

Shared Service & Business Process Outsourcing Centers in **SLOVAKIA**



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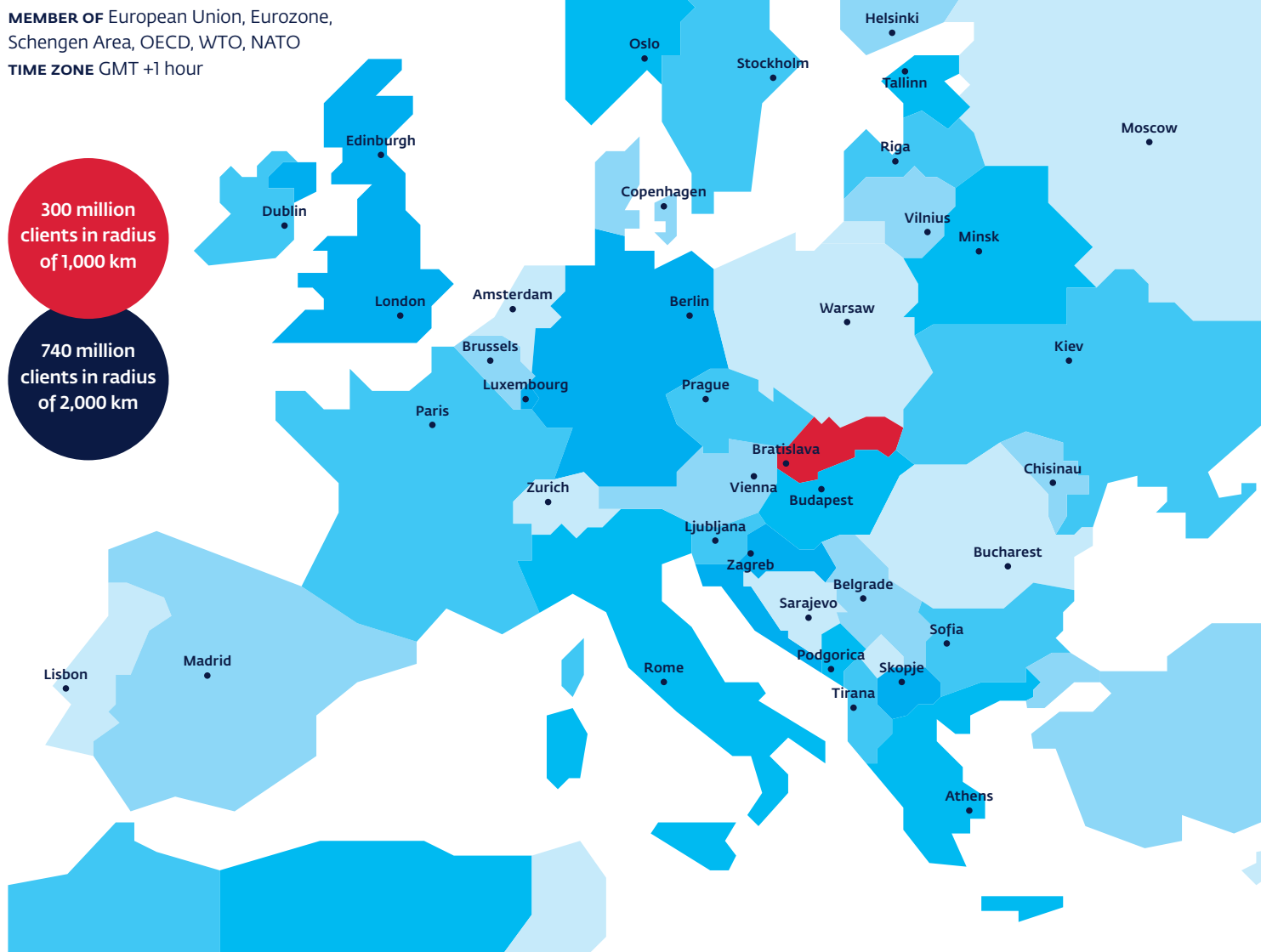
The purpose of this publication is to present Slovakia's dynamically expanding segment of Shared Services & Business Process Outsourcing Centers. SSC & BPOs provide international support services for their parent companies and other subsidiaries or execute specific outsourced business processes for third-parties from abroad.



TOTAL AREA 49,035 km²
POPULATION 5.4 million
CAPITAL CITY Bratislava
MEMBER OF European Union, Eurozone, Schengen Area, OECD, WTO, NATO
TIME ZONE GMT +1 hour

300 million clients in radius of 1,000 km

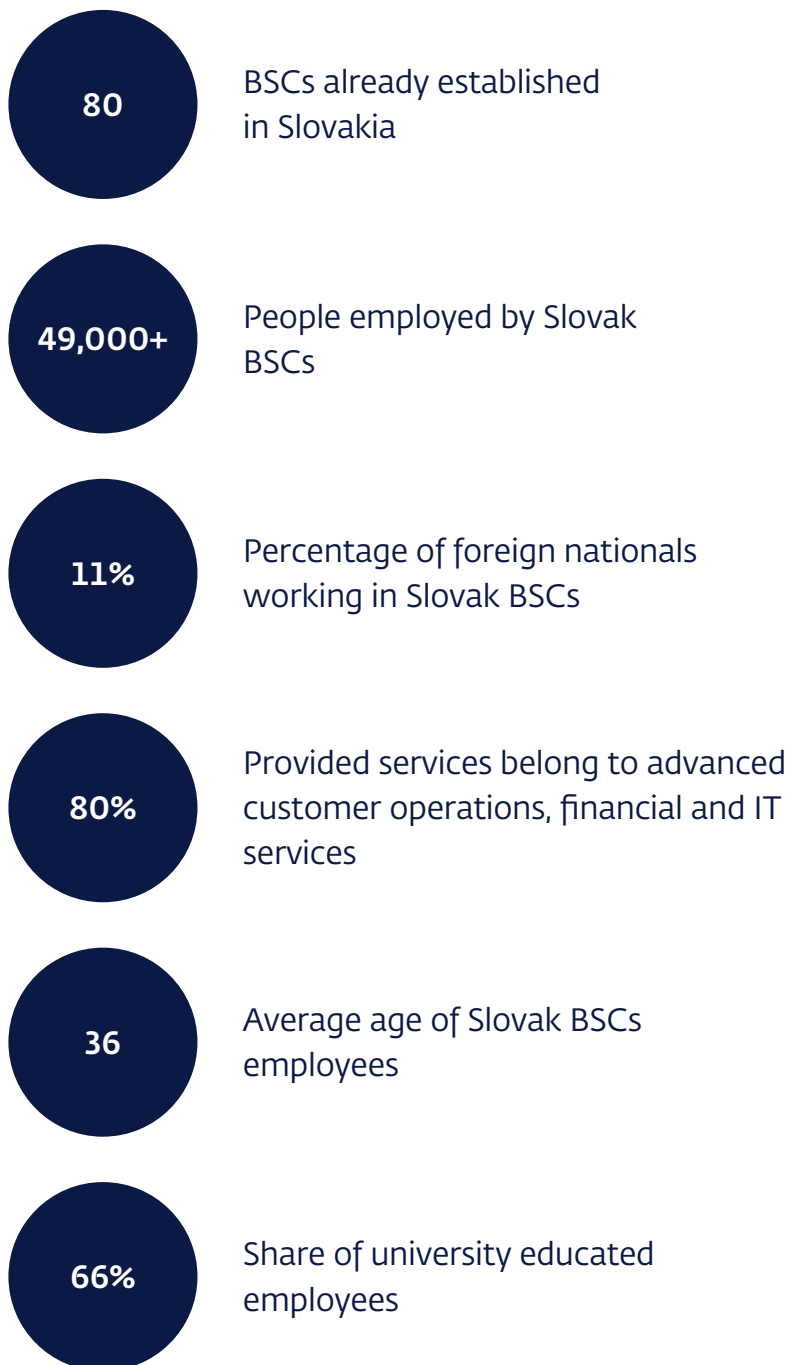
740 million clients in radius of 2,000 km



Slovak SSC & BPOs

— Key Facts

Over the past two decades, Slovakia experienced dynamic growth of the Business Services Centers (BSC)* sector networks. Encouraged by an increasing high-quality standard of the Slovak business environment, the number of multinational centers is expected to increase further.



Top Reasons to Establish a BSC in Slovakia

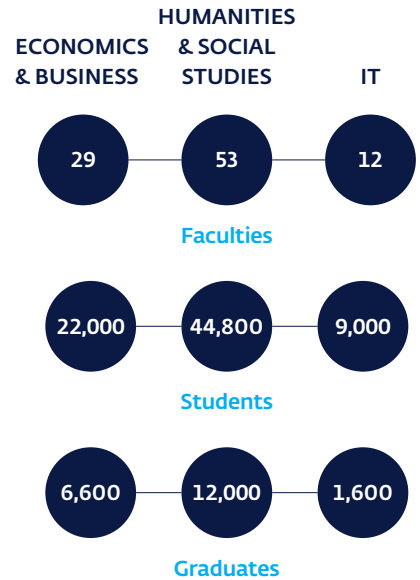
- 1 Excellent multilingual skills
- 2 35 universities providing qualified pool of labour force
- 3 Candidates willing to relocate or commute daily in the radius of 60–80 km
- 4 Strategic time zonation & geographic location
- 5 High quality data & voice networks
- 6 Attractive investment incentives for BSC sector
- 7 Political & economic stability
- 8 Dynamically growing real estate market with modern and affordable offices
- 9 Euro currency as one of the few in CEE
- 10 Governmental initiatives particularly supporting the growth of the BSCs sector

Source: SARIO 2024, AmCham Business Service Center Forum Survey, 2024



35 University Level Institutions in Slovakia

Thanks to a huge variety of offered study fields, Slovak university graduates are praised for their multidisciplinary skill-set.



Source: The Institute for Information and prognosis in Education 2023/2024, SARIO calculations

Qualified Labour Force

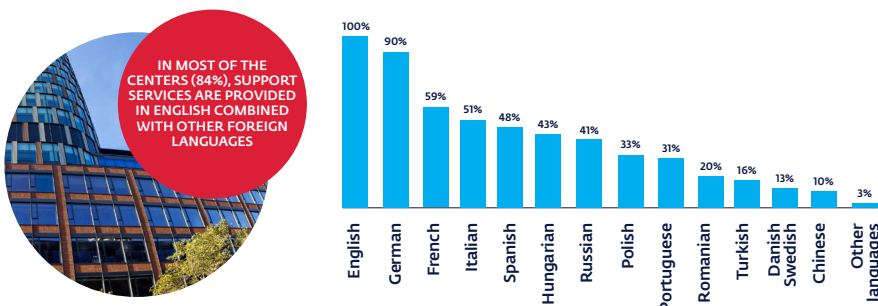
Availability of talented personnel is one of the key elements for SSC & BPOs success. Investors in Slovakia can benefit from qualified, multilingual and highly adaptable workforce matched with competitive wage costs.

THE MOST COMMON FOREIGN LANGUAGES TAUGHT AT SLOVAK SECONDARY SCHOOLS (GENERAL EDUCATION)
% of all students learning foreign languages



Source: Eurostat, Foreign language learning statistics (2022)

LANGUAGES USED WHEN PROVIDING BUSINESS SERVICES FROM SLOVAKIA



*Other Languages: Finnish, Arabic, Japanese, Greek, Bulgarian, Czech, Norwegian, Korean
Source: AmCham Business Service Center Forum (2024)

BSCs: Academic Partnership Success Stories

SKILLS FOR SUCCESS – FROM UNIVERSITY TO WORKPLACE

First fully accredited course by the Business Service Center Forum (BSCF) for students of Faculty of Business Management at the University of Economics focused on soft skills such as time management, team work, communication skills, conflict resolution and many others.

DUAL EDUCATION

As a pioneer in this field, since the academic year 2013/2014, Deutsche Telekom Systems Solutions Slovakia implements ICT dual education initiative, where 60% to 80% of the program is dedicated to practical training.

INDIVIDUAL PROGRAMS

Many SSC & BPOs have developed individual cooperation platforms with educational institutions at all levels.

AVERAGE GROSS MONTHLY SALARY (SELECTED POSITIONS IN SLOVAK BSC SECTOR/EUR)

AREA	POSITION	BRATISLAVA		KOŠICE		BANSKÁ BYSTRICA	
		Min	Max	Min	Max	Min	Max
FINANCE	Accounting Clerk (AP, AR, Fixed Assets, ICO, C&B)	1,400	1,700	1,400	1,700	1,400	1,600
	GL Accountant	1,600	1,800	1,400	1,800	1,400	1,700
	Cash Collector	1,500	1,700	1,400	1,400	1,300	1,600
	TAX Specialist	2,000	2,500	2,000	2,500	2,000	2,500
	Financial Analyst	1,600	1,900	1,600	1,800	1,600	1,800
	Team Leader	2,500	3,500	2,400	3,400	2,400	3,300
	Manager	3,500	5,000	3,000	5,000	3,000	5,000
CUSTOMER SERVICE / SALES	Call center Agent	1,200	1,500	1,200	1,500	1,200	1,500
	CC Team Leader	1,500	2,000	1,500	1,900	1,500	1,900
	Customer Service Agent	1,500	1,900	1,400	1,900	1,400	1,900
	Telesales Specialist for Inbound	1,400	1,600	1,300	1,500	1,300	1,500
	Telesales Specialist for Outbound	1,400	1,600	1,300	1,500	1,300	1,500
	Team Leader	1,800	2,300	1,800	2,000	1,800	2,000
	Manager	2,400	3,000	2,200	3,000	2,200	3,000
HR	HR Helpdesk Agent	1,400	1,600	1,300	1,600	1,300	1,500
	HR Data Management Specialist	1,500	2,000	1,500	1,800	1,500	1,800
	Recruitment and Selection Specialist	1,400	1,900	1,400	1,800	1,400	1,800
	Learning and Development Specialist	1,700	2,200	1,600	2,000	1,600	2,000
	Team Leader	1,800	2,300	1,700	2,000	1,800	2,300
	Manager	2,500	4,000	2,500	4,000	2,500	4,000
PRO-CUREMENT	Procurement Clerk	1,600	1,800	1,500	1,800	1,500	1,800
	Procurement Specialist	1,800	2,200	1,600	1,900	1,600	1,900
	Team Leader	2,500	2,800	2,200	2,500	2,200	2,500
	Manager	3,300	4,000	2,800	3,800	2,800	3,800
IT	IT Help Desk	1,500	2,000	1,500	2,000	1,500	2,000
	System Administration	1,800	3,000	1,800	3,000	1,800	2,900
	SAP Specialist	2,200	3,500	2,200	3,300	2,200	3,300
	SW Testing	2,300	3,500	2,300	3,500	2,300	3,500
	SW Developers	2,800	4,500	2,800	4,500	2,800	4,500
Language bonus (other than English)		200€ per month					

Employer's contributions (36,2%) are not included.

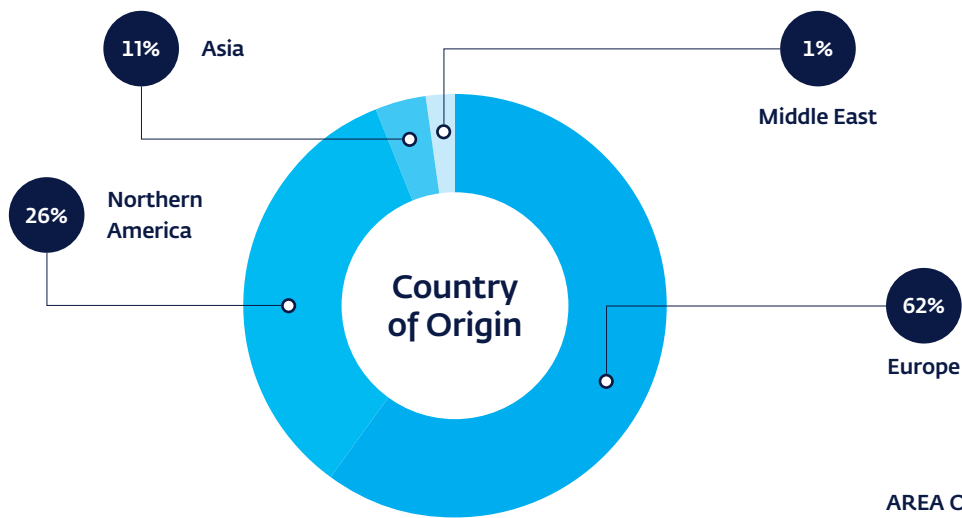
Source: BALANCED HR, 2024

Slovak SSC & BPOs

Thanks to the availability of qualified labour force and its performance, BSCs in Slovakia are evolving towards centers with higher added-value with greater emphasis on quality of their services. On top of that, more and more BSCs are moving up their value chain by creating Centers of Excellence with specialized positions. 41% of the Slovak BSCs declared further centralization process and 12% of them are planning to transfer some of their basic functions to other territories in order to take over operations with higher added value.

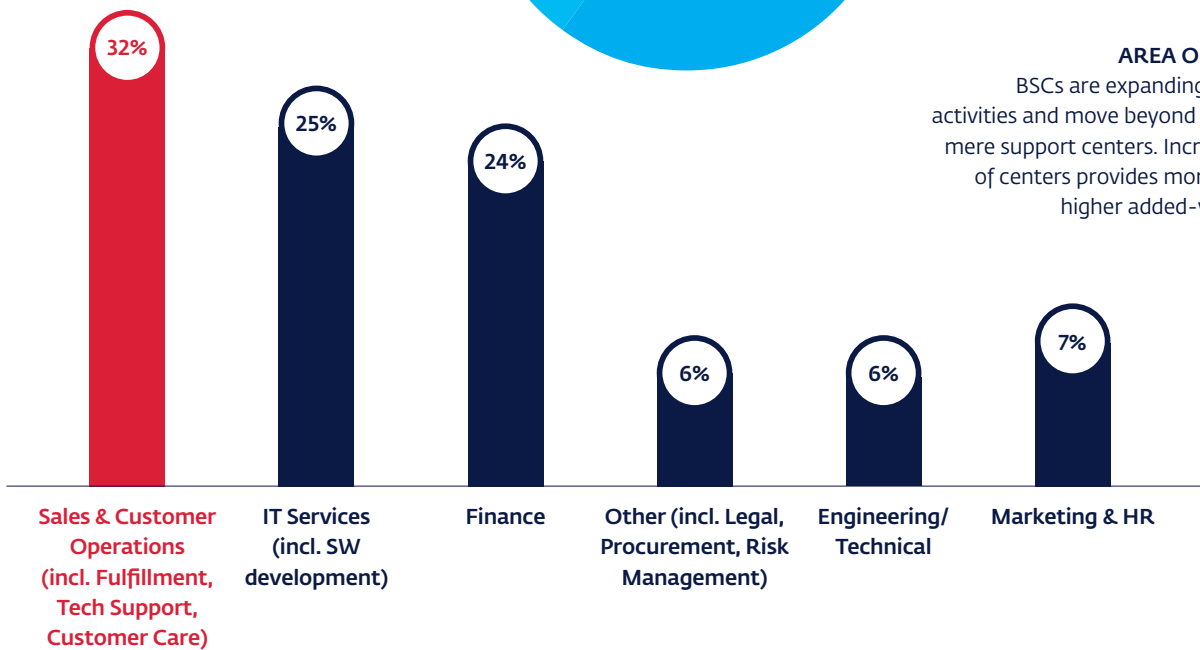
COUNTRY OF ORIGIN

The Slovak SSC & BPOs landscape is dominated by large companies originating from the US & Western Europe.



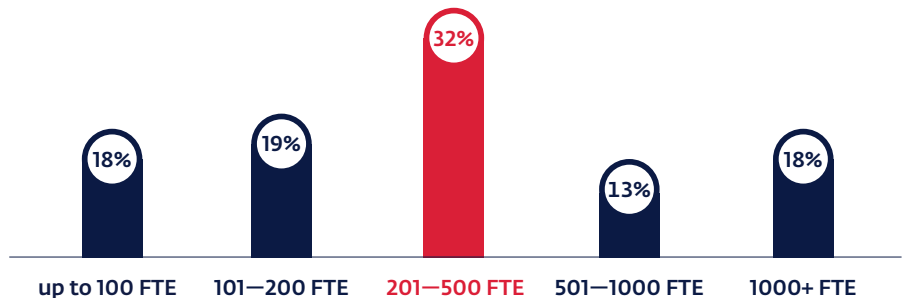
AREA OF OPERATION

BSCs are expanding their business activities and move beyond the function of mere support centers. Increasing number of centers provides more complex and higher added-value activities.



NUMBER OF EMPLOYEES

There are several SSC & BPO companies with employees exceeding 1000 FTE. The majority of centers in Slovakia employ between 200 and 500 FTE.



Source: SARIO, 2024

BSCs Success Stories in Slovakia



AT&T Global Network Services Slovakia | Bratislava

"AT&T has operated in Slovakia since 1999. We have four centres in two cities, with a workforce of more than 2,400 that support high-quality communication services and solutions for our multinational customers. In Slovakia, we continue to find great opportunities to match the requirements of global clients with a highly motivated and skilled workforce."

GABRIEL GALGÓCI, Former Slovak Country General Manager



Arcondis | Košice

"Arcondis opted for Slovakia (Košice) as the location, which combines in the best way the crucial investment factors – skilled IT workforce, top-tier universities and scientific institutions, a great working culture and an innovative mindset of people. After a certain time, we are even more convinced that we did the right decision when coming to Košice"

DANIEL CARNOKY, Country Managing Director (Slovakia)



Adient | Bratislava

"Adient has its unique presence in Slovakia which is a combination of production plants, business center and technical center operating in 8 different locations, from Bratislava to Bardejov. Our 4,000 employees daily contribute to success of our automotive company and are changing the world in motion with their work, from an initial design of a seat, through its production, delivery to its final accounting and reporting process. Slovakia and its regions proved that we can be a leader in quality, efficiencies and sustainable business."

BARBORA ZÁHRADNÍKOVÁ, Acting General Manager



IBM International Services Centre | Bratislava, Košice

"The broad range of missions we support, through Business Process Services, CIO services, Digital Sales, Finance & Accounting, Sales Support and more, requires well educated employees with perfect foreign language and IT skills, and Slovakia has enabled IBM International Services Centres to grow from 100 to over 3000 employees over the last 12 years."

PAUL BURT, IBM ISC Location Leader & Managing Director



Zurich Insurance | Bratislava

"In 2007 Zurich Insurance started with a Customer Support Center in Bratislava providing mainly transactional roles suitable for fresh graduates. 15 years later with a changed name as Zurich Bratislava Competence Center and more specific focus, the Center hosts 400 experts in 7 business areas - Actuarial, Risk Management, Data Science, Business Intelligence, IT Infrastructure and Software Development, Insurance Network Services, and Software Asset Management - and is still growing. Thanks to the highly qualified and skilled resource pool in Slovakia - in conjunction with remarkable work ethics and enthusiasm - the center evolved from an executional service center to a product owning competence center and is now expanding to the Eastern part of Slovakia with a second location in Kosice."

WOLFGANG H FISCHER, CEO Zurich Bratislava Competence Center

Deutsche Telekom Systems Solutions Slovakia | Košice

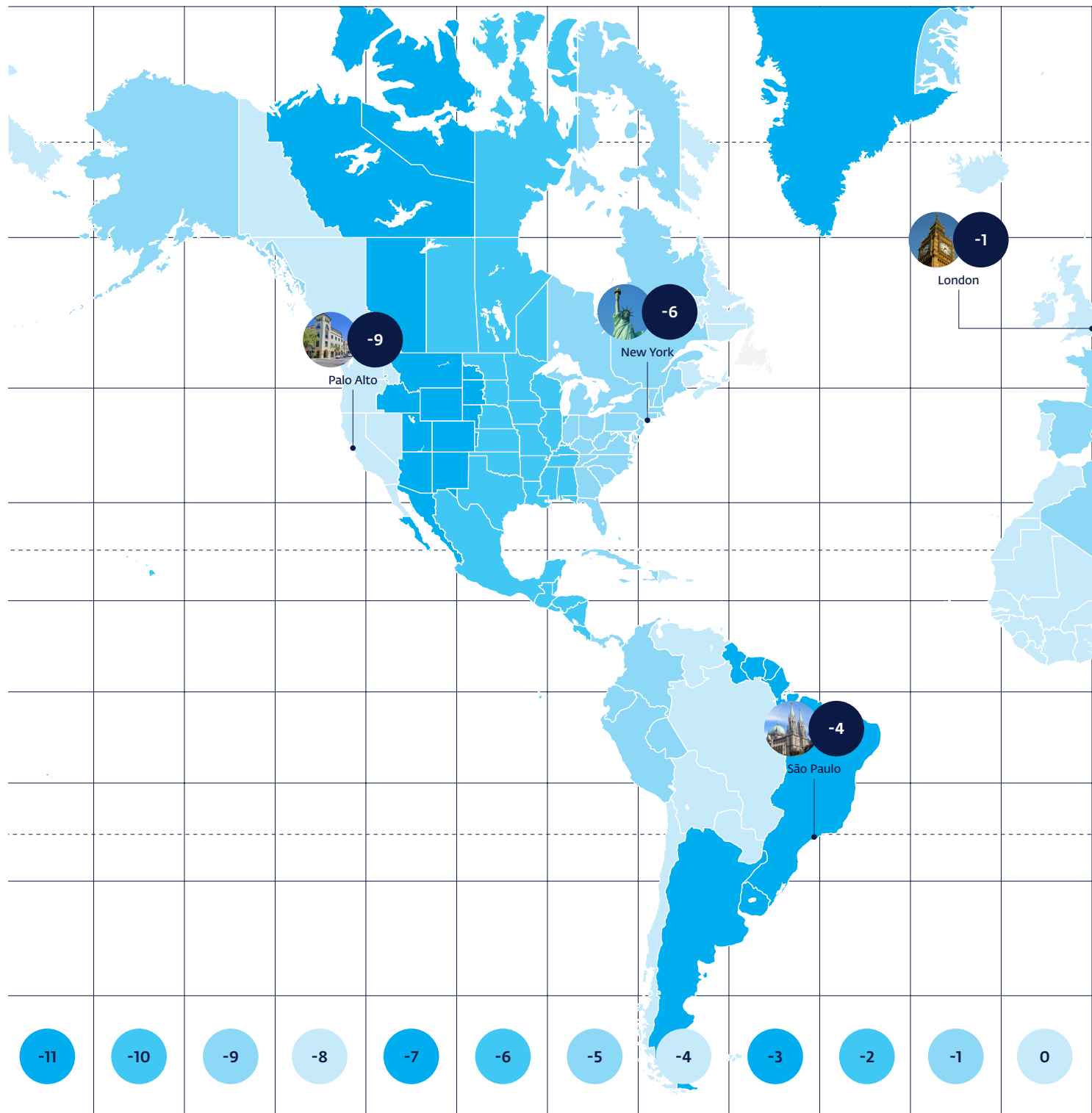
"January 2016 sees 10 years of Deutsche Telekom Systems Solutions Slovakia presence in Košice and we have no regrets about making this city our home in Slovakia. We exceeded initial business case approximately tenfold, reaching 4,300 highly qualified employees in both IT operations and business process outsourcing. We are particularly happy with a very close and productive partnership with the region, local middle schools and universities, who helped to propel us among largest ICT shared centres in Slovakia and the one with fastest growing value added."

MARTIN DŽBOR, Director, Strategy & Innovation, Deutsche Telekom Systems Solutions Slovakia

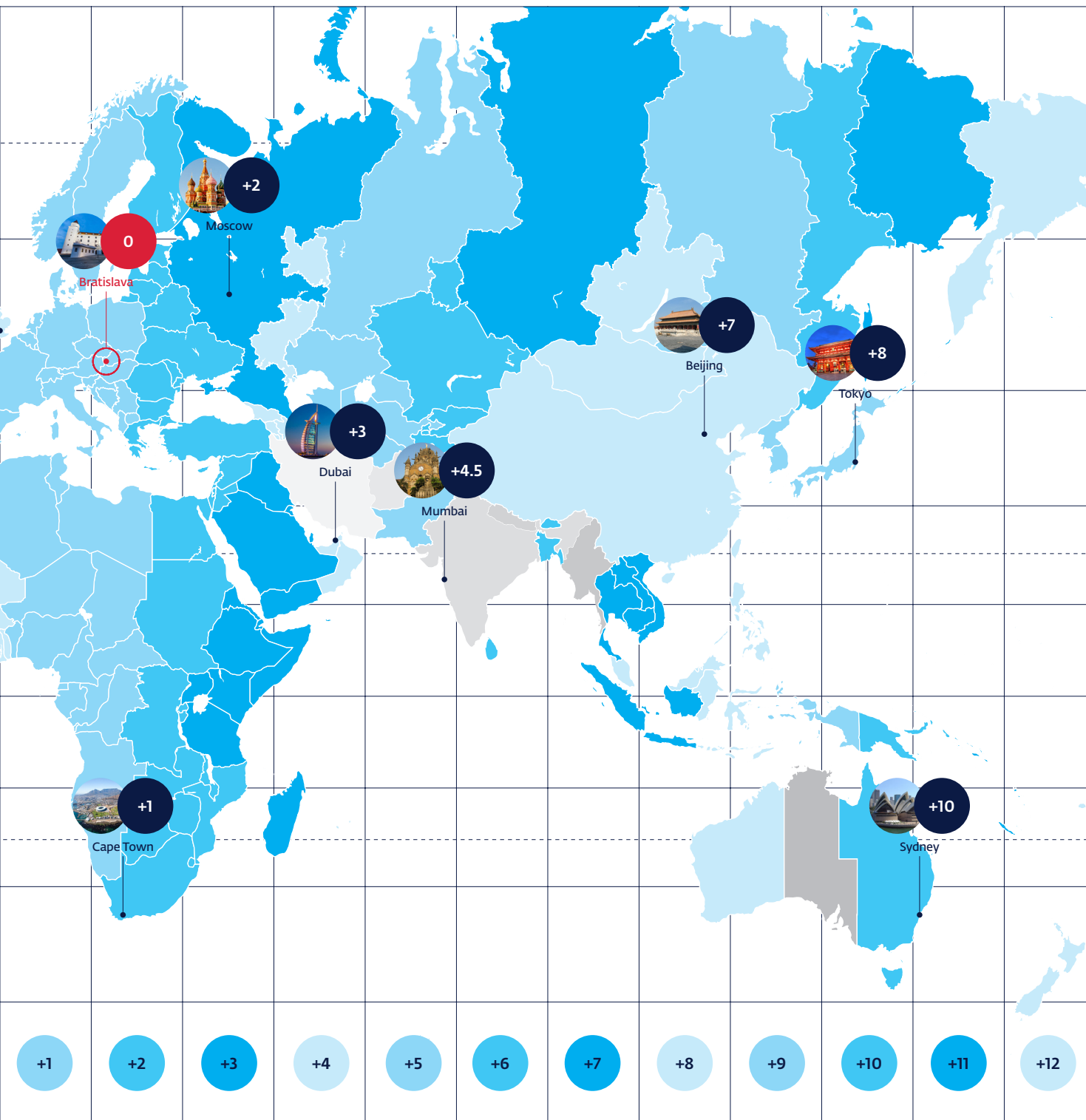


Time Zone Map

Slovakia's strategic location in the Central European Time zone (CET) makes it an outstanding destination for flexible delivery of offshore support.

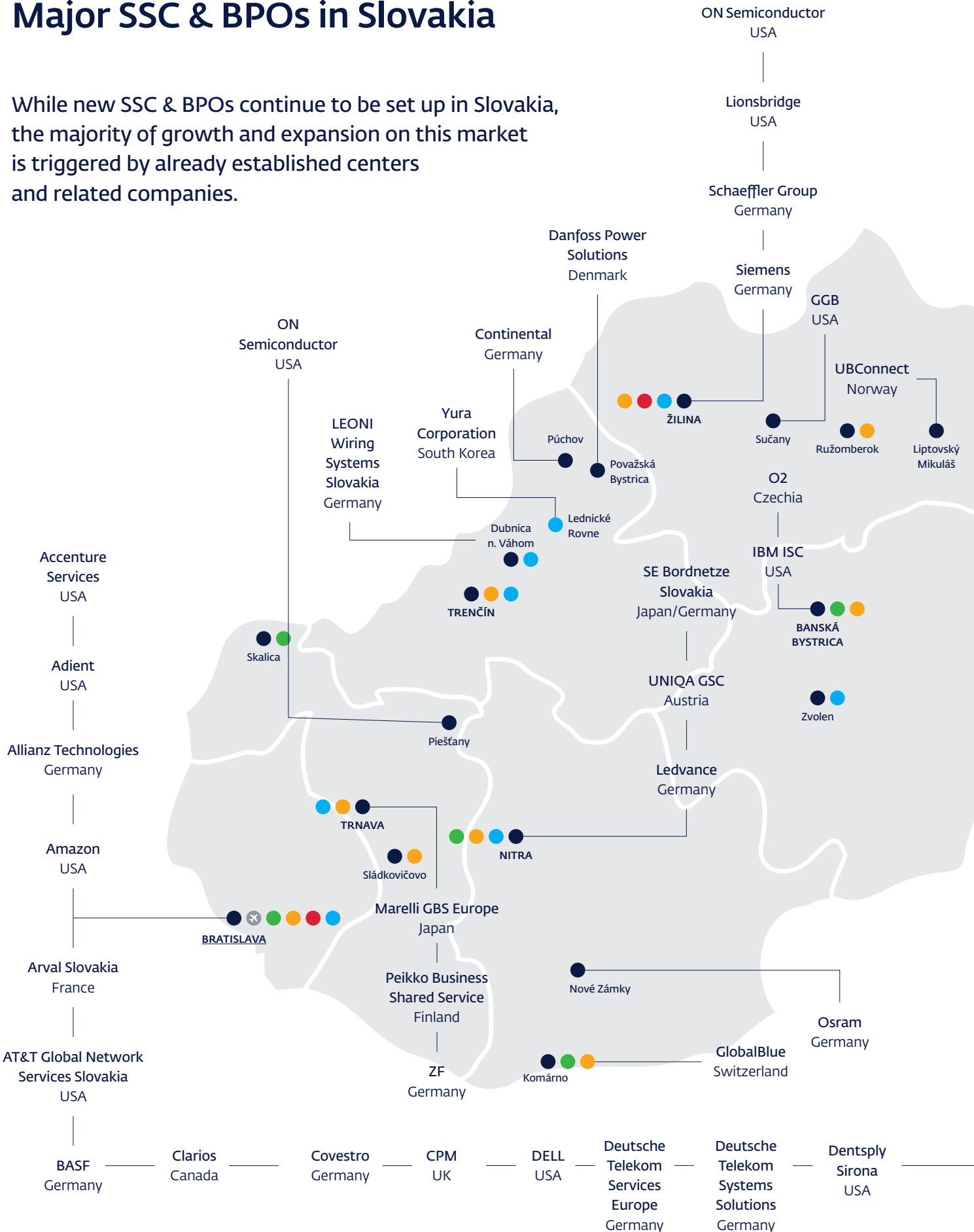


Slovak SSC & BPOs can operate various shifts throughout the day which allow them to support their headquarters or customers in Asia by starting shifts from the early morning hours, then cover the American continent from the afternoon till late evening hours and any other time zones in between.



Major SSC & BPOs in Slovakia

While new SSC & BPOs continue to be set up in Slovakia, the majority of growth and expansion on this market is triggered by already established centers and related companies.

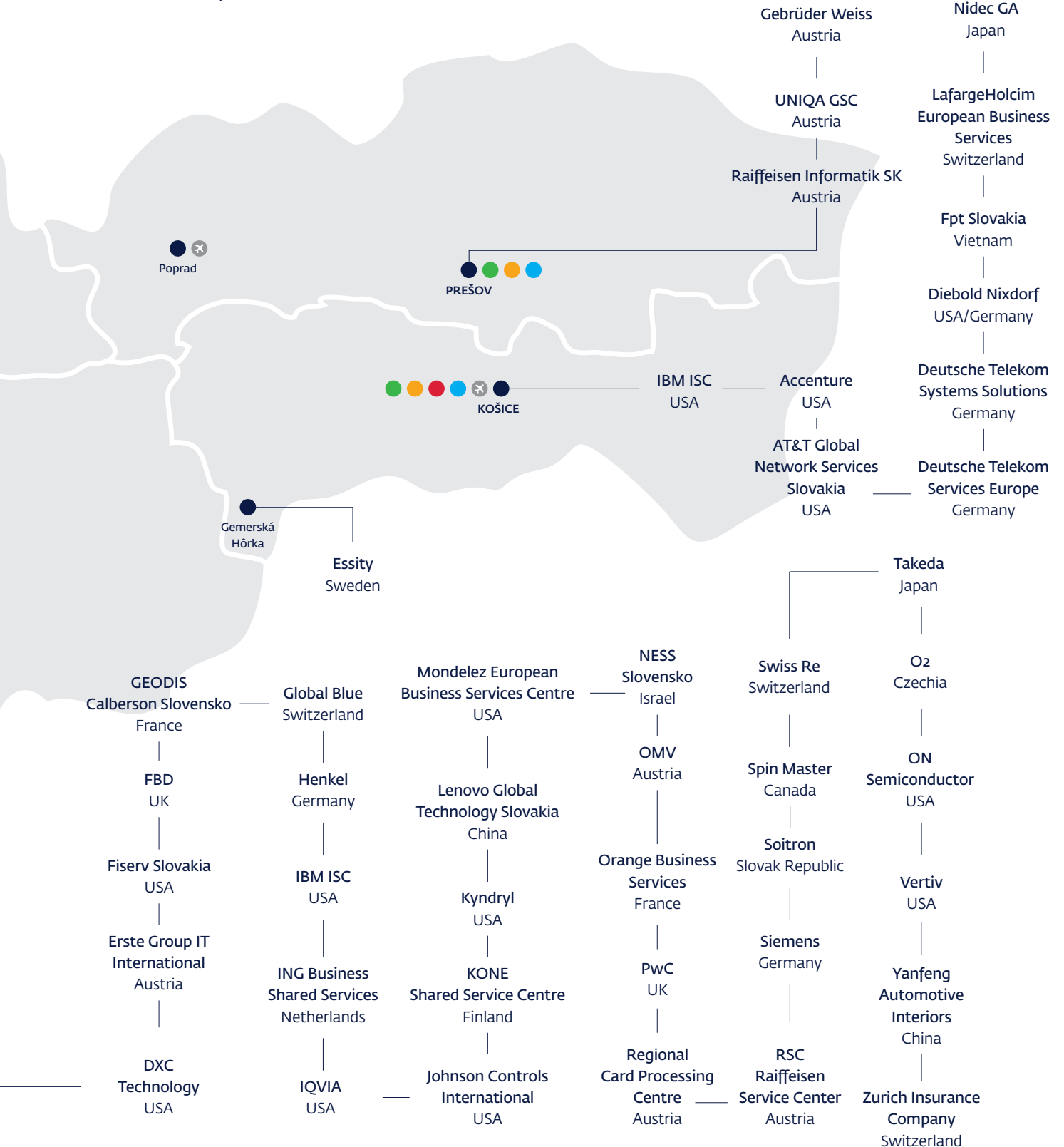


UNIVERSITY FACULTIES

- Economics & Business
- Social
- IT
- Technical

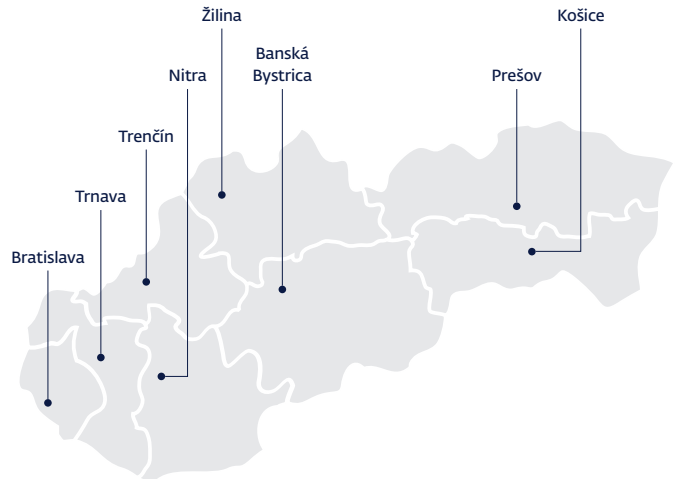
✈ International Airport

Source: SARIO 2024. Presented list of SSC & BPOs operating in Slovakia is subject to change and does not represent an exhaustive overview. ICT companies with activities only related to telecommunication, computer programming or internet information services are not included.



Hot SSC & BPO Hubs in Slovakia

The majority of SSC&BPOs in Slovakia are located in the capital city of Bratislava or in the second largest city of Košice. Nevertheless, new hubs are gradually developing, offering great value proposition for new SSC & BPOs.



BRATISLAVA

Bratislava is the capital and the most populous city in Slovakia. It is one of the richest regions in the EU in terms of GDP per capita level with dynamically growing and modern A-level office market. At the same time, the city features an outstanding position thanks to its geographical proximity to major CEE cities.

2,075,000
m²

Office Stock

13.3%

Vacancy Rate

15,5
EUR/m²

Average monthly rent



KOŠICE

The second largest city and the capital of Eastern Slovakia offers the highest standard of living in the region. It attracts qualified labour force from surrounding regions and provides potential investors with steadily increasing office market including A-level offices.

214,270
m²

Office Stock

8.68%

Vacancy Rate

10.5
EUR/m²

Average monthly rent



EMERGING LOCATIONS — REGIONAL CAPITALS

Banská Bystrica, Nitra, Prešov, Trenčín, Trnava and Žilina are new destinations on the Slovak SSC & BPO map providing excellent conditions for business. The locations combine availability of high quality personnel, reasonable wage levels, competitive prices of real estate market and attractive investment incentives.

All regional capitals are important academic centers and transportation crossroads with excellent highway connection (D1 and R1).

OPPORTUNITIES IN OTHER LOCATIONS

Companies tend to establish their centers also in smaller cities benefiting from proximity to existing or former production facilities, lower level of wage costs/rent of office space market and availability of attractive investment incentives with the intensity up to 60% of total eligible costs.

Source: CBRE, 2024, SARIO database, 2024

Business Service Center Forum



In early 2014 the American Chamber of Commerce in Slovakia (AmCham) launched the Business Service Center Forum initiative with the mission to raise awareness of the BSC sector's role in the Slovak economy and help it grow further in Slovakia.

The Business Service Center Forum (BSCF) brings together shared services centers (SSCs) and business process outsourcing (BPOs) providers operating in Slovakia. Their presence and importance in Slovakia has been growing since 2000. Nowadays, BSCs represent a significant employment sector within the Slovak economy with more than 39K+ employees, which has specific needs and faces specific challenges.

Every year AmCham Slovakia surveys the business service centers associated in BSCF to gather aggregate data and presents an updated picture of the sector. This data is published in an information brochure summarizing who works in these centers, where they are located, what services they provide and how they contribute to the state budget as well as local communities, and last but not least, why they are in Slovakia and not elsewhere in the world.

BSC Forum's efforts in the public policy have focused on labor affairs, education and foreign investment support. These efforts materialize in regular communication with relevant ministries, government agencies, universities and schools as well as engagement in public discussions at conferences and seminars.



Furthermore, one of the latest initiatives is called Career4u, with the goal to promote Slovak BSCs and increase their awareness among potential candidates. This is done by presenting short videos of individual careers in various departments in different companies.

On top of the mentioned activities, the aim of AmCham is to promote competitive job vacancies within Slovak SSC & BPOs by the initiative called Work in Slovakia-Good Idea. The pilot project was initiated in London (January 2019) and it's now launched in other European cities.

In the area of education, BSCF has continuously been running the flagship **Train the Trainer** series of soft skills trainings for university and high school teachers and two of the fully accredited university courses for master students entitled **Skills for Success: From University to Practice and Hands-on HR: Global Trends**.

More information on the BSCF is available on their website www.bscf.eu

WHY TO BECOME A MEMBER?

- BSC Forum shares information within the sector about concerns, solutions and best practices
- The platform communicates with national and local authorities: monitors and evaluates legislation, labor market and CSR activities
- The forum interacts with universities and secondary schools to improve the employability of graduates at BSCs



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

**CONTENT
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