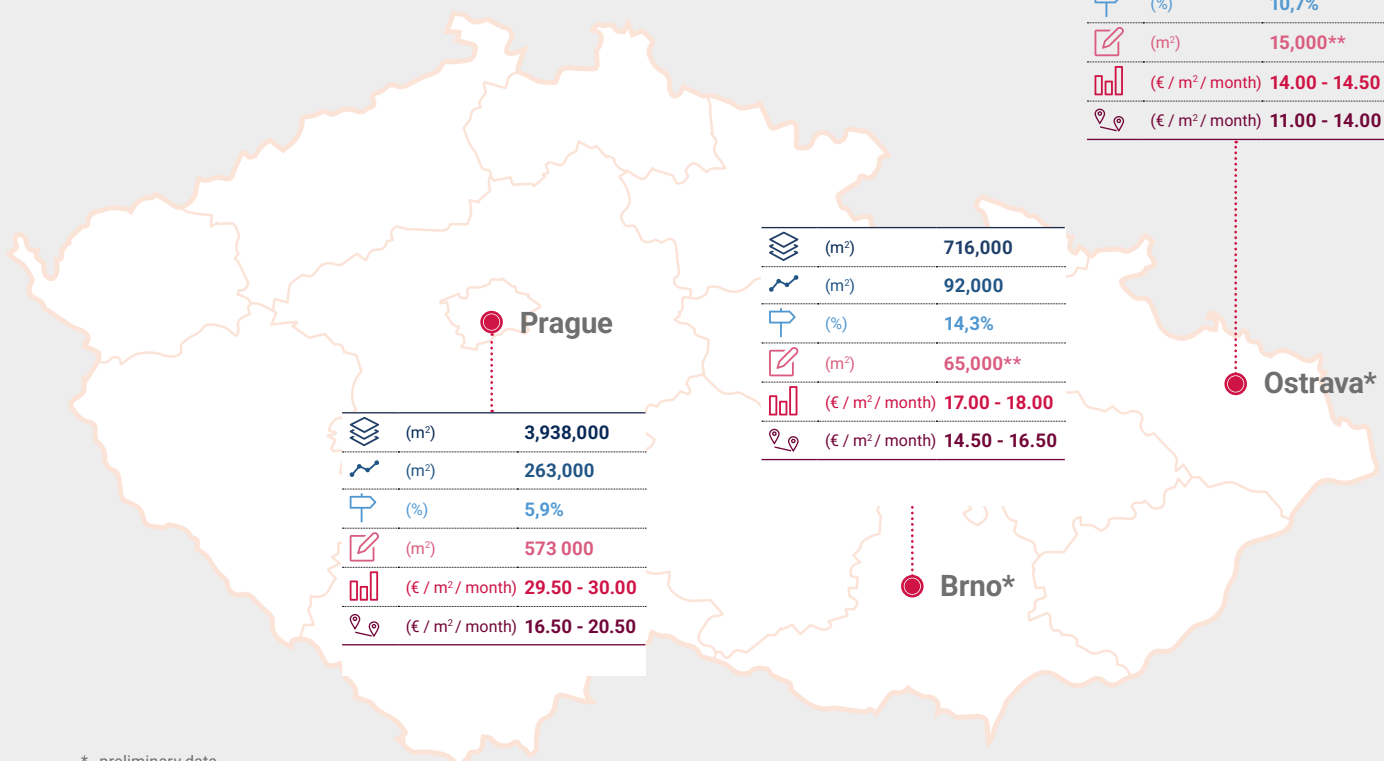
OFFICE MARKET IN THE CZECH REPUBLIC

The Czech real estate market, in particular the office and industrial sectors, proved its resilience and is set to endure the near future despite daily changing geopolitics and difficult economic headwinds. Thanks to the highly skilled and talented business sectors and the market's strategic location in Central Europe, we expect to see the transformation towards a mature, sustainable and modern European 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)

	(m ²)	246,000
	(m ²)	3,000
	(%)	10,7%
	(m ²)	15,000**
	(€ / m ² / month)	14.00 - 14.50
	(€ / m ² / month)	11.00 - 14.00



* preliminary data

** estimate

Source: Source: PRF Q4 2025, RRF Q3 2025

PRAGUE

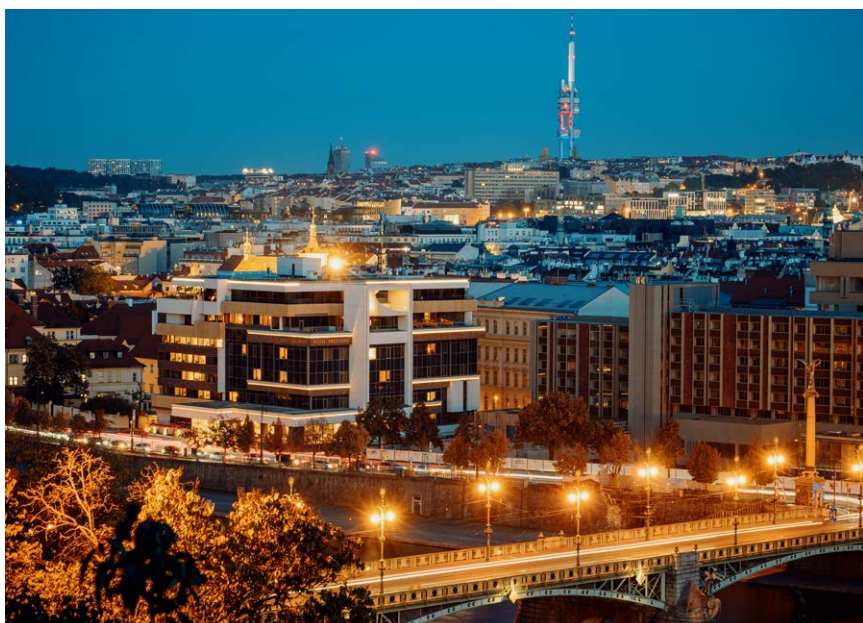
Prague, as the country's economic, cultural and historic centre, naturally has the largest office market. Almost 4 million m² of modern office space is commonly divided into 10 districts or several business hubs. Most offices are in Prague 4 and Prague 5, followed by Prague 8 and Prague 1. If we look for the specific locations, areas like Pankrác, Karlín, Brumlovka, or the city centre are the most sought-after office hotspots. However, there are established modern office hubs scattered across most districts, which are attractive to occupiers thanks to their proximity to the airport, metro stations, highway connections, or simply the genius loci of the locations.

The market has experienced a continuous increase in available space since the historical lows in 2019, when there was very little to choose from for newcomers or even for the established occupiers. Now, we are experiencing a more neutral market, where occupiers have several options if the move is timed well in advance. A vacancy rate of around 6% was recorded throughout 2025, considerably lower than in other CEE capitals. Several locations, especially within the most established and sought-after office hubs mentioned above, can lack the right amount of space at the right time due to high demand.

The limited number of office projects completed between 2021 and 2025 helped keep the vacancy rate at a decent level. As a result, the Prague market has not experienced any major shock or sudden availability in recent years. Also, there have been very few distressed assets in recent years. On the other hand, this can be perceived as double-edged and limited new construction can limit the number of choices companies have when looking for new offices on the market. Nevertheless, the future of the Prague office market is not gloomy, as developers still have a formidable pipeline of modern projects involving prominent architects and urban planners.

The cost of prime office space in Prague experienced an increase, but in 2025, it was found stable at up to €30 per m² per month. The energy crisis, limited construction workforce, and construction costs are putting some new developments under review; most will proceed, often being rescheduled or, in some cases, even redesigned for residential use. The prices and capacities of construction will likely remain unchanged, potentially widening the price gap between new and existing projects pricewise. Furthermore, every to-be project in the pipeline is designed with ESG principles in mind. Looking away from the city centre, costs per square meter between €16.50 and €20.50 are more common for the most modern space in established office locations. However, developers are currently asking between €20 and €26 per square meter rents for the inner-city locations and over €35 per square meter for the premium projects within the downtown area.

Limited new development activity limits the number of opportunities. However, new projects provide exceptional quality.



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BRNO

With approximately 700,000 m² 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 in hubs around the centre and in several spots on the outskirts, which benefit from proximity to the universities or industrial facilities. Occupiers in Brno are often branches of larger companies acting as business service centres or research & development facilities.

Despite the active market with moves or tenant entries, a vacancy rate of between 12% and 15% was recorded throughout 2025. As the market is relatively small and complex, larger completions or spaces vacated by large occupier moves can take longer to absorb, especially amid the latest rightsizing trend.

Construction activity in Brno is ambitious and usually led by locally focused developers who are aware of the local market's needs and are not focusing only on office or industrial construction. In the last five years, approximately 107,000 m² of modern offices have been delivered, with a slightly lower volume under construction. Like Prague, new locations are emerging - Nová Zbrojovka, Dornych, or Trio Brno by established developers are becoming a real choice for coming occupiers, not to mention upcoming expansions of the Ponávka and Vlněna office hubs.

Office costs in Brno have increased over the past several years, thanks to the increasing quality of the developments and increasing demand. Compared with Prague, Brno is cheaper in most cases, but this gap is narrowing, especially given the ongoing situation regarding material and labour costs and the limited office development activity. The cost per square meter in prime projects in Brno is around €18.00 per m² 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 €14.50 to €16.50 per m² per month.

Multiple locations in Brno are rapidly changing, aiming to create attractive locations



OSTRAVA

The stock of modern offices in Ostrava accounted for approximately 250,000 m² and represents the third largest office market in the country. Modern properties are spread across the city, but the area surrounding the shopping mall Forum Nová Karolína and the historical core is considered the prime office location, with the most modern properties and developments here.

The available office space for lease has been largely stable during the past years, between 10% and 12%. The vacant space is slowly being absorbed, and it can sometimes be difficult to find a unit of the desired size or quality. As the market is a third the size of the Brno office market, every larger vacant or leased office significantly affects the resulting vacancy rate.

There has always been a shortage of construction activity over the past several years in Ostrava, interrupted by the recently completed Organica, a great example of modern and smart office property. It is not that the city does not attract developers; rather, permitting and slower market absorption make development more difficult. Moreover, investors are currently focused on the industrial sector, which is booming around Ostrava. This situation is improving, mainly thanks to local investors, with the currently under construction multi-functional building Václav by developer Antracit being a great example.

The cost of prime offices in Ostrava is stable at approximately €14 per m² per month, and was driven by the leasing of the 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 €11 and €14 per m² per month.

Numerous interesting public developments in Ostrava will offer modern facilities like a library, a concert hall and others.





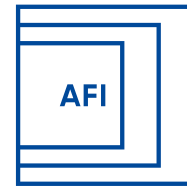
OTHER REGIONAL CITIES

For the rest of the country, local developers (and even direct occupiers) are pushing through projects, especially in well-connected cities like Pilsen, Hradec Králové and Olomouc or near established industrial zones. Such projects, already existing or proposed, are of high quality and offer excellent services to their clients. Thanks to lower operating costs, the decision to establish an office in regions can prove economically viable, but it can also be more challenging to populate properly.

SUMMARY

Despite the current geopolitical disorder, the central European and the Czech market, especially, can attract and withhold new tenants through competitive market conditions such as high property standards, an innovative environment, and a skilled, well-educated and talented workforce. Supported by the beautiful picture-postcard looks of Czech cities, high standards of living, its location in the heart of the European continent, and its connections to surrounding countries, the Czech Republic should always be on the list of expansion options.

CZECHIA: A STABLE EUROPEAN BASE FOR HIGH-VALUE INVESTMENT



Association
for Foreign
Investment

The Czech Republic combines a high quality of life with a highly educated, technically skilled workforce – a combination that has consistently attracted foreign investors seeking both performance and long-term stability. A safe living environment, reliable public infrastructure and accessible healthcare support the relocation of international professionals, while a strong education system delivers talent for engineering, IT, business services and R&D.

At AFI – the Association for Foreign Investment – we work in close cooperation with the Ministry of Industry and Trade, CzechInvest and other public institutions to support investors throughout the entire investment lifecycle. Together with CzechInvest, AFI contributes to a transparent and predictable investment environment. Through its members and trusted partners, AFI provides investors with hands-on expertise and practical support to help them establish operations in Czechia, grow their presence and successfully expand over the long term

Over the past 15–20 years, foreign direct investment in Czechia has evolved from predominantly large-scale manufacturing toward higher value-added activities, including advanced technologies, R&D centres and business services (Source: CzechInvest, 2024). Between 2014 and 2024, CzechInvest facilitated 787 investment projects worth more than EUR 18 billion, creating almost 89,000 jobs (Source: CzechInvest, 2024). Notably, approximately 70% of recent projects represent expansions of existing operations, highlighting strong investor confidence and long-term commitment (Source: CzechInvest, 2024).

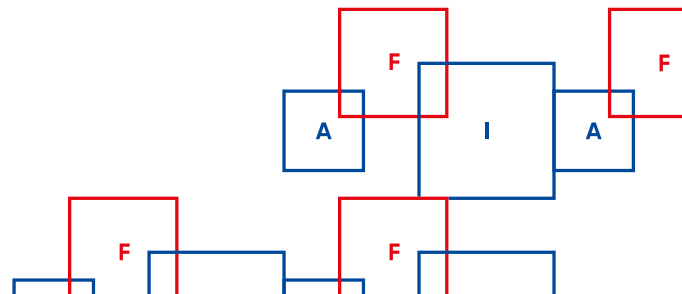
Germany, the United States, Japan and South Korea remain among the most significant source countries, with global companies such as ON Semiconductor, Accenture, Volkswagen, Hyundai and Toyota having established and expanded successful operations in Czechia (Source: CzechInvest, 2025). This track record reflects the country's ability to serve as a reliable European base for advanced manufacturing, technology development and business services.

Today, Czechia stands as a proven European location where investors can plan with confidence – supported by strong institutions, skilled people and a track record of long-term success. It is a place not only to invest, but to build, grow and remain competitive in Europe for decades to come.



Gabriela Hrbáčková

*Chairwoman of the Steering Committee
Association for Foreign Investment - AFI*



787

investment projects
in 2014–2024



18 BILLION

investment projects worth
in 2014–2024



89.000

creating jobs
in 2014–2024

BRANDS

ON Semiconductor, Accenture, Volkswagen, Hyundai, Toyota

Source: CzechInvest, 2024



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