



Aktuálna pozícia Slovenska v tabuľkách zahraničných investorov

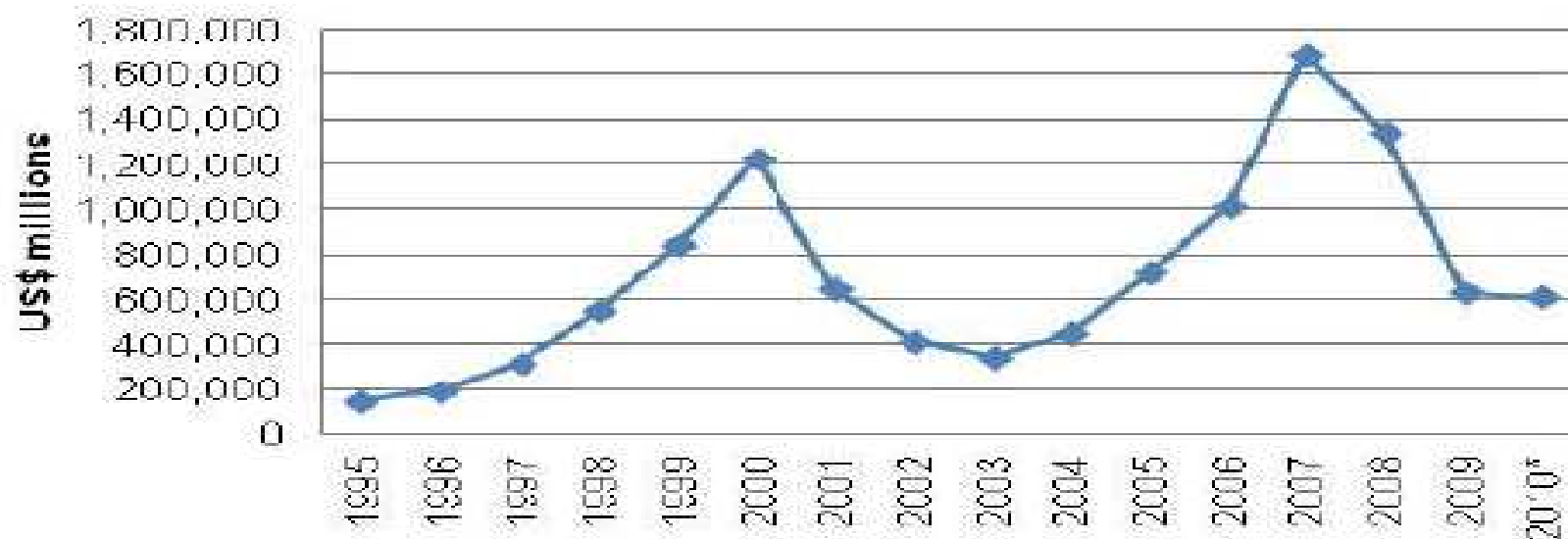


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Vývoj investícií M&A vo svete, 1995-2010

Figure 1. International M&A investment, 1995-2010



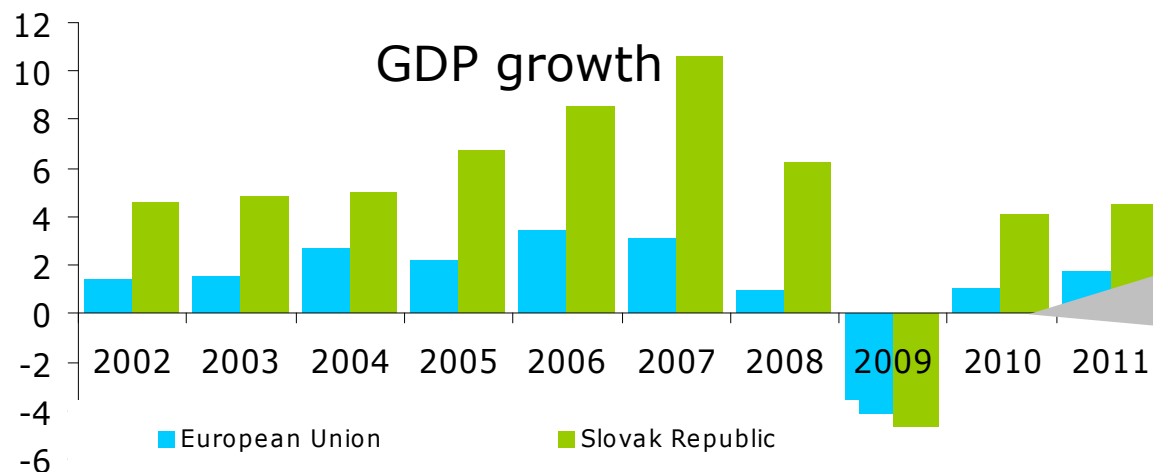
* Projection based upon first half 2010
Source: Dealogic.



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Makroekonomická pozícia Slovenska



GDP Prediction for 2010

EC	4,1%
OECD	4,1%
National Bank of SR	4,3%
IMF	4,1%
MF SR	4,1%

	2008	2009	2010 1Q	2010 2Q	2010 3Q
Real GDP growth	6,4%	-4,7%	4,8%	4,7%	3,8%
Labour productivity growth	3,8%	2,7%	-	-	
HICP Inflation	4,6%	1,6%	0,5%	1,2%	1,1%
Unemployment	7,7%	11,4%	12,9%	12,4%	12,3%
Average monthly gross salary (€)	723	744,5	725	758	750



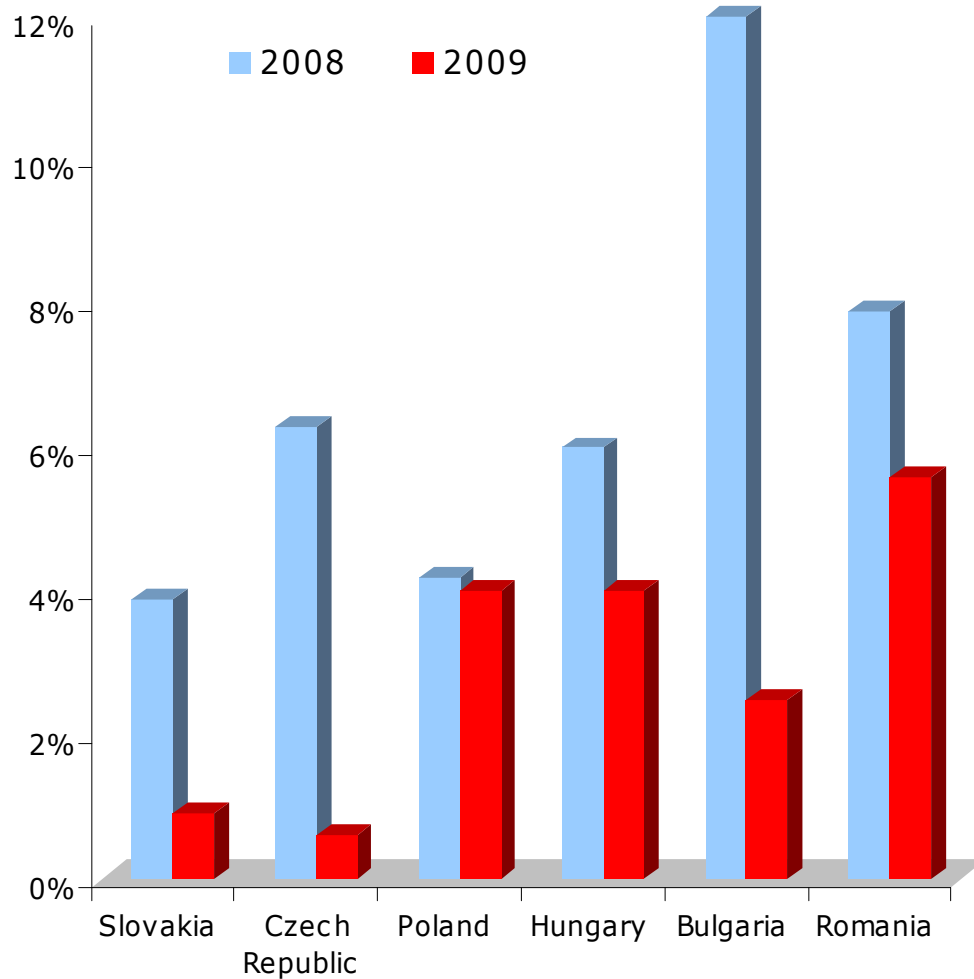
Source: International Monetary Fund, Eurostat,
Slovak Statistics Office, Central office of Labour, social affairs and family



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Inflácia v SR



Country	Inflation (HICP) in	
	2008	2009
Slovakia	3.9%	0.9%
Czech Republic	6.3%	0.6%
Poland	4.2%	4.0%
Hungary	6.0%	4.0%
Bulgaria	12.0%	2.5%
Romania	7.9%	5.3%

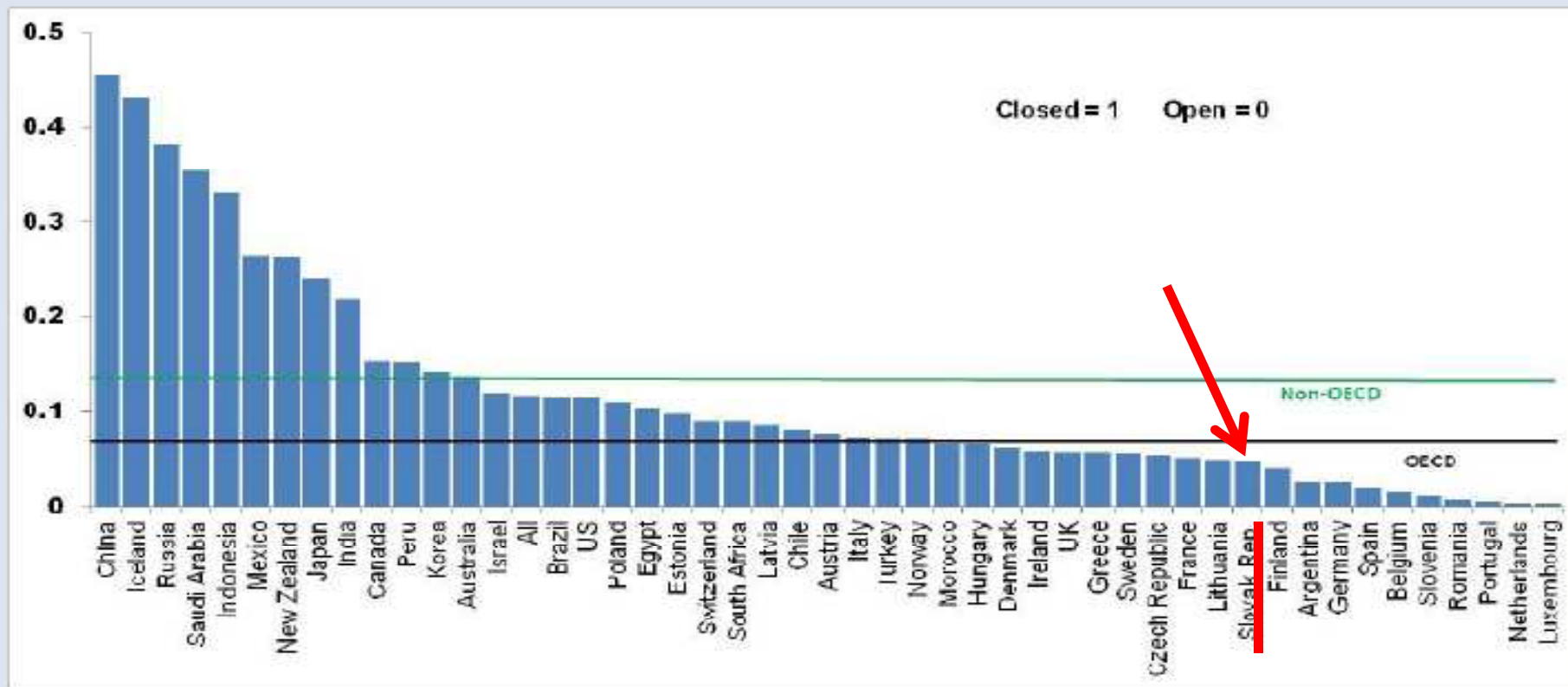


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Otvorenosť Slovenska pre PZI

Figure 2. FDI Index by country



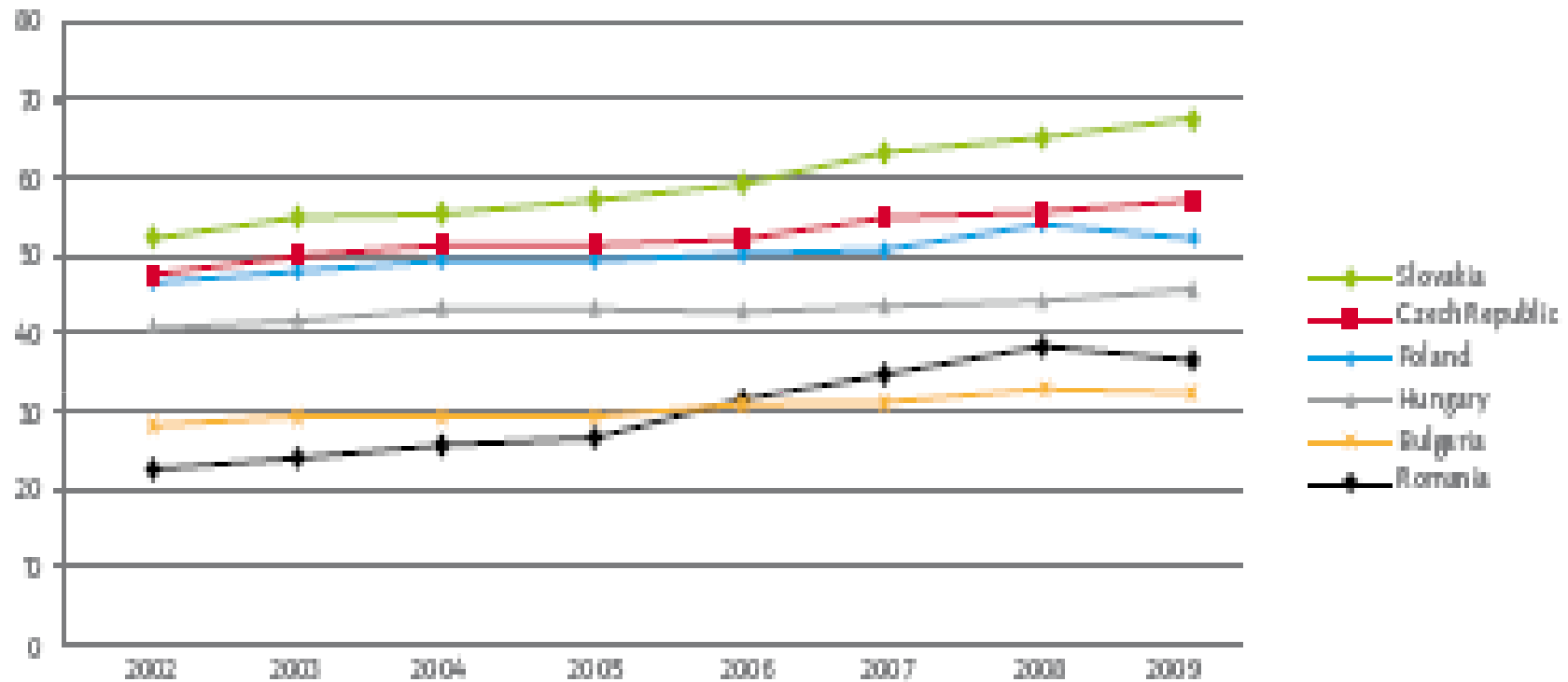
Source: OECD Investment Division.



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Najvyššia produktivita práce v regióne



Source: Eurostat; www.epp.eurostat.ec.europa.eu, ITC, EU ITC, 2009



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Hodnotenie Slovenska medzinárodnými ratingovými agentúrami

COUNTRY RATINGS (Sovereign foreign currency ratings)	SLOVAKIA	CZECH REPUBLIC	HUNGARY	POLAND	BULGARIA	ROMANIA
 STANDARD & POOR'S	A+ stable	A positive	BBB- Negative	A- stable	BBB Stable	BB+ Stable
 Moody's Corporation	A1 stable	A1 stable	Baa3 negative	A2 Stable	Baa3 positive	Baa3 stable
 FitchRatings	A+ stable	A+ positive	BBB negative	A- Stable	BBB- negative	BB+ stable
 JCR Japan Credit Rating Agency,	A+ stable	A stable	BBB+ stable	A- Stable	BBB stable	BBB- negative
 R&I NOW Rating and Investment Information	A stable	A stable	BBB stable	A- stable		
OECD Country risk	0	0	2	0	4	4

Source: www.standardandpoors.com, www.moodys.com,
www.fitchratings.com, www.jcr.co.jp, www.r-i.co.jp, www.oecd.org

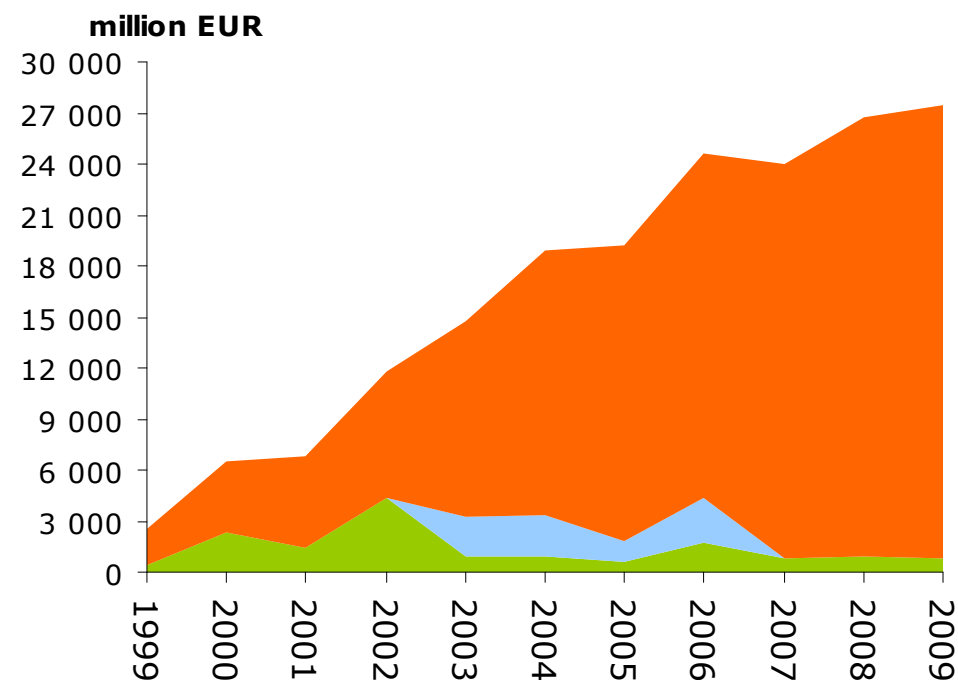


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Príliv PZI do Slovenskej republiky

Country of Origin	Investor
USA	US Steel , Emerson, DELL EMEA Centre of Excellence, Whirlpool, IBM International Services Centre, HP European IT Operation Centre, Johnson Controls R&D Centre, AT&T, Accenture Technology Solutions , Getrag Ford (Deutschland)
China	LENOVO
Taiwan	AU Optronics , ESON, Foxconn , Delta Electronics
Germany	Siemens , Volkswagen , T-Systems
Japan	Sony , Panasonic , Yazaki, Mitsui Sumitomo
Korea	Samsung , KIA Motors , Hyundai Mobis
France	PSA Peugeot Citroen , Alcatel R&D



- Inward FDI position (million EUR)
- FDI inflow per year incl. reinvested profit (million EUR)
- FDI inflow per year (million EUR)

Source: SARIO, 2010



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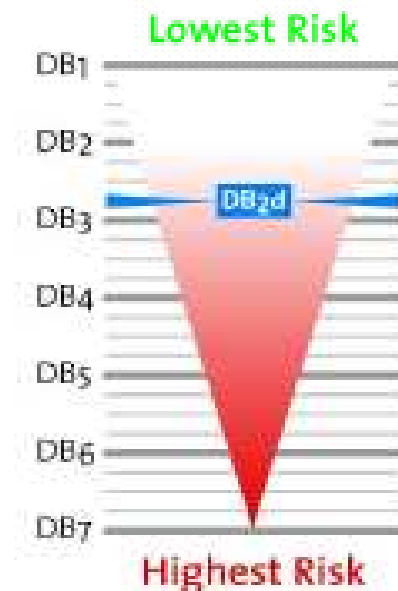
Slovensko - najlepšie investičné prostredie podľa krajín strednej a východnej Európy

Dan & Bradstreet hodnotenie roku 2009 134 krajín

9 z 10 investorov by opäť prišlo do SR



DB2d	Cyprus, Slovensko
DB3a	Španielsko, Taliansko, Česko
DB3b	Írsko, Grécko, Poľsko
DB3c	Portugalsko, Litva
DB3d	Maďarsko
DB4a	Bulharsko, Rumunsko



Source: D&B Country Report 2009



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Rankings on the ease of doing business:

DB2011 RANK	DB2010 RANK	ECONOMY	DB201 REFOR
1	1	Singapore	0
2	2	Hong Kong SAR, China	2
3	3	New Zealand	1
4	4	United Kingdom	2
5	5	United States	0
6	6	Denmark	2
7	9	Canada	2
8	7	Norway	0
9	8	Ireland	0
10	10	Australia	0
11	12	Saudi Arabia	4
12	13	Georgia	4
13	11	Finland	0
14	18	Sweden	3
15	14	Iceland	0
16	15	Korea, Rep.	1
17	17	Estonia	3
18	19	Japan	1
19	16	Thailand	1
20	20	Mauritius	1
21	23	Malaysia	3
22	21	Germany	1
23	26	Lithuania	5
24	27	Latvia	2
25	22	Belgium	1
26	28	France	0
27	24	Switzerland	0
28	25	Bahrain	1
29	30	Israel	1
30	29	Netherlands	1
31	33	Portugal	2
32	31	Austria	1
33	34	Taiwan, China	2
34	32	South Africa	0
35	41	Mexico	2
36	46	Peru	4
37	35	Cyprus	0
38	36	Macedonia, FYR	2
39	38	Colombia	1
40	37	United Arab Emirates	2
41	40	Slovak Republic	0



Doing Business 2011

POZÍCIA SLOVENSKA:

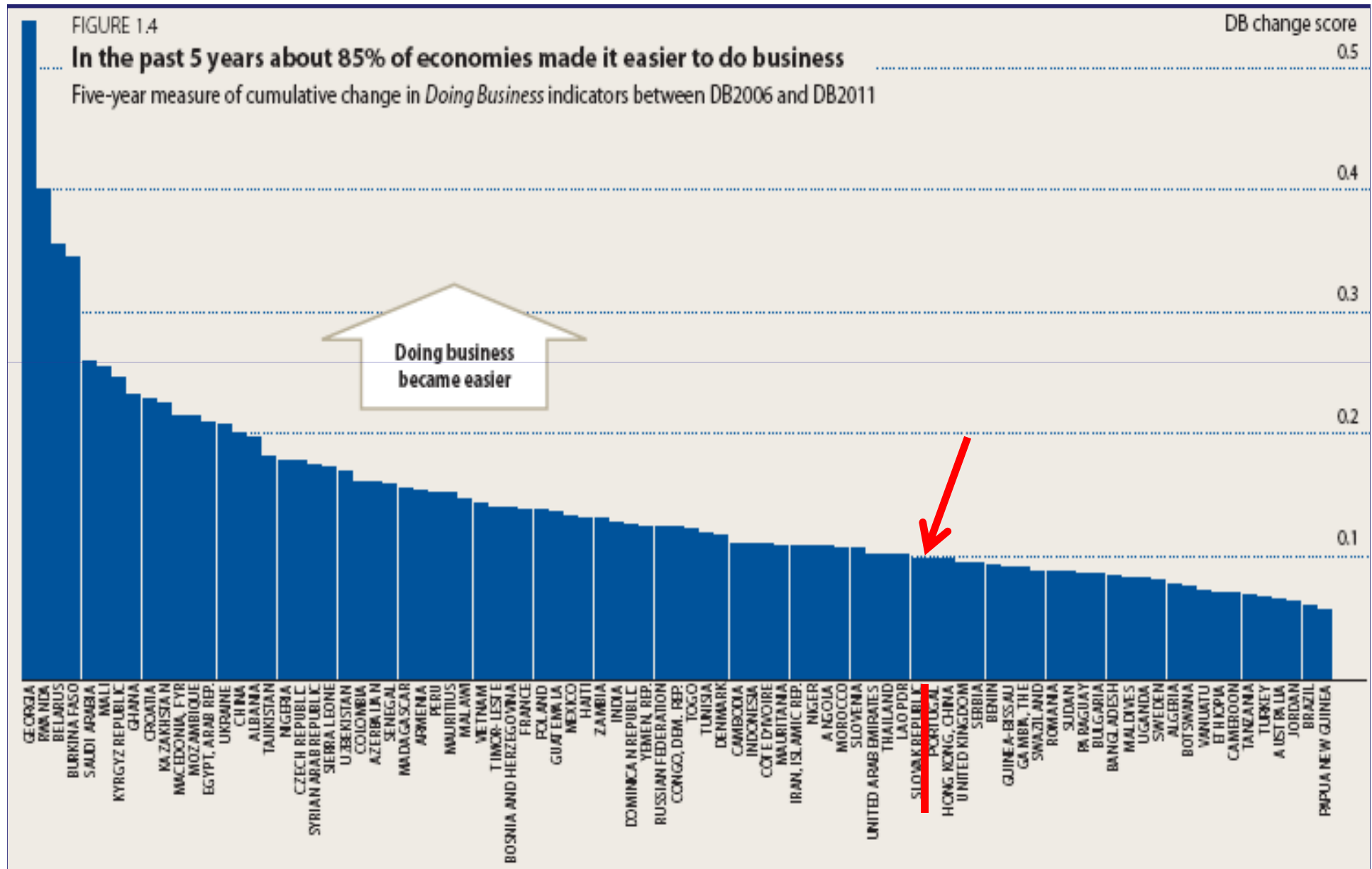
41. miesto



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Zlepšovanie podnikateľského prostredia vo svete počas posledných 5 rokov



Index ekonomickej slobody 2011

Heritage Foudation

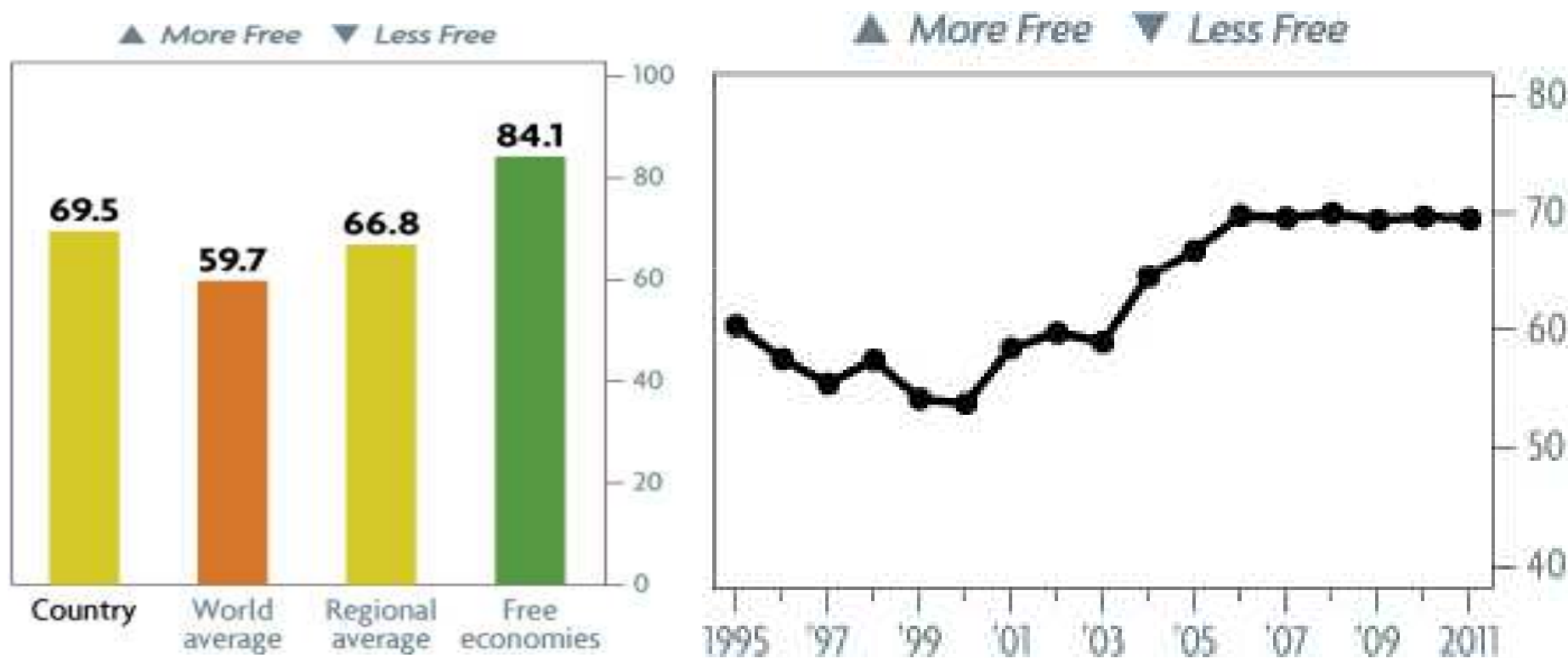
POZÍCIA SLOVENSKA: 37.miesto

World Rank	Country	Overall Score	Change from 2010	Business Freedom	Trade Freedom	Fiscal Freedom	Government Spending	Monetary Freedom	Investment Freedom	Financial Freedom	Property Rights	Freedom from Corruption	Labor Freedom
1	Hong Kong	89.7	0.0	98.7	90.0	93.3	89.6	87.1	90.0	90.0	90.0	82.0	86.2
2	Singapore	87.2	1.1	98.2	90.0	91.1	91.3	86.2	75.0	60.0	90.0	92.0	98.0
3	Australia	82.5	-0.1	90.1	84.4	61.3	64.7	85.0	80.0	90.0	90.0	87.0	92.2
4	New Zealand	82.3	0.2	99.9	86.6	64.7	49.3	84.8	80.0	80.0	95.0	94.0	89.2
5	Switzerland	81.9	0.8	80.2	90.0	68.4	69.3	83.8	80.0	80.0	90.0	90.0	87.8
28	Czech Republic	70.4	0.6	69.8	87.6	81.0	44.8	80.0	70.0	80.0	65.0	49.0	77.0
29	Georgia	70.4	0.0	87.3	89.2	87.5	60.3	76.7	70.0	60.0	40.0	41.0	92.1
30	Norway	70.3	0.9	88.3	89.4	51.6	51.5	75.1	65.0	60.0	90.0	86.0	45.8
31	Spain	70.2	0.6	77.2	87.6	61.0	49.3	82.4	80.0	80.0	70.0	61.0	53.0
32	Belgium	70.2	0.1	92.6	87.6	41.8	25.0	82.5	80.0	70.0	80.0	71.0	71.0
33	Uruguay	70.0	0.2	61.5	83.0	84.3	76.5	72.8	80.0	30.0	70.0	67.0	74.9
34	Oman	69.8	2.1	69.4	83.6	98.5	68.1	69.5	55.0	60.0	50.0	55.0	89.1
35	South Korea	69.8	-0.1	91.6	70.8	72.2	73.0	78.7	70.0	70.0	70.0	55.0	46.5
36	Armenia	69.7	0.5	82.4	85.5	89.2	85.7	76.0	75.0	70.0	30.0	27.0	75.9
37	Slovak Republic	69.5	-0.2	73.4	87.6	84.2	63.7	81.6	75.0	70.0	50.0	45.0	64.5
38	Jordan	68.9	2.8	65.8	78.8	92.7	60.9	81.4	70.0	60.0	55.0	50.0	74.2

Index ekonomickej slobody 2011

Heritage Foudation

POZÍCIA SLOVENSKA: 69,5 (-0,2)



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Hodnotenie celkového daňového zaťaženia, 2010

Svetová banka, PriceWaterhouseCoopers

Economy	Total Tax Rate				Rank
		Profit tax	Labour tax	Other taxes	TTR
	TTR	TTR	TTR	TTR	rank
Poland	42.3%	17.7%	22.1%	2.5%	102
Slovak Republic	48.7%	7.0%	39.6%	2.1%	131
Czech Republic	48.6%	7.4%	38.4%	3.0%	132
Hungary	53.3%	16.7%	34.4%	2.2%	144



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PZI v strednej a východnej Európe

FDI into Central and Eastern Europe by sector (job creation)

Rank 2009	Sector	Jobs Created in 2008	Jobs Created in 2009	Change 2008-2009	Market Share 2009
1	Automotive	27,266	27,002	-264	41%
2	Food	5,811	5,426	-385	8%
3	Electronics	2,320	4,811	2,491	7%
4	Machinery & Equipment	4,937	3,774	-1,163	6%
5	Computers	1,390	2,600	1,410	4%
6	Non-metallic mineral products	2,209	2,459	250	4%
7	Electrical	3,365	1,997	-1,368	3%
8	Retail	1,555	1,500	-55	2%
9	Furniture & Sports Equipment	1,781	1,398	-383	2%
10	Plastic & Rubber	3,800	1,341	-2,459	2%
11	Wood	1,810	1,265	-545	2%
12	Fabricated Metals	2,394	1,259	-1,135	2%
13	Software	1,891	1,258	-633	2%
14	Chemicals	2,087	1,243	-844	2%
15	Oil & Gas	350	1,025	675	2%
16	Business Services	2,329	1,009	-1,320	2%
17	Other Transport Equipment	2,067	903	-1,164	1%
18	Pharmaceuticals	1,158	850	-308	1%
19	Scientific Instruments	33	703	750	1%
20	Construction		675	675	1%
	Other	8,076	2,831	-5,245	4%
	Grand Total	76,629	65,609	-11,020	100%

Source: Ernst & Young European Investment Monitor 2010

Najväčší investori v Európe

Top ten origin countries of FDI into Europe (job creation)

Rank 2009	Origin	% of jobs created				
		2005	2006	2007	2008	2009
1	USA	23%	23%	19%	22%	19%
2	Germany	17%	14%	13%	15%	17%
3	China	1%	1%	1%	2%	7%
4	France	8%	3%	7%	6%	5%
5	Switzerland	2%	3%	3%	3%	5%
6	United Kingdom	4%	6%	5%	4%	4%
7	Japan	4%	10%	4%	6%	3%
8	India	1%	2%	3%	4%	3%
9	Italy	3%	2%	4%	4%	3%
10	Sweden	3%	3%	3%	3%	2%

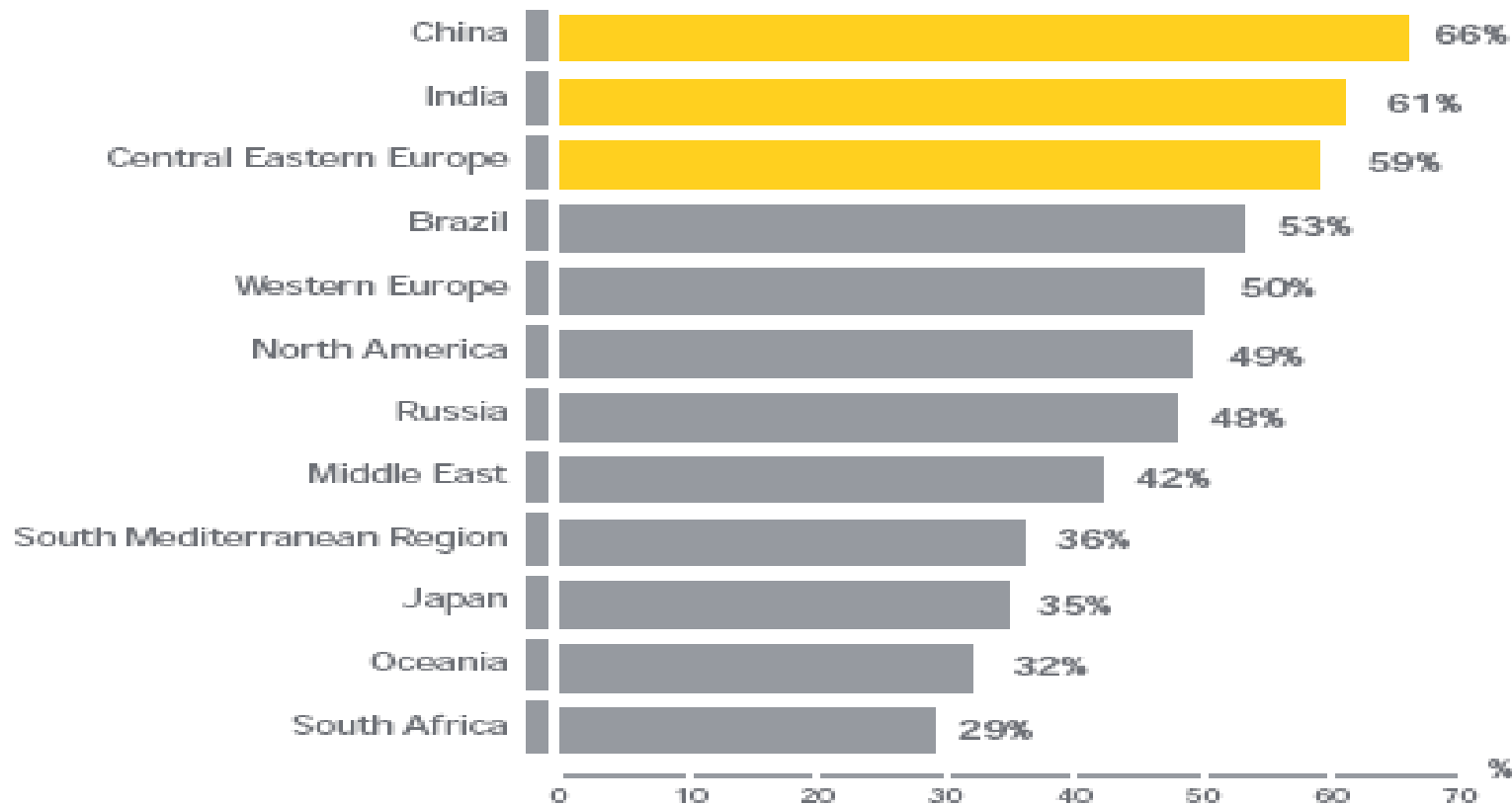
Source: Ernst & Young European Investment Monitor 2010



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Najatraktívnejšie destinácie sveta z hľadiska prílevu PZI pre obdobie 2011 - 2013



Source: Ernst & Young's 2010 European attractiveness survey

Total Respondents: 814. Respondents selected 3 possible answers.



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SARIO Who We Are

MISSION EXECUTED THROUGH
3 CORE SECTIONS

Foreign Direct Investment

Foreign Trade

Structural Funds of the EU

Government
Funded
Organization
under the direction
of the Slovak
Ministry of Economy



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SARIO INVESTMENT PROJECTS

	No. Of projects	Investment (M EUR)	Number of jobs	Sector
Finished in 2002 – 2008	337	6 770	65 767	automobile, electronics, engineering, textile, plastics, metal processing
Finished in 2009	9	313,43	5375	automobile, electronics, engineering, textile, plastics, metal processing
In process 01/2010	143	4,288 – 4,603	21 446 – 23 257	automobile, electronics, engineering, textile, chemics, plastics, metal processing, research and development

Source: SARIO, 2010



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SARIO STRATEGIC PROJECTS

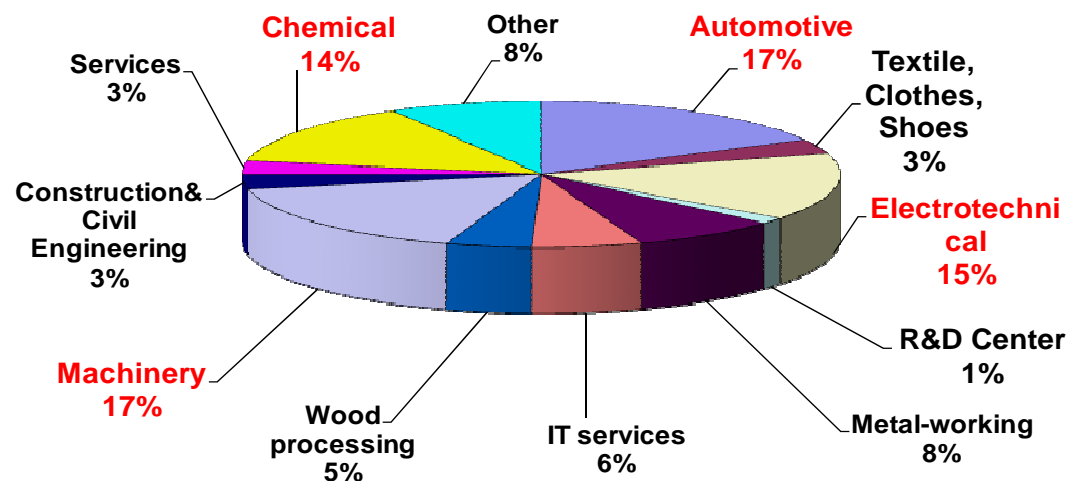
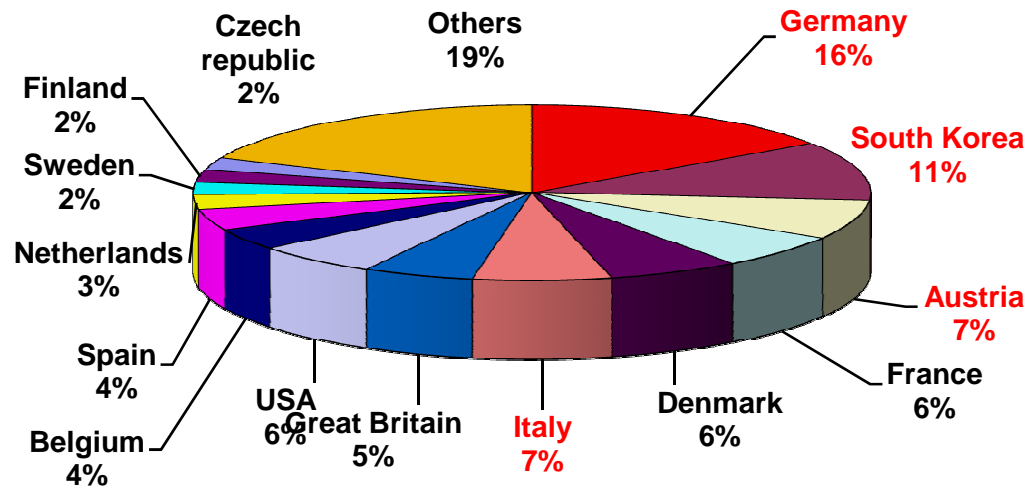
Company name	Country of origin	Jobs	Investments mil EUR	Location
SONY	Japan	1500	76,3	Nitra
SAMSUNG	South Korea	450 + 800	63	Galanta
SAMSUNG EI. LCD	South Korea	1200-1400	320	Voderady
KIA Hyundai	South Korea	3400	1100	Žilina
Peugeot-Citroen	France	3500	750	Trnava
DELL	USA	1000+800	8	Bratislava
Johns Manville Slovakia	USA	1 400	120	Trnava
Whirpool	USA	1300	200	Poprad
GFT	Germany/USA	787	345	Kechnec
AUO	Taiwan	3000	191,3	Trenčín
ICU Medical	USA	700	14	Vráble



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SARIO INVESTMENT PROJECTS BY COUNTRY AND SECTOR 2002-2008



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Ďakujem za Vašu pozornosť.

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