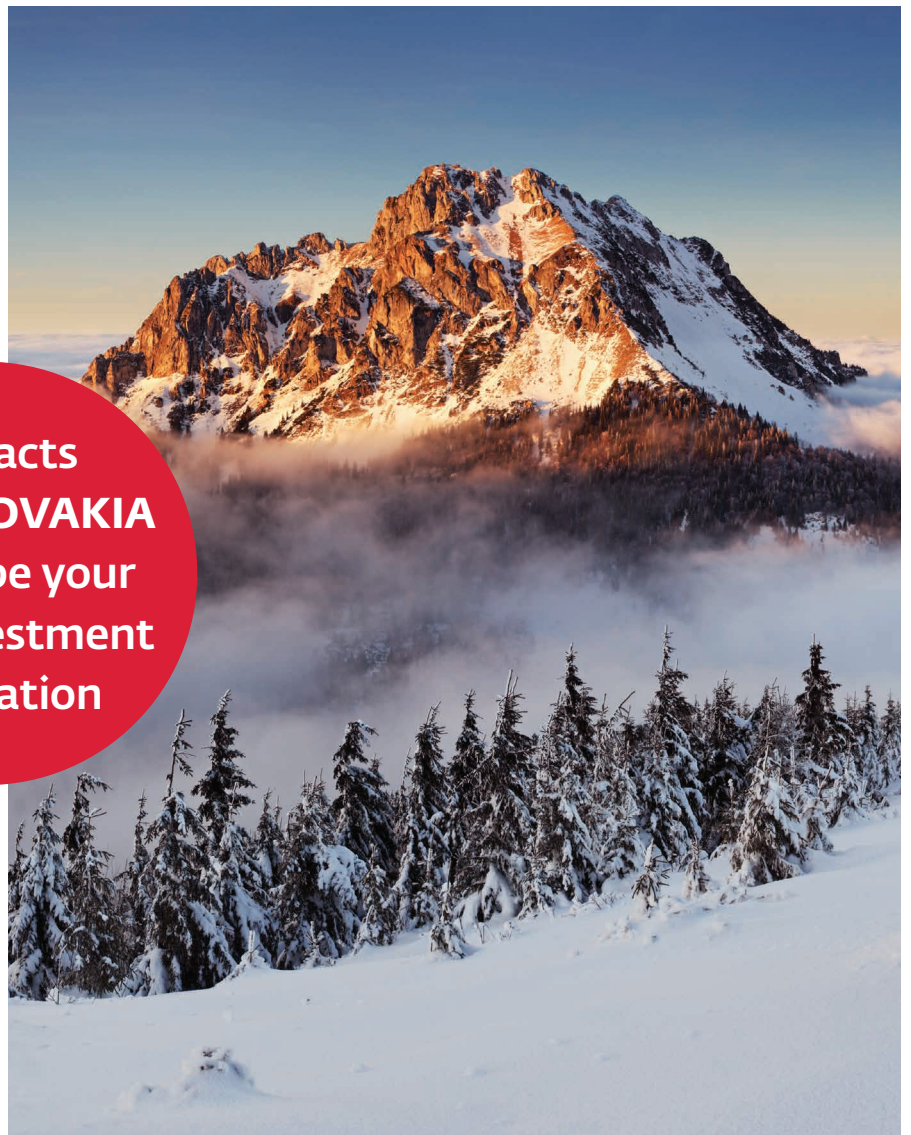


Why SLOVAKIA



Key facts
WHY SLOVAKIA
should be your
next investment
destination



Why SLOVAKIA

This publication provides an overview of Slovak investment & business environment including its key sectors. The main purpose is to illustrate what **SLOVAKIA** has to offer and why it should be considered an ideal location for various types of businesses — ranging from manufacturing, global services and IT centres to research & development.



Closer Than You Think

GENERAL INFORMATION

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

SLOVAKIA is situated in the geographical centre of Europe and is accessible from all key European economic hubs. As a fully integrated EU member, Slovakia is a part of its internal market, which means that around 500 million EU citizens can be easily accessed.



10 REASONS



Why Consider **SLOVAKIA** as Your Investment Destination



SLOVAKIA offers a competitive business environment including several distinctive features, which set Slovakia apart from other CEE (Central & Eastern Europe) countries and thus represent a unique value proposition for investors.



1

LOCATION

Strategic location in the heart of Europe with great export potential

2

SAFETY & STABILITY

One of the safest and politically most stable countries in Europe

(source: Credit Insurance Group Credendo)

3

EUROZONE

A member of the Eurozone since 2009 as one of the few in Central & Eastern Europe

4

QUALIFIED WORKFORCE

Cost-effective, skilled and loyal labour force with excellent multilingual skills

5

PRODUCTIVITY

The highest labour productivity rate in Central & Eastern Europe

(source: OECD)

6

INVESTOR-FRIENDLINESS

The Slovak government is continuously increasing the quality of local business & investment environment

7

INNOVATIVE ECOSYSTEM

The highest share of higher added-value jobs in CEE, ready for new investments into R&D and innovation

8

OPENNESS

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

(source: Eurostat)

9

DEVELOPED INFRASTRUCTURE

Developed and steadily growing infrastructure network with regards to road, railway & flight connections

10

INCENTIVES

Attractive investment incentives scheme and special tax regimes for R&D activities

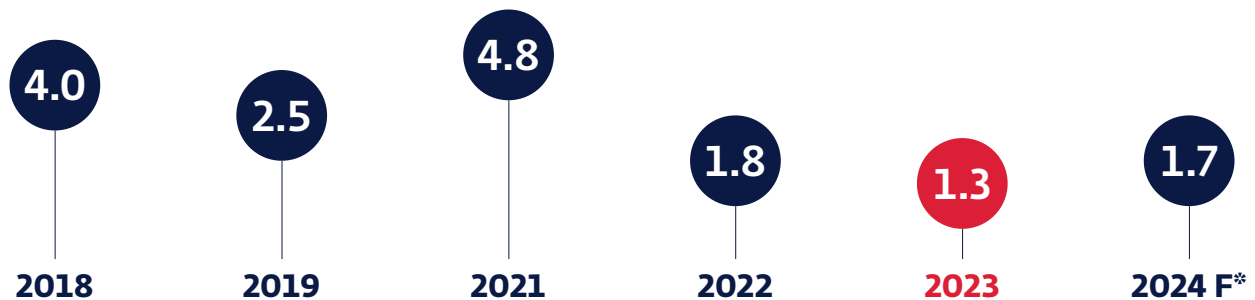
Macroeconomic Overview

SLOVAKIA is experiencing an ongoing economic expansion, driven by continually increasing domestic demand, as well as booming investments – domestic and foreign. Generally, since 2010 Slovak economy has been growing faster than the EU average.



Slovak economy has been growing also in terms of quality. Between 2010 and 2020 **SLOVAKIA** experienced the highest average growth of added value in the industrial production in the CEE.

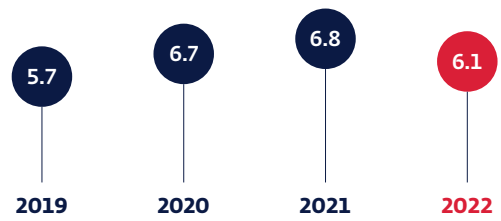
REAL GDP GROWTH (%)



*All EU countries experienced negative growth in 2020 due to the global pandemic.
Sources: GDP Growth Data: Eurostat, 2022, European Commission – Autumn 2023 Economic Forecast; Unemployment rate: Eurostat, 2022;
Country Credit Ratings: S&P, Moodys, Fitch, JCR (2023)



UNEMPLOYMENT RATE (%)



COUNTRY CREDIT RATINGS



Continually Improving **Business Environment**

There are several recent activities and measures introduced by the Slovak government to increase the quality of the Slovak business & investment environment.



2015
Introduction of R&D
related tax regime —
R&D superdeduction



2015
Launch of official dual
education system



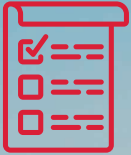
2017
Decreased corporate
income tax rate to 21%



2018
New attractive investment
incentives scheme



2019
Electricity price discount
for energy-intensive
manufacturers



2020
Mechanism for reduction
of bureaucracy and costs
'1 in—1 out' rule (by
1/6/2021), '1 in—2 out' rule
(by 1/1/2022)



2021
Kurzarbeit — Mechanism
for ensuring the retention
of jobs during a crisis



2022
More attractive incentives
rules as a response to Covid
and Energy crisis



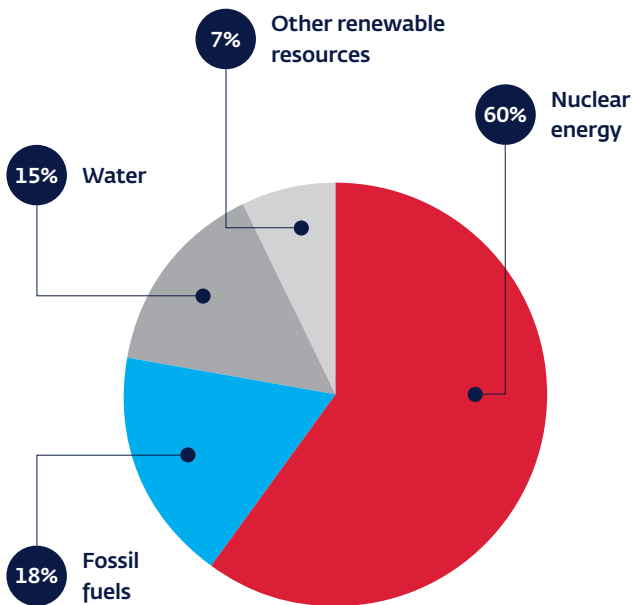
2023
New National strategy for R&D
2030 — an action plan with a set
of 91 measures to increase the
innovation performance of Slovakia



Regional Leader in Environmental Performance

SLOVAKIA has one of the greenest energy mixes in Europe. In total, more than 82% of power in **SLOVAKIA** was produced from low-carbon sources (renewables and nuclear energy) in 2022. The share of renewables currently represents about 22% of total production.

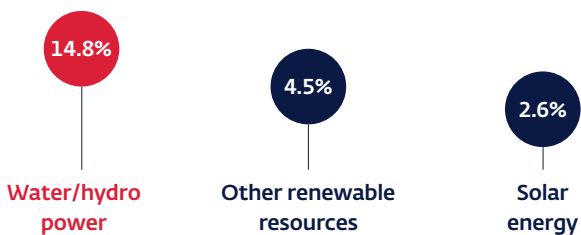
ENERGY PRODUCTION IN SLOVAKIA



60.0
SLOVAKIA reaches significantly higher score of environmental performance compared to other countries in the CEE region within the Environmental Performance Index (EPI)

EPI — Environmental Performance Index
Using 40 performance indicators, the EPI ranks 180 countries on their national efforts to protect environmental health, enhance ecosystem vitality & mitigate climate change

COMPOSITION OF RENEWABLE SOURCES IN SLOVAKIA



Renewable future
According to predictions the share of renewable resources is expected to reach about 27.3% by 2030

Source: Slovak Ministry of Economy (2023); Environmental Performance Index (2023)



The Most Open Economy in the EU

EXPORT (% OF GDP)

3RD PLACE IN THE EU



Export Of Goods

4TH PLACE IN THE EU

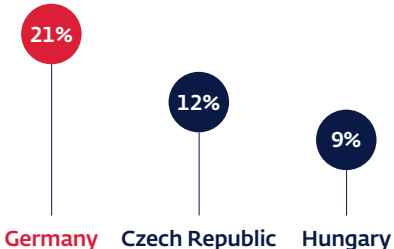


Export Of Goods & Services



SLOVAKIA'S Main Export Markets

Intra—EU trade accounts for 80% of Slovakia's exports (Germany 21%, Czech Republic 12%, Hungary 9%), while outside the EU — to United Kingdom 4%, United States 3% and 3% to China.

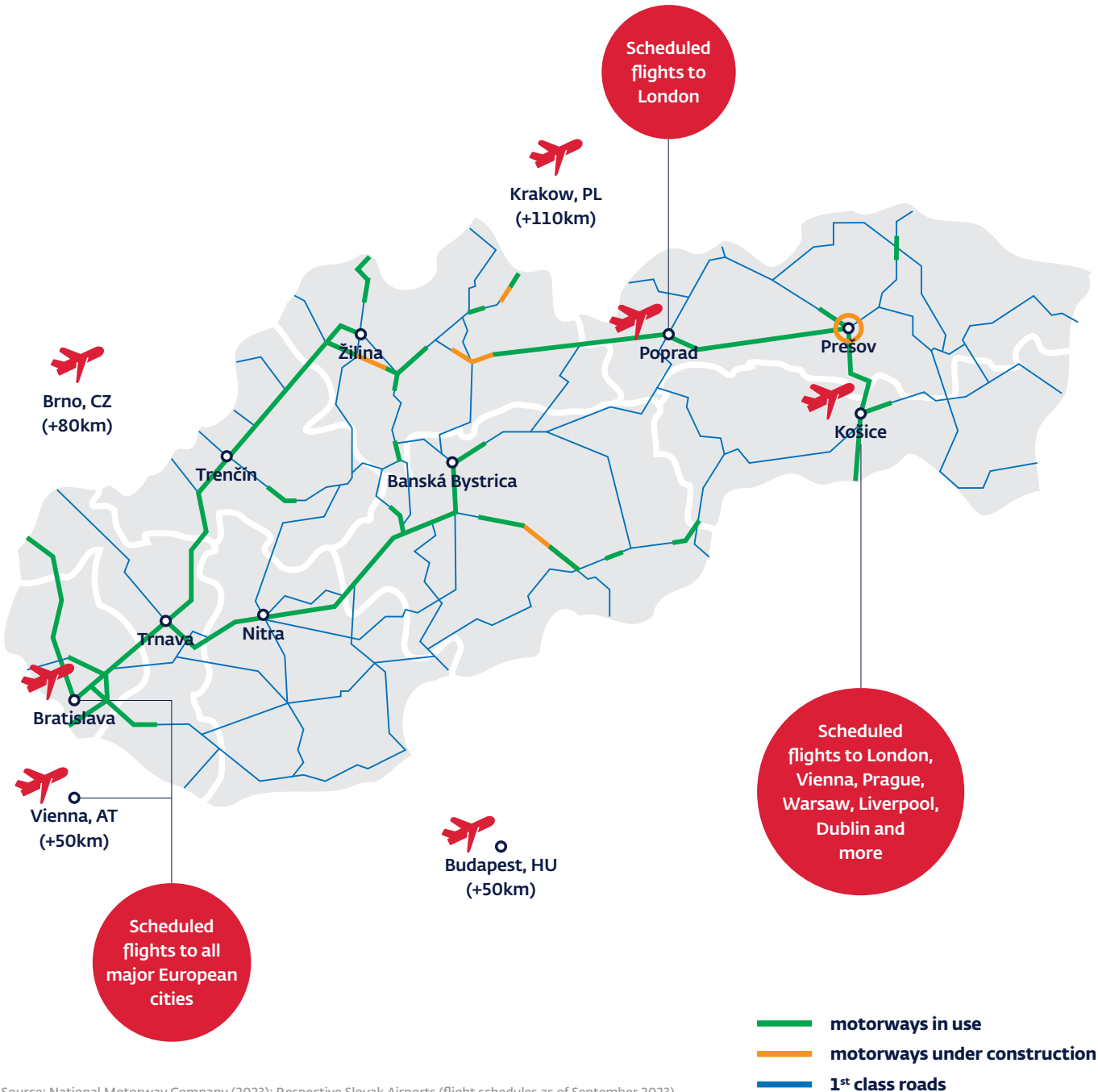


Source: Eurostat 2023 (data for 2022)



Dynamically Developing Infrastructure

SLOVAKIA's national roads network provides safe and efficient travel, as well as fast and reliable transportation of goods.



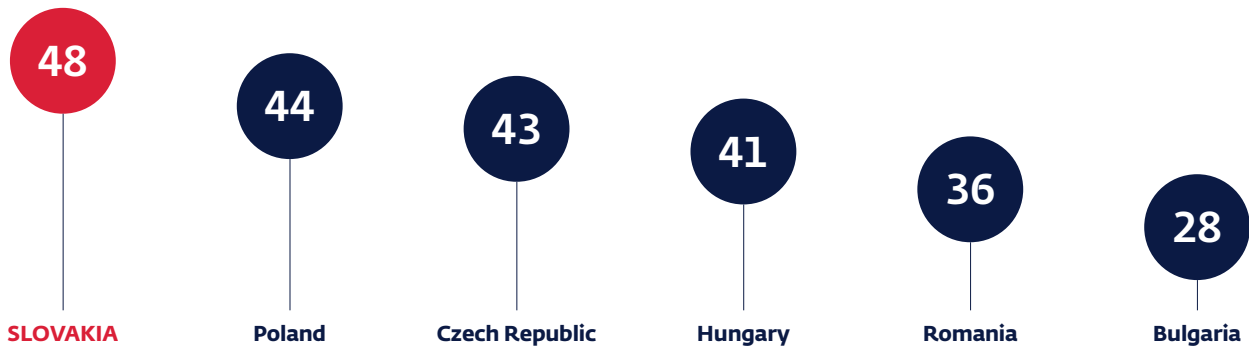
Source: National Motorway Company (2023); Respective Slovak Airports (flight schedules as of September 2023)

Productive & Skilled Labour Force

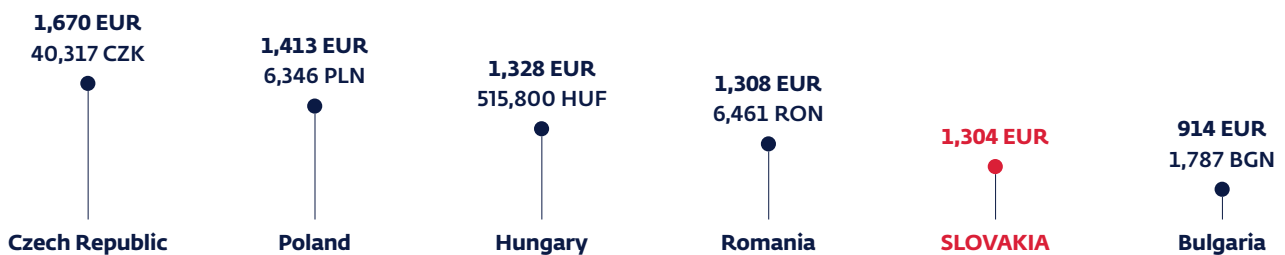
In SLOVAKIA, investors can find a workforce which excels in three major areas – productivity, qualification & labour costs. SLOVAKIA is a regional leader in labor productivity, while remaining cost-competitive on the regional as well as the European level.



LABOUR PRODUCTIVITY IN CEE GDP per hour worked



AVERAGE GROSS MONTHLY SALARIES



Interesting Facts & Rankings



1

AMONG WORLD LEADERS IN AUTOMATION

Slovakia belongs to top 25 countries with the highest number of installed robots in the manufacturing industries per 10,000 employees.

2

THE GREENEST ENERGY MIX AMONG THE V4 COUNTRIES

Compared to V4 countries (CZ, HU, PL) Slovakia has the biggest share of energy from renewable sources on total production of electricity (22.4 %). In total, more than 82% of power in Slovakia was produced from low-carbon sources (renewables and nuclear energy) in 2022.

3

THE HIGHEST PROPORTION OF HIGHER ADDED-VALUE JOBS

Employment in high- and medium-high technology manufacturing sectors and in knowledge-intensive services as a share of total employment is the highest in the region.

4

CONSTRUCTIVE LABOUR RELATIONS

Slovakia records the lowest number of lost working days due to industrial actions in Europe (per 1,000 employees).

5

HARD-WORKING LABOUR FORCE

Slovakia has the highest percentage of people working at night & weekends in the CEE.

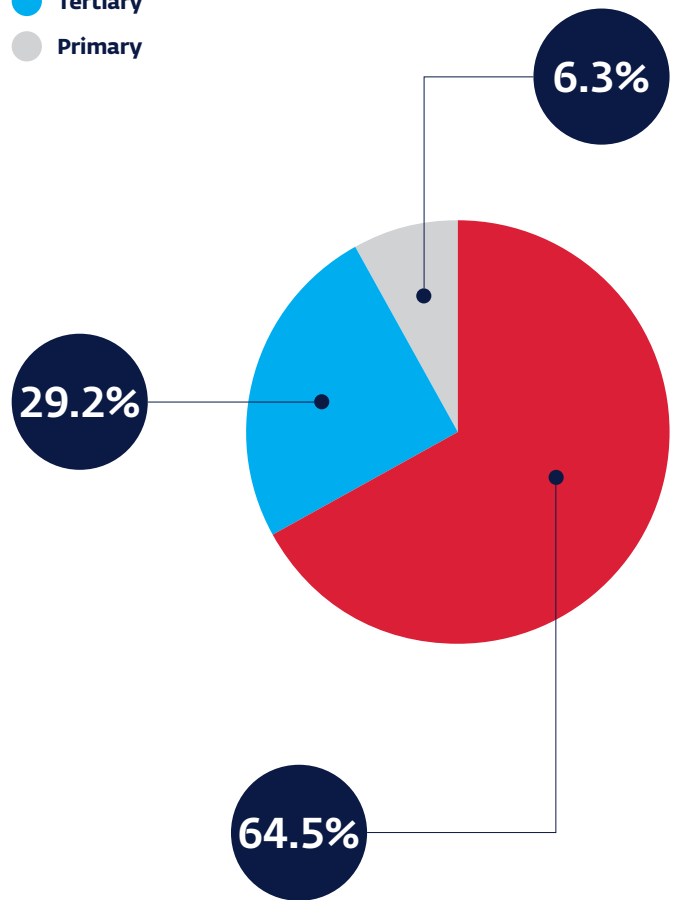
Education & Language Competencies

SLOVAKIA has a well-established system of secondary schools and universities preparing students for a successful entry to the labour market in line with the employer's requirements.



THE HIGHEST ATTAINED EDUCATION (25—64 years population)

- Secondary
- Tertiary
- Primary



Source: Eurostat (data for 2022)

SECONDARY EDUCATION

94%

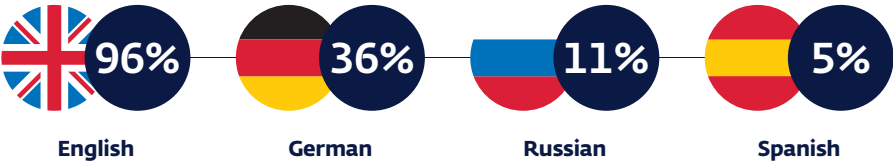
One Of the Most Educated Workforce
The proportion of 25–64 years old people with at least secondary level qualification, compared to an EU average of 80%.



Dual Education

The Slovak Government fully implemented a new dual education framework facilitating shared theoretical education in schools and practical training in companies. Companies joining the new scheme have the advantage of not only benefiting from a prepared and qualified labor force, but also of the possibility to utilize a related tax relief.

More than 200 schools and 2,700 companies were involved in the dual education scheme in 2022/2023

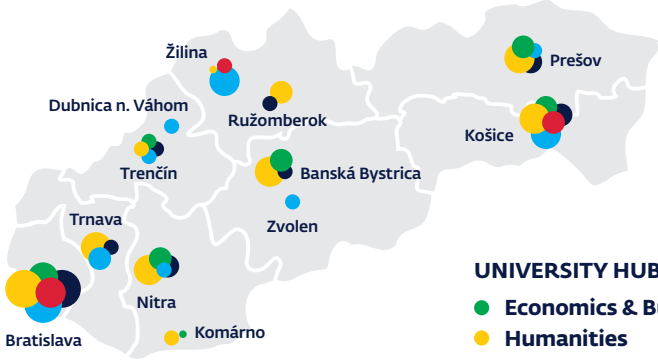


THE MOST COMMON FOREIGN LANGUAGES TAUGHT AT SLOVAK SECONDARY SCHOOLS

TERTIARY EDUCATION

High Share Of STEM Profiles

Every 4th 25–64 years old tertiary-educated adult studied sciences, technology, engineering and mathematics (STEM) programs.



- UNIVERSITY HUBS**
- Economics & Business
 - Humanities
 - IT
 - Technical (including IT study programmes)
 - Other

2022
2023

136,168 students

35,484 graduates

Source: Share Of STEM Profiles: OECD (2021); Dual Education Statistics: National Union Of Employers, dualnysystem.sk (2022/2023); Languages Statistics: Eurostat (2021); Universities and Secondary Vocational Schools Statistics: Slovak Centre of Scientific and Technical Information for the Academic Year 2022/2023

Pillars of the Slovak Economy

SLOVAKIA prides itself on its industrial heritage which has provided a stable base for the development of certain sectors such as automotive or electronics.



Over the last decade, global corporations representing various sectors have selected **SLOVAKIA** as the top location for their expansion in the CEE region.



New **VOLVO CARS** facility with production capacity of 250,000 purely electric vehicles per year will start operation in 2026 in Košice

01 AUTOMOTIVE

The automotive industry has a strong tradition in **SLOVAKIA** and became the most important sector and driving force of the Slovak economy. Over the past 30 years it has been an important source of foreign direct investment as well as industrial innovation.

more than 1 million
vehicles produced
in 2022

261,000
people employed directly
and indirectly in the automotive
industry

50%
share of automotive industry
and machinery production on total
industrial production

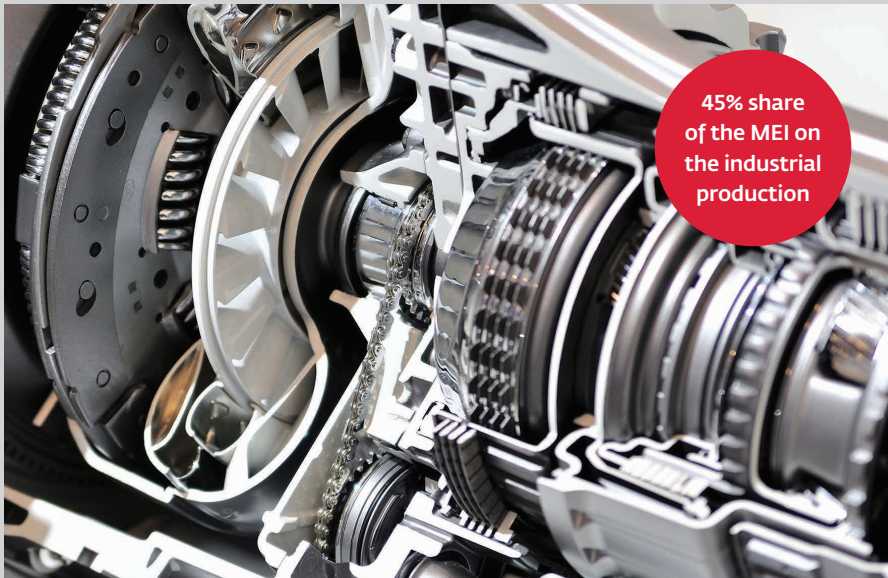
Apart from the four operating carmakers, the Slovak automotive industry is also defined by its well-developed and high quality supplier network. As **SLOVAKIA** is well located within the European automotive production hub, Tier 1–2 suppliers can also benefit from a wider regional market.



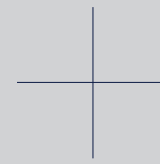
Currently, 13 electric or partly electric models are being produced in **SLOVAKIA**. There is also a growing number of e-mobility suppliers.



1st place
in the world in
the car production
per 1,000
inhabitants



45% share of the MEI on the industrial production



The Machinery & Equipment Industry (MEI) in SLOVAKIA represents one of the key pillars of the Slovak economy. It has a strong historical background and maintains its stable position in the Slovak industry.

02 MACHINERY & EQUIPMENT INDUSTRY

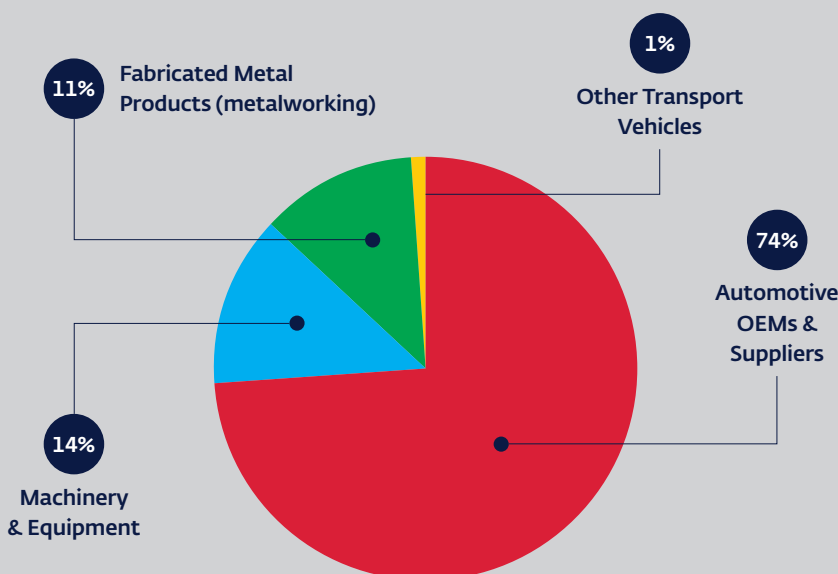
The MEI sector is of crucial importance, not only because of its contribution to the GDP and foreign trade balance, but also for its potential to create jobs and generate innovations.

€ 40.2 BN.
sales revenue

39%
of all industrial
jobs

860+
companies active
in the sector (20+ FTEs)

DIFFERENT SUBSECTORS OF MEI (based on turnover)



The MEI in SLOVAKIA is closely linked to the automotive industry which is the highest contributor to investments in SLOVAKIA. However, it is not the only driver of the sector. Other crucial subsectors of the MEI are machinery, metalworking and production of other transportation vehicles.

Source: Statistical Office of the SR, Yearbook of Industry of the SR 2022, SARIO

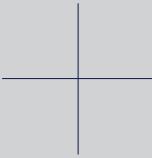
03 AEROSPACE

In the space sector, SLOVAKIA follows up on its decades of experience in international research programmes as well as participating in two manned space missions.



45+ companies directly involved in the space sector with 50+ more active in related areas

€ 108+ MIL. revenues generated by companies directly involved in the space sector



SLOVAKIA's researchers have been actively involved in major international missions including Rosetta, BepiColombo, JUICE or JEM-EUSO. These solid research capacities along with a strong base of companies working with electronics, high-precise machinery, progressive materials & ICT have contributed to the recent dynamic growth of space industry.

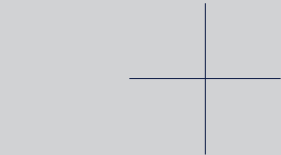
NUMBER OF COMPANIES DIRECTLY INVOLVED IN SPACE SECTOR



The Slovak aviation industry builds on an old tradition of Slovak inventions, such as early 20th century parachute or late 19th century helicopter prototype.

€ 135 MIL. revenues generated by the aviation sector

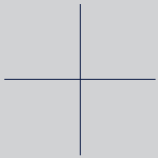
1,400 employees in aircraft production, maintenance & training



Currently, the sector is represented by companies developing and producing fast ultralight aircrafts, gyrocopters or even several prototypes of flying cars, as well as innovative training simulators and ICT systems.



Source: SARIO Materials; Finstat, 2023 (data for 2022); Companies involved in space sector — SARIO calculation compiled from data of 46 companies identified as space and space-related (working in related sectors & with relevant technologies)



The Slovak EECI reflects both — traditional electronics manufacturing (power generators, telephones, radios, etc.) and new trends especially connected to the growing automotive industry (electric motors, microelectronics, sensors).



SLOVAKIA has over 120 years of experience in electronics & electrical components industry

04 ELECTRONICS & ELECTRICAL COMPONENTS

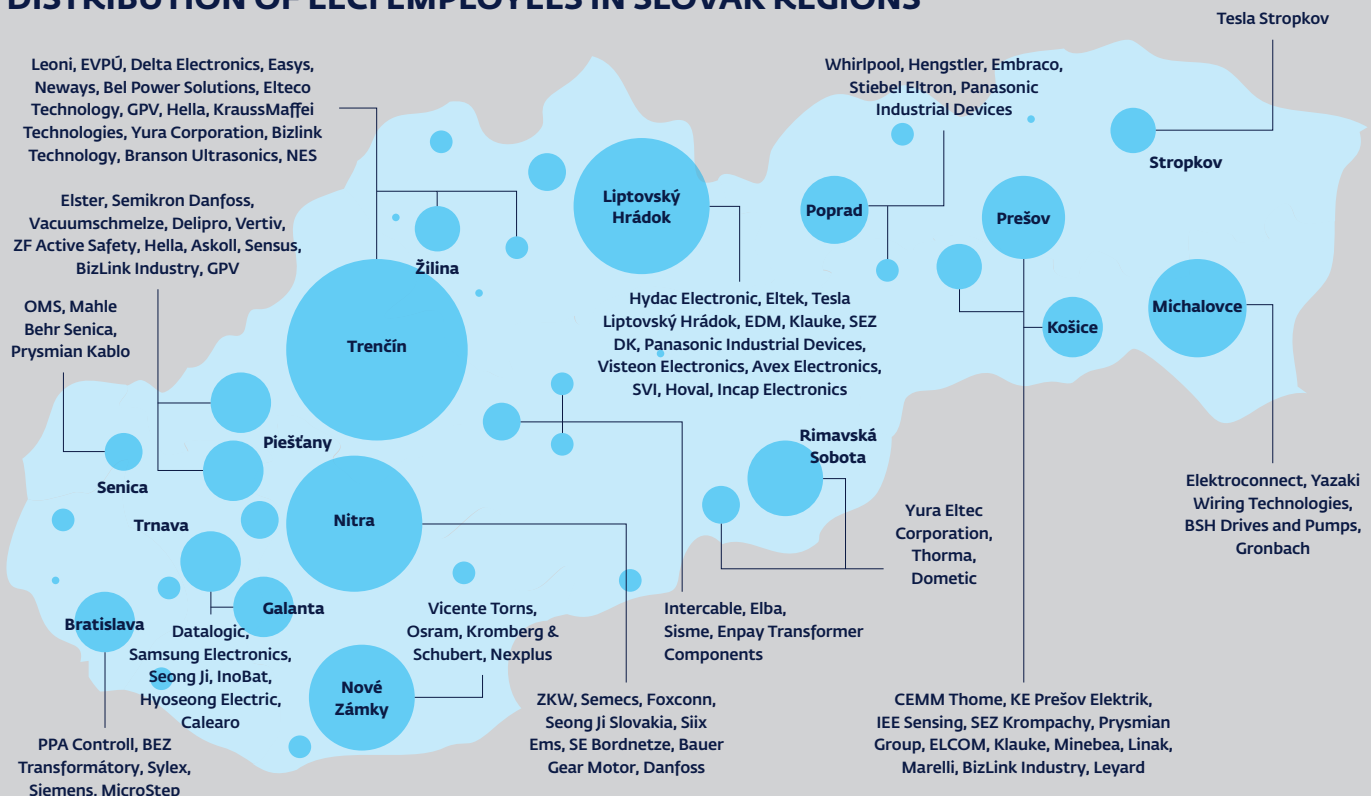
The electronics & electrical components industry (EECI) is one of the strongest contributors to the country's GDP and is also one of the biggest employers in the country.

9%
share of EECI on total manufacturing production

41,600+
people employed in the EECI

207
companies in EECI (20+ FTEs)

DISTRIBUTION OF EECI EMPLOYEES IN SLOVAK REGIONS



Source: Statistical Office of the SR, Yearbook of Industry of the SR 2022, SARIO

05 CHEMICAL & PHARMACEUTICAL INDUSTRY

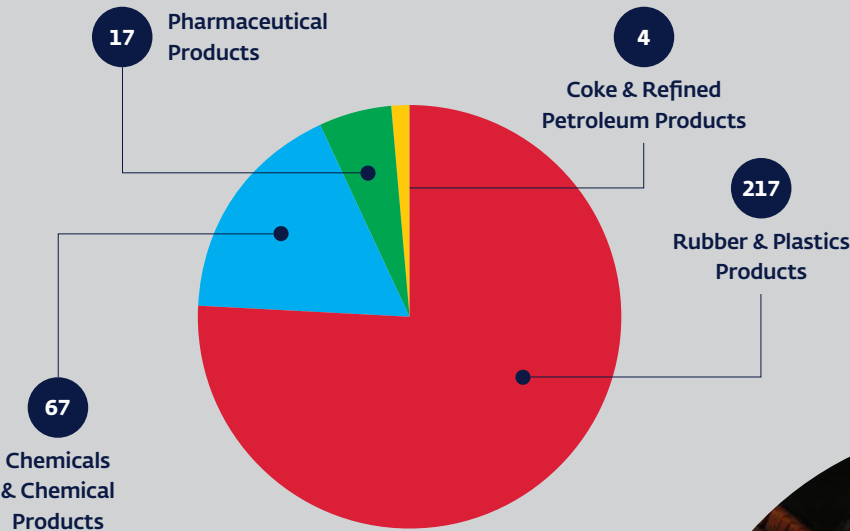
The chemical industry has traditionally been one of the largest sectors of the Slovak economy. This industry includes a diversified portfolio of hundreds of different products ranging from petrochemicals, rubber and plastic products to pharmaceuticals.

€ 10.81 BN.
revenues of the
chemical industry*

+40,000
people employed
in the chemical industry*

9%
share of the chemical industry on
the industrial production*

NUMBER OF COMPANIES DIRECTLY INVOLVED IN THE CHEMICAL & THE PHARMACEUTICAL INDUSTRY (only the companies with 20+ employees are included)



INNOVATIVE SLOVAK BIOTECH COMPANIES
 MultiplexDX creates & develops 98% accurate revolutionary cancer diagnostic tests. Glycanostics develops prostate diagnostic products with 95%+ accuracy, as well as assay kits for other types of cancer and non-oncological diseases.

TOP COMPANIES FROM THE CHEMICAL & PHARMACEUTICAL INDUSTRY

RUBBER & PLASTICS
 Continental Matador Rubber, Chemosvit Folie, ContiTech Vibration Control, Continental Tires Slovakia

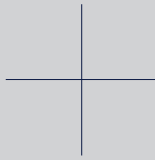
PHARMACEUTICAL INDUSTRY
 Saneca Pharmaceuticals, Biotika, HBM Pharma, Unimed Pharma

CHEMICALS & CHEMICAL PRODUCTS
 Duslo, Fortischem, BASF, Meroco

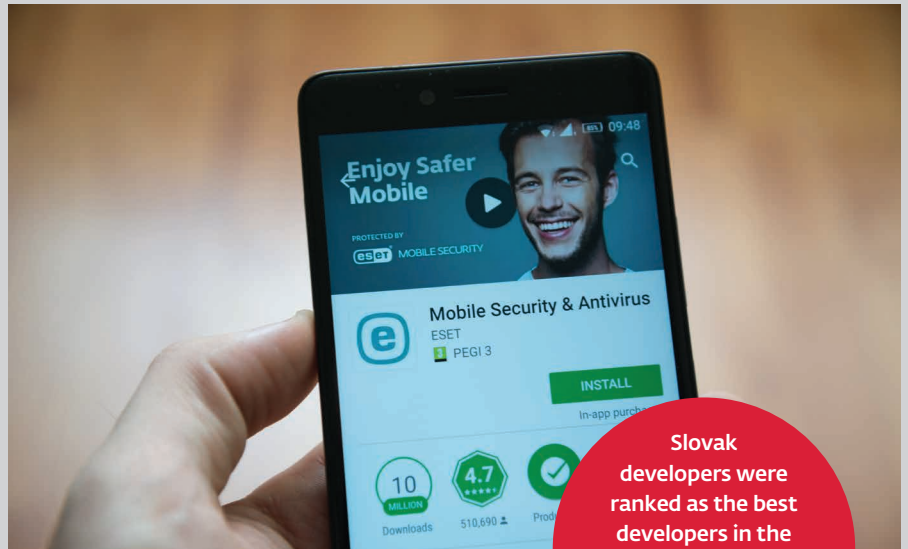
COKE & REFINED PETROLEUM
 Slovnaft, Probugas



*The data include all subsectors: Coke & refined petroleum products, chemicals & chemical products, pharmaceutical products and rubber & plastic products. Sources: The Statistical Office of the Slovak Republic, Yearbook of Industry of the SR 2022



The majority of IT services in SLOVAKIA are provided by service centers and software houses. On top of that, traditional activities of telecommunication operators are gradually expanding beyond their standard services and building a more diversified portfolio is becoming an integrated part of their business.



Slovak developers were ranked as the best developers in the world as measured by programming skills testing program

06 INFORMATION & COMMUNICATION TECHNOLOGIES

The information & communication technologies (ICT) sector has a solid position in the Slovak economy. This is demonstrated by the presence of foreign owned companies such as Deutsche Telekom IT & Telecommunications, Asseco, Accenture, Soitron, Atos as well as strong domestic companies such as Eset, Sygic.

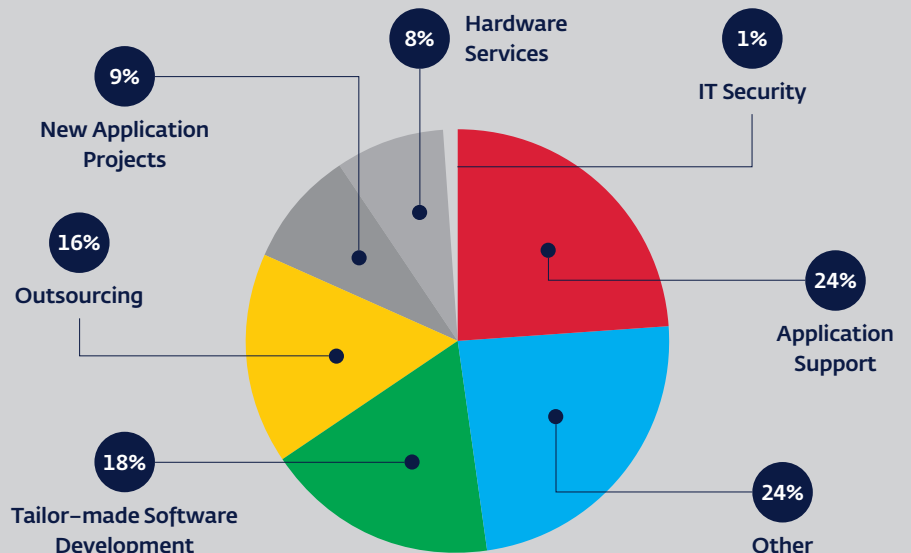
5%
ICT contribution to
Slovak GDP

105,000
jobs in ICT
sector

66
games development
companies & studios

IT SERVICE MARKET IN SLOVAKIA

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.



07 BUSINESS SERVICE CENTER (BSCs)

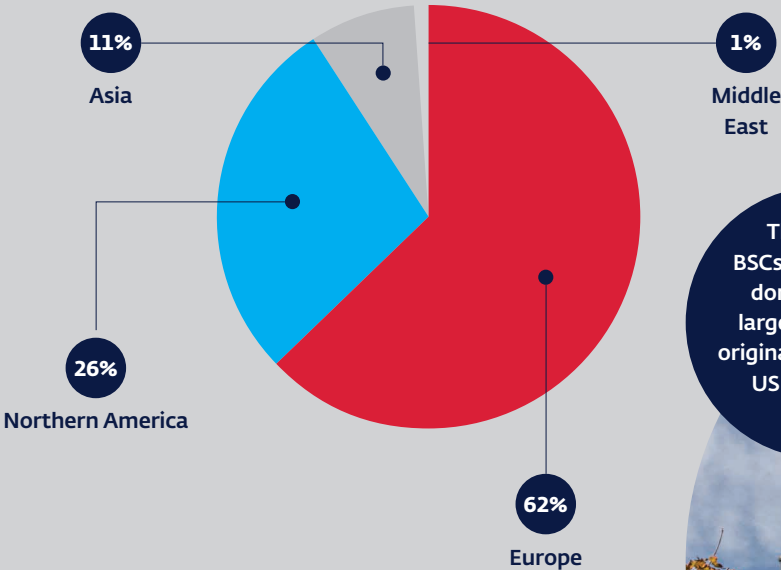
Thanks to the availability of labour force and its language skills BSCs in SLOVAKIA are evolving towards centers with higher added-value with greater emphasis on quality of their services.

70+
BSCs already
established in Slovakia

40,000+
people employed
by BSCs

80%
centers provide
higher added value functions
& transactional processes

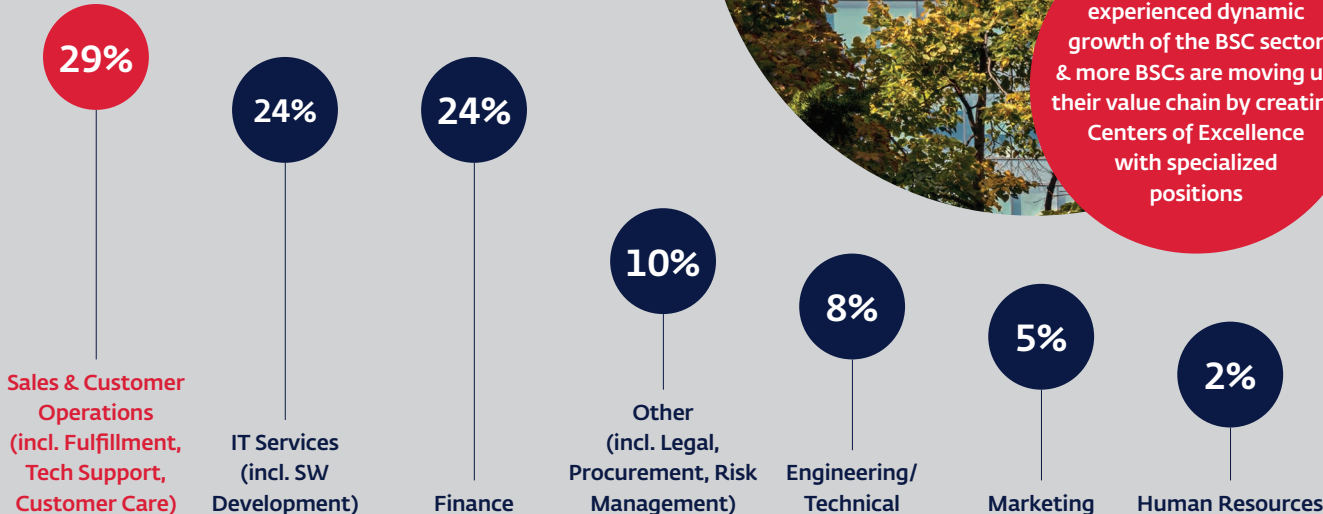
COUNTRY OF ORIGIN



TOP BUSINESS SERVICES CENTERS IN SLOVAKIA
 Deutsche Telekom Systems Solutions, Adient, Henkel, Swiss Re, Accenture, IBM, Dell, AT&T, Johnson Controls, DXC Technology



AREAS OF OPERATION



Source: ICT: Statistical Office of the Slovak Republic, Yearbook of Industry of the SR 2023; SARIO calculations based on Finstat 2023
BSCs figures: AmCham Business Service Center Forum Survey, 2023; SARIO, 2023



NATIONAL STRATEGY FOR RESEARCH, DEVELOPMENT AND INNOVATION 2030

The national strategy, adopted by the Slovak Government in March 2023, presents a vision of how to make Slovakia a better place for research, development and innovation. Thanks to complex reforms and new investments, Slovakia will transform its industry, accelerate economic growth and become again more attractive destination for highly qualified talent and companies creating high added value. The strategy includes an action plan with a set of 91 measures to increase the innovation performance of Slovakia.

08 RESEARCH & DEVELOPMENT

As a top priority, the Government of the Slovak Republic is determined to attract and support investments with high added value and innovation potential.

Companies with R&D can benefit from special tax regime – an additional 100% of their R&D costs can be deducted from their tax base

KEY FACTS WHY CONSIDER SLOVAKIA FOR R&D

1

Highly qualified labour force at affordable costs

2

Many production plants in high-tech industries

3

Established cooperation between companies & local universities

4

Broad R&D and innovation network

5

Presence of R&D centres & technology clusters

6

R&D incentives

09 SLOVAK INDUSTRY 4.0 SOLUTIONS

SLOVAKIA belongs to the top 25 countries with the highest number of installed industrial robots in the manufacturing industries per employee. Such background generates a significant potential for product and process innovations as well as an implementation of the latest Industry 4.0 solutions.

SARIO INNOVATION SERVICES

The matching platform of SARIO, connecting the needs of large investors established in Slovakia with capacities and competencies of advanced and innovative Slovak technology companies providing mainly industry 4.0 and advanced IT solutions.

300+
innovative companies
in our database

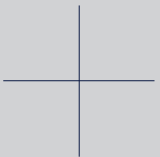
33
innovation events since
September 2017

180+
presentations of shortlisted
Slovak companies

SLOVAK INNOVATIVE COMPANIES MAINLY FOCUS ON, BUT ARE NOT LIMITED TO

- 01 INDUSTRY**
automation, predictive maintenance, quality control, digital factory solutions
- 02 PRODUCT DEVELOPMENT**
design, prototyping, testing, tooling
- 03 SERVICES SECTOR**
software automation, outsourcing, cybersecurity, big data and AI

Slovak Ministry of Economy has approved Action Plan for Smart Industry already in 2018



EXAMPLES OF UNIQUE SLOVAK SOLUTION PROVIDERS
Tangent Works, Anasoft, Trivita Data, Brain IT, Ditis, Photoneo, Marpex, IxWorx Dorps, CEIT, Sova Digital, Matador Automation, Infotech, Manex, Rossum Integration, eDocu, MTS, Bost—Stimba, Igrow, Merchant

Source: SARIO (2022); International Federation of Robotics (2023, latest data from 2021)

Success Stories in SLOVAKIA



660+

Successful SARIO projects since 2002 including Volvo Cars, Jaguar Land Rover, Volkswagen, Kia, Stellantis, Amazon, IBM, Dell, Johnson Controls, Embraco, Samsung, Honeywell, Minebea and others.

SLOVAKIA has been the final investment destination for several hundreds successful projects from various countries and in a wide range of industrial sectors.



NETHERLANDS

Heineken, ING Business Shared Services, Biotika, Inalfa Roof Systems, Van Doren Engineers Slovakia, AAF International, BDR Thermea



GERMANY

Brückner Group, Porsche, Bosch, Siemens, Volkswagen, Brose, Covestro, T-Systems, Schaeffler, Leoni, Mahle, Hella, KUKA, Osram, ZF, Evonik Fermas, Deutsche Telekom, Continental, Vaillant, BSH Drives and Pumps



SOUTH KOREA

Kia, Samsung, Mobis, YURA, Sungwoo Hitech, Hyundai Steel, Donghee Slovakia, Daejung Europe, Seoyon E-Hwa Automotive, Hyundai WIA, KUNHWA Hyoseong Electric, Hanjoo Light Metal



CHINA

Lenovo, Yanfeng, Huawei, Mesnac, Boge Elastmetall, Leyard Europe



JAPAN

Minebea, SE Bordnetze, Panasonic Industrial Devices, Yazaki, Marelli, Akebono, U-Shin, SIX EMS, Brother Industries, Embraco



AUSTRIA

MIBA Sinter, Neuman Aluminium, ZKW, Uniqa4Ward RSC Raiffeisen Service Centre, Kronospan, Erste Digital, Pöttinger, Casa 7



ITALY

Marelli, Brovedani, SISME, Bonfiglioli, MTA, Intercable, Mevis, Lombardini, C.I.M.A., Lova, Meta System, Leitech



TAIWAN (CHINA)

AU Optronics, Foxconn, Delta Electronics

EXAMPLES OF FOREIGN INVESTORS WITH R&D OPERATIONS

Adient, Yanfeng, Brose, Osram, Siemens, BSH, Honeywell, Embraco



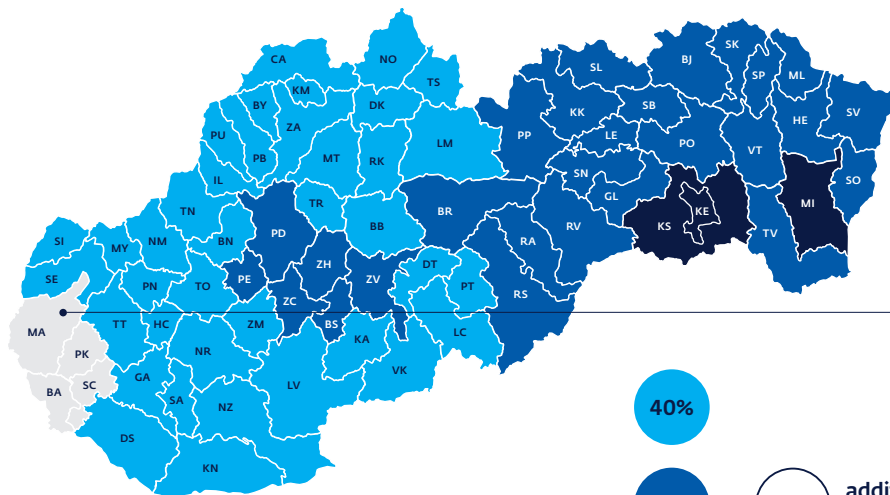
Investment Incentives

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.



Districts in Bratislava region are excluded from the investment aid scheme



40%

50%

60%

+10% additional incentives for medium-sized enterprises

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

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

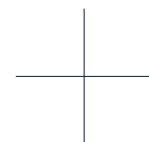
ELIGIBLE COSTS

- 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

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

*An amendment to the Governmental Regulation no. 195/2018 Coll. is currently in the legislation process. Map of maximum intensities above already reflects these changes (maximum aid intensity in the Western Slovakia increased from 30% to 40%). Please contact us at invest@sario.sk for more information (including minimum conditions).



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

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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
- assistance with investment projects implementation
- 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 INNOVATION SOURCING

- matching local tech companies with the operations of large companies that plan to implement innovative solutions to streamline and optimize their processes
- focused mostly on Industry 4.0 solutions such as digitalization, intelligent automation, and robotics as well as advanced and complex IT solutions for various industries
- based on a database of more than 300 local tech companies which is constantly updated and expanded

04 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

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