



BRATISLAVA — THE CAPITAL OF SLOVAKIA

SETTLE IN SLOVAKIA GOOD IDEA

SLOVAKIA – CLOSER THAN YOU THINK

- **Located in the geographical and political heart of Europe**
- **Easily accessible** from all European important centers
- The capital Bratislava lies **on the border with Austria and Hungary** and 60 km from the Czech border
- **600 MILLION CLIENTS** in radius of **2,000 km**

Establishment: 1 January 1993

Population: 5,400,000

Area (km²): 49,035

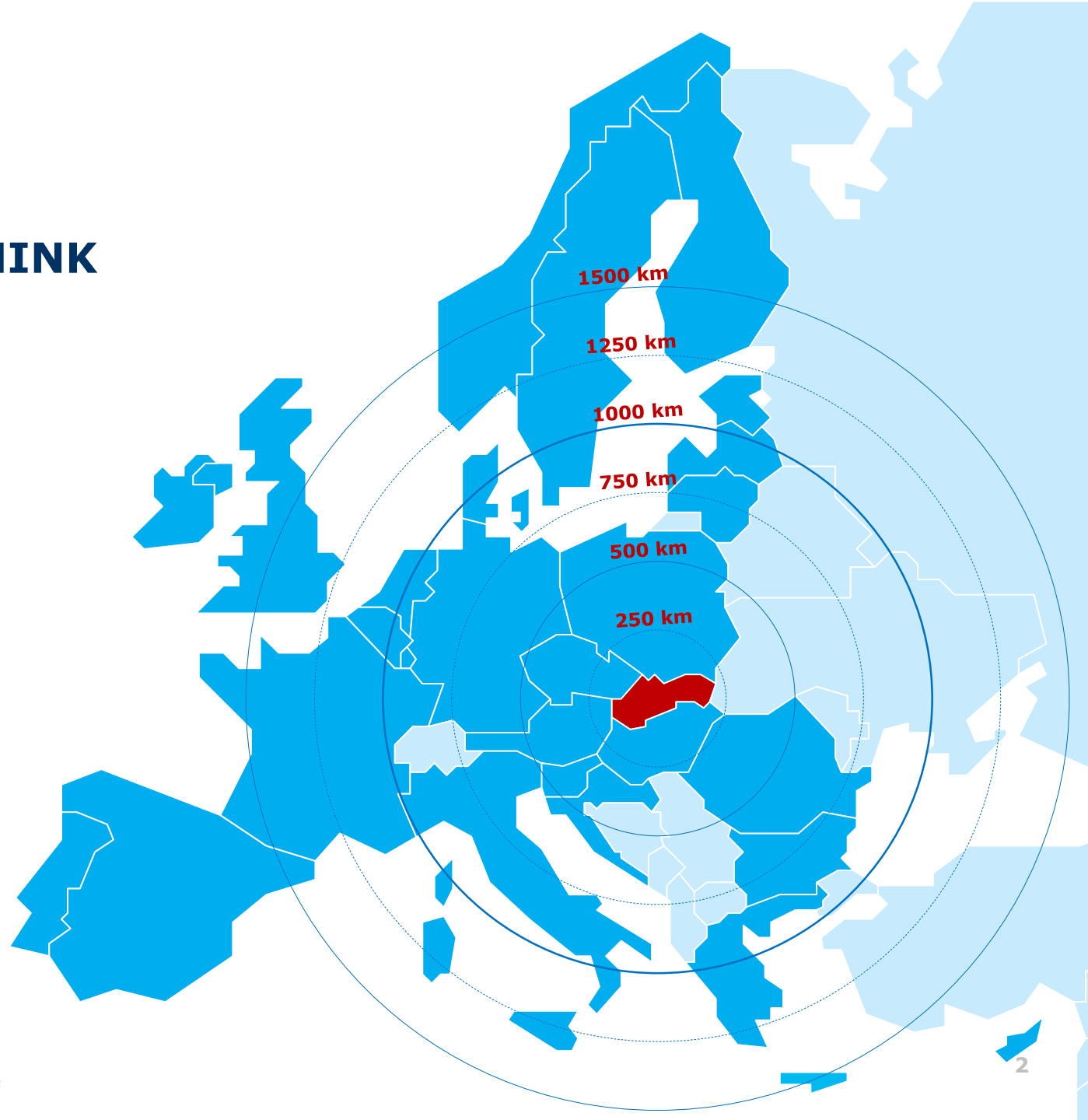
Official currency: Euro

Official language: Slovak

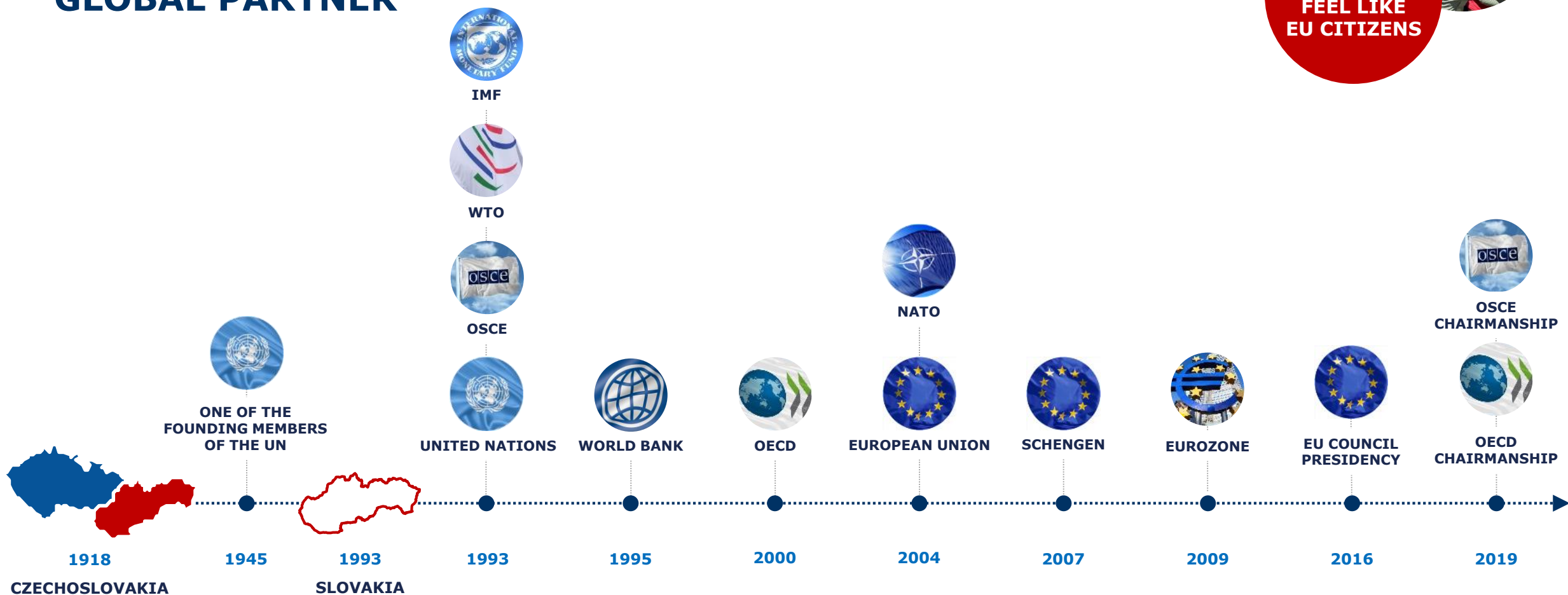
Political system: Parliamentary democracy with 4 years election term

Neighbors: Austria, Czech Republic, Hungary, Poland, Ukraine

Time zone: GMT+1 hour



SLOVAKIA – FULLY INTEGRATED EU MEMBER AND RELIABLE GLOBAL PARTNER



80% OF
SLOVAKS
FEEL LIKE
EU CITIZENS

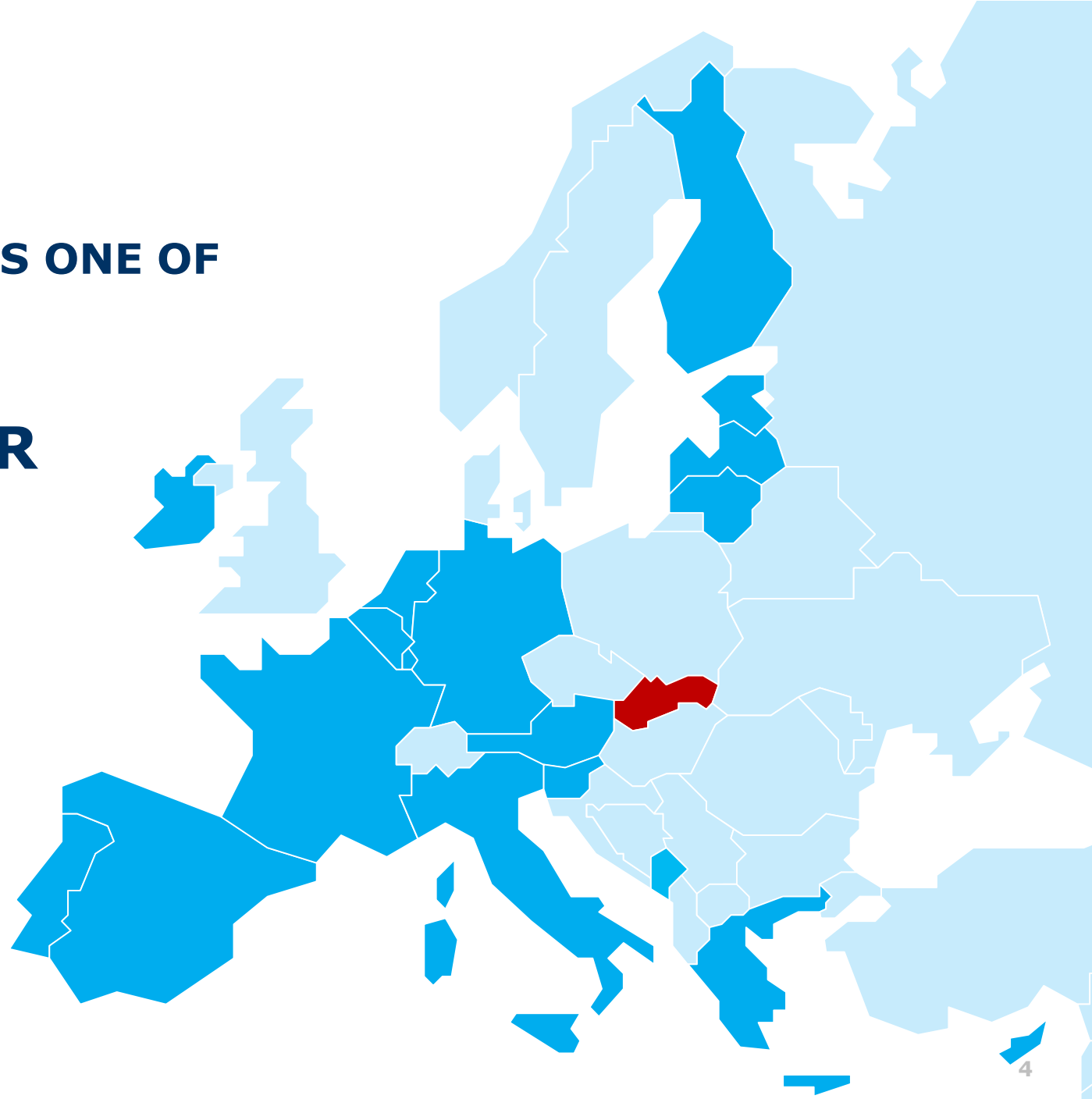


SLOVAKIA HAS EURO CURRENCY AS ONE OF THE FEW IN CEE



EUROZONE MEMBER SINCE 2009

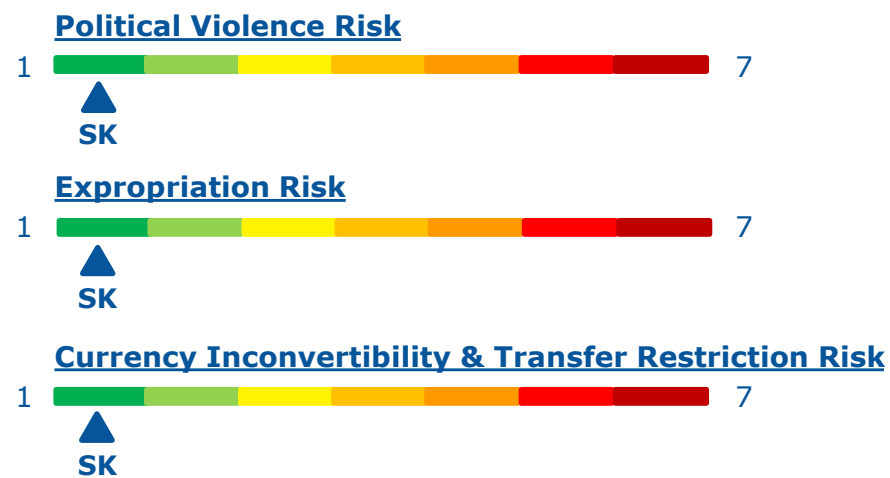
- **Positive impact on business:**
 - Limitation of Foreign Exchange Risk
 - Lowering Transaction Costs
 - Growth in Foreign Trade
 - Increased Economic & Financial Stability
- **Favorable conditions for long-term business decisions**





ONE OF THE SAFEST COUNTRIES FOR INVESTORS IN EUROPE

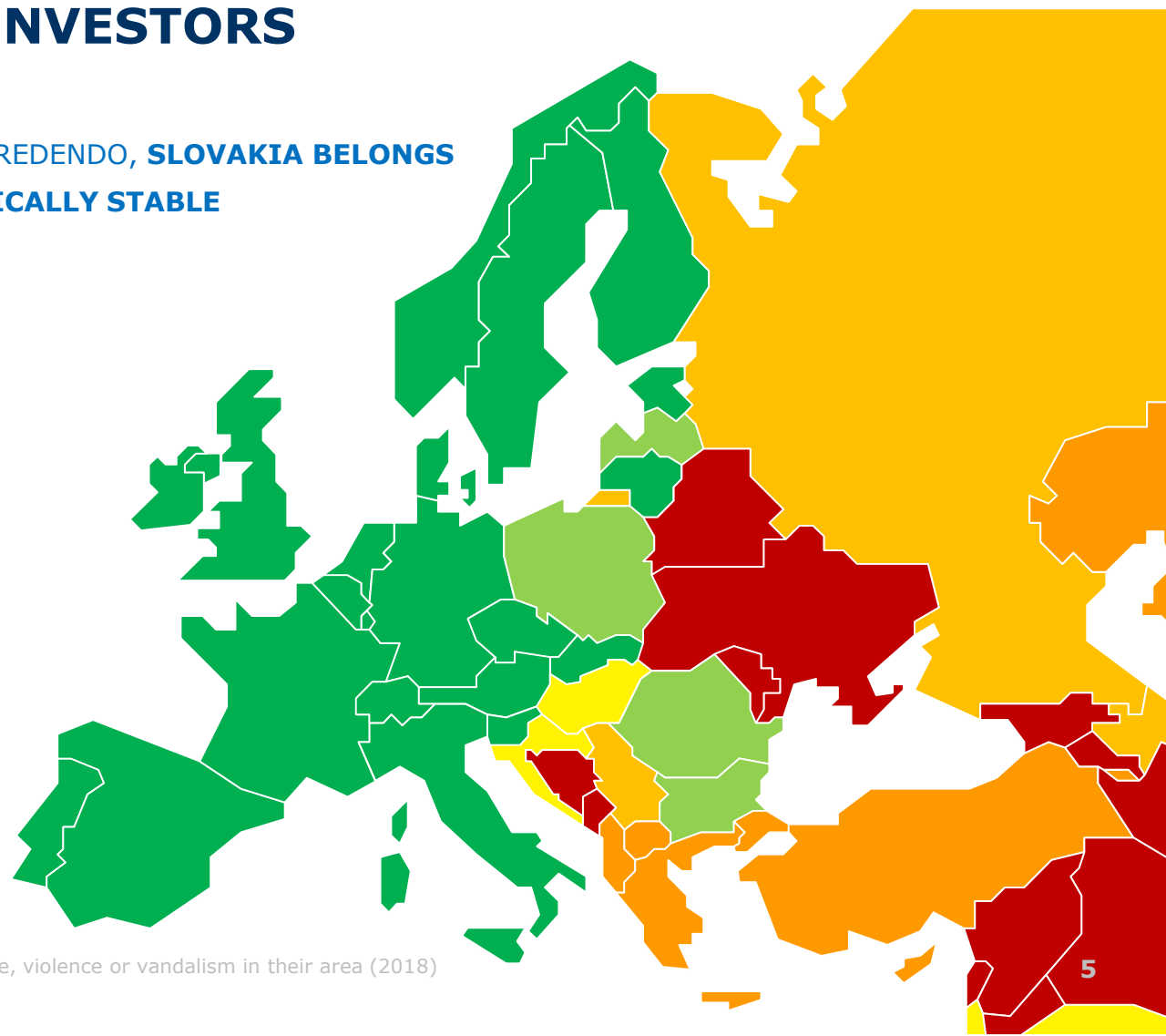
ACCORDING TO POLITICAL RISK ANALYSIS OF CREDIT INSURANCE GROUP CREDENDO, **SLOVAKIA BELONGS TO A GROUP OF COUNTRIES WITH THE SAFEST AND THE MOST POLITICALLY STABLE ENVIRONMENTS IN EUROPE.**



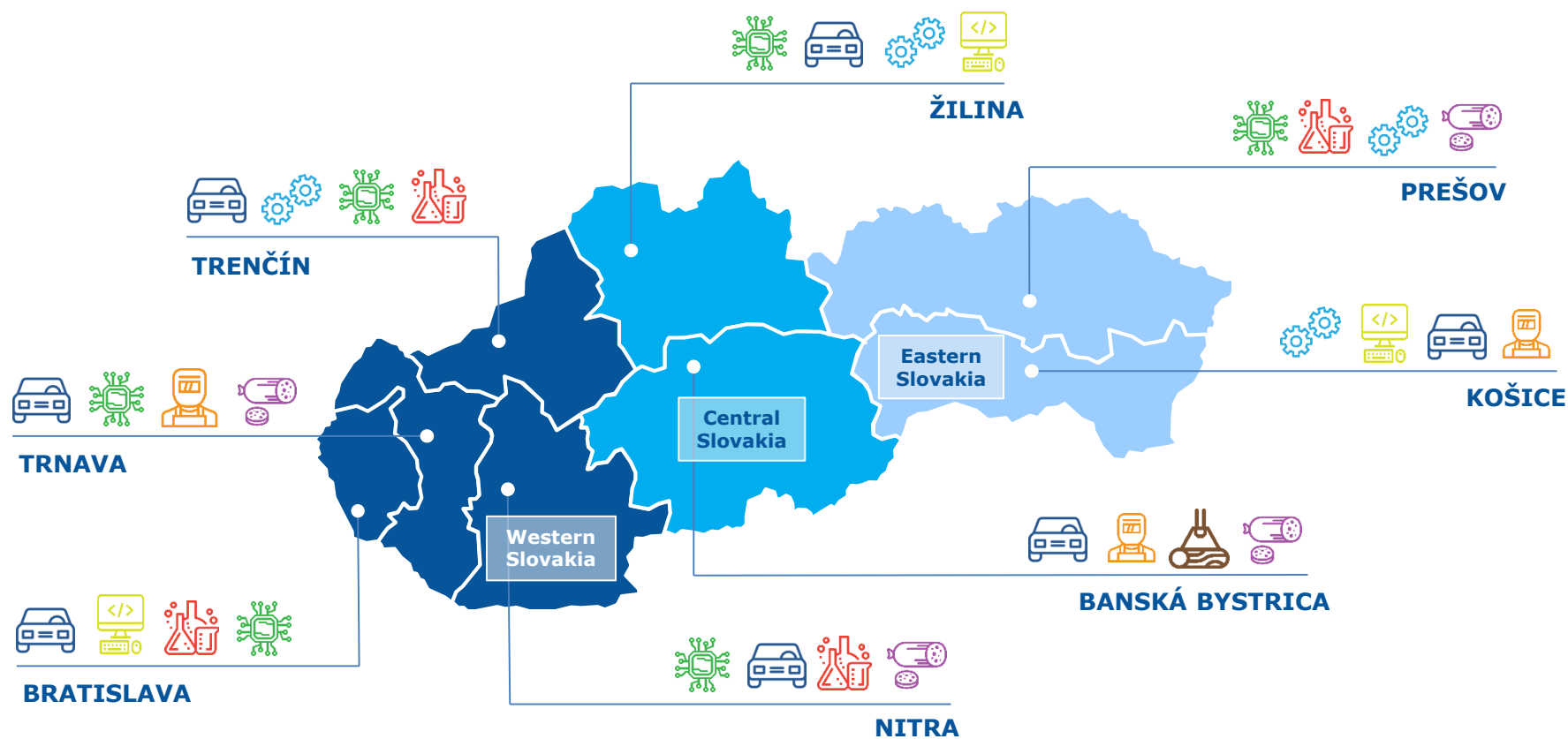
EUROSTAT:



AMONG TOP 3 SAFEST COUNTRIES IN THE EU



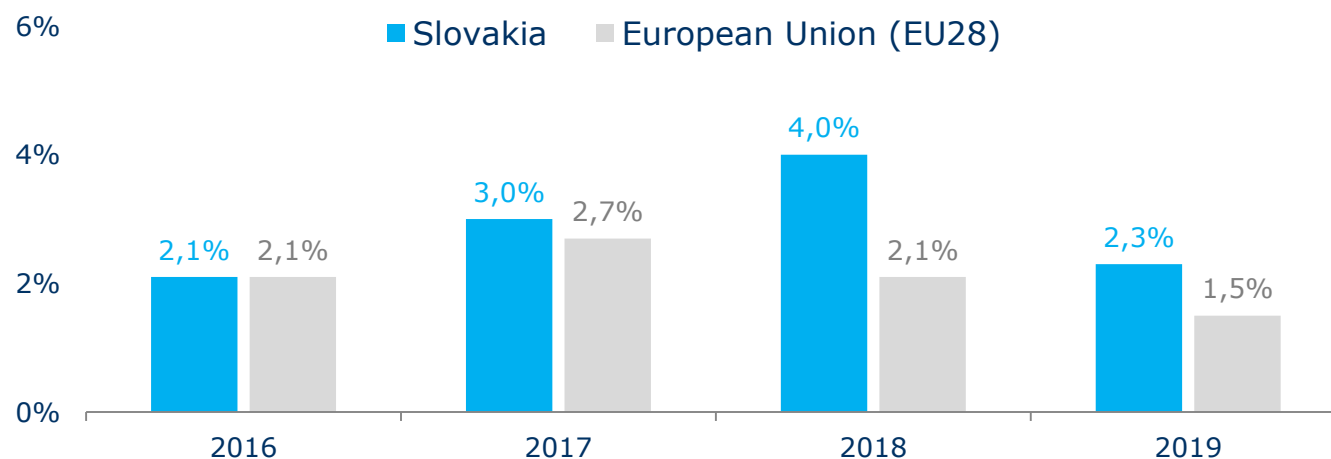
DIVERSIFIED INDUSTRIES ACROSS THE COUNTRY



-  **Automotive Industry**
-  **Machinery & Equipment**
-  **Electronics & Components**
-  **ICT & Business Services**
-  **Metallurgy & Metal Processing**
-  **Chemical & Pharmaceutical Industry**
-  **Food Industry**
-  **Forestry & Wood Processing**

BASIC MACROECONOMIC DATA INDICATES ECONOMIC STABILITY

GDP GROWTH



	2016	2017	2018	2019
Real GDP Growth	2.1%	3.0%	4.0%	2.3%
Inflation	-0.5%	1.4%	2.5%	2.8%
Unemployment	9.7%	8.1%	6.5%	5.8%

GDP GROWTH PREDICTION BY EUROPEAN COMMISSION

	2020f	2021f
Germany	- 6.5%	5.9%
Slovakia	-6.7 %	6.6 %
Poland	-4.3 %	4.1 %
Czech Rep.	-6.2 %	5.0 %
Hungary	-7.0%	6.0 %
Romania	-6.0%	4.2 %
Bulgaria	-7.2%	6.0 %

85%
EXPORTED
TO EU

THE MOST OPEN ECONOMY IN THE EUROPEAN UNION



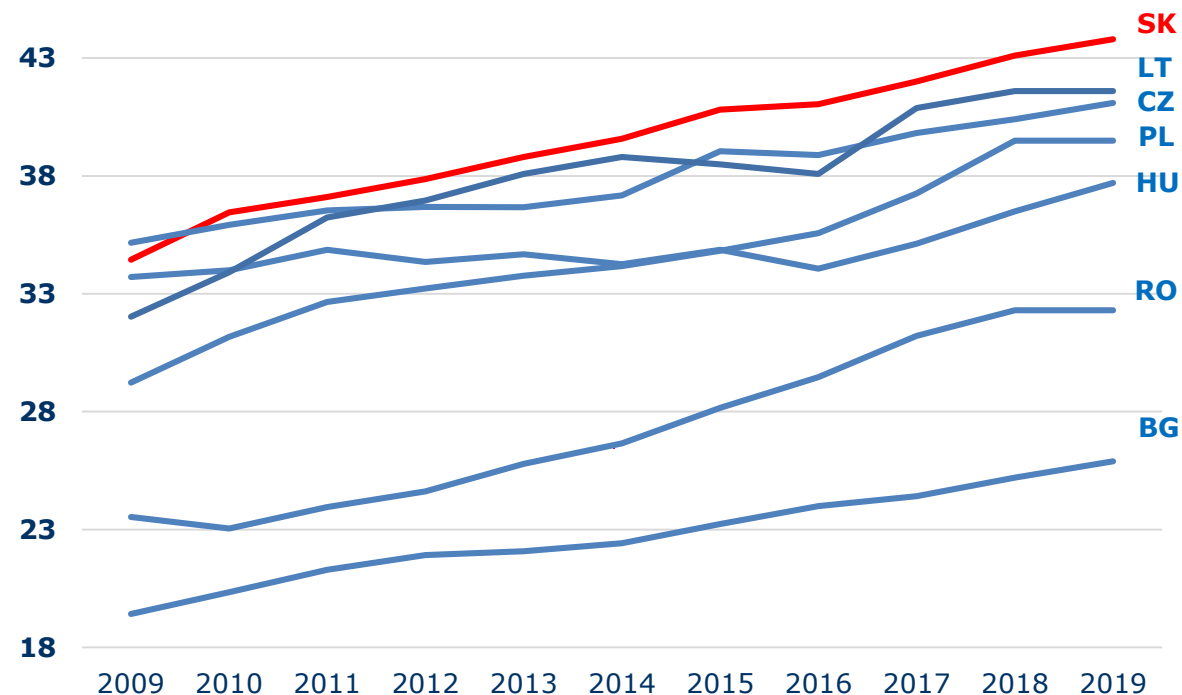
Slovakia ranks as **No. 1 globally in EASE OF TRADING ACROSS BORDERS** reflecting the time and cost associated with the logistical process of exporting/importing goods (The World Bank ranking).



Slovakia ranks as **No. 12 in the world in the OPEN MARKETS INDEX** assessing openness to trade, trade policy settings, FDI openness and trade-enabling infrastructure (ICC ranking).

SLOVAKIA REACHES THE HIGHEST LABOUR PRODUCTIVITY IN CEE

GDP (IN PPS) PER HOUR WORKED (IN USD)



LEADER IN AUTOMATION – NO. 16 GLOBALLY

Slovakia has **165 industrial robots** per 10,000 employees, the best rate in CEE (European avg = 114; World avg = 99)



FDI & TECHNOLOGY TRANSFER LEADER IN CEE

In the extent of **bringing new technology** to host country. 15th place worldwide (out of 137 countries)



THE HIGHEST SHARE OF ADDED-VALUE EMPLOYMENT IN CEE

Jobs in **medium-high technology manufacturing** and **knowledge-intensive services** in the CEE region



ONE OF THE LOWEST NUMBER OF LOST WORKING DAYS DUE TO INDUSTRIAL ACTIONS IN EU

per 1,000 employees thanks to existing **tripartite dialogue** – platform ensuring low level of industrial action



THE HIGHEST SHARE OF PEOPLE WORKING AT NIGHT IN EU

almost **every 4th** in the automotive industry

SLOVAKIA HAS DIVERSIFIED MANUFACTURING SECTOR WITH HIGH-TECH INDUSTRIES

MORE THAN 4/5 OF TOTAL
MANUFACTURING OUTPUT VALUE
IN SLOVAKIA IS CREATED BY 6
PRODUCTION SECTORS



PRESENT: 9 (CONFIRMED) BRANDS PRODUCED IN SLOVAKIA



VOLKSWAGEN GROUP
Germany | 1991 | Bratislava



PSA PEUGEOT CITROËN
France | 2003 | Trnava



KIA MOTORS
South Korea | 2004 | Žilina



JAGUAR LAND ROVER
United Kingdom | SOP 2018 | Nitra

The only plant
in the world
producing 5
brands under
one roof

VOLKSWAGEN Touareg,
AUDI Q7 & Q8
PORSCHE Cayenne
SKODA Karoq
VOLKSWAGEN up!
ŠKODA Citigo
SEAT Mii

The most
profitable plant of
PSA in the world
with the most
silent press
room

New **PEUGEOT** 208
CITROËN C3

The only
KIA Motors
plant located in
Europe

KIA cee'd
KIA cee'd Sportswagon
KIA pro_cee'd
KIA Sportage,
+ **ENGINE** shop for
KIA and **HYUNDAI**

The most
sophisticated
production site of
the group and 1st
JLR plant outside
the UK

LAND ROVER Discovery
LAND ROVER Defender

177,000

People employed
directly employed by 4
car producers & Tier 1
suppliers

275,000

Employed directly and
indirectly by the
automotive industry

50%

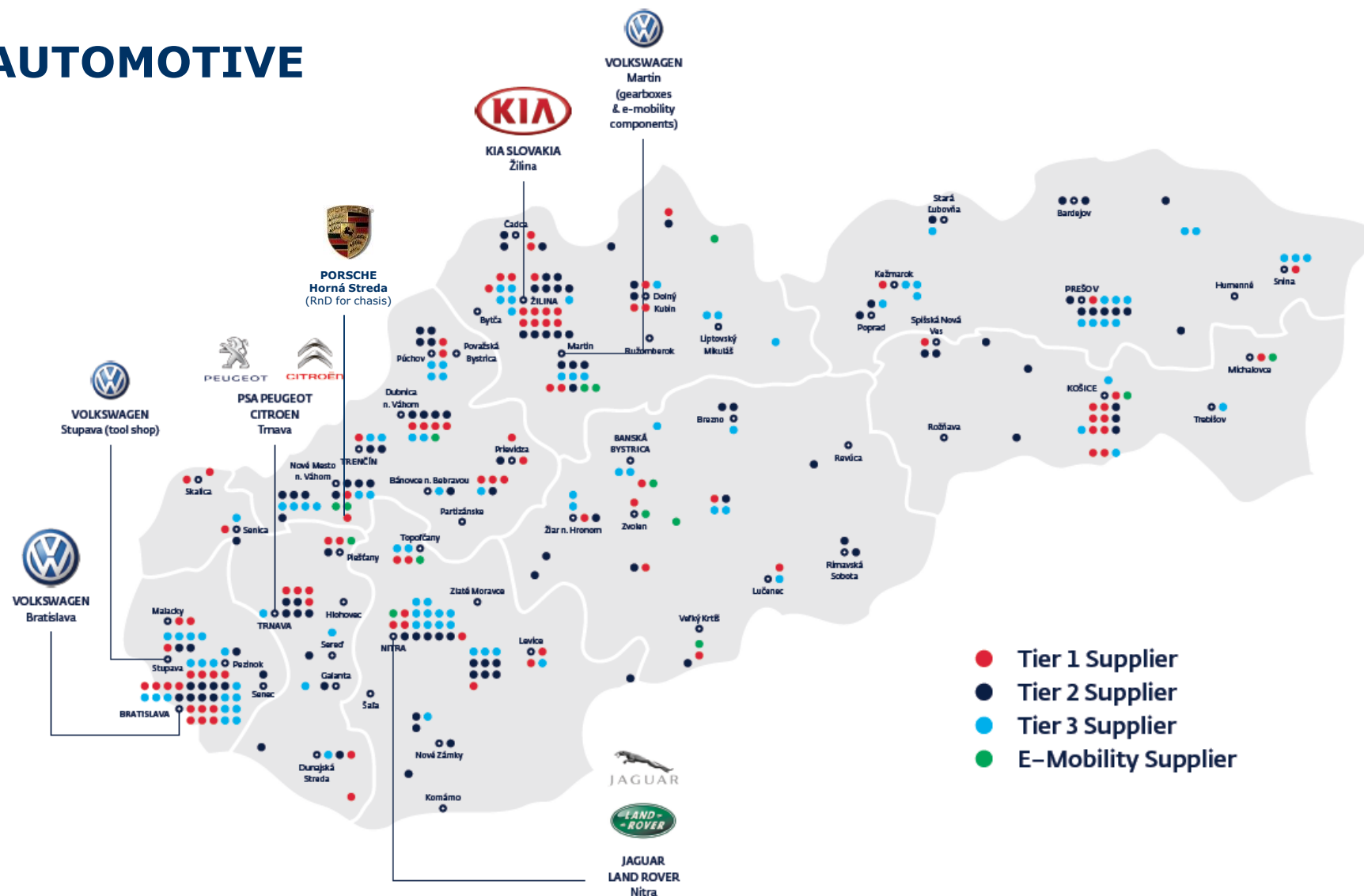
Share of the automotive
industry on total
industrial production

4 & 13 E-Models

4 BEV models & 11
PHEV and MHEV
models are produced

NETWORK OF 350+ AUTOMOTIVE SUPPLIERS

More than **350 automotive suppliers** are operating in Slovakia. While Western Slovakia still tends to offer numerous benefits to incoming investors, we are experiencing and further expecting an even quicker growth of FDI in the Central and Eastern part of the country



SLOVAKIA VIEWED POSITIVELY AS AN INVESTMENT DESTINATION

DECISION MAKERS IN THEIR OWN WORDS



Great Britain | Automotive

'Slovak government has prepared a very good investment environment for us. You have a very good reputation in high quality production.'

Dr. Ralph Speth | CEO



USA | SSC

'Among the important factors were the legal system, the state of the economy, the business climate and the quality of governance. The number one criterion, however, were the people. It was them who had the greatest impact on our company's growth. In 2001, we didn't say we'd be employing 2,000 employees here by 2008.'

Veit Dengler | General Manager



Germany | ITC

'Slovakia won, because we do not search for the cheapest, but the best people. The infrastructure with the universities here with other conditions is a good base for a further development.'

Horst Reichardt | President

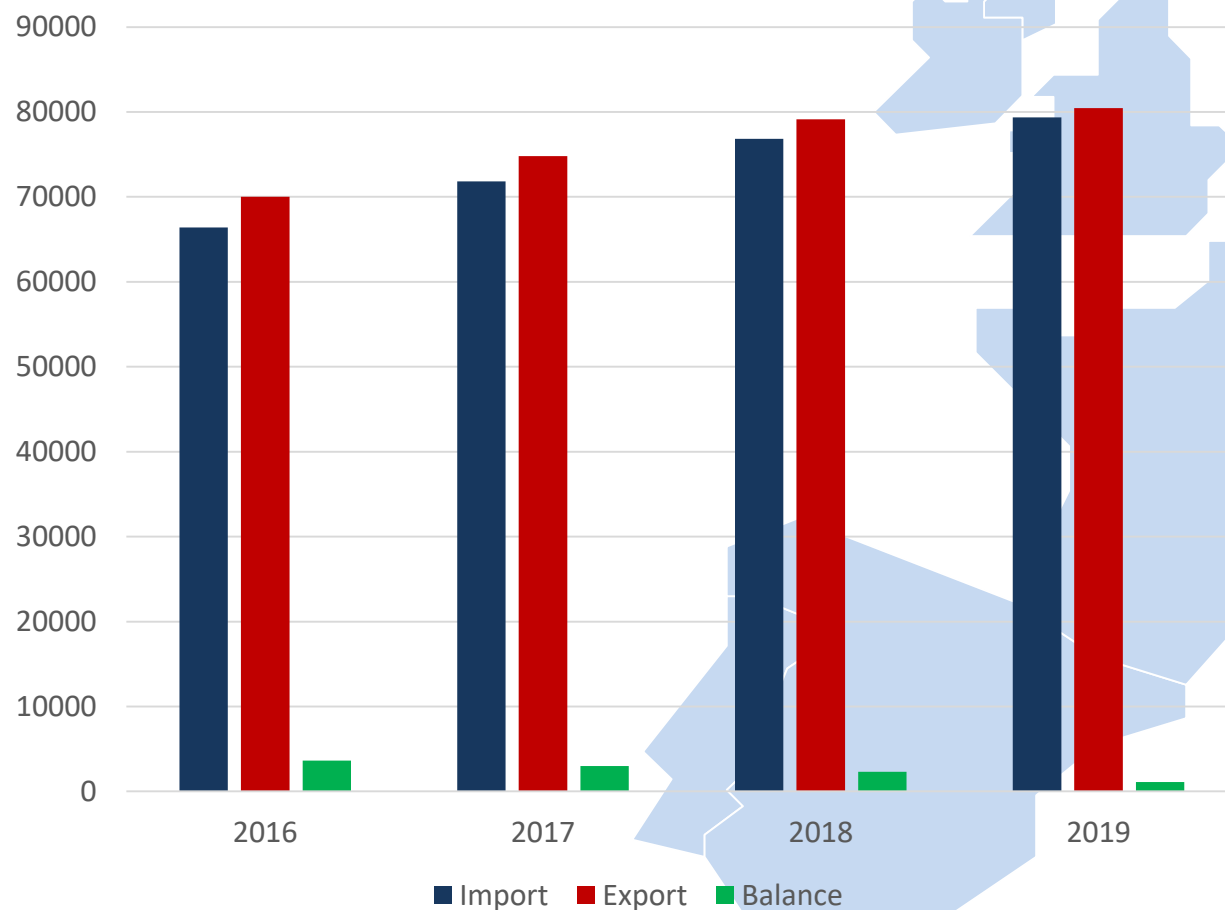


Brazil | Refrigeration,
compressors and condensing
units, SSC, R&D

'Today top management team is purely represented by local professionals, with the majority of them working for the company for more than 10 years. This is a very good base for the stability of the company, as they have a better knowledge of the local culture.'

Norbert Brath | R&D Global Product Engineering Director

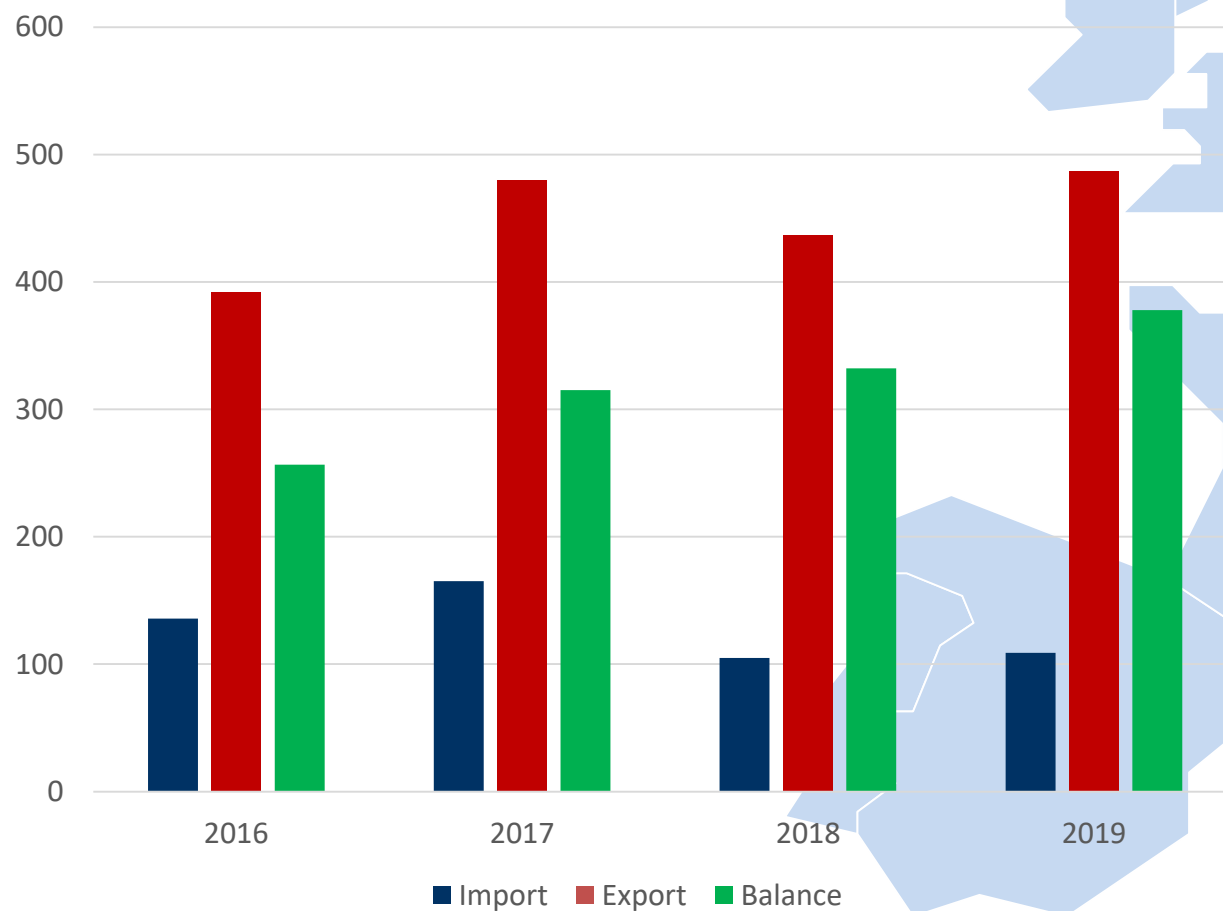
SLOVAKIA FOREIGN TRADE



In mil. €



FOREIGN TRADE BETWEEN SLOVAKIA AND CROATIA



In mil. €

FOREIGN TRADE COMMODITIES BETWEEN SLOVAKIA AND CROATIA

Export from Slovakia



Telephone sets



Screens and displays



Automotive vehicles



Technical oil

Import from Croatia



Pharmaceutil pills



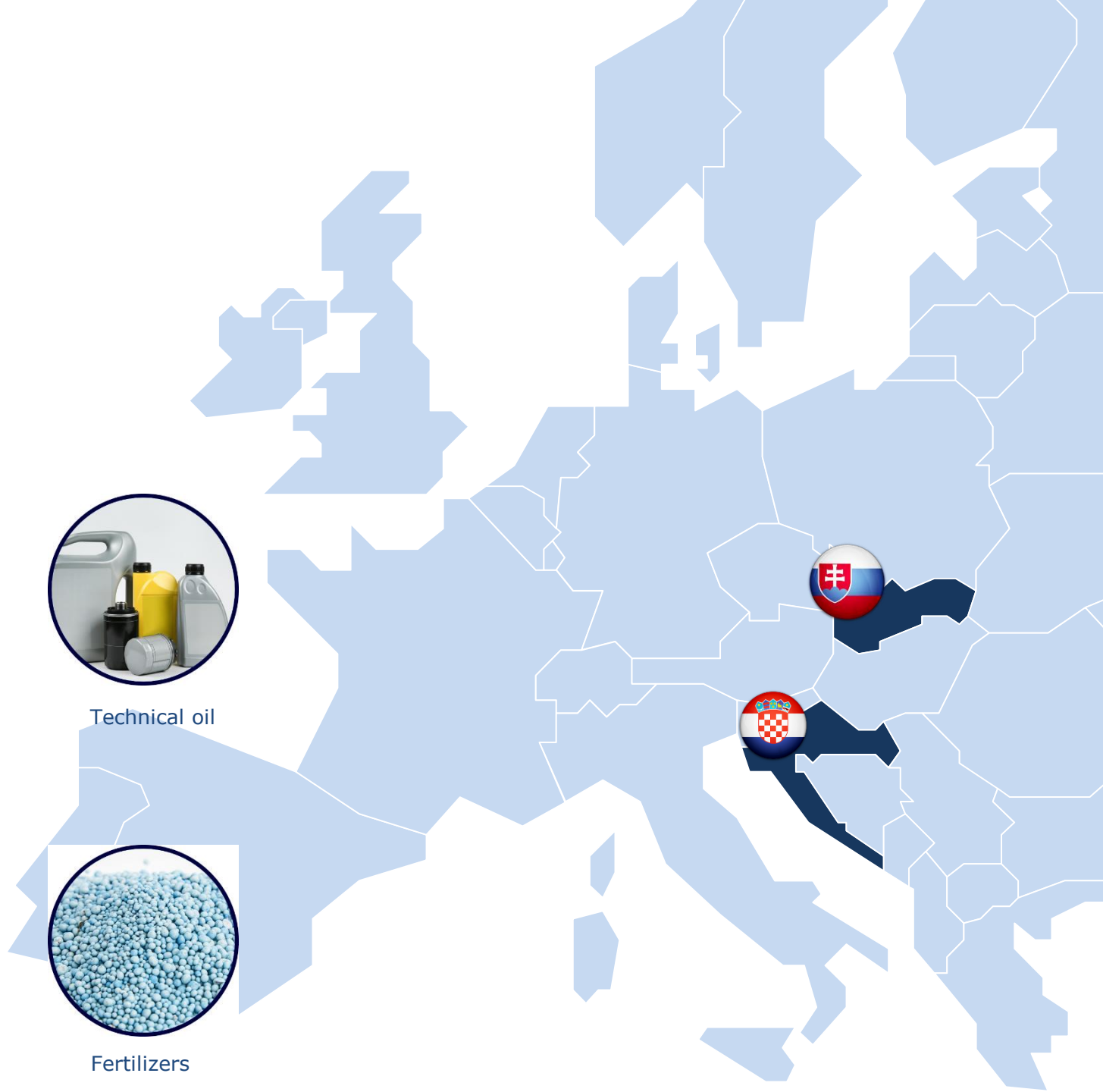
Technical oils



Aluminium products



Fertilizers



Thank you

ADAM, CSUKA
Consultant, FOREIGN TRADE DEPARTMENT,
SARIO

E: adam.csuka@sario.sk