

Quality of Life

In slovenia business and pleasure go hand in hand. Business travellers soon come back as visitors, and many holidaymakers decide to relocate to slovenia. There is so much to see and enjoy, and so many national dishes and superb wines to taste.



Slovenia's landscape is a mosaic of the Alpine, Pannonian and Adriatic geological formations and climate. Such a variety offers ski slopes and sea bathing plus excellent golf courses and the great outdoors for practically all sport pursuits. In a nutshell, quality of life is high, health care system excellent, entertainment, art and cultural events to suit all tastes, and crime rate is very low. Slovenia's "can do" attitude is inspiring, people are friendly and hospitable, and atmosphere relaxed.

Testimonial:

»Slovenia lives to the promise of being an excellent location with its well-developed transport infrastructure that enables fast access to other European markets. As traffic jams are an exception, Sunday trips to the places of interest or a ride to the coast do not take long on the road.«

Johannes Hoedelmayr, CEO
Hödlmayr International AG



Quality of Life, 2008

Austria	9.64
Czechia	7.59
Slovenia	6.81
Slovakia	6.30
Greece	6.18
Portugal	6.12
Croatia	5.58
Hungary	5.25
Poland	4.26

Source: IMD - World Competitiveness Yearbook, 2008



Logistics & Distribution in Slovenia

Facts and figures in 2007

Number of companies: 1,995
Number of employees: 29,373
Revenue (in €): 3,316 mn
Exports (in €): 1,273 mn

Source: AJPES, 2008

Key services:

- freight forwarding and freight shipping,
- handling of goods,
- goods warehousing and storage,
- maritime and inland logistics terminal operations
- additional services

Call us any time

JAPTI'S FDI Division - a gateway for investors requiring access to continuously updated FDI data and intelligence on companies, industries and markets.

At JAPTI we believe that Europe's economic landscape is changing faster than the political one, so we stand by enterprises with a vision helping investors to spend time and money to the best effect.

We have capacity to provide investors with information on investment opportunities and business operating conditions. This assistance aims to reduce investors' start-up costs associated with site selection and includes investmentspecific information and company counselling.

All services are free of charge and include critical information to develop foreign investment strategies, understand sector trends, assess locations, and make contact with authorities and supplier clusters.



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Ministry of the Economy



Slovenia

The Right Mix of Qualities



Logistics & Distribution



Quality Workforce

Slovenia's asset and its key competitive advantage are its people. Workforce is well educated and highly skilled. Education and ongoing training are seen as necessary for success by an average Slovenian. Slovenian workforce also takes pride in its high business ethics and flexibility. Computer skills and flexibility are strong, professional ethics and loyalty match western values.

Language skills are well developed in Slovenia and most people can speak at least one foreign language. There is growing awareness of the need for communication in foreign languages. Language schools are busy year round and companies encourage staff to brush up on their language skills on a regular basis.

In the sector, there are over 29,000 employees in almost 2,000 companies. Some 2,650 students are enrolled in undergraduate courses for transport and logistics engineers. The number of students in secondary school for transport and logistics is 1,300.

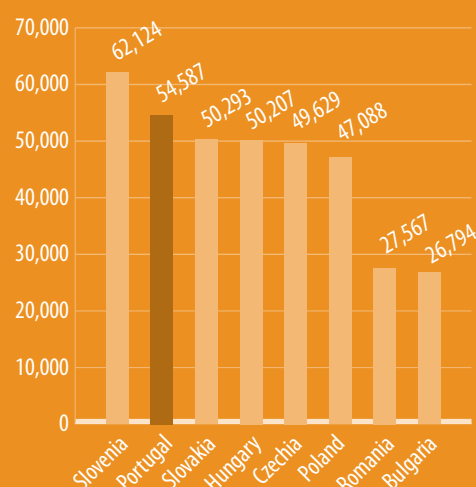
Productivity/value added per employee, 2007

Company	Value-added per employee (in €)
Instalacija	182,566
Luka Koper (Port of Koper)	81,785
Adria Airways	76,761
BTC	76,602
Aerodrom Ljubljana	74,149
Schenker	62,944
DARS	43,941
Viator & Vektor Group	34,185
Intereropa	32,378

Source: IBoN, 2008

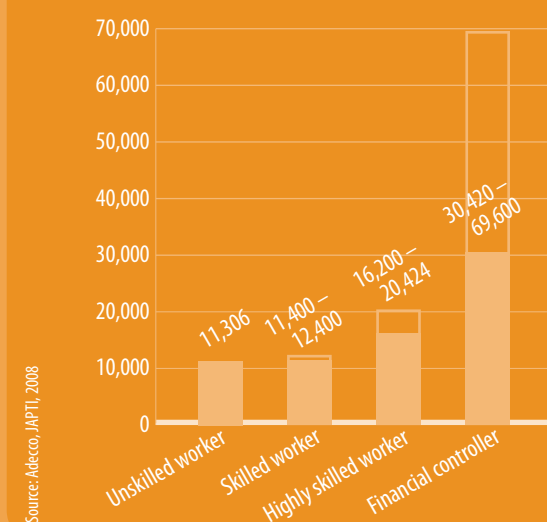
Productivity in Services, 2007

Related GDP (PPP) per person employed in services (in US\$)



Source: IMD - World Competitiveness Yearbook, 2008

Estimated gross annual labour cost in logistics & distribution for 2009 (in €)



Source: Adeco, JAPTI, 2008

Quality Link to Regional Markets

Slovenia is a prime location for companies doing business with central, east and south-eastern Europe. Thanks to its strategic geopolitical position and decades of close economic ties with its neighbours, the Slovenian companies are real "connoisseurs" of the regional markets. This also includes knowledge of the languages, distinctions in legislation, and particularly, a mentality along with a business culture in specific areas, which originates from personal ties over many years.

Transit traffic has always played an important role and as the traditional transport. As traditional trade routes are being reopened, there is a clear upswing in road and rail transport services. Furthermore, the Slovenian transport and logistics companies have been pro-active over the past few years in exploiting investment opportunities in the markets of southeastern Europe where Slovenia is one of the most important foreign investors.

Slovenian freight forwarders, carriers and warehouse operators have up-to-date fleets of vehicles

and mechanised and computerised warehouses with state-of-the-art technology. A growing number of firms offer customers modern logistic hubs, along with the possibility of outsourcing total logistics services. The number of companies specialised in transport services forging strategic links is rising and focus on transport is broadening to include a full range of logistics activities.

New warehouse facilities and distribution centres are being built to meet the needs after Slovenia's accession to the EU as warehouses in the areas bordering on other EU countries are being used in the transit business.

How far are major cities from Slovenia's capital

Destination	Km*	Time*
Zagreb	135	2
Venice	250	2
Vienna	385	4
Munich	440	4
Budapest	450	5
Sarajevo	500	6
Belgrade	550	5

*Distances and approximate journey time by road from Ljubljana



Quality Infrastructure

Slovenia has all the attributes of a distribution and logistics hub: top geographical position at the heart of the region intersected by traditional trade and transport routes – location of choice for international companies planning their future regional distribution set-up

Two Pan-European transport corridors (No. 5 linking Barcelona and Kiev and No. 10 from Salzburg to Thessalonica) intersect at Ljubljana. An excellent track-record of Slovenian companies in this line of business coupled with modern transport infrastructure is a proven recipe for high-quality and cost-competitive services tailored to clients' needs. As a member state of the EU, Slovenia is a gateway for Asian and EU manufacturers and traders to faster and more reliable trade routes that meet at fully equipped logistics centres.

Shipping to Slovenia's only cargo port - **Port of Koper** - means gaining 7 to 10 days for ships arriving from Asia compared with sailing Europe's northern ports. Its total maritime throughput is over 15 million tonnes and over 300,000 TEUs respectively by the end of 2007. There are currently 11 modern and fully equipped terminals specialised for various types of goods, storage facilities for general cargo and several special warehouses. Special advantages are available in 4.7 sq.km. of the port's economic zone with 324,000 sq.m. of covered and sheltered warehouse facilities and slightly less than 1 mn sq.m. of open-air storage. The expansion of facilities includes a new car storage building and new inland terminals to be followed by the extension of the Pier No. 1 and a new container terminal to be constructed at the third pier.

The largest increases have been recorded at the container, car and general cargo terminals. Container freight and vehicles in 2007 rose by 44% and 28% year-on-year.

The motorway density in Slovenia is higher than EU-27 average and the links with the neighbouring EU Member States and the southeast Europe equally good. In other words, you will easily reach Slovenia from anywhere in Europe by car or lorry within a day or two. Currently, there are over 500km of well-maintained motorways and 1,050km of trunk roads. The completion of the extended motorway network is scheduled for 2013.

As railway service is regaining its importance, infrastructure modernisation is one of national priorities. Freight traffic is well developed, and the rail links between the Adriatic Sea and the landlocked CEE countries offer plenty of opportunities. Both freight and passenger service with southeastern Europe has grown over the last few years. The national rail operator **Slovenian Railways (SŽ)** runs both passenger and freight service and operates railway infrastructure including 60,000m² of warehouses.

Three international airports provide easy access by air to Slovenia. The central Slovenian airport for passengers and cargo is Aerodrom Ljubljana 25km from the capital. Scheduled flights operated by several airlines carry passengers to important European destinations. The airport has been recently renovated, its infrastructure extended and the cargo terminal modernised. Maribor Airport mostly handles cargo transportation whereas Portorož Airport has facilities for smaller planes only. **Adria Airways**, a regional Star Alliance member, boasts 45 years as a national airline and a modern fleet of aircraft.

Leading domestic and foreign-owned companies

Enterprise	Services	Foreign Investor
Adria Airways	Air cargo	
Adria kombi	Combined transport	Ökombi
Aerodrom Ljubljana	Airport	
Alpetour	Transport agency	
BTC	Storage and reloading	
DARS	Supporting land transport activities	
Fersped	Forwarding & transport	
Hoedlmayr logistics	Forwarding & transport	Hödlmayr International
Instalacija	Cargo handling	
Intereuropa	Combined transport	
Luka Koper (Port of Koper)	Port, storage and reloading	
Pacorini Koper	Storage	B. Pacorini
Schenker Ljubljana d.d.	Forwarding & transport	Schenker
Slovenske železnice	Transport, reloading & storage	
Viator & Vektor	Forwarding & transport	

Facilities, research institutions, clusters and associations

- University of Ljubljana, Faculty of Maritime Studies and Transport
www.fpp.edu,
- Institute of traffic and transport Ljubljana
www.prometni-institut.si,
- Chamber of Commerce and Industry of Slovenia - Association of Transport and Communications
www.sloveniapartner.com,
- Ministry of Transport
www.mzp.gov.si