



WHY THE BSC SECTOR MATTERS?

In 2025 AmCham Slovakia surveyed 41 business centers with operations in the country, which were integral part of the BSCF community at the time. The aggregated data reflects the status quo of the business centers industry in Slovakia as of October 1st, 2025.



WHO IS WORKING AT THE SERVICE CENTERS IN SLOVAKIA?

The surveyed sample of business centers employs more than 35 000 people. 83% of the member companies expect their headcount to further grow or remain stable within the next 12 months and two thirds of them plan no changes in existing social benefits for their employees. The average age of FTEs is 37,5 years and has constantly been growing since 2015. 61% of them hold a university degree. Service centers continue to preserve lean management structure as only 10% of the population have people management positions. BSCs continue to employ predominantly Slovak citizens; there are only 9% of foreigners among staff whereas those from the EU member states slightly prevail. From the point of view of gender diversity, business centers employ almost balanced range of professionals – 47% of them are women.

35 041

Total number of FTEs in the service centers

UNIVERSITY EDUCATED



61%

WOMEN



47%

FOREIGN NATIONALS



9%

AVERAGE AGE



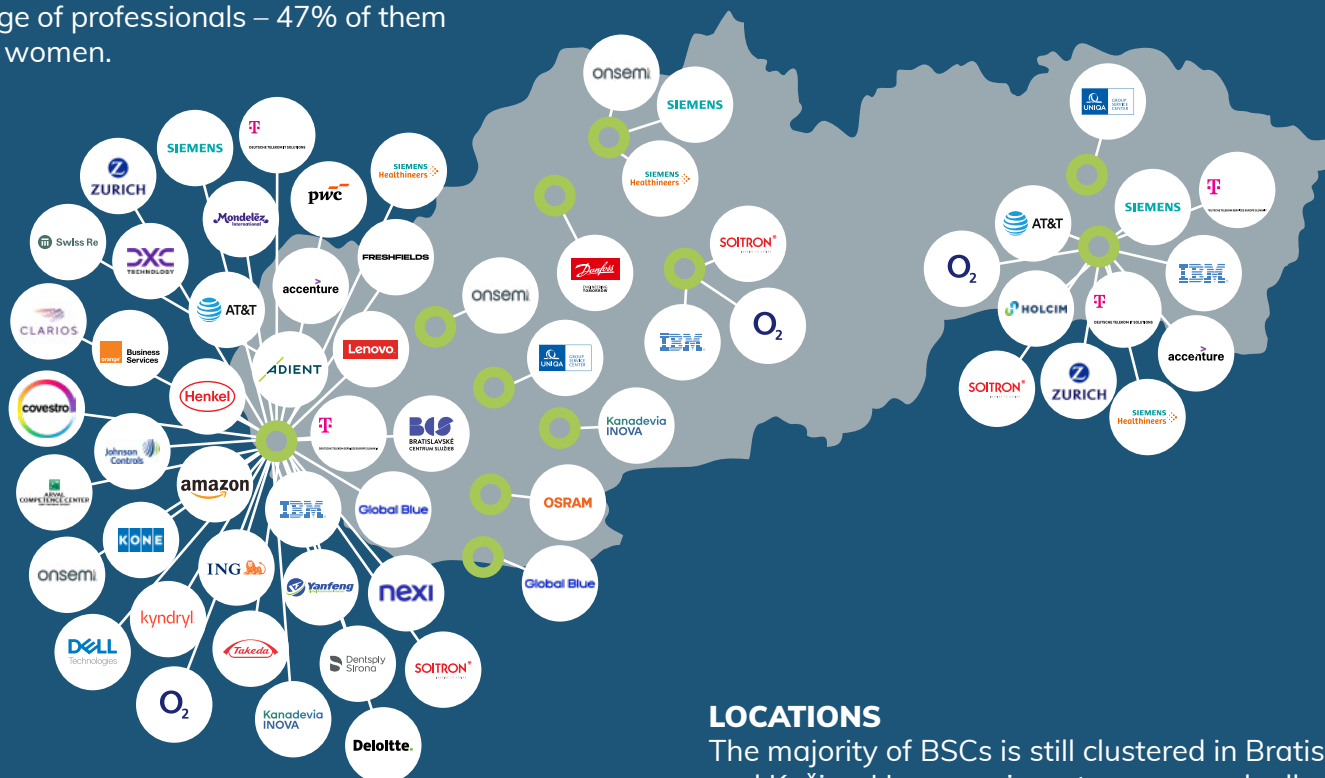
37,5

MANAGERS



10%

SOURCE
BSCF 2025 Survey



WHERE ARE THE BSCs LOCATED AND HOW BIG ARE THEY?

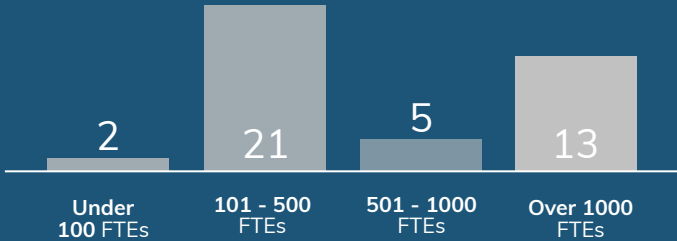
LOCATIONS

The majority of BSCs is still clustered in Bratislava and Košice. However, investors are gradually discovering advantages of regional hubs in Nitra, Žilina, Prešov, Banská Bystrica, Nové Zámky, Považská Bystrica, Komárno, Levice and other cities.

SIZE

In the context of Central and Eastern Europe, Slovakia is noteworthy for having a significant number of X-Large BSCs (employing more than a 1000 people).

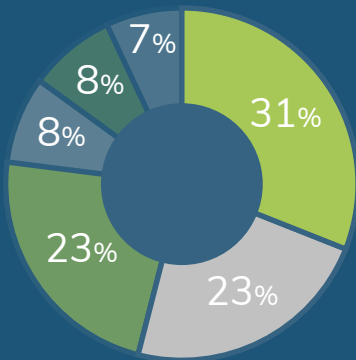
SOURCE
BSCF 2025 Survey



BUSINESS
SERVICES
PROVIDED

BSCs in Slovakia are mostly mature centers that provide value-add services and sophisticated processes for their global or regional operations. Almost 80% of all services fall within advanced Customer Operations (including Sales, Fulfilment, Tech Support and Customer Care), Financial Services or IT Services. The graph shows percentage of BSCF members' employees in these fields:

SOURCE
BSCF 2025 Survey



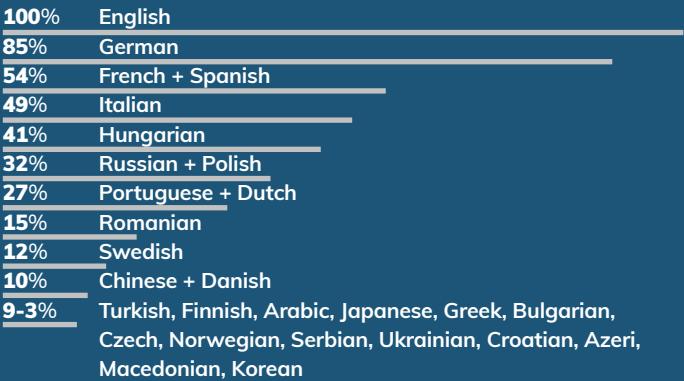
- Customer operations (incl. Sales, Fulfillment, Tech Support, Customer Care)
- IT services (incl. Software development)
- Finance
- Engineering/Technical
- Marketing + Human Resources (incl. Supply Chain Management, Pricing, Merchandising, Product Lifecycle Management)
- Other (incl. Legal, Procurement & Sustainability)



LANGUAGES USED WHEN
PROVIDING BUSINESS
SERVICES FROM SLOVAKIA

In order to serve their clients in their mother tongue BSCs hire staff with good and diverse foreign language skills. Proficiency in English is a must everywhere. The level of the second or third foreign language makes a difference when exploring the job opportunities in this sector.

SOURCE
BSCF 2025 Survey



HOW BIG IS THE SHARED
SERVICES INDUSTRY IN
SLOVAKIA?

BSCF MEMBERS' COUNTRIES OF ORIGIN



95%
of all
employees
in Slovakia

SOURCE
BSCF 2025 Survey



WHAT IS THE ANNUAL CONTRIBUTION OF BSCF MEMBER COMPANIES TO THE SLOVAK ECONOMY?

192,6

million €

EMPLOYEE INCOME TAX

156,9

million €

SOCIAL INSURANCE
(employees)

437,1

million €

SOCIAL INSURANCE
(companies)

37,2

million €

CORPORATE INCOME TAX



3,0% of the Slovak **state budget income**



1,3% of all **economically active citizens** of Slovakia

1,191

billion €

SALARIES EXPENDITURES

SOURCE

Financial information was prepared by PricewaterhouseCoopers Slovensko, s.r.o. based on data from BSCF Register of financial statements and from Trend weekly for year 2024.

2826

€

AVRG. MONTHLY SALARY

SOURCE

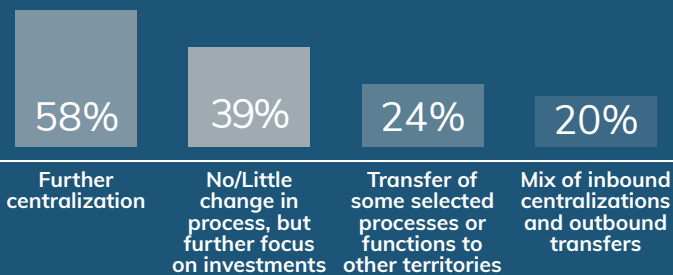
BSCF members calculations, 2025



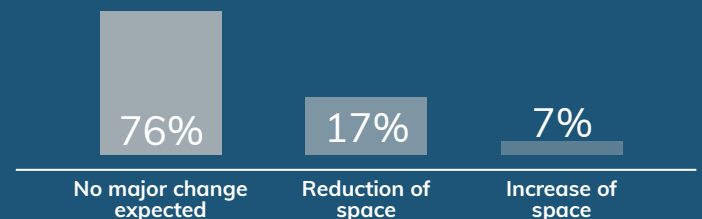
STRATEGIC CHALLENGES IN SLOVAKIA 2025

SOURCE
BSCF 2025 Survey

What are BSCF companies' development plans for next 2-3 years compared to the current position in Slovakia (cumulative)?



What are BSCF companies' office space plans for the next 2-3 years?

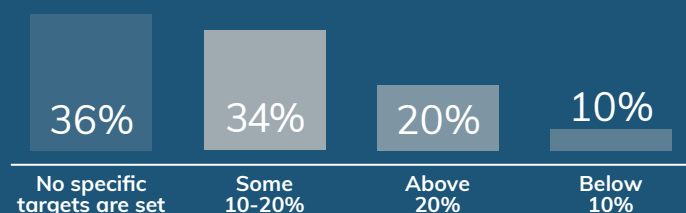


What is the current extent of your flexible weekly working time arrangement (cumulative)?

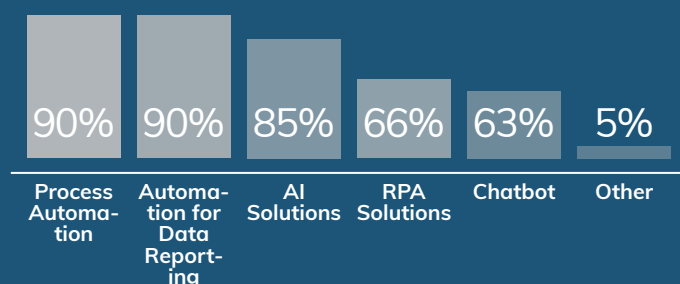




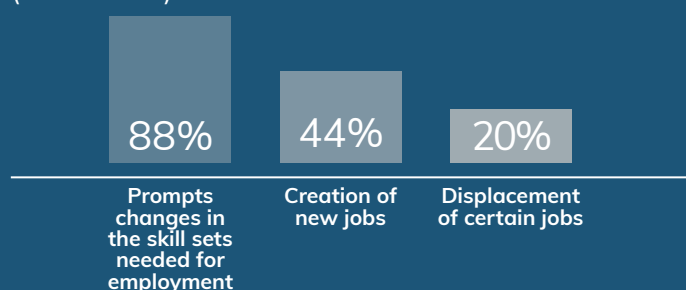
What is the planned extent of automation/AI of relevant processes or functions in BSCF companies in next 2-3 years?



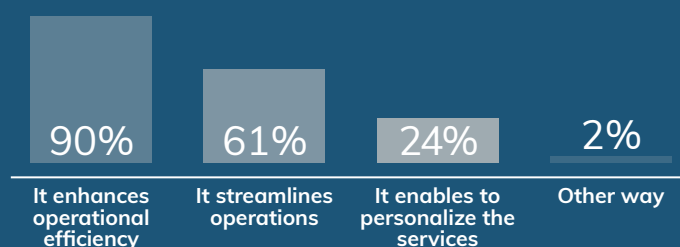
What type of automation/robotization are business centers implementing (cumulative)?



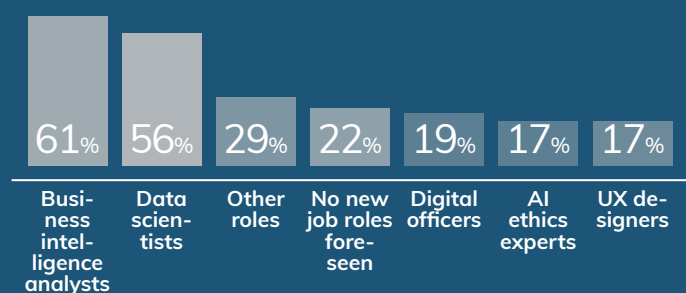
How does the implementation of AI/RPA affect the organizational structure of business centers (cumulative)?



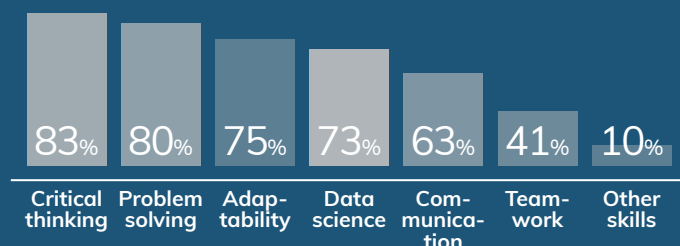
How does AI/RPA implementation influence business centers' operations (cumulative)?



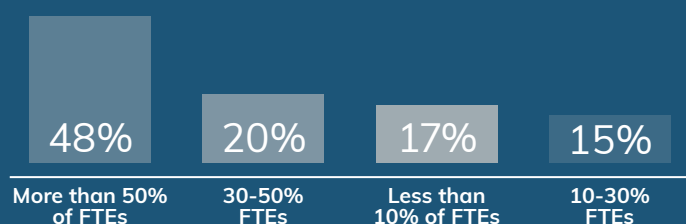
What kind of new job roles do business centers foresee in regard with the implementation of AI/RPA solutions (cumulative)?



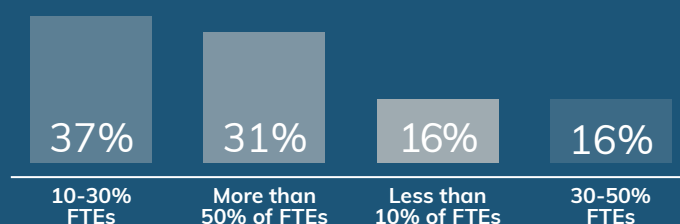
Which critical skills do business centers anticipate will be in high demand within next 2-3 years due to AI/RPA advancements (cumulative)?



How many % of FTEs in business centers have passed basic AI trainings or programs as part of their digital transformation?



How many % of FTEs in business centers use AI tools in their daily operations?

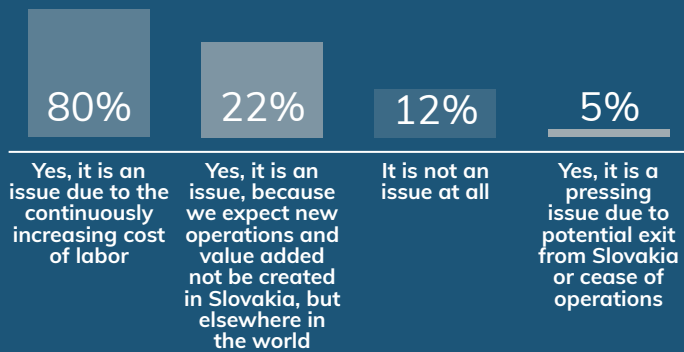




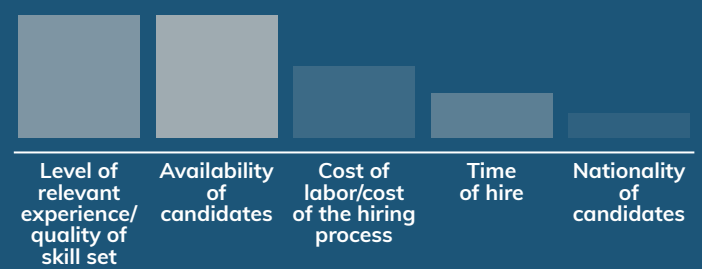
HUMAN RESOURCES

SOURCE
BSCF 2025 Survey

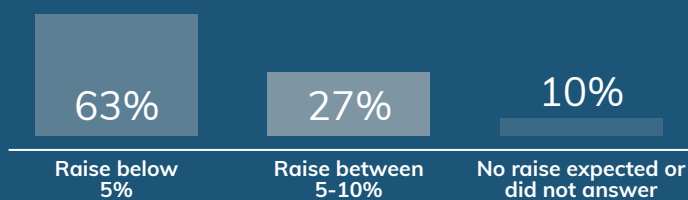
How critical is the lack of labor resources for BSCF companies' strategic development (cumulative)?



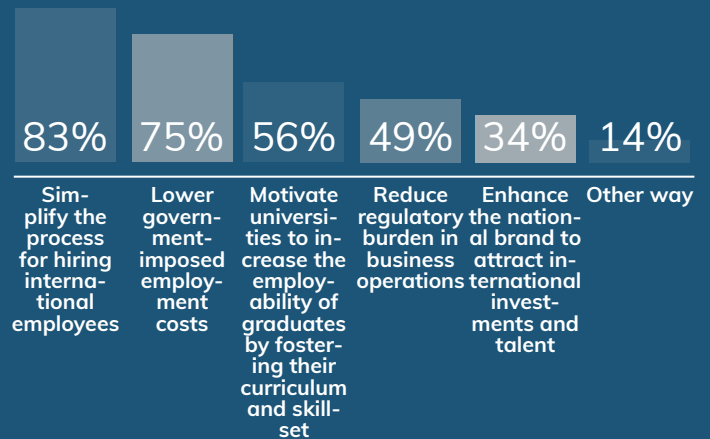
What is the main issue for BSCF companies with the hiring process?



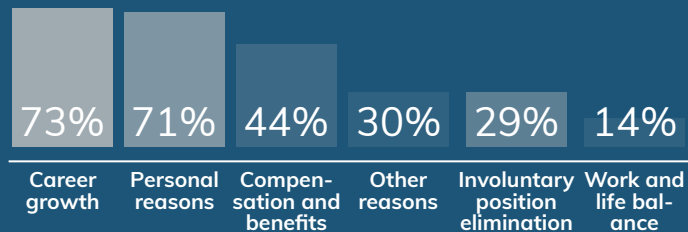
Do business centers expect to further raise salaries within next 12 months?



What measures can the government implement to support BSCF companies in thriving (cumulative)?



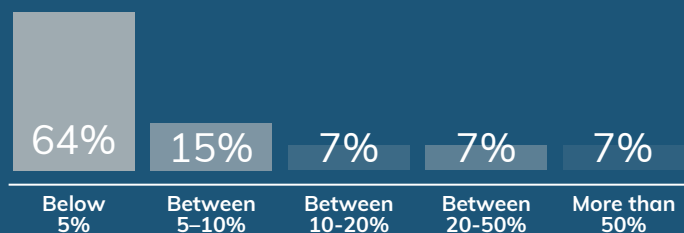
What have been the main reasons for labor fluctuations at BSCF companies over the last 12 months (cumulative)?



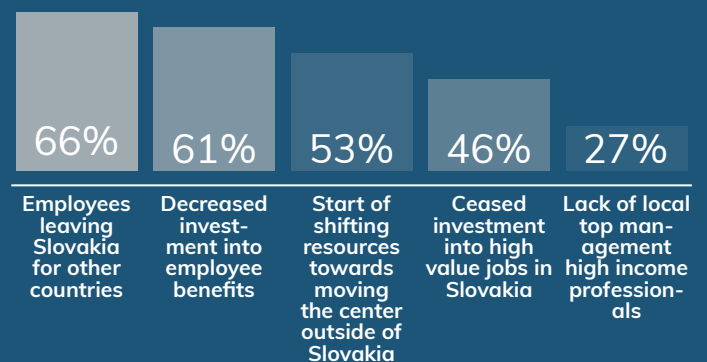
9,93%

AVERAGE OVERALL ATTRITION RATE (LAST 12 MONTHS)

What % of BSCF companies' staff permanently works from a remote location?



According to the opinion of BSCF member companies, the recently adopted consolidation packages combined with previous government interventions into the systems of remuneration, taxes and levies, will result in (cumulative):



6 GOOD REASONS

TO JOIN AMCHAM'S BUSINESS SERVICE CENTER FORUM



MISSION

BSCF aims to raise awareness of the business centers' role in the Slovak economy and helps it grow further in the country.



COMMUNICATION

BSCF shares information within the sector about concerns, solutions and best practices in areas such as HR, education, media exposure and many more.



REPRESENTATIVENESS

BSCF is the leading platform for business centers in Slovakia, amplifying a joint voice of over 95% of all the industry's FTEs.



INTERACTION WITH PUBLIC OFFICES

The community frequently interacts with national and local authorities, monitors the labor market and proposes changes to the legislation.



IMPACT

Powerful and direct legislative impact in Slovakia, supporting the continuous improvement of business environment.



BUSINESS-ACADEMIC COOPERATION

BSCF interacts with universities and high schools to improve the employability of graduates at business centers and strengthens the skillset of future industry leaders.



Join BSC Forum

and help to
make the voice
of BSCs stronger!



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