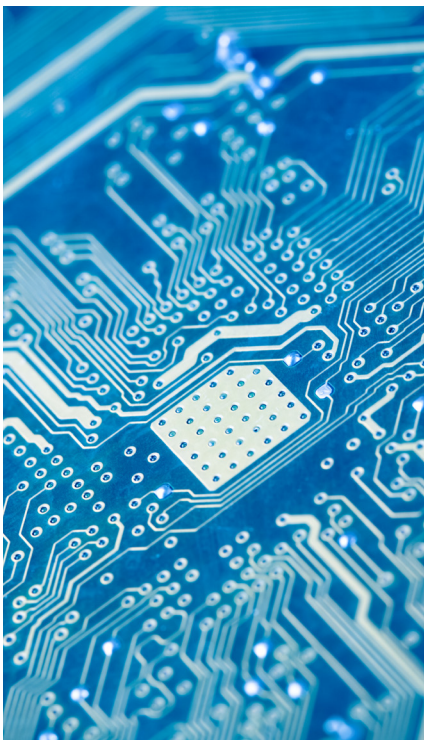


# Information & Communications Technology Sector in **SLOVAKIA**



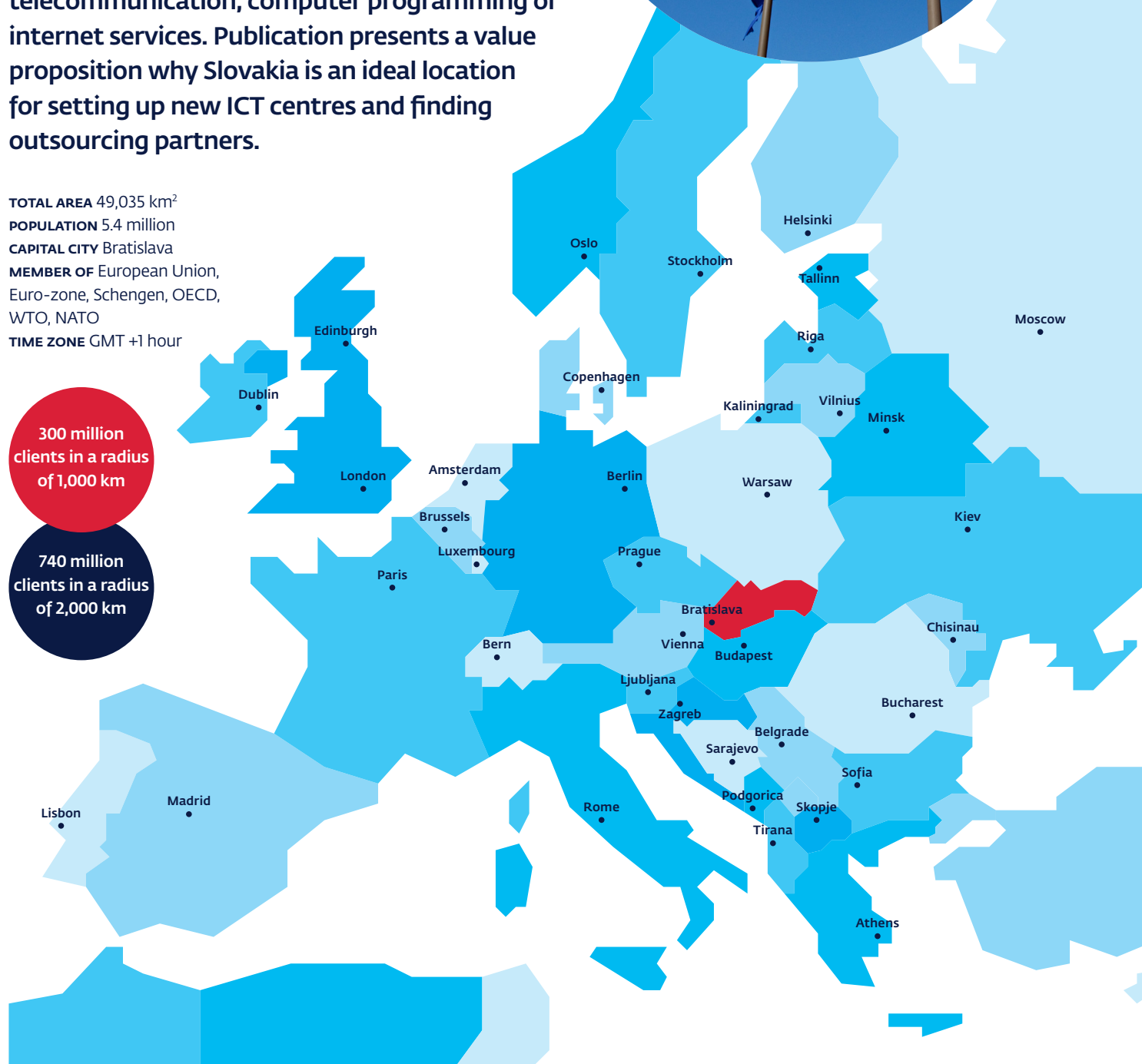
# Information & Communications Technology (ICT) Sector in Slovakia

The purpose of this publication is to introduce Slovakia's dynamically expanding ICT sector, which includes activities especially related to telecommunication, computer programming or internet services. Publication presents a value proposition why Slovakia is an ideal location for setting up new ICT centres and finding outsourcing partners.

**TOTAL AREA** 49,035 km<sup>2</sup>  
**POPULATION** 5.4 million  
**CAPITAL CITY** Bratislava  
**MEMBER OF** European Union, Euro-zone, Schengen, OECD, WTO, NATO  
**TIME ZONE** GMT +1 hour

300 million clients in a radius of 1,000 km

740 million clients in a radius of 2,000 km



# ICT in Slovakia at a Glance

The ICT sector plays an important role in the Slovak economy and has significant potential for growth. Due to a favorable combination of business advantages Slovakia has become an attractive destination for ICT investors.

1<sup>st</sup>

## Digital/Technological skills

Based on the IMD World Digital Competitiveness Ranking, among Visegrad group countries, Slovakia ranks 1<sup>st</sup> in areas such as Internet users, or Investment in Telecommunications.

16 000

## Companies in the IT sector

The number of IT companies is continually growing

4,2%

## ICT share on the total employment

The sector creates more than 110,000 job opportunities

80%

## Growing employment in the ICT sector

The total number of employees in the sector grew by 80% between 2013 and 2023

4,5%

## ICT's contribution to Slovakia's GDP

Significant footprint in the Slovak economy



## Top Reasons to Establish an ICT Company in Slovakia

1

Adaptable, educated and cost-effective workforce

2

The highest labour productivity in the region

3

Well-developed ICT institutional network

4

High quality data & network coverage

5

Strategic geographical location from the perspective of time zonation

6

Political & economic stability

7

Euro currency as one of the few in CEE

8

Additional tax deduction for R&D expenses up to 100%

9

Attractive investment incentives for the ICT sector

10

One of the most export-oriented and open economies in the EU

Source: ITAS 2024, IMD World Digital Competitiveness Ranking 2023, Eurostat 2024 (last available data 2023)



# Qualified Labour Force



Slovak labour force is perceived by foreign investors as educated, motivated, adaptable to culturally different management styles with great multilingual competences and very positive attitude to work habits.



## LANGUAGE COMPETENCES

86% of Slovaks speak at least one other language besides their mother tongue. Multilingualism is rising also among young generation. Students learn at least one foreign language already at primary school and continue these studies at higher levels.

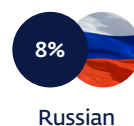
### The Most Common Foreign Languages Taught at Slovak Secondary Schools % of all students learning foreign languages



English



German



Russian



Spanish

Source: Eurostat, 2024 (latest data from 2022)

## ICT COMPETENCES OF SLOVAK LABOUR FORCE

ICT technologies became an integrated part of the daily life in Slovakia.

Their role continues to grow which is reflected by steadily raising adaptability of the Slovak population to ICT technologies.

### 5G Coverage



5G coverage of households increased from 55% in 2022 to 79% in 2023

### 5G Spectrum



5G spectrum increased from 33% to 67% within the last 5 years.

### Households with very high capacity network coverage



Approx. 2/3 of all households have access to VHCN coverage



Source: Digital Economy and Society Index Report, 2024

\*The amount of spectrum assigned and ready for 5G use within the so-called 5G pioneer bands.

# ICT Related Education in Slovakia

Almost half of secondary school graduates keep on studying at universities, thus creating qualified and skilled labour force. Programs including ICT studies are becoming more and more popular & sought after by young generation.



## 12 ICT Faculties at 7 Slovak Universities

11,784

students enrolled in ICT study fields

2,826

graduates of ICT study fields per year

## 6 Arts Faculties Relevant for Game Development Industry

3,375

students enrolled in arts faculties relevant for game development industry

Besides solely ICT programs there are also other study fields relevant for game development industry, such as animation, visual effects, production, distribution, game design sound production and others. This education is provided by **4 arts faculties**.

976

graduates of arts faculties relevant for game development industry

## ACCADEMIC PARTNERSHIPS

### Success Stories of T-Systems In Košice

#### DUAL EDUCATION\*

As a pioneer in this field, since the academic year 2013/2014 T-Systems has implemented ICT dual education initiative where students receive 70% of practical education.

#### INDIVIDUAL PROGRAMS

T-Systems Slovakia, in cooperation with the Faculty of Business Economics of the University of Economics in Bratislava, launched the Honoris PM Program with the focus on project management.

#### SKILLS FOR SUCCESS — FROM UNIVERSITY TO WORKPLACE

At the Faculty of Economics of the Technical University in Košice, experts from T-Systems are involved in teaching the subject of SAP, used by most of the centres.

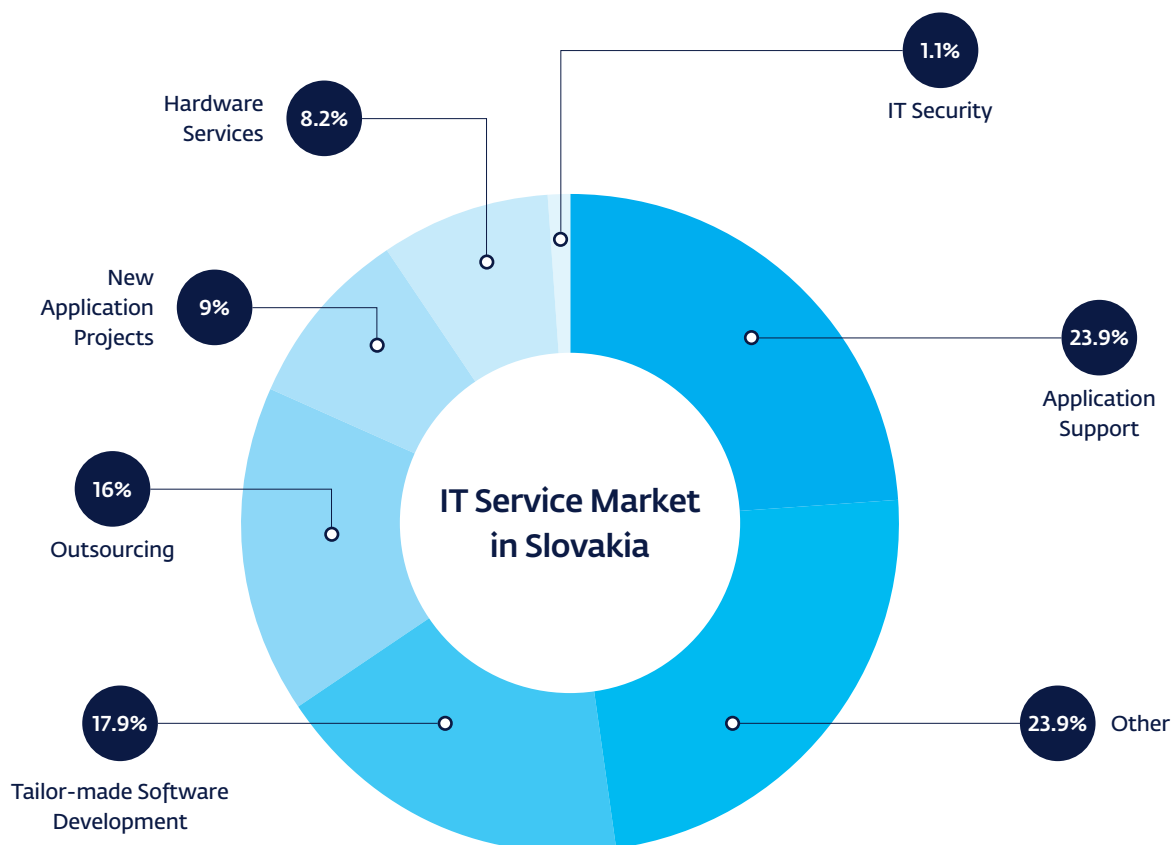
\*Note: Education and training adapted to the employer's requirements at secondary grammar schools.

Source: Slovak Centre of Scientific & Technical Information, 2023/2024, SARIO, T-Systems

# Inside the Slovak ICT Market



The majority of IT services in Slovakia are composed by application support and other tailor-made services (such as helpdesk, network administration, cloud storage, remote support, etc.) followed by tailor-made software development and outsourcing.



Source: Trend, 2019, (last available data)

# Competitive Salaries in Slovak ICT Sector

Although salaries in the ICT sector are above the Slovak average, in comparison with the Western EU countries remain significantly lower and still competitive in the CEE region.



Differences in salaries occur also on the regional level in Slovakia allowing the investors to explore regions outside the main hubs.

AVERAGE GROSS MONTHLY SALARY IN EUR (SELECTED POSITIONS)

AREA	POSITION	BRATISLAVA		KOŠICE		OTHER REGIONS	
		MIN	MAX	MIN	MAX	MIN	MAX
Technical Support	Technical Support Team Leader*	2,500	3,200	2,300	2,800	2,300	2,800
	Technical Support Level 1*	1,500	1,900	1,300	1,600	1,400	1,700
SW Development	SW Technical Lead	2,800	4,500	2,800	4,400	2,800	4,400
	SW Engineer (C++, .Net, Java, Javascript), 1–3 years experience	1,800	2,800	1,600	3,400	1,800	2,800
	SW Engineer (C++, .Net, Java, Javascript), 3 and more years experience	2,800	4,200	1,800	4,000	2,800	4,200
IT Consulting	Business Analyst (more than 3 years of experience)	2,200	3,600	2,000	3,000	2,300	3,300
	BI Consultant	2,000	3,300	1,800	3,000	2,000	3,000
	ERP Consultant	2,200	3,500	2,000	3,300	2,200	3,200
	ERP Developer	2,300	3,800	2,000	3,800	2,300	3,800
Other	Network Engineer (3–5 years experience)	2,000	3,500	1,800	3,300	1,900	3,000
	Linux System Administrator	1,800	3,000	1,800	3,000	1,700	2,700
	Window Administrator	1,800	3,000	1,600	2,500	1,700	2,600

\*depending on language skills  
Source: Grafton/Platy.sk, 2024

# ICT Companies in Slovakia

The ICT sector has a solid position in the Slovak economy, what is demonstrated by the presence of foreign-owned companies as well as strongly growing domestic companies.

## TOP ICT EMPLOYERS – IT & Telecommunication Service (TS) Providers in Slovakia

COMPANY NAME	COUNTRY ORIGIN	FIELD	LOCATION	EMPLOYEES
Deutsche Telekom IT Solutions Slovakia	Germany	IT	Košice	3,900
Slovak Telekom	Germany	TN	Bratislava	2,400
Accenture Technology Solutions	Ireland	IT	Bratislava, Košice	1,560
Eset	Slovakia	IT	Bratislava	1,380
Orange Slovensko	France	TN	Bratislava, Košice	1,030
Siemens Healthcare	Germany	IT	Bratislava, Košice, Žilina	960
Lenovo Slovakia	China	IT	Bratislava	820
IBM Slovakia	USA	IT	Bratislava, Košice	840
UNIQA Group Service Center Slovakia	Austria	IT	Nitra	810
Asseco Central Europe	Poland	IT	Bratislava, Žilina, Trenčín, Banská Bystrica, Lučenec, Košice, Ružomberok, Snina	550
PIXEL FEDERATION	Slovakia	IT	Bratislava	280
Nexi Central Europe	Italy	IT	Bratislava	270
Fiserv Slovakia	Netherlands	IT	Bratislava	270
Eviden Slovakia (former Atos)	France	IT	Bratislava, Žilina, Košice, Prievidza	250
SAP Slovensko	Germany	IT	Košice	210
SOITRON	Slovakia		Bratislava, Košice, Banská Bystrica	200
DOXXbet	Slovakia	IT	Žilina	180
DITEC	Slovakia	IT	Bratislava, Žilina, Trnava, Banská Bystrica	170
exe	Poland	IT	Bratislava	120

Source: FinStat, 2024 (data for 2023); SARIO (2024) IMD World Digital Competitiveness Ranking (2023)



## Diversification of Telecommunication Segment

Traditional activities of telecommunication operators are gradually expanding beyond mere provision of telecommunication services. Building a diversified portfolio enriched by internet sales or IT services, data centers or software houses, is becoming an integrated part of their business.

1<sup>st</sup>

The highest amount of investments in telecommunications sector among the V4 countries in 2023





**SYGIC**  
 Developer of GPS navigation software for mobile devices and solutions for businesses. The most downloaded offline navigation in the world.



## Notable Slovak Patents

Did you know that Slovak companies stand behind numerous globally well-known products? Here are some examples of successful Slovak brands.



**ESET**

Protects users in 180 countries

One of the global leaders in security software development including award winning NOD32® Antivirus



**RESCO**

One of the global leaders in developing cross-platform mobile software solutions

Resco Cloud solution is the ultimate tool for offline access to data, interactive maps for businesses & more



**SOITRON**

Soitron developed a system for intelligent police cars

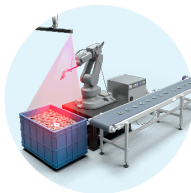
Developer of IT solutions from integrated communication systems to mobile police units



**NG AVIATION**

One of a kind software for safe & smooth aviation

NG Aviation is an unique platform for digitization of aeronautical data making Aviation digital for Airports, Air Navigation Service Provider and Airlines



**PHOTONEO**

A leading provider of robotic vision & intelligence

Development of the world's highest resolution and highest accuracy 3D camera solutions



**INNOVATRICS**

Wide range of application — from attendance system to presidential elections

Biometric Software for identity management based on fingerprint & face recognition technology

Source: SARIO, 2024

# Slovak Fastest Growing IT Companies of 2024



Ranking positions in top 50 fastest growing companies in Central Europe based on the Deloitte Technology Fast 50 Central Europe 2024 programme.



## AGEVOLT SLOVAKIA

A charging platform for electric vehicles. AgeVolt is a provider of a comprehensive electromobility ecosystem, making EV charging convenient and accessible whilst achieving optimal energy distribution.

((SENSONEO))

## SENSONEO

Global leader in smart waste solutions. By developing & deploying resilient hardware and software Sensoneo empowers cities, businesses, and countries to manage waste smarter.



## SEC TECHNOLOGIES

A game-changer in the world of long-range active stand-off detection technology. SEC Technologies serves a diverse range of industries from CBRN military units to environmentalists, providing reliable detection technology that works in any environment.

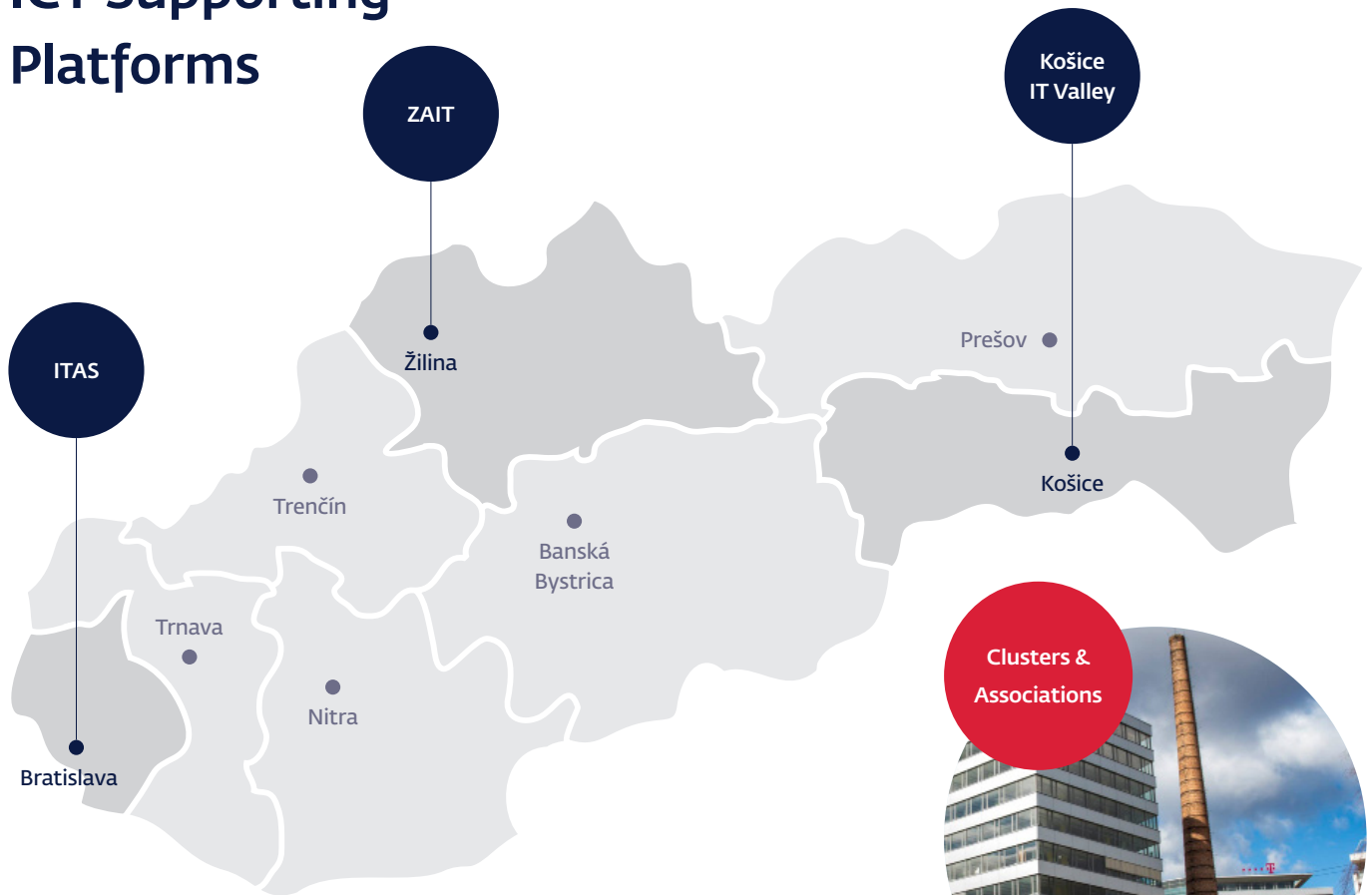


## VESTBERRY

A Portfolio Intelligence platform for Venture Capital. A fintech analytical platform helps Venture Capital & Private Equity investors manage their capital smarter.

Source: SARIO, Deloitte Technology, Fast 50 Central Europe, 2024

# ICT Supporting Platforms



## ITAS

- Headquartered in Bratislava
- Established in 1999
- Slovak association of 100+ ICT companies representing about 80% of the Slovak IT market
- Members employ more than 30,000 people

### ITAS runs several projects including:

- Digital transformation of private sector interlinking the ICT sector with other Slovak industries
- Digital transformation of public sector via active cooperation on Digital Coalition project
- Support of educational initiatives at all levels — from academic programs to requalification
- IT Testing — verification of IT skills among population in Slovakia among population in Slovakia



## KOŠICE IT VALLEY

- Headquartered in Košice
- Established in 2007
- Slovak association of 87 members and sympathizers, including the private, public and academic sector
- Cluster Management Excellence Gold Label — in 2015 certificated as the 1<sup>st</sup> in Central Europe

### Activities of Košice IT Valley are carried out in Eastern Slovakia:

- Over the years focus on education stays as one of the priorities, but scope of the cluster itself has gone beyond
- Innovations, research & development, support of collaboration within the cluster and support of investments become an integral part of the cluster



## ZAIT

- Headquartered in Žilina
- Established in 2008
- Slovak association of 21 members, including the private, public and academic sector
- In 2014 certificated as European Cluster Excellence Initiative Bronze Label

### ZAIT activities that are mainly in the Žilina region at:

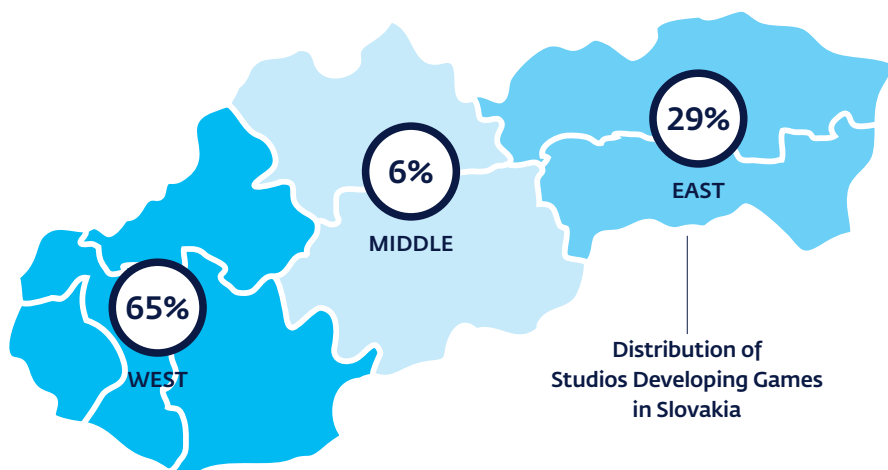
- Interconnection of private sector and R&D institutions
- Supporting lectures of ICT companies at secondary schools
- Offering educational programs and organizing school camps for raising IT skills

Source: ITAS, Košice IT Valley, ZAIT

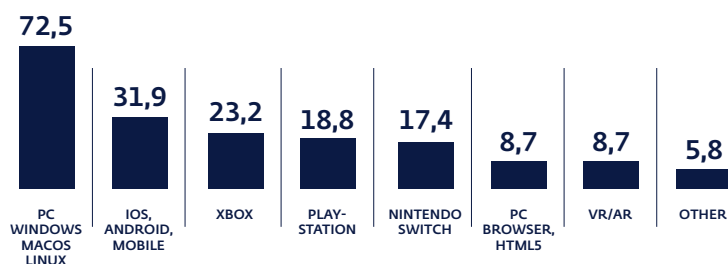
# Emerging Slovak Game Development Industry



The game development industry in Slovakia has been gaining pace by uniting a wide range of studios. This rapidly growing market is a result of the world's top industry professionals presence and together with relevant educational programs, a new generation of game developers is shaping in Slovakia.



PRIMARY TARGET PLATFORM FOR RELEASED GAMES (IN %)



NUMBER OF PROFESSIONALS



Source: Slovak Game Developers Association, 2024



Number of game development companies & studios in Slovakia



Number of fully-released Slovak games created in 2024



Median age of employees



## Top Game Studios in Slovakia — Based on Turnover in 2023

STUDIO	EMPLOYEES/ PROFESSIONALS	YEAR OF ESTABLISHMENT	HQ	TURNOVER (THS. EUR)
Pixel Federation	283	2007	Bratislava	42,380
Nine Rocks Games	61	2020	Bratislava	3,570
Inlogic Software	80	2006	Košice	3,180
SuperScale	60	2016	Bratislava	2,940
PowerPlay Studio	60	2007	Bratislava	2,870
Blue Brain Games	22	2015	Bratislava	1,950
Gentlemen's	4	2014	Bratislava	1,460
Noise Artillery	38	2014	Bratislava	1,420
Games Farm	40	2001	Košice	1,100
6ofps	28	2014	Bratislava	1,060

Source: Slovak Game Developers Association, 2024

## Game Development Platform in Slovakia



As a civic association supports digital game development as well as game developers and start-ups in Slovakia. The association helps new talents to improve their artistic, technological and business skills, and promotes education of professionals and general public in the field of digital games.

## Game Events in Slovakia

### UNICON TRNAVA TRNAVA

University event consisting of discussions, e-sports, table games, cosplays and others.

### BRATISLAVA GAME JAM BRATISLAVA (ANNUALLY)

A contest for individuals and teams of programmers, script writers, graphics, philosophers and illustrators whose main aim is to make a video game prototype in just 40 hours and to experiment with bold game design.



### GAME DAYS KOŠICE (ANNUALLY)

The only international videogame festival in Slovakia providing opportunities for leading figures of the sector to present their experience with progressive video game creation. The event combines digital games with artistic qualities.

### SLOVAK GAME DEVELOPERS ASSOCIATION BRATISLAVA, KOŠICE (MONTHLY)

Community meetings of digital game developers to present their work, to exchange know-how and to encourage networking among them, creating a compact and collaborative meetup platform.

Source: FinStat, 2024 (data for 2023)

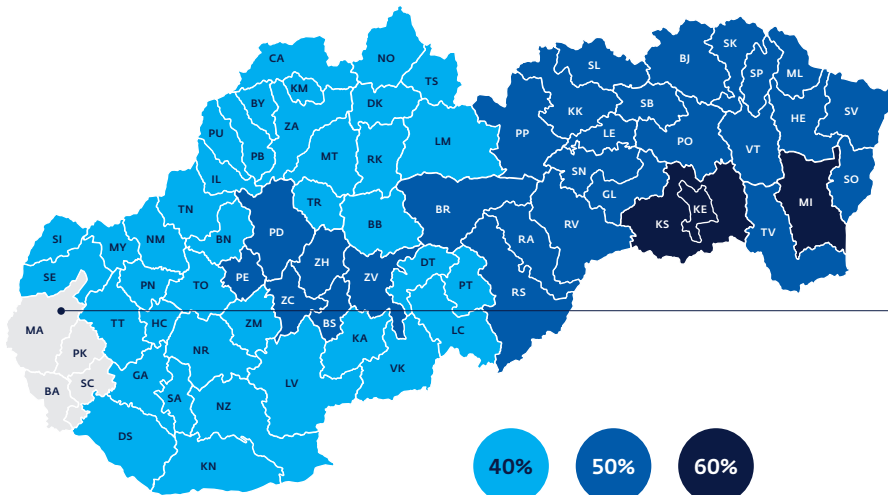
# Investment Incentives

The primary goal of the investment incentives is to motivate investors to place their new projects in regions with higher unemployment and to attract projects with higher added value.



Districts in Bratislava region are excluded from the investment aid scheme

## MAXIMUM REGIONAL INVESTMENT AID INTENSITY



### ELIGIBLE PROJECTS

The Act on Investment Incentives divides the projects, which may be supported, into four categories:

- industrial production
- technology centers
- combined projects of industrial production and technology center
- shared services centers

### ELIGIBLE COSTS

- Costs of land acquisition
- Costs of buildings acquisition & construction
- Costs of new technological equipment and machinery acquisition
- Intangible long-term assets — licences, patents, etc.
- Rent of new land/building
- or
- Total wage costs of all new employees calculated over a period of 2 years

+10% additional incentives for medium-sized enterprises

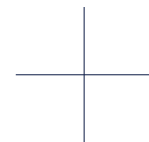
+20% additional incentives for small and micro-sized enterprises

+10% additional incentives for projects related to critical technologies

### FORMS OF INVESTMENT INCENTIVES

- Corporate income tax relief
- Cash grant
- Contributions for the newly created jobs
- Rent/Sale of real estate for a discounted price

Please contact us at [invest@sario.sk](mailto:invest@sario.sk) for more information (including minimum conditions and critical technologies definition).



Positive regional contribution of a new investment projects shall be concluded based on these categories — investment location, number of jobs created, average gross monthly salary of new employees, expected added value and possible qualification of a project respecting definition of a priority area



## AIM INVESTMENT AWARDS UAE 2022

CEE & TURKEY REGION  
Best Investment Promotion Agency in 2022



# SARIO Profile

Slovak Investment and Trade Development Agency (SARIO) is a governmental investment and trade promotion agency of the Slovak Republic. The agency was established in 2001 and it operates under the Ministry of Economy of the Slovak Republic.

## 01 INVESTMENT SERVICES

### FOR POTENTIAL INVESTORS

- investment environment overview
- organization of the investor´s visits of Slovakia
- starting a business consultancy
- sector and regional analyses
- investment incentives consultancy
- site location & suitable real estate consultancy

### FOR ESTABLISHED INVESTORS

- identification of local suppliers, service providers
- assistance with expansion preparation and execution
- assistance with Industry 4.0 solutions and R&D implementation

## 02 FOREIGN TRADE SERVICES

### IF YOU ARE LOOKING FOR

- Slovak supplier or sub-contractor
- information about Slovak export/trade environment
- sourcing opportunities
- forming a joint venture, production cooperation or other forms of partnership with a Slovak partner

### SERVICES FOR EXPORTERS

- information on foreign territories
- customized search for foreign partners
- online database of business opportunities
- export Training Centre
- subcontracting assistance

## 03 SLOVAK SPACE OFFICE

### FOR SLOVAK ENTITIES

- tailor-made sector entry consultancy
- startup creation through hackathons and incubation programs
- cooperation opportunities through matchmaking events
- internationalization of the Slovak space companies and research institutions

### FOR FOREIGN PARTNERS

- customized search for local partners
- assistance with establishing branch in Slovakia
- cooperation on space industry events

**SARIO IS YOUR ONE STOP SHOP FOR INVESTMENT & TRADE IN SLOVAKIA.  
TALK TO US TODAY!**

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