

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 living in Slovenia is high, health care system excellent, entertainment, art and cultural events to suit all tastes. Slovenia's "can do" attitude is inspiring, people are friendly and hospitable, and atmosphere relaxed. Slovenia is a good place to raise children, personal safety is high and pollution very low.



Machining & Metalworking Industry in Slovenia

Facts and figures in 2007

Number of companies: 2,094
 Number of employees: 55,795
 Revenue (in €): 6,226 mn
 Exports (in €): 3,866 mn

Key export markets: Australia, Austria, Croatia, Czechia, France, Germany, Great Britain, Hungary, Ireland, Italy, Netherland, Serbia, Spain, Switzerland, USA

Source: AJPES, 2008

Key services:

- vehicles
- metal fittings and components
- cast and fabricated metal elements
- water turbines and pumps
- various metal products
- metal tools
- truck lifts
- airconditioning, heating and ventilation systems

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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Slovenia

The Right Mix of Qualities



Machining & Metalworking Industry

INVEST SLOVENIA



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



Quality Workforce

Slovenia's machining and metalworking industry boasts a long industrial tradition. Today we talk about three pillars: metalworking, machine building and car component manufacture and assembly.*

As labour productivity has come into sharper focus than ever before, all major manufacturers are working to upgrade facilities and invest in new projects. At this point, experience and knowledge of employees give companies an edge through innovative solutions that translate to continuing improvements of manufacturing processes. There are nearly 55,800 employees in over 2,000 companies in the sector. The bulk of workforce is employed in metalworking, but in terms of value-added per employee, the most successful are the companies specialising in car component manufacture and assembly. These manufacturers have been the integral part of international supply chains for quite a while.

Different educational institutions create knowledge that enhances the productivity and competitiveness of the metals industry, and develop its human resource base. Currently some 3,800 students are enrolled in undergraduate courses for occupations in the machining and metalworking industry. The number of students in secondary schools for metalurgy and mechanical engineering is 7,100.

A cutting edge of Slovenian workforce is command of foreign languages. International studies rank Slovenians at the European top. 91% of population can communicate in at least one world language with the English and German being most widespread (71% of population is able to communicate in at least two world languages). Nevertheless, language schools are still busy year round and companies encourage staff to brush up on their language skills on a regular basis.

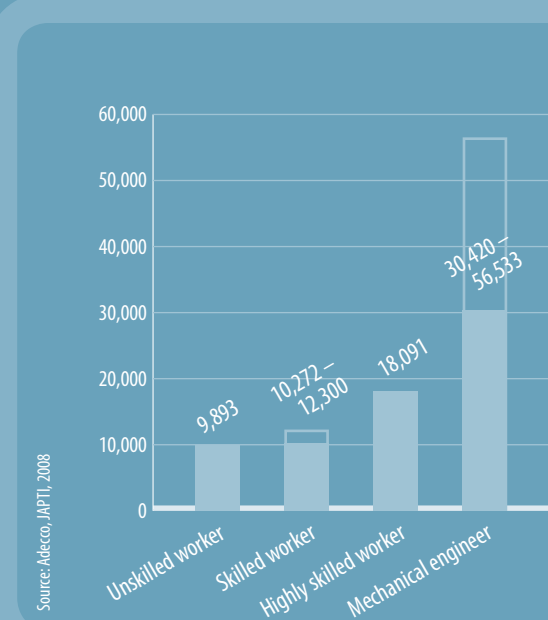
* You can find more about car component manufacturing and assembly in a special brochure about the automotive industry.

Productivity/value added per employee, 2007

Company	Value-added per employee (in €)
Akers valji Ravne	66,713
Eurovek	60,591
Seaway Group	58,918
Rondal	52,395
Skrli	51,164
Trim	50,876
Metalna-SRM	47,605

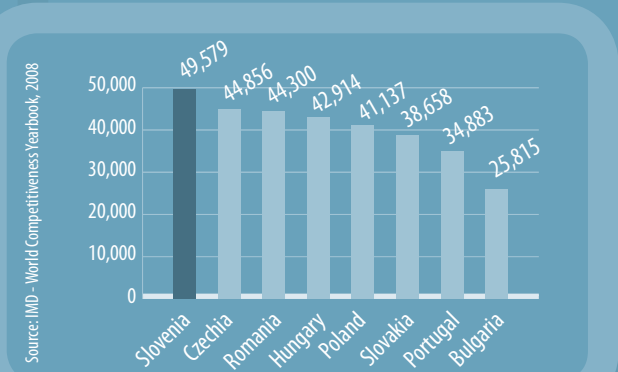
Source: iBon, 2008

Estimated gross annual labour cost in metals industry for 2009 (in €)



Source: Adeco, IAPTI, 2008

Productivity in Industry, 2007
Related GDP (PPP) per person employed in industry (in US\$)



Source: IMD - World Competitiveness Yearbook, 2008

Quality Link to Regional Markets

A central geopolitical position at the cross-roads of trade and transport routes gives Slovenia a cutting edge and accounts for its historical, cultural and economic profile – the key elements of its national economy.

By definition, Slovenia is an export-oriented country, and its metals industry is a key element of the country's export mix with 62% of sales earned in foreign markets. With exports worth 3.9 billion euros in 2007, Slovenia's businesses involved with the manufacture of all kinds of fabricated metal products and machined parts generates 20% of all exports of the manufacturing sector. Despite the fact that the general economic picture in the EU has been bleak for some time and the fact that the EU Member States are the biggest trading partners of the Slovenian companies, Slovenian exporters managed to increase sales over the last five years by more than 50% thanks to their export strategy.

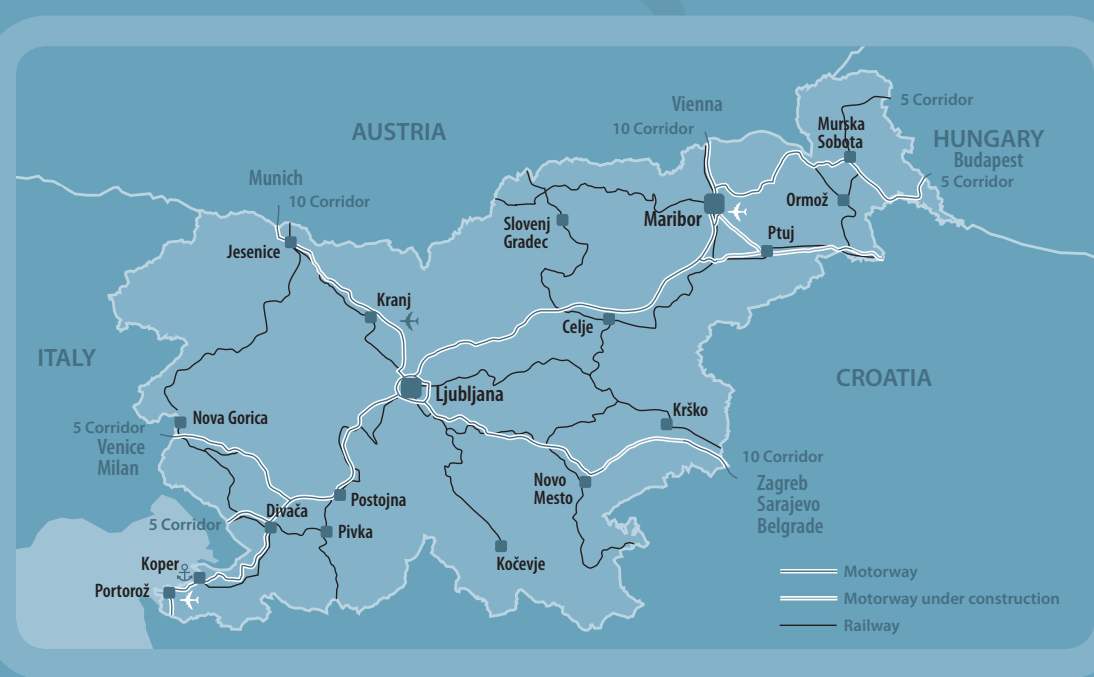
As a result of its position and decades of fostering economic links with its neighbours, Slovenia is in a pole position to serve the markets in the region. Over the past few years, the most successful Slovenian metalworking-machining companies have been proactive in exploiting investment opportunities in the markets of south eastern Europe (SEE) where Slovenia is one of the most important foreign investors.

The number of international companies setting up their regional hubs in Slovenia is rising attracted by the expertise of local managers, sales force and field engineers, and their in-depth knowledge of the regional markets. They speak the language, they are familiar with legislation, they know their way around, and what's most important there are no cross-cultural barriers for them.

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 lies at the intersection of the 5th and 10th Pan-European Transport Corridors for road and rail transport. Its transport and IT infrastructure is well-branched. The Adriatic Port of Koper is the shortest maritime connection for cargo arriving from Asia to landlocked countries of Central Europe through the Suez Canal.

The companies working in the manufacture of metal products co-operate closely in clusters, professional associations, universities, research institutes, supporting fundamental and applied research that address technological barriers facing the industry. Designers and manufacturers of tools have been at the forefront of the industry providing a platform for toolmaking companies with CAD/CAM/CAE designed and manufactured tooling. Other companies benefit from comprehensive hi-tech solutions to increase productivity and speed delivery. These are large, as well as medium and small enterprises, well-known in the EU working to specifications of leading manufacturers in the automotive and

aviation industry (Audi, Benteler, BMW, Chrysler, IN Alfa, Magna, Mercedes, PSA Group, VW), and non-metal industry sectors such as household appliances and IT.

The list of the industry's biggest and most successful companies (excluding automotive industry) include Unior, Trim and Kovinoplastika Lož in the hands of domestic owners boasting excellent results under their own brand name in the most discerning markets. Metals industry has always been interesting for foreign investment. Alongside Renault and a number of other foreign investors in the automotive industry, sound performance and fast growth have been achieved by a number of foreign-owned companies: Palfinger, GKN Driveline, Akers and others.

Leading domestic and foreign-owned companies

Enterprise	Products	Foreign Investor
ADK	Components for car lifts	
Akers valji Ravne	Manufacture of machinery for metallurgy	Akers Sweden
Arcont	Metal structures	
EMO – Orodjarna	Tools for sheet metal fabrication, CAD/CAM/CAE designed tools	
Eurovek	Machine tools	Knauf Insulation
Farmtech	Machinery for the mechanical and mechanical-biological treatment of solid wastes	Komptech Rafwick
GKN Driveline Slovenija	Ball, needle and roller bearings	GKN ITALIA
Gorenje Orodjarna	Tools for sheet metal fabrication, plastics processing and CAD/CAM/CAE designed tools	
Impol	Metal semiproducts	
Iskra Avtoelektrika	Tools for sheet metal fabrication, fabrication of metals, pressure and gravitation metal casting	
Kovinoplastika Loz	Metal fittings, tools for sheet metal fabrication, plastics processing and die casting	
Lama Dekani	Furniture fittings, prefabricated systems, tools	Titus International
Litostroj EI	Equipment for hydroelectric power plants, pump stations and related industrial equipment	
Liv Postojna	Tools for sheet metal fabrication and plastics processing	
Metalna-SRM	Lifting and handling equipment	
Orodjarna & inženiring Alba	Tools production for machinery	Alba Industrieanlagen
Palfinger	Cranes, hoists and winches	Palfinger
Rondal	Powder metallurgy	
Roto Loz	Metal smallware	Roto Frank
Sistemska tehnika	Plant, machinery and technological equipment	Steyr-Daimler-Puch Spezialfahrzeug
Styria vzmeti	Metal products	Styria Federn
Skrli	Metal equipment for wine trade and other food and chemical industries	Calux Holding
TBP	Bowden cables and plastic foils	
Tomos	Motorbikes	Hidria Gmbh
Trim	Metal buildings, structures, façade panelling, roofs	
Unior	Machine and hand tools, forgings and sintered parts	
Varstroj	Manufacture of metalworking machine tools	

Faculties, research institutions, clusters and associations

University of Ljubljana,
Faculty of Mechanical Engineering
www.fs.uni-lj.si

University of Maribor,
Faculty of Electrical Engineering
www.fs.uni-mb.si/en

TECOS - Slovenian Tool and Die Development Centre
www.tecos.si

Chamber of Commerce and Industry of Slovenia – Metal Processing Association
www.sloveniapartner.com

Toolmakers Cluster of Slovenia
www.toolscluster.net

Institute of Metals and Technology
www.imt.si