

SECTOR OVERVIEW

# Information & Communications Technology Sector in SLOVAKIA

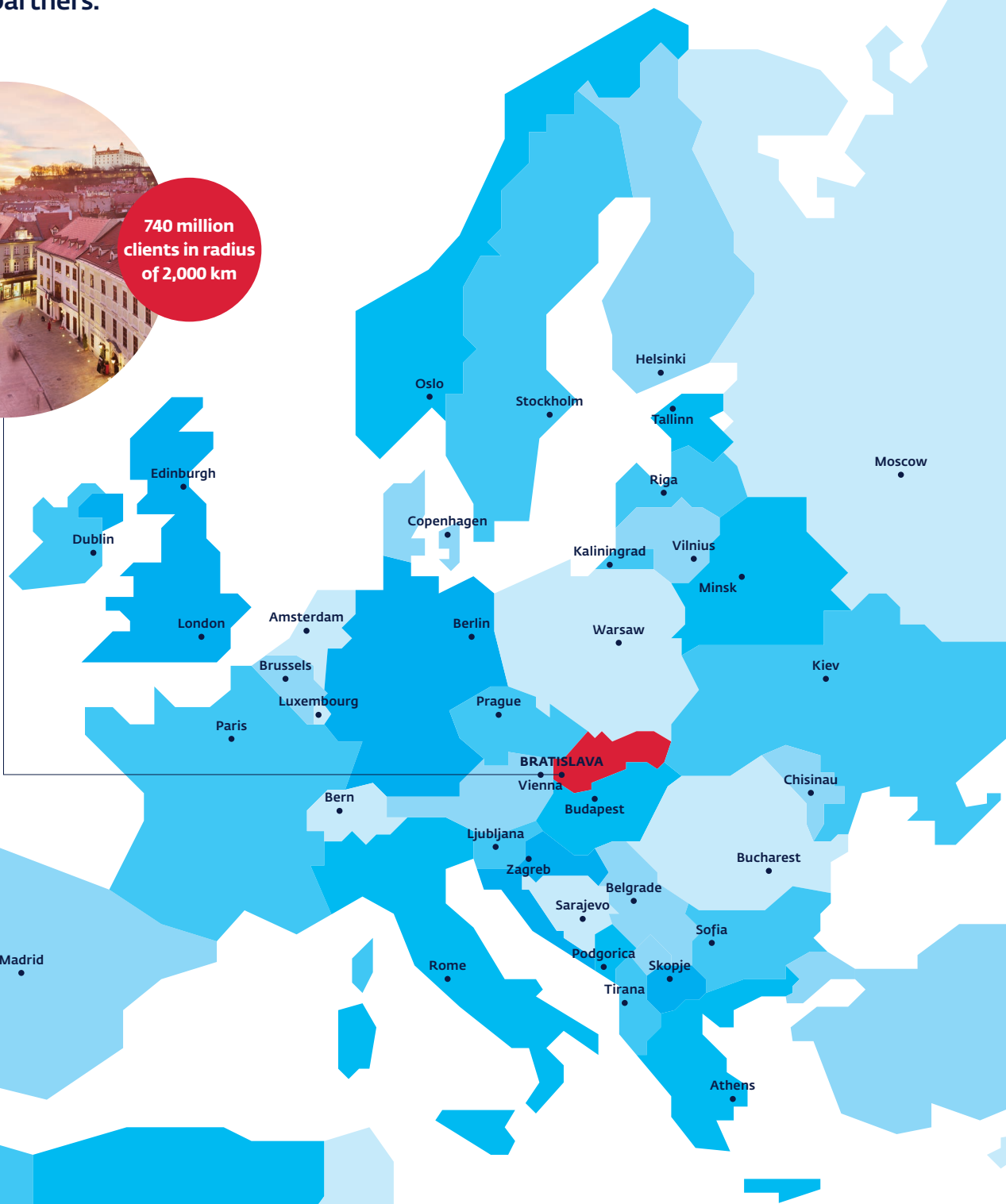


# Information & Communications Technology Sector in SLOVAKIA

This publication introduces SLOVAKIA's fast-growing Information & Communications Technology (ICT) sector, covering telecommunications, software development, and internet services. It highlights why SLOVAKIA is an attractive location for establishing ICT centres and finding outsourcing partners.



740 million clients in radius of 2,000 km





1

**KEY FACTS**

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.



20,000  
companies in the  
IT sector



120,000  
the sector creates more  
than 120,000 job opportunities



1<sup>st</sup>  
Slovakia ranks 1<sup>st</sup> in areas  
such as digital or communications  
technological skills



70%  
the total number of employees  
in the sector grew by 70% between  
2014 and 2024



4.6%  
ICT share on  
the total employment



4.5%  
ICT's contribution to  
Slovakia's GDP

**TOP REASONS  
TO ESTABLISH AN ICT  
COMPANY IN SLOVAKIA**



adaptable, educated  
and cost-effective workforce



the highest labour productivity  
in the region



well-developed  
ICT institutional network



high-quality data and  
network coverage



strategic geographical  
location from the perspective  
of time zonation



political and economic  
stability



euro currency as one  
of the few in CEE



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



attractive investment  
incentives for the ICT sector



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

Source: Finstat 2025, IMD World Digital Competitiveness Ranking 2024, Eurostat 2025 (Share on the total employment — data for 2024, job opportunities data for 2024, contribution to GDP — data for 2022), Statistical Office of the SR 2025 (data for 2024)

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# QUALIFIED LABOUR FORCE

Labour force in SLOVAKIA 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 (% of all students learning foreign languages)



98%  
English



36%  
German



5%  
French



5%  
Spanish

## 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.

88%

### 5G COVERAGE

5G coverage of households increased from 79% in 2023 to 88% in 2024

67%

### 5G SPECTRUM

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

73%

### VERY HIGH CAPACITY NETWORK COVERAGE

Almost ¾ of all households have access to VHCN



\*The amount of spectrum assigned and ready for 5G use within the so-called 5G pioneer bands.  
Source: Digital Economy and Society Index Report, 2025, Eurostat, 2024 (latest data from 2022)



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## 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 and sought after by young generation.

### 12 ICT FACULTIES AT 10 SLOVAK UNIVERSITIES

8,962

students enrolled in ICT study fields

1,889

graduates of ICT study fields per year



#### KEMPELEN INSTITUTE OF INTELLIGENT TECHNOLOGIES (KInIT)

KInIT is an independent non-profit research institute focused on intelligent technologies and artificial intelligence. It connects academia, industry, and international partners to foster collaborative research and, in cooperation with universities, offers doctoral studies in artificial intelligence and digital law.

### SUCCESS STORIES OF DEUTSCHE TELEKOM IN KOŠICE

1

#### DUAL EDUCATION\*

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

2

#### INDIVIDUAL PROGRAMS

Deutsche Telekom, 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.

3

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

At the Faculty of Economics of the Technical University in Košice, experts from Deutsche Telekom 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, 2024/2025, SARIO, Deutsche Telekom, KInIT

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# COMPETITIVE SALARIES IN SLOVAK ICT SECTOR

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



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.

MEDIAN GROSS MONTHLY SALARIES FOR SELECTED POSITIONS (IN EUR)

POSITION	BRATISLAVA	KOŠICE	OTHER REGIONS
Software Engineer	2,920	2,580	2,540
.NET Programmer	2,680	2,340	2,310
C++ Programmer	2,740	2,380	2,360
IT Analyst	2,440	2,130	2,100
IT Architect	3,770	3,440	3,420
IT Project Manager	2,890	2,560	2,530
IT/Technical Support Specialist	2,030	1,690	1,670
IT System Administrator	2,170	1,820	1,790
Systems Engineer	2,650	2,180	2,270
Cloud Engineer	3,060	2,730	2,700
Game Designer	2,200	1,880	1,850
Game Developer	2,500	2,220	2,170

Source: Platy.sk, 2025

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## ITC 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

COMPANY NAME	COUNTRY	LOCATION	EMPLOYEES
Deutsche Telekom	Germany	Košice	3,800
Slovak Telekom	Germany	Bratislava	2,370
Accenture	Ireland	Bratislava	1,590
Eset	Slovakia	Bratislava	1,430
DXC Technology Slovakia	USA	Bratislava	1,280
Siemens Healthcare	Germany	Bratislava, Košice, Žilina	1,070
Orange	France	Bratislava	1,030
UNIQA Group Service Center Slovakia	Austria	Nitra	880
IBM Slovakia	USA	Bratislava, Košice	870
Lenovo	China	Bratislava	860
Scheidt & Bachmann Slovensko	Germany	Žilina	700
Asseco Central Europe	Poland	Bratislava, Žilina, Trenčín, Banská Bystrica, Lučenec, Košice, Ružomberok, Snina	540
Ness KE	Luxembourg	Košice	420
SkyToll	Czech Republic	Bratislava	410
Takeda	Japan	Bratislava	400
Alanata	Slovakia	Bratislava	350
Fpt Slovakia	Vietnam	Košice	350
GlobalLogic Slovakia	USA	Košice	330
CANCOM Slovakia	Germany	Košice	320
Diebold Nixdorf	USA	Bratislava	290
Nexi Central Europe	Italy	Bratislava	280
SAP Slovensko	Germany	Bratislava, Košice	280

1<sup>st</sup>

**SLOVAKIA** scores the highest ranking among the V4 countries in terms of availability and adoption of digital communication infrastructure and services within a country

### 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.

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# INNOVATIVE SOLUTIONS FROM SLOVAKIA

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



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

1

## ESET

**Protects users in 180 countries**

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

2

## RESCO

**Global leader in developing cross-platform mobile software solutions**

Ultimate tool for offline access to data, interactive maps for businesses and more.

3

## SOITRON

**Soitron developed a system for intelligent police cars**

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

4

## NG AVIATION

**Software for safe and smooth aviation**

Digitization of aeronautical data for airports, air navigation service provider and airlines.

5

## ZEBRA TECHNOLOGIES

**Robotic vision and intelligence**

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

6

## INNOVATRICS

**From attendance system to presidential elections**

Biometric software for identity management based on fingerprint and face recognition technology.

Source: SARIO, 2025

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## COMPANIES SHAPING THE SLOVAK ICT SECTOR

### TECHNOLOGY FAST 50

A ranking of Central Europe's fastest-growing technology companies, measured by % revenue growth over the 4 years. Several IT companies from **SLOVAKIA** — earned a spot.

#### 1 POWEREX SOFTWARE

PowerX is an energy-tech company that uses AI to optimize and monetize distributed energy assets through a virtual power plant platform.

#### 2 FUERGY SOFTWARE

An energy-tech company delivering smart battery storage and AI-powered energy management to optimize energy use and reduce costs.

#### 3 SLONEEK SOFTWARE

An all-in-one HR platform that streamlines recruitment, onboarding, payroll, and workforce management for SMEs and growing companies.

#### 4 VESTBERRY FINTECH

Portfolio intelligence software that helps venture capital and private equity funds manage investments, automate reporting, and gain actionable insights.

#### 5 ZIRCON TREE MEDIA & ENTERTAINMENT

A tech and marketing company helping teams manage, analyze, and optimize digital advertising campaigns.

Source: Deloitte Technology, Fast 50 Central Europe, 2025



### COMPANIES TO WATCH

1

#### DOKLADO

Bookkeeping app that digitizes receipts and syncs transactions with accounting software.

2

#### SEAK

A tech company offering smart lighting and EV charging solutions that improve energy efficiency using existing power-line infrastructure.

3

#### POWERFUL MEDICAL

A med-tech company using AI to analyze ECGs and detect heart conditions, enabling faster and more accurate diagnostics.

4

#### SEC TECHNOLOGIES

A Slovak defence-tech company developing long-range detectors for hazardous threats.

5

#### FINAX

A Slovak robo-advisor offering automated investing and portfolio management across multiple EU markets.



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## SLOVAK ICT SUPPORTING PLATFORMS

ICT supporting platforms in SLOVAKIA connect industry, academia, and the public sector to promote innovation, digital skills, and the growth of the technology ecosystem.

1

**IT ASSOCIATION OF SLOVAKIA**  
**Connecting Slovakia's ICT ecosystem**  
Founded in 1999 and headquartered in Bratislava, IT Association of Slovakia (ITAS) is the Slovak association of over 100 ICT companies, representing around 80% of the national IT market and employing more than 30,000 people. The organization drives digital transformation across both the private and public sectors, supports education and reskilling initiatives at all levels, and promotes IT skills certification to strengthen SLOVAKIA's digital economy.

2

**ZAIT**  
**Žilina's primary IT cluster**  
ZAIT is headquartered in Žilina and was established in 2008 as a Slovak cluster of 21 members from the private, public, and academic sectors. In 2014, it was awarded the European Cluster Excellence Initiative Bronze Label. Its activities are mainly focused on the Žilina region, where it connects the private sector with R&D institutions, supports ICT education at secondary schools, and organizes educational programs and camps to develop IT skills.

Source: ITAS, Košice IT Valley, ZAIT, National Supercomputing Center

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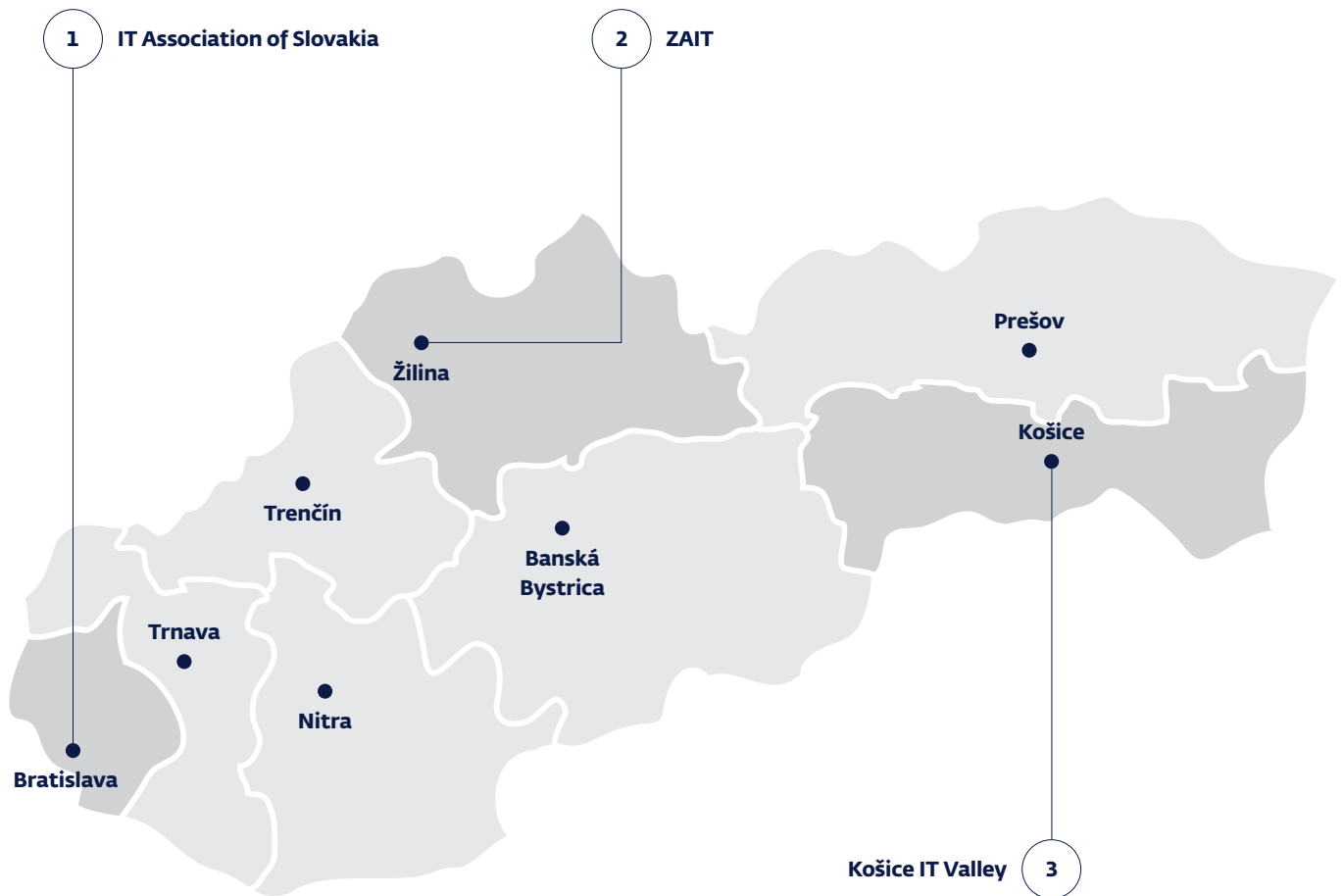
### KOŠICE IT VALLEY

#### A leading regional ICT cluster

Košice IT Valley is headquartered in Košice and was established in 2007 as a Slovak association of 82 members and sympathizers from the private, public, and academic sectors. In 2015, it was awarded the Cluster Management Excellence Gold Label as the first organization in Central Europe. Its activities are focused on Eastern Slovakia, where it continues to prioritize education while also expanding into innovation, R&D, cluster collaboration, and investment support.

#### NATIONAL SUPERCOMPUTING CENTER

The National Competence Centre for High-Performance Computing (HPC) serves as the coordinating body for HPC activities in **SLOVAKIA**. Established by the Ministry of Investment, Regional Development and Informatization of the Slovak Republic and the Slovak Academy of Sciences, it supports the development of HPC infrastructure, projects, investments, and digital skills through the EuroCC initiative. Through cooperation with SARIO, it also promotes investments in HPC, ICT projects, R&D, and data centers in **SLOVAKIA**.



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## SLOVAK GAME DEVELOPMENT INDUSTRY

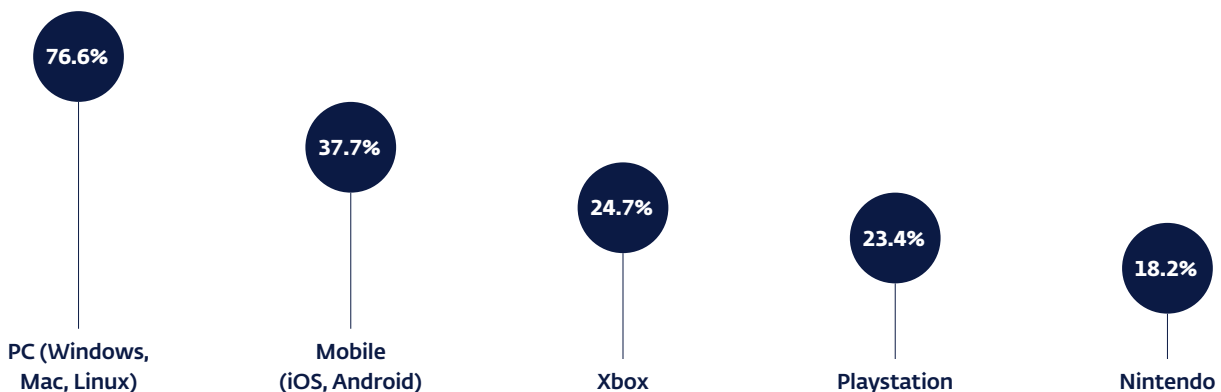


The game development industry in **SLOVAKIA** is expanding, uniting a growing number of studios. With strong educational programs and experienced professionals in the field, a new generation of game developers is emerging.

### SLOVAK GAMING INDUSTRY IN NUMBERS

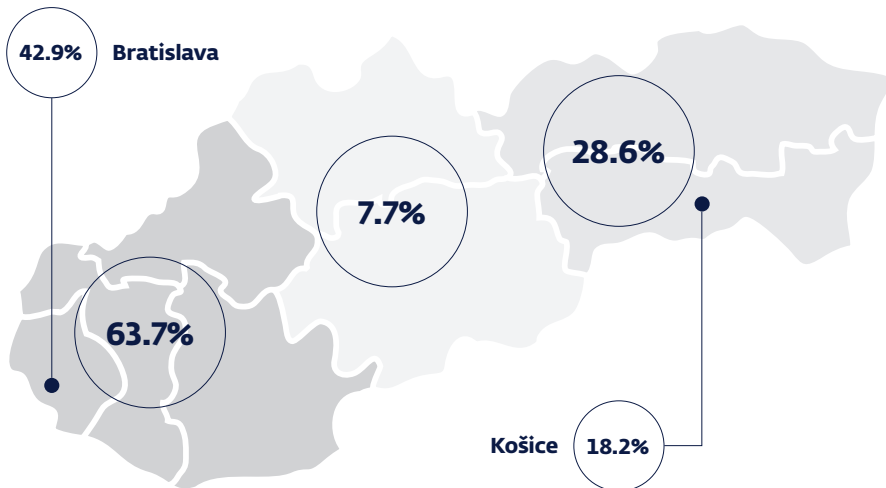


### PRIMARY TARGET PLATFORM FOR RELEASED GAMES (IN %)



Source: Slovak Game Developers Association (2025), Web pages of particular events

## DISTRIBUTION OF GAME DEVELOPING STUDIOS



## TOP 10 GAME STUDIOS IN SLOVAKIA

	STUDIO NAME	YEAR OF ESTABLISHMENT	HEADQUARTERS
1	Pixel Federation	2007	Bratislava
2	Nine Rocks Games	2020	Bratislava
3	Inlogic Software	2005	Košice
4	SuperScale	2016	Bratislava
5	PowerPlay Studio	2007	Bratislava
6	3Division	2005	Košice
7	Gentlemen's	2018	Bratislava
8	Blue Brain Games	2015	Prague
9	Noise Artillery	2014	Bratislava
10	QORPO	2018	Bratislava



### SLOVAK GAME DEVELOPERS ASSOCIATION

A civic association supporting digital game development, game developers, and startups in SLOVAKIA. It helps emerging talent develop artistic, technical, and business skills while promoting education in digital games for professionals and the public.

Source: Slovak Game Developers Association (2025), Web pages of particular events



## GAME EVENTS IN SLOVAKIA

1

### UNICON TRNAVA

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

2

### BRATISLAVA GAME JAM

A competition where individuals and teams create video game prototypes in just 40 hours while experimenting with innovative game design.

3

### GAME DAYS KOŠICE

The only international video game festival in Slovakia, bringing together leading creators to share innovative game development experiences and celebrate games as an art form.

4

### GLOBAL GAME JAM SLOVAKIA

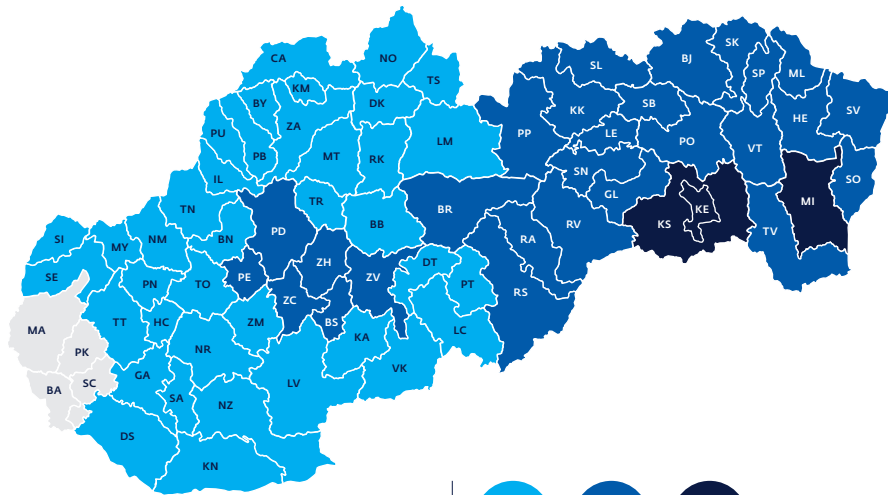
The world's largest game jam, bringing creators together to make games in 48 hours around a shared secret theme.

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# INVESTMENT INCENTIVES

## MAXIMUM REGIONAL INVESTMENT AID INTENSITY

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.



### 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 grants
- 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).

### R&D TAX DEDUCTION

- applicable to all phases and all types of R&D with tangible or intangible results
- deductible costs directly linked to the R&D project
- deduction automatically claimed in the tax return for the respective tax period
  - 1<sup>st</sup> time in tax accounting as standard costs/expenses
  - 2<sup>nd</sup> time as superdeduction (additional deduction from income tax base) + annual increase

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.

Note: Districts in Bratislava region are excluded from the investment aid scheme.



## 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!**

**SLOVAK INVESTMENT AND TRADE DEVELOPMENT AGENCY**

Mlynské nivy 44/b | 821 09 Bratislava | Slovakia  
invest@sario.sk | trade@sario.sk

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**ISBN 978-80-89786-36-7**

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