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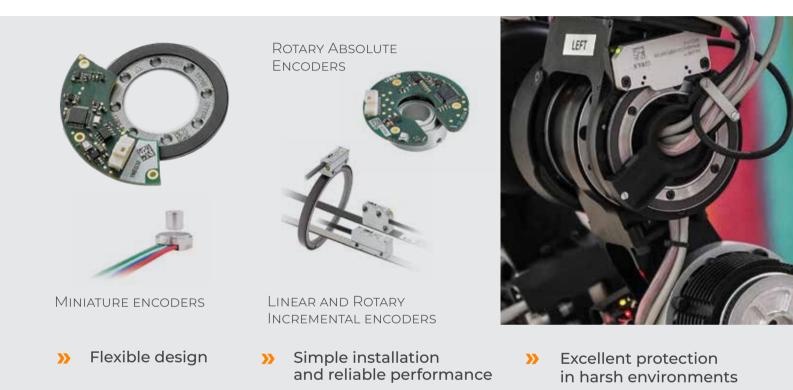
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Discover Slovenia

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Green



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Active





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Proud Winners of Globalisation

For the sixth year in a row, Slovenia's economic growth is higher than the eurozone average. This is mostly down to the country's exporters, who have been strengthening their presence on international markets year on year. In the last decade, Slovenian exports have doubled - and continue to rise. According to 2019 forecasts, exports will touch the EUR 42 billion mark, which is 88% of GDP. While industry is traditionally a strong part of Slovenian exports, the services sector has become a much more successful part of the economy: the competitiveness of the Slovenian transport chain and the increased range of Slovenian tourist products and services have made a particularly decisive contribution to increasing services exports from EUR 5 billion in 2011 to EUR 8.7 billion this year.

The high share taken by exports (88% of GDP) tells us that there are not many small European countries more integrated into complex value chains than Slovenia. Because we have focused on forging links and cooperating with international partners in order to boost economic development, Slovenia was among Bertelsmann's "winners of globalisation" in 2018. Indeed, if we take GDP growth and purchasing power from 1990 to 2016 into account, we are world championship runners-up, right behind Switzerland. The results have only improved since 2016, and remain promising into the future as well.

Despite the decline in international merchandise trade, Slovenia's economic growth forecasts remain positive, with Slovenia slated to maintain growth above 2.7% in 2020 and 2021. Sometimes the calendar helps too. In 2020, because some national holidays fall on the weekends, Slovenia will have six extra working days – which will help to ensure that economic growth does not slow and will remain, once again, higher than the EU-28 growth rate.

The ratio between Slovenia's growth rate and the EU average is an important indicator for us. Up until

In the last decade, Slovenian exports have doubled - and continue to rise.

Sonja Šmuc General Manager of the Chamber of Commerce and Industry of Slovenia

the crisis that began in 2008, Slovenia had been rapidly closing the development gap; in the depths of the crisis, however, that gap once again began to increase. The tremendous successes of recent years have more than made up for what was lost. One motivation to maintain the dynamic level of growth is the chance to reach the EU average by 2025. After that is achieved, we can set about tackling the next stage, which is to propel ourselves into the top 25% in Europe.

This is an ambitious target. But if we work smartly in the economy and pursue good economic policies, it is achievable. We would like to increase the current added value per employee, which stands at EUR 44,415 and is a third higher than in 2007, to EUR 60,000 by 2025. This vision has gained traction from the much better links that have been forged between companies and institutions in the field of development, the financial and capital condition of Slovenian enterprises, which are showing record low levels of debt, good integration into international markets, a well-educated workforce and increased domestic consumption, which reflects the rising living standards.

Slovenia's public debt is also being reduced at an accelerated rate and will, within two years, fall below the level of the Maastricht criteria, enabling the country to maintain competitiveness vis-à-vis its main trading partners. Nevertheless, we are well aware that the key risks for Slovenia are connected with tectonic shifts in personal mobility, as many Slovenian enterprises are reliant on European partners in the automotive industry. Changes in geostrategic relations in global trade, which are already leading to a fall in global economic growth, could affect Slovenia (a markedly export-oriented country) to a much greater extent than countries that rely less on exports. However, even in these cases we will rely on those great Slovenian virtues of adaptability, resourcefulness and innovation - virtues that made us a recognised and respected partner on the international stage.





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(WEF - Global Competitiveness Index 2018; World Bank Group, Doing business 2019)



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Find out how you can benefit from Slovenia's green qualities, creative talent and smart solutions. Welcome to visit our website **www.sloveniabusiness.eu**













The Good News Keeps Coming

Slovenia remains on the right track. The economic results are favourable, with growth considerably higher than that of the eurozone for the sixth year in a row. This is mostly down to high export growth, with investment and domestic consumption also on the rise. We should also mention that we have achieved high levels of foreign investment growth in recent years as well.

Why do business with Slovenia? My answer is that Slovenia offers a stable business environment with well-developed infrastructure and a well-educated workforce – and it is right next to a huge market.

This is something that an increasing number of foreign firms setting up in Slovenia acknowledge. Although taxes in Slovenia are not the lowest in the EU, they are still considerably lower than in the most developed countries of the EU. The country has numerous direct aid programmes for new investments, along with excellent infrastructure, a highly skilled workforce and a very stable social structure. The European market and European regulations provide massive potential for enterprise development.

The domestic market is small and boutique, which means that Slovenia depends on exports. If low added value business that competed mainly on price accounted for the majority of exports a decade ago, exporters today are the most profitable and innovative part of the Slovenian economy. Centres of excellence are springing up, with top scientists working alongside company-based researchers to develop new solutions for large numbers of global customers.

Slovenian industrial companies are responsible for the bulk of exports, and the main markets are the EU, Russia and the countries of the Far East. The most important sectors are the car industry, pharmaceuticals, household appliance manufacturing, machine and device construction, and the wood industry. Although large companies generate the majority of exports, Slovenia has developed a significant number of family-owned firms over the last ten years. These

> A significant number of family-owned firms is raising the added value of their products and services, and is using innovation to secure an increasingly important position on many global markets.

> > Boštjan Gorjup President of the Chamber of Commerce and Industry

smaller firms are raising the added value of their products and services, and using innovation and development to secure an increasingly important position on many global markets.

Slovenia's position at the heart of Europe makes it an extremely important intersection for different modes of transport. The Port of Koper is the most important port in Central Europe, an indispensable link between the car, machine, chemical and electricity industries of that region and the rest of the world. In this area, Slovenia is also beginning a new investment cycle to expand and modernise the flow of and ease of access for freight, the volumes of which are growing constantly in this part of Europe as a result of rapid economic growth.

The Slovenian state is a complex beast, and the business world are fond of saying that it still imposes too much regulation on the economy. However, the economic climate is improving nevertheless – and indeed, the state has also been responsible for developing mechanisms for promoting smart specialisation, bringing science and business together and encouraging new investment. In Slovenia, work is a value with historical roots. In this Alpine and hilly environment, work has always had to be grabbed with both hands if a person is to survive. Today, Slovenia has one of the highest percentages of university graduates, while technical professions are again becoming more popular with the younger generation.

Tourism is an important sector of the economy and one that makes full use of the country's incredible, wonderfully preserved natural environment, its stellar gastronomic tradition, and the fact that it is one of the safest, most secure and most socially stable countries in the world. Openness to the cultures of the world and solidarity ensures a high quality of life. As the Slovenian saying goes, there are no straight paths in life: you have to be prepared for peaks and troughs. In Slovenia we are ready for any new challenge.



Slovenia

Official name: Republic of Slovenia Capital city: Ljubljana **Government:** Parliamentary Republic State President: Borut Pahor Prime Minister: Marjan Šarec Local government: 212 municipalities, of which 11 have urban status; 12 statistical regions, which are grouped into two cohesion regions – Western and Eastern Slovenia Area: 20,273 km² **Population:** 2,084,301 (1 April 2019) Location: bordered by Austria, Italy, Hungary and Croatia; excellent connections with all European markets Currency: Euro GDP per capita: EUR 21,182 Growth in 2018: 4.1% Projected growth for 2019: 2.9% (Consensus Economics, October 2019) Time zone: CET (GMT+1), and CEST (GMT+2) in summer

Official languages: Slovene, together with Italian and Hungarian, respectively in the areas with Italian and Hungarian minorities.

Source: Statistical Office of the Republic of Slovenia (SURS)







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KOVIS is an internationally innovative company for the development and production of components for the railway industry and various parts for other industrial sectors.

Kovis has established itself internationally with the production of brake discs for all types of railway vehicles: from locomotives, trams, and metro lines to high-speed trains. In addition to the brake discs, Kovis is also the largest manufacturer of axle boxes for freight wagons in Europe.

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KOVIS d.o.o. Brezina 102, SI-8250 Brežice, Slovenia, Europe

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Top Business Linked Data

Ease of doing business, openness to trade, education and innovations remain the strongest pillars of success.

Bojan Ivanc, CFA, CAIA, Chief Economist at Chamber of Commerce and Industry's Analytics Department



12th

Prices (IMD)

(out of 63)

(out of 163) Global Peace Index (IEP)

(out of 141) Macroeconomic stability (WEF)

Gth

(out of 190) **Resolving Insolvency (DB)**

14th

(out of 28) Innovation Union Scoreboard (EC)

23th

(out of 190) Getting electricity (DB)

32th

(out of 63) IMD World Digital **Competitiveness Ranking**)

26th

(out of 141) Skills (WEF)

33th (out of 141)

Infrastructure (WEF)

28th

(out of 141) Innovation capability (WEF)

39th

(out of 167) Logistics Performance Index (WB)

Sources: Doing Business (DB), IMD - World Competitiveness Rankings, IMD - World Digital Competitiveness Rankings, WEF - The Global World Competitiveness Report, Logistics Performance Index (world Bank), Innovation Union Scoreboard (European Commission)

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- **2009** (construction year)
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- 🖺 6,189.00 m²
- 2010 (construction year)
- ⑥ 6.360.000,00 € + TAX

Slovenia, the European Union's Current Star Performer

As in other European countries, domestic demand is becoming increasingly important for future economic trends

Bojan Ivanc, CFA, CAIA, Chief Economist at the Chamber of Commerce and Industry's Analytics Department

Slovenia's Growth Continues to Exceed EU-28 Average

The Slovenian economy has been growing over the last six years. According to the Slovenian Chamber of Commerce and Industry's Analytics Department, Slovenia will experience relatively high economic growth in 2019 (in the area of 2.9%), which will be twice as high as the EU-28. Real economic growth stood at 4.1% in 2018 (lowered by 0.4 p.p. after a review by the Statistical Office of the Republic of Slovenia), which is twice as high as the long-term neutral growth rate assessment (2.2%). This level of growth was the sixth-highest among the EU-28. In real terms, Slovenia surpassed the 2008 level of development in the second half of 2017. Following growth in consumption, only investments in fixed assets remain below the pre-crisis (2008) level. In the second quarter of 2019 they stood one-sixth lower in real terms than their level in the second quarter of 2008, when Slovenia was in the midst of a residential construction boom. According to the most recent current forecasts by Eastern European Consensus, economic growth is expected to reach 3.3% in 2019 and 2.8% in 2020. The estimates for 2019 are in the 2.8–3.6% range. The cooling of the euro area's economy, and particularly the German economy, is thus having an increasing impact on this estimate.

The CCI Analytics Department's forecast economic growth rate of 2.9% in 2019 is based on the creation of jobs and growth of wages, as well as on moderate (i.e. no longer record-level) consumer optimism and increased investment. Lower interest rates are stimulating domestic consumption, particularly of durables (vehicles) and real estate, and spurring construction growth. Financing conditions remain favourable, and alongside significant internal resources from retained earnings are continuing to provide for solid growth in investment by the Slovenian corporate sector. Trade will slow somewhat due to slightly weaker conditions for exports to the main European markets, but growth in exports in 2019 will remain at 7.5%, primarily due to imports (in fact re-exports) in pharmaceuticals associated with the start-up of a new specialised distribution centre. Higher wages and increased employment are expected to additionally stimulate growth of private consumption. Slovenian consumers are otherwise a bit less optimistic this year, but the level of optimism remains above the long-term average. Certain areas of manufacturing (metals, car industry) are also facing major challenges, which are gradually also expanding into service activities. Consumer confidence in manufacturing has already fallen below the long-term level, while other sectors remain above the long-term average.

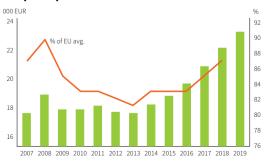
GDP growth is forecast to reach 2.9% in 2019 and 2.7% in 2020.

Current account balance



2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019

GDP per capita





Labour productivity

has increased from

EUR 34.000

EUR 44,000

to more than

over the last 10

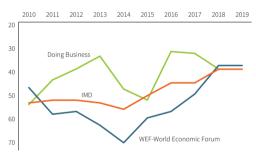
years.

Export Growth Double That of EU Overall

With regard to exports, the Slovenian economy is

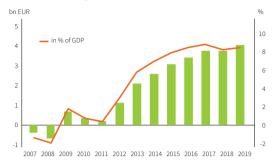
primarily focused on EU markets, as they account for more than three-quarters of its goods exports, which together with services account for 85% of GDP, which is twice as high as the EU-28 as a whole. The CCI Analytics Department expects goods exports to rise by 9.7% in 2019, while imports will grow by 11.8%. Lower nominal growth of exports and imports (+4.3% and 5.1%) is expected in 2020. Trade growth is predicated upon growth in industrial production, which will stand at 3% in 2019 and will slow slightly in the second guarter, as the number of new orders in 2019 has already decreased. Nominal growth in goods exports stood at 9.3% in 2018, which was twice that recorded in the euro area and the EU-28, and 4.7 p.p. lower than in 2017. Industrial production rose by 6.4%, which is 2 p.p. lower than in 2017. Growth in exports of services stood at 9.3% in 2018, primarily as a result of a successful tourism season, good performance by the transport sector and new business abroad for construction firms. In 2019 we are expecting 8.5% nominal growth in exports of services and 5.6% growth in imports of services. Growth of transport services and other business services (primarily construction) will be higher on both the export and import sides.

Ranking





Trade balance (goods & services)



Slovenian Economy Solvent, with Low Levels of Debt

Slovenian firms have tightened up their balance sheets and improved their organisational structures over the last decade. The net debt to EBITDA ratio declined from 6 to less than 2.3, while cash now accounts for 6.4% of assets. Value added was up 7.6% in 2018, and the number of employees grew by 4.6%. Value added per employee was over EUR 44,000, despite substantial growth (+7.4%) in the prices of input raw materials that Slovenia's export economy needs for production. ROE was over 9.1%, while companies earmarked 5.3% of sales revenues for investment in 2018. Further increases can be expected in investment activity, after a long period of being more than one percentage point down on its long-term average. In addition to investments in machinery and transport equipment, whose growth will slow to 3-4%, investments in commercial real estate will also increase considerably.

Consumption Also Rising Due to Movement

After a two-year lag relative to the EU overall, domestic consumption in Slovenia is again increasing, which is primarily attributable to more favourable dynamics on the labour market. According to the employment registers, the working population will therefore grow by 2.7% in 2019, while this employment trend will slow in 2020 (to 0.4% growth), alongside lower unemployment and lower demand on the labour market due to slowing growth in manufacturing. The employment of foreign nationals is increasing, in parallel with rapid growth in construction and manufacturing, and in other services. In the first quarter of 2019, half of all newly employed persons were employed in construction and manufacturing.

An increasing number of companies (40% of all enterprises) are citing problems with hiring qualified workers and are planning to increase recruitment levels in the coming months. The surveyed unemployment rate (ILO methodology) fell to 5.1% in 2018, 3.1 p.p. lower than the figure for the euro area and the lowest rate since 2009. The unemployment rate stood at around 4% before the crisis, and rose to 11% at the peak of the crisis. In 2019 we are forecasting a surveyed unemployment rate of 4.4%, with a slight further decrease (to 4.3%) in 2020. The registered unemployment rate will fall to 7.7% in 2019 and 7.5% in 2020.

Wage Growth Increasing, Real Estate Prices Rising

Average gross wages in 2019 will rise by 4.4% in both the public and private sectors. In the private sector, wage growth will be driven by good corporate performance, a gradual increase in productivity, labour shortages and the associated upward pressure on wages, and an increase in the minimum wage. The highest wage increases will be recorded in trade, hotels and catering, and support service activities, i.e. in sectors with the largest labour shortages and the highest percentage of minimum wage workers. Wage growth in the public sector (over 5%) will be higher owing to the agreed wage increases, and to a lesser extent due to the increase in the minimum wage. Average gross wages in 2018 were up 3.4%, and net wages were up 2.9%. The wage growth in the private sector in 2018 was partially on account of higher additional payments (performance bonuses) due to good overall corporate performance in the last year, and the further easing of the tax burden on certain bonuses (the '14th month') down to the level for an average salary.

The increase in household consumption is mainly attributable to increased employment and higher levels of remuneration, while household deposits are also increasing (+6.8% in 2018, with similar growth forecast for 2019). Lending growth remains moderate

GDP growth



2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019

at 2.2% for corporate borrowing and 7% for household borrowing. Year-on-year growth in housing loans stood at 4.7% in December 2018, while growth in consumer loans stood at 11.8%. Loans to households have been showing strong growth in 2019, while corporate loans are growing slightly more slowly. However, growth in corporate loans has been improving since December 2018, and reached 3% in 2019. Growth in consumer loans will be high in 2019 and will exceed 10% for the third year in a row, the average amount of consumer loans is growing, and the average maturity of newly approved consumer loans is increasing. Growth in housing loans is estimated at over 5%. Despite all of this, Slovenian households

The surveyed unemployment rate (ILO) is forecast to fall below **4.5%**

in 2019 and 2020.

T.P.G. = Trust, Personal care and Global presence

TPG Logistics was established and operates under principles which are evident from the very name of the company:

- Trusted by both its partners and customers
- Professional attitude in the quality provision of a personalised service, and
- Global, providing comprehensive world-wide coverage in relation to every requirement, including door-to-door.

TPG Logistics is a dynamic rapidly growing company with proficient staff who have the knowledge and make every effort to provide the best & fastest transport solution. Based on professional experience acquired over a number of years, TPG Logistics offers optimal solutions and competitive rates.

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TPG's subsidiary TPG Agent, offers a vessel chartering facility as well as the possibility to book project and bulk cargo capacities.

TPG also specialises in perishable cargos as well as other temperaturesensitive freight, in which the company also represents one of the largest partners of Luka Koper at the Port of Koper.

Advantages of TPG Logistics

- Offers maximum flexibility, providing customers with quick decisions and rapid responses.
- A successful company with 8 % annual growth
- Trusted by an increasing number of customers, whose business is growing with that of TPG
- In relation to container throughput, one of the Slovenia's leading logistics enterprises
- Global presence through its partnerships with logistics service providers world-wide
- Providing excellence, guaranteed through certification:
 - ISO 9001-2008 (Certificate QS-5478)
 - Authorised Economic Operator (AEO Certificate SIAEOCSI001000201131967)



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are some of the least indebted in the euro area with respect to both GDP and disposable income.

After four years of growth in residential real estate prices, particularly in 2018-2019 (average rate 12%), we can once again speak of record prices on the residential real estate market, which have now reached the level of prices achieved in 2008 (although still 10% lower in real terms). Over the full year 2018, real estate prices grew by 15%. The EU average for the year was 4.4%. Real estate prices will continue to grow, and we are expecting 7% growth in 2019 and 6% in 2020. One of the key reasons for this is slow adjustment on the supply side. Household debt is also still below average, as the average household is able to repay its mortgage debt from its half-year earnings, while households across the euro area require their full annual earnings.



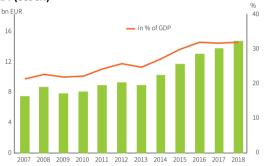
Wage growth is

higher in 2020.

4.4%

expected to stand at

in 2019 and slightly



Large State Budget Surplus in 2018

The Slovenian national budget surplus grew faster than forecast due to fast growth of nominal GDP in 2017 and 2018. The budget surplus for 2018 stood at EUR 337 million, or 0.7% of GDP. The government's consolidated gross debt decreased to EUR 32.2 billion, i.e. to 70.1% of GDP in relative terms. Slovenia has reported a primary surplus in the consolidated public finance budget (surplus revenues to expenditure before payment of interest) since 2015, and a secondary surplus since 2017 (after payment of interest, expenditure for which is falling due to the low interest rates at which existing debt is being refinanced). Nevertheless, according to estimates by the European Commission and the Slovenian Fiscal Advisory Council, the structural deficit is expected to increase further, as the current high level of economic growth masks a lack of serious long-term reforms in pensions and healthcare. In 2019 we can once again expect a surplus in the consolidated public finance budget. Growth in revenues along with continued favourable movements on the labour market is a consequence of rapid growth of social security contributions and accelerated growth in funds received from the EU, while growth in tax revenues will be slightly below last year's figure, mainly due to the easing of the tax burden on annual leave allowances.

Inflation remained low in 2018, despite the continued positive domestic economic climate. Prices (HICP) increased by 1.9% in 2018, which equalled the EU-28 figure and outpaced the euro area (1.8%), primarily due to higher energy prices, which are weighted higher in Slovenia's market basket. Inflation (HICP) remains relatively low in 2019 (August Slovenia 2.4% and EU-28 1.4%), and is forecast to stay below 2% for the entire year in both the EU and Slovenia. High demand for workers in the private sector could lead to higher growth in wages and prices (i.e. service price inflation) in the coming months. Growth in wages continues to lag behind the Višegrad countries, due to which the Slovenian export competitiveness vis-à-vis those countries remains positive. We can therefore expect 1.8% growth in the consumer price index in 2019 and 1.9% in 2020.

Trade War an Indirect Threat

The main risks to the Slovenian economy are associated with the sustainability of the favourable trends in exports, particularly in connection with the threat of trade wars and their indirect effects. The risk of import tariffs on European cars and car parts being introduced by the US is increasing, which would hit the European economy hard. There are considerable unknowns with regard to the speed of the transition from diesel-powered vehicles to electromobility, as well as other political uncertainties connected with the EU single market, particularly regarding the free flow of goods over the EU's internal borders. This is of very great importance to Slovenia's transport sector (port, railroads, freight transport). The return of faster growth of labour costs due to growth in domestic demand (construction and real estate) could gradually weaken the export competitiveness of the Slovenian economy, which is currently high, as the current account surplus is still over 6% of GDP.

As a small, open economy, the EU single market, the euro and the four freedoms (free movement of goods, services, labour and capital) are the key performance determinants for Slovenian exporters and their export competitiveness. Due to integration into global value chains via Germany, it is important for the global flow of goods to remain as free as possible. Due to the Slovenian economy's integration into those global value chains, every Slovenian citizen has EUR 25,000 more on average than they had when Slovenia gained independence (source: Bertelsmann). Slovenia has therefore taken good advantage of the growth in global trade, although lower growth or negative growth could lead to a decline in living standards.

R&D expenditure (mio EUR)

424	506	660	703	716	689	651	612	599
2009	2010	2011	2012	2013	2014	2015	2016	2017

Source: Bank of Slovenia, Statistical Office of Republic of Slovenia



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Ever-Improving Skills and Qualifications

The average level of qualifications of the Slovenian population aged over 15 is good – and improving. People with qualifications primarily in natural sciences and technical fields are sought after.

Darja Močnik, Analytical Department, Chamber of Commerce and Industry of Slovenia

Employees's Skills and Qualifications Are on the Rise

The average level of qualifications of the Slovenian population aged over 15 is good – and is improving. 23.7% of the population aged over 15 have upper secondary or higher education, while 52.4% have secondary or professional education. It is mainly people in the 25 to 49 age group that have tertiary qualifications (62.1%). The most sought-after people on the labour market are currently those with qualifications in natural sciences and technical fields, while there are sufficient numbers of graduates of economics, law and social sciences.

There are approximately 314,000 people aged under 14 in Slovenia, or 15.1% of the population, while there are 403,000 people aged over 65 (19.8% of the population). The leading age group in the country, accounting for 29% of the population, comprises those between 30 and 50. According to demographic projections, the proportion of older people will increase, while the solutions for the labour market lie in a longer working life, with various incentives for remaining active on the labour market for longer, faster inclusion in the labour market and increased recruitment from the rest of the world in areas where there are shortages.

Inhabitants



Citizens of Slovenia 1,941,109 Foreign citizens 143,192

Data as at Q2 as of 1.4.2019 Source: Statistical Office of Republic of Slovenia

Education by age groups (Population aged 15 years or more)

	Total	Basic or less	Upper secondary	Tertiary
Age	1,756,203	419,278	920,661	416,264
as of total	100 %	23.9 %	52.4 %	23.7 %
15-19 years	93,057	77,969	15,088	0
20-24 years	101,073	11,063	75,527	14,483
25-29 years	117,900	7,701	63,806	46,393
30-34 years	137,904	9,267	71,884	56,753
35-39 years	155,455	11,337	83,142	60,976
40-44 years	153,903	15,340	85,709	52,854
45-49 years	145,715	22,092	81,959	41,664
50-54 years	154,888	25,446	93,762	35,680
55-59 years	148,581	31,887	86,230	30,464
60-64 years	146,465	43,047	79,521	23,897
65 + years	401,262	164,129	184,033	53,100

Two thirds of young people aged between 18 and 24 are involved in one form of education. This is above the OECD average of 53%.

62.1%

of people in the

have tertiary qualifications.

25 to 49 age group

Data as at 2018, Source: Statistical Office of the Republic of Slovenia

Slovenia has a population of just over 2.08 million, 93.1% of whom are Slovenian citizens and 6.9% are foreign nationals (as at 1 April 2019).

High Levels of Participation in Education

In 2018 two thirds of those aged between 18 and 24 in Slovenia were enrolled in a form of education, 23% were employed, and 9.5% were not in education, employment or training (NEET). The proportion of young people in this age group who are involved in education is above the OECD (53%) and EU-23 (57%) averages, while the proportion of NEETs is below the OECD (14.3%) and EU-23 (13.4%) averages.

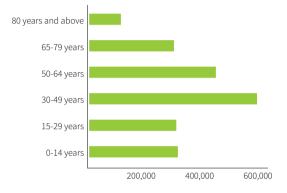
The proportion of young adults (25–34 years) who have tertiary education rose from 30% in 2008 to 41% in 2018, but is still below the OECD (44%) and EU-23 (43%) averages. Slovenia is at the top of the OECD rankings for the proportion of people who have reached a doctoral or comparable level of education: in 2018, for example, 5.3% of young adults had a doctorate or comparable level of education (3.8% of those aged between 25 and 64). On average, 0.8% of young adults and 1.1% of those aged between 25 and 64 had completed this level of education in the OECD and EU-23.

Fewer Students for the Ninth Year in a Row

In the 2018/19 academic year, 75,991 enrolled in tertiary education, which is a fall of 0.7% on the previous academic year (76,534) and of 34.2% on the figure for ten years ago (115,445). In the last nine years, the number of students in tertiary education has fallen by almost 39,000, or by an average of 4,320 every academic year. The main reason for this is demographic, as the generations leaving school and going to university are becoming ever smaller in numerical terms.

Slovenia is at the top of the OECD rankings for the proportion of people who have reached a doctoral or comparable level of education.

Age structure of inhabitants



Source: Statistical Office of the Republic of Slovenia Data as at Q1 as of 1.1.2019



Gradiška ulica 3, SI - 2230 Lenart, Slovenia T: +386 (0)2 729 16 00, F: +386 (0)2 729 16 10 E-mail: info@tbp.si

TBP, Modern European Manufacturer

TBP, the manufacturer of Bowden cables for automobile industry, is located in Lenart, Slovenia and in Tlaxcala, Mexico. The company was established almost 60 years ago. It manufactures more than 80 million bowden cables per year for established automobile brands such as BMW, VW, Audi, Porsche, Seat, Škoda, Lamborghini, Daimler, Volvo, Jaguar, Bentley, Bugatti, Rover, Ford, GM, and others.



Modern equipment, innovation and creativity

The skilled staff and modern technological equipment are the reasons for TBP's success. The company is the supplier to and partner of established manufacturers in the automobile industry due to its strong research and development activities as well as the ISO 9001 certification, IATF 16949 certification and ISO 14001 certification.

Manufacturing program

The company produces bowden cables for different types of door locks and bowden cables for electric car window regulators. We manufacture them for the extreme conditions, such as low temperature or high humidity.

Bowden cables door locks are also produced for car doors with break-in safety function. Bowden cables for electric car window regulators are a palette of bowden cables, able to adapt to different car windows shift systems. With inbuilt systems to compensate differences in temperatures and with aeration they enable optimal and reliable functioning in the most extreme conditions.

The company produces for the interior of personal car vehicles small plastic handles of different shapes and colors. Because we use most-advanced computer techniques for modeling and strength calculations, they are characterized by reliability, ergonomic and modern design and are soft and adaptable in the hands.



For the own needs and needs of the extended market the company produces semi-manufactured products and component parts for Bowden cables, seats, arms and the most demanding 3-D bending of Al-tubes.



Interview with Dr. Jure Knez - President and Co-Founder of Dewesoft.

0.00

Dr. Jure Knez is the president of the Dewesoft, a Slovenian company producing innovative measuring instruments. Founded in 2000, with a clear vision, smart management and perseverance it has become a recognized brand with more than 200 employees and a global reach.

Q. Dewesoft is quite new in test and measurement, what exactly do you do?

Dewesoft develops and produces data acquisition tools for testing and measurement. Our systems are used in research and development for even the most advanced tests. They are suited for a range of fields, from spacecraft launchers and satellites to new, safer vehicles, and other products that improve our daily life. What most distinguishes us, however, is our hu-

man approach. We engineer our products from the user experience. We build the hardware and software to create the fastest, most flexible, most intuitive user experience possible.

We support our customers in choosing the right measuring setup, case by case, depending on their real needs, their jobs to do.

Q. How are you better than your competitors?

Dewesoft is more than just business – the most important asset in Dewesoft is people. We cultivate excellence through career development plans and talent assessment. We support our staff with continuous training programs and certification opportunities to ensure personal success.

At Dewesoft we work hard, and with passion. This passion affects the products and services we can provide. The best solutions are made by a motivated team of people who love their work - those who light up when they have an idea for improvement.

Yet, what probably differentiates us most is a pol-

icy that favors employee involvement through company shares. Today Dewesoft is 100% employee-owned. The bond between employees and the company goes beyond the simple employment relationship.

Q. What are the technical features that distinguish your products?

The company was founded on the idea to reduce test times and data analysis with innovative methods, without neglecting, however, the precision of measurement. We have specialized in the acquisition and analysis of signals, compatible with third-party devices.

Our software, Dewesoft X3, integrates all that is needed; data recording, analysis and reporting. We add value to all this with the possibility of performing calculations during acquisition, while everything is recorded with perfect synchronization.

And what really makes the difference is our flexible software license model without hidden costs, without renewable annual contracts and without annoying upgrade rates. Dewesoft X3 is even completely free in analysis mode.

Q. But you make hardware as well?

Yes, to achieve high performance and perfect user experience, we needed to have complete control over the design of the hardware, firmware, and software, so make our own systems with cutting-edge technology like the DualCore-ADC[®] and SuperCounter[®] technologies integrated into our SIRIUS[®] product line.

Q. How are you organized and how can you support your customers?

Our operations center is located in Slovenia, home to the research, development and production departments. Here you will find our test laboratories, workshops, production lines, administration and communication centers. Besides, we have local offices in 15 countries providing technical support and sales. We offer the highest level of support in our field thanks to a team of expert technicians. We also have a wide network of official partners with specific skills for various application sectors.

Q. What are your plans for the near future?

We are working on innovative technologies that will revolutionize the way testing is done in the coming years. This challenge is very complex but the first results are exciting.

We have already achieved the goal to integrate the high-performance acquisition and real-time control. We are now working on the new generation of analog-to-digital converters which will allow us to cover the range of measurement and analysis signals, needed for new electrical applications.

Our strength lies in the compatibility with any device, in measurement performance and in the implementation of standard interfaces and protocols that favor a simple integration with third-party systems, with newly emerged technologies - and with those that have not yet been invented.



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of its merchandise

trade with Europe,

7% with Asia, 2.9%

with North, Central

and South America, and Africa 0.9%.

88%

Slovenia's Merchandise Trade in 2018 the Highest Since Independence

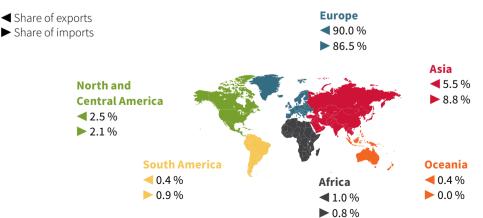
The success of Slovenian companies is strongly dependent on the growth in import demand in the European economy – so it makes sense to consider more intensive economic links with Africa and Asia.

Darja Močnik, Analytical Department, Chamber of Commerce and Industry of Slovenia

Slovenia is strongly co-dependent on European markets, particularly those of Germany, France and neighbouring countries - so it would make sense for the coutnry to consider forging more intensive economic links with Africa and Asia, where economic growth will increase in the years to come. Indeed, the choice becomes a little starker at a time when the EU economy is slowing. By spreading themselves across other markets, forging links, establishing joint ventures or engaging in other forms of cooperation, companies would be able to reduce risks and their dependence on the EU. The key challenge is presented by the barriers to access to these markets, which are fairly distant - which means that, without a local presence, these markets cannot be entered with any success.

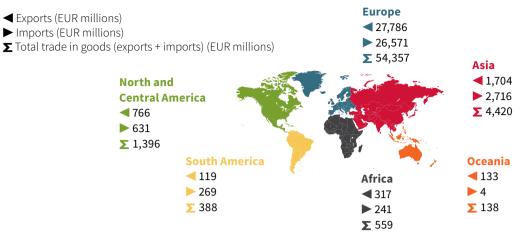
Slovenia's merchandise trade continues to grow and in 2018 was at its highest since independence, with exports up 9.2% and imports up 11% on the previous year. Exports totalled EUR 30.9 billion and imports EUR 30.7 billion in 2018; in the same year, 26,227 companies in Slovenia exported and 46,177 imported. The fairly high growth in merchandise trade continued in 2019 (export growth of 9.2%, import growth of 11.1%), with half the growth coming from the establishment of trade in pharmaceutical products.

Europe, which mainly means the EU-28, EFTA and the countries of SE Europe (SEE), is Slovenia's most important economic partner, accounting for 88% of Slovenia's merchandise trade. The Asian countries come second (7% of Slovenia's merchandise trade), while America accounts for 2.9% of Slovenia's merchandise trade (North and Central America 2.3%, South America 0.6%). While African countries have potential as trade partners, they currently account for only 0.9% of Slovenia's merchandise trade. Oceania brings up the rear, with a mere 0.2%.



Slovenia's imports and exports of goods by continent, 2018

Slovenia's trade in goods, 2018



Source: Statistical Office of the Republic of Slovenia

Europe is Slovenia's Most Important Trading Partner

Slovenia has a markedly export-oriented economy, which means that it is strongly exposed to conditions in the international environment. A stable and transparent international environment, in addition to a well-ordered domestic market, have an important bearing on Slovenia's prosperity.

For reasons of proximity and integration, Slovenia is most heavily incorporated into international trade flows with Europe. In 2018 Slovenia exported goods worth EUR 27.8 billion (or 90% of its total exports) to Europe, and imported goods worth EUR 26.6 billion (86.5%) from its home continent. In the last five years, Slovenian goods exports to Europe (i.e. including European countries outside the EU) have risen by 33.6% and its imports by 37.9%. In its trade with Europe, Slovenia generates a surplus of EUR 1.2 billion (2018 figure) and generates merchandise trade totalling EUR 54.4 billion. In the first half of 2019, Slovenian exports to and imports from European countries rose by 13% and 11.2% respectively.

In 2018 Slovenian exports to the EU-28 (which contains slightly fewer countries than the continent of Europe as a whole) comprised mainly cars (17% of total exports to Europe), machinery and mechanical components (10%), pharmaceutical products (9.5%), and mineral fuels and oils (6%). Slovenia's main imports from the EU-28 were vehicles and vehicle components (14% of total imports from the EU-28), machinery and mechanical devices (10%), electrical machinery and equipment (9%), mineral fuels and oils (8%) and pharmaceutical products (6%).

Merchandise Trade Surplus with the EU-28 for the First Time in 2019

In 2018 exports to the EU-28 accounted for 77.1% of all goods exported by Slovenia, with imports from those countries accounting for 78.3% of all goods imported into the country. Slovenia saw 9.2% growth in merchandise trade with the EU-28 in 2018, with the figure rising to EUR 47.9 billion (the five-year growth figure is 36.1%).

The favourable output structure of Slovenian exports (i.e. above-average growth in foreign demand for products with a relatively high share in the Slovenian export structure) also had a positive effect on export efficiency and led to a growth in the market share of Slovenian exports on the EU-28 market between 2014 and 2018. In 2018 Slovenia exported 9.8% more goods (EUR 23.8 billion) to the EU-28 and imported 8.7% more goods from those countries (EUR 24 billion) than it did the year before. In the last five years, Slovenia's goods exports to the EU-28 have risen by 35.9% and its imports by 26.2%.

While growth has continued in 2019, it is lower on account of reduced demand and a slowdown in the European economy, particularly in Germany. In the first half of 2019, Slovenia's goods exports to the EU-28 rose by 6.4% and its imports from those countries rose by 4.3%. Slovenia recorded a deficit in merchandise trade with EU Member States until 2018, when it was at its second-lowest level since 2005 (only in 2014 was it lower). Slovenia recorded a trade surplus for the first time in 2019. Slovenia had been generating a surplus with non-EU European countries for a number of years, but posted a deficit in 2019, mainly on account of an increase in imports from Switzerland.

Germany the Top EU Country for Slovenia

The success of the Slovenian economy largely depends on the four EU countries to which it exports almost half the goods it sells abroad: Germany, which accounts for 20.3% of total goods exports, Italy (12.4%), Croatia (8.1%) and Austria (7.6%). In 2018 Slovenian companies exported goods worth just under EUR 15 billion to these four countries, with Germany accounting for 42% of this figure (EUR 6.3 billion). As far as imports of goods are concerned, Germany is in first place with 18.1% of total imports, followed by Italy (15%), Austria (10.5%) and Croatia Between 2014 and 2018, Slovenia's goods exports to Europe (i.e. not just the EU) rose by **33.6%** and its imports by **37.9%**.

Slovenia recorded a deficit in merchandise trade with EU countries until 2018 and its first trade surplus in 2019.

Almost half of all goods that Slovenia sells abroad are exported to Germany, Italy, Croatia and Austria. Trade with the V4 accounts for 10.5% of Slovenia's total volume of merchandise trade.

Trade with SEE countries accounts for 12.4% of Slovenia's total trade.

Exports of goods to SEE countries increased from EUR 3.3 billion in 2014 to EUR 4.6 billion in 2018 (nominal growth of 38%). (5.5%). In 2018, 22,340 Slovenian companies exported to the EU-28 and 43,744 Slovenian companies imported from those countries.

Visegrad Countries Important Partners

The Visegrad Four (V4) are important trading partners for Slovenia – indeed, they are comparable in importance with the countries of South-Eastern Europe. The volume of Slovenia's trade with the V4 amounted to EUR 6.5 billion in 2018 - a rise of 9.6% on the 2017 figure. Trade with the V4 accounts for 10.5% of Slovenia's total volume of merchandise trade. In 2018 exports to and imports from the V4 increased by 8% and 11% respectively. In the last five years, exports to and imports from the V4 have increased by 30% and 40% respectively. Exports to the V4 account for 9.9% of Slovenia's overall exports, while imports from those four countries account for 11.2% of the country's overall imports. Merchandise trade with the Visegrad Four has continued to grow in 2019 and, on both the export and import sides, Slovenia has achieved growth of approximately 10% with the V4.

Slovenian exports to the V4 in 2018 comprised mainly pharmaceutical products (16% of all exports to the V4), electrical machinery and equipment (13%), machinery and mechanical components (10%), cars (10%), and iron and steel (5%). Slovenia's main imports from the V4 in that year were vehicles and vehicle components (16% of all imports from the V4), electrical machinery and equipment (14%), machinery and mechanical devices (7%), plastics and plastic products (5%), and iron and steel (4%).

Switzerland By Far the Most Important EFTA Trading Partner

In 2018 Slovenia conducted 2.6% of its merchandise trade with EFTA countries (EUR 1.6 billion), with Switzerland accounting for the bulk of this (EUR 1.5 billion), followed by Norway. Slovenia recorded a surplus of EUR 43.4 million (EUR 826.6 million in exports and EUR 783.2 million in imports) with EFTA countries in 2018. Merchandise trade with EFTA

Austria

Trading with Europe

- Share of exports of goods to a particular country in total exports to the continent
- Share of imports of goods from a particular country in total imports from the continent



countries has doubled (growth of 107%) in the last five years (2014–2018).

Proximity and Shared History Make SE Europe Important

Companies can establish contacts with the countries of SE Europe (Croatia, Bosnia and Herzegovina, Serbia, Montenegro, Kosovo, North Macedonia and Albania) more easily as a result of their shared history and existing business contacts, their mutual knowledge of local languages and business practices, and mutual brand recognition. These countries are important economic partners for Slovenia. In 2018 the volume of Slovenia's merchandise trade with SEE countries amounted to EUR 7.6 billion, or 10.5% more than in 2017. Trade with SEE countries accounts for 12.4% of Slovenia's total trade. Exports to SEE countries rose by 8.7% and imports by 13.5% in 2018. Exports of goods to SEE countries increased from EUR 3.3 billion in 2014 to EUR 4.6 billion in 2018 (nominal growth of 38%), while imports climbed from EUR 1.9 billion in 2008 to EUR 3 billion in 2018 (55% increase). Exports to SEE account for 15% of Slovenia's overall exports, while imports from the countries in that region account for 9.8% of the total.

As regards the value of Slovenia's external trade, Croatia ranked first in 2018 among SEE countries (EUR 4.2 billion, or 6.8% of Slovenia's overall merchandise trade), followed by Serbia (EUR 1.5 billion, 2.5%), Bosnia and Herzegovina (EUR 1.3 billion, 2.2%), North Macedonia (EUR 307 million, 0.5%), and the rest. In the first half of 2019, exports to SEE countries rose by 8% and imports by 3%.

Asia is Slovenia's Second Most Important Trading Partner

Asia is the second most important continent for Slovenia in terms of merchandise trade, accounting for 5.5% of Slovenia's total goods exports and 8.8% of its total goods imports. Exports to and imports from Asia have increased by 61.1% and 31.2% respectively in the last five years. Slovenia posted a deficit of EUR 1 billion in its trade with Asia in 2018 (the total value of merchandise trade was EUR 4.4 billion).

Slovenia's most important partners in Asia are India, Japan and China, the world's largest global economy. Slovenia's economic interests in Asia are closely connected with the Port of Koper, Slovenian railways, the Slovenian automotive industry, and cooperation in a number of highly most complex technological fields; cooperation with Asia in the areas of science, development and innovation is also extremely important.

Slovenia's participation in Asia-Europe forums (ASEAN, ASEM, ASEF) is a key component of its presence on the continent. China was Slovenia's top Asian export partner in 2018, accounting for 18% of the country's total exports to the continent, followed by Turkey (16%), South Korea (6.5%) and Japan (6.4%). Pharmaceutical products were the biggest single category of goods exported to Asia

Trade in goods with Asia

- ◄ Share of exports of goods to a particular country in total exports to the continent
- Share of imports of goods from a particular country in total imports from the continent



Asia accounts for 5.5% of Slovenia's total goods exports and 8.8% of its total goods imports.

(14.3% of exports to the continent), followed by vehicles and vehicle components (14%), machinery and mechanical devices (12.6%), electrical machinery and equipment (12.4%), and optical and photographic equipment (7.6%). China, Turkey and South Korea are also Slovenia's most important partners in terms of imports (11–37% of all imports from Asia), followed by India, Israel and Japan. Slovenia's main imports from Asian countries are vehicles and vehicle components (16% of all imports from Asia), electrical machinery and equipment (14%), machinery and devices (10%), organic chemical products (just below 10%), and mineral fuels and oils (8%).

Cooperation with Asia in the areas of science, development and innovation is extremely important.

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Trade in goods with North and Central America

Share of exports of goods to a particular country in total exports to the continent
 Share of imports of goods from a particular country in total imports from the continent



Importance of North and Central America on Account of Their Cultural Links with Europe

Exports to and imports from North and Central America have increased by 38.5% and 273% respectively in the last five years.

Africa accounts for 1% of Slovenia's total goods exports and 0.8% of its total goods imports. North and Central America is the second most important continent for Slovenia in terms of merchandise trade, accounting for 2.5% of Slovenia's total goods exports and 2.1% of its total goods imports. Exports to and imports from this region have increased by 38.5% and 273% respectively in the last five years. In its trade with the countries of North and Central America, Slovenia generates a surplus of EUR 135 million (2018 figure) and generates merchandise trade totalling EUR 1.4 billion (2.3% of its overall merchandise trade). North and Central America are important for Slovenia because of the region's cultural links with Europe, its increasing global political importance and, in the case of Mexico, its high economic potential.

Merchandise trade between Slovenia and the USA has been growing over the last four years and reached record levels in 2018. The volume of merchandise trade increased from EUR 700.9 million in 2014 to EUR 1.1 billion in 2018, due mainly to the high growth in imports. Merchandise trade with the USA accounted for 1.8% of Slovenia's total merchandise trade in 2018. Slovenia has recorded a slight surplus in bilateral merchandise trade with the USA in the last five years. Slovenia's exports to the USA mainly include medicinal products, glass products, rods from other alloyed steel, polyamides (PAM), and machines (for washing and drying bottles and other containers). Increased imports of petroleum derivatives and oils, technologies for obtaining nuclear energy, and aircraft (aircraft and helicopters) provided the main thrust of import growth in 2018. Half of imports comprised goods with relatively low added value (oils), while the rest had relatively high added value (nuclear technology, heating elements, helicopters, aircraft and jet engines).

In 2018 merchandise trade with Canada amounted to 0.24% of Slovenia's overall merchandise trade, not taking into account exports of Slovenian semi-products that are installed as components in European products and exported to the Canadian market (although we do not have sufficient data to determine the volume of those exports). Slovenia exports principally medicinal products, video game consoles, batteries, electric motors and electric generators to Canada. In 2018 Canada's main exports were ash and residues (containing arsenic and metals), unwrought nickel, chemical wood cellulose and medicinal products.

Merchandise trade with Central America accounted for 0.2% of Slovenia's total merchandise trade in 2018. A surplus in bilateral trade between Slovenia and Central America has been recorded in all of the past ten years (EUR 81.6 million in 2018). Slovenia exports parts for rotational electrical machinery, medicinal products, electrical equipment for lighting and signals, electric motors and generators to Central America – in other words, mainly items with high added value and items used in the automotive and electrical industries. For the most part, Slovenia imports bananas, computers, insecticides, ethylene polymers and amine-function compounds from Central America.

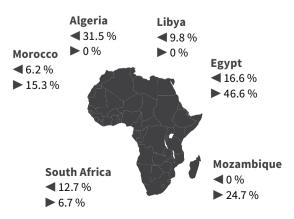
Africa of Minor Importance

Africa is the fourth most important continent for Slovenia in terms of merchandise trade, accounting for 1% of Slovenia's total goods exports and 0.8% of its total goods imports. In the last five years, exports to Africa have fallen by 3% and imports increased by a factor of 160. In its trade with Africa, Slovenia is still generating a surplus of EUR 76 million (2018 figure) and merchandise trade totalling EUR 558.9 million. The main challenge on the African continent is the search for new markets; there is also a great deal of humanitarian cooperation.

Slovenia's main exports to Africa are wood and wood products (24.5% of total imports to the continent), machinery and mechanical devices (13%), paper and cardboard (13%), pharmaceutical products (10%), and electrical machinery and equipment

Trade in goods with Africa

- Share of exports of goods to a particular country in total exports to the continent
- ► Share of imports of goods from a particular country in total imports from the continent



A deficit in bilateral

Slovenia and South America has been

recorded in all of the

trade between

past ten years.

(6.6%). Slovenia's main imports from Africa in 2018 were mineral fuels and oils (29%), aluminium and aluminium products (25.4%), vehicles and vehicle components (12%), plastics and plastic products (5.5%), and electrical machinery and equipment (5%).

Mainly Agricultural Products Imported from South America

South America is the fifth most important continent for Slovenia in terms of merchandise trade. Merchandise trade with South America accounted for 0.63% of Slovenia's total merchandise trade in 2018 and amounted to EUR 388 million, which was 4.7% (or EUR 17.5 million) up on the 2017 figure. Since 2014 it has risen 34.4% from an annual base of EUR 289 million. South America accounts for 0.4% of Slovenia's total goods exports and 0.9% of its total goods imports. In the last five years, exports to and imports from South America have increased by 12% and 47% respectively. A deficit in bilateral trade between Slovenia and South America has been recorded in all of the past ten years (EUR 150 million in 2018).

Slovenia exports principally video game consoles and devices (indirect exports, since the products are manufactured in other countries), medications, prefabricated buildings, tricycles, scooters and other aluminium products to South America. Exports from South America comprise mainly oilseed cake

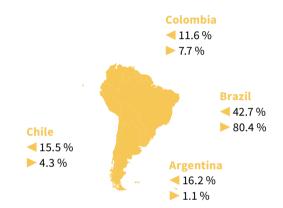
Those, who win the obstacles, can reach the top.

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and other solid residues (around half of all imports), chemical wood cellulose, bananas and coffee, i.e. mainly food industry residues intended for further processing, primary agricultural products used in domestic foods and input materials for use in the wood industry.

Trade in goods with South America

- Share of exports of goods to a particular country in total exports to the continent
- Share of imports of goods from a particular country in total imports from the continent



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Large Increase in Exports to Oceania and Australia

Exports to Oceania have increased by 75% in the last five years, although imports have remained at more or less the same level in that time. Oceania is an interesting market for the Slovenian economy, exports from which mainly come in sectors with a differentiated range of products (importance of design and the continuous introduction of improvements). That said, it is one of the least important regions for the Slovenian economy on account of its minor economic weight and, above all, its distance from Europe. Oceania accounts for 0.4% of Slovenia's total goods exports and 0.01% of its total goods imports. Exports to Oceania have increased by 75% in the last five years, although imports have remained at more or less the same level in that time. In its trade with Oceania, Slovenia generates a surplus of EUR 129 million (2018 figure) and merchandise trade totalling EUR 138 million. Slovenia is losing its potential position on account of Australia's intensive involvement in trade partnerships with the developed Pacific economies of Japan and South Korea.

Slovenia's main exports to Oceania and Australia are machinery and mechanical devices (46% of all exports to the region), vehicles and vehicle components (13%), electrical machinery and equipment (9%), pharmaceutical products (8.5%), and paper and cardboard (4%). Slovenia's main imports from Oceania and Australia in 2018 were electrical machinery and equipment (26%), toys and boardgame components (15%), machinery and mechanical devices (10%), optical and photographic measuring components (6.5%), and beverages and alcohol (5%).

Slovenia's trade in services totalled EUR 13.2 billion in 2018, which was a rise of 7.4% on the year before.

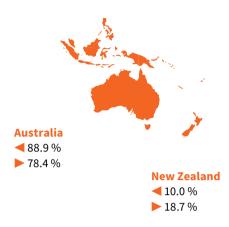
Surplus in Services Considerably Higher Than Surplus in Goods

Distribution of exports in services, 2018 (in %)

Slovenia's trade in services totalled EUR 13.2 billion in 2018, which was a rise of 7.4% on the year before. The surplus of exports over imports amounted to EUR 2.7 billion. The export of services accounted for 20.4% of

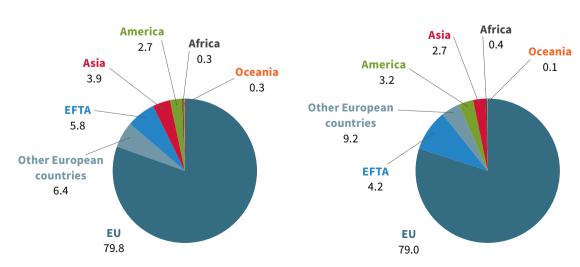
Trade in goods with Oceania and Australia

- Share of exports of goods to a particular country in total exports to the continent
- Share of imports of goods from a particular country in total imports from the continent



Slovenia's total exports (i.e. of goods and services), while the import of services accounted for 15% of total imports. In 2018 Slovenia posted growth of 7.5% in trade in services with Europe, growth of 7.8% with the EU-28, growth of 31.9% with Africa, growth of 7.4% with America and growth of 4.5% with Asia. However, there was a fall of 0.5% in trade in services with Oceania and Australia.

Distribution of imports in services, 2018 (in %)



Slovenia's trade in services (EUR millions), 2018

	Net position in services (exports less	Total trade in services (exports and
	imports)	imports)
Total	2,678	13,248
Europe	2,442	12,212
EU	2,184	10,533
EFTA	237	681
Other European countries	21	998
Africa	3	40
America	48	387
Oceania	21	30

Source: Statistical Office of the Republic of Slovenia

Europe Accounts for Just Over 92% of Slovenia's Services Exports

If we break the figures down by continent, Europe accounts for 92% of Slovenia's services exports (EU 79.8%, EFTA 5.8%, other European countries 6.4%), followed by Asia (3.9%), America (2.7%), Oceania and Australia (0.3%), and Africa (0.3%).

Slovenia posts similar figures for trade in services on the import side. On the import side, Europe

accounts for 92.4% of Slovenia's trade in services (EU 79%, EFTA 4.2%, other European countries 9.2%), followed by America (3.2%), Asia (2.7%), Africa (0.4%), and Oceania and Australia (0.1%).

Three EU countries together accounted for 41.8% of total exports of services from Slovenia (Germany 14.7%, Austria 14% and Italy 13.1%), which indicates very high dependence on the markets concerned. In 2018, 40% of the services imported were imported from three countries: Croatia (16.9%), Austria (12.3%) and Germany (10.9%).

Slovenian services exports to Europe rose by 9.4% in 2018, and have risen by a total of 39.4% in the last five years. Tourist travel (spending by foreign tourists in Slovenia) accounts for the highest single share of services exports (33.9% of total exports of services to European countries), with travellers holidaying on the coast and in other tourist areas. This is followed by transport services (29.4%), construction services (6.6%), telecommunications and computer services (6.5%) and other business services (17.1%).

The main imported services are travel by Slovenian tourists (27.9%), transport services (19.2% of total services imports from European countries), telecommunications and computer services (10.4%), construction services (3.5%) and other business services (26.7%). Slovenia is an attractive destination Tourism accounts for the highest single share of services exports.

The Port of Koper, the good motorway network, Slovenian railways and other players in the Slovenian logistics chain all play a major role in the success enjoyed by the transport sector.



for tourists and travellers because it is oriented towards green tourism, is safe and orderly, and contains an incredible variety in a small area. The Port of Koper, the good motorway network, Slovenian railways and other players in the Slovenian logistics chain all play a major role in the success enjoyed by the transport sector.

SEE countries in Slovenia accounts Trends in Slovenia's trade in services (%) for the highest

single share of services exports (just under half), followed by transport services.

Tourist spending

by V4 citizens and

citizens from other

	Change	Change	Change	Change
	2018/2017	2018/2014	2018/2017	2018/2014
	Exports	Exports	Imports	Imports
Total	9.3	39.7	4.7	24.5
Europe	9.4	39.4	4.8	23
EU	9.0	42.0	5.9	24.3
EFTA	15.1	42.8	-0.5	57.3
Other				
European	9.1	11.5	-2.3	3.8
countries				
Africa	22.2	-21.7	45.4	79.8
America	4.9	33.2	10.7	71.7
Oceania				
and	2.4	63.7	-15.0	52.6
Australia				

Source: Statistical Office of the Republic of Slovenia

Travel and Transport Account for the Bulk of Services Exports to the V4

Trade in services with America amounted to EUR 386.9 million in 2018, with the USA accounting for EUR 308.5 of this total.

Trade in services with Asia reached EUR 452.4 million in 2018 (China EUR 67.5 million, Hong Kong EUR 41.8 million and Japan EUR 23.8 million). Tourist spending by V4 citizens in Slovenia accounts for the highest single share of services exports (45.5%), followed by transport services (32%), telecommunications and computer services (35%) and other business services (12.5%). The main imported services are transport services (35.2% of total services imports from the V4), followed by spending by Slovenian tourists in Visegrád countries (9%), telecommunications and computer services (7.9%) and construction services (7.5%).

Travel and Transport Account for Almost Half of Services Exported to SE Europe

Spending by tourists from SEE countries accounts for the bulk of services exports (just under half of the overall total services exported to SEE countries), followed by exports of transport services (one sixth), telecommunications and computer services (nearly 10%) and other business services (17%). The main import services include transport services (two-fifths of total imports of services from SEE), spending by Slovenian tourists in SEE countries, telecommunications and computer services, and other business services (ranging between 15% and 17% of total services imports from SEE). As far as the last-mentioned category is concerned, it is very important for citizens of SEE countries to learn the Slovenian language, as information scientists and consultants in the region are strengthening their cooperation.

Slovenia with a Surplus in Trade of Services with the USA

Trade in services with the USA amounted to EUR 386.9 million in 2018, up 7.4% on the previous year. Slovenia records trade in services of 79.7% with the USA alone. Slovenia has a surplus of trade in services with the USA. In 2018 this stood at EUR 47.6 million (EUR 30.3 million with the USA), meaning that it exports more services than it imports. The USA accounts for 2.7% of Slovenia's total services exports and 3.2% of its total services imports. In 2018 services exports increased by 4.9% to EUR 217.2 million. Services exports have increased by 33.2% in the last five years.

Spending by US tourists in Slovenia accounts for the biggest single share of services exports (28.9% of total exports of services), followed by exports of transport or transport performed for US companies (21.3%), telecommunications and computer services (12.3%) and other business services (21.3%). In 2018, imports of services from the USA increased by 10.7% to EUR 169.7 million. In the last five years they have increased by 71.7%. The main imported services are transport services (12.5% of total services imports), followed by telecommunications and computer services (11.4%), compensation for use of intellectual property (6.7%), central government services (15.1%) and other business services (45.4%).

Services Exports to Asia Have Increased by 60% in the Last Five Years

Trade in services with Asia amounted to EUR 452.4 million in 2018, up 4.5% on the previous year. Slovenia has a surplus of trade in services with Asia (EUR 170.3 million in 2018), meaning that it exports more services than it imports. Asia accounts for 3.9% of Slovenia's total services exports and 2.7% of its total services imports. In 2018, services exports to Asia increased by 6.6% to EUR 311.4 million. Services exports have increased by 60% in the last five years.

Exports of transport or transport performed for Asian companies accounts for the biggest single share of services exports (39.5%), followed by travel or spending by Asian tourists in Slovenia (25.9%), exports of telecommunications and computer services (11.4%) and other business services (10.3%). In 2018 services exports to Asia increased by 0.4% to EUR 141 million, and have increased by 20.1% in the last five years. The main imported services are transport services (32.4% of total imports of services), followed by telecommunications and computer services (11.5%), insurance and pension insurance services (10.6%) and other business services (36.2%).

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The Key to Success Is Hard Work

As Slovenian companies are primarily export-oriented and as they are represented on all continents, Slovenian products are highly valued in many places. But Slovenia is not as well-known around the world as it would like to be, according to Slovenian businesspeople working abroad. Ana Vučina Vršnak

In the global world the key to success is a good idea, and even more its implementation, but at the same time you have to have a great team that works hard, and along with all that it's good to have a little bit of luck, says Žiga Vavpotič, the initiator of the Simbioza project, co-founder of the Ypsilon Institute, and former president and current non-executive director of Outfit7. Ivan Fornazarič, CEO of the Gorica Group, a manufacturer of world-class trailers and commercial bodies based in Dubai, agrees that success in business generally requires hard work and a little luck, and also being in the right place at the right time. Maja Mikek, Co-founder and CFO of Celtra, adds that the most important qualities are desire, courage and persistence. Matjaž Cokan, head of Gorenje do Brasil, says that the most important factor for success abroad is familiarity with the market and the competition.

"The fact is, Slovenia is not as well-known around the world as we would like it to be. We are a young country, and we simply have to do more to build recognition, whether through diplomacy, sport, science, culture or business. A lot of Slovenian companies are recognised abroad and they are one of the greatest promotors of Slovenia," says Cokan. He adds that the Made in EU label is a very good reference on the Brazilian market.

"A few years ago we founded the Slovenian-Brazilian Chamber of Commerce (Slobraz), through which we promote Slovenian business and tourism. We are a full member of Eurochambres, the bilateral association of European chambers of commerce and industry. Under the auspices of Eurochambres we support the ratification of the free trade agreement between the EU and Mercosur," says Cokan.

Success in business requires hard work and a little luck. being in the right place at the right time, but also a desire, courage and persistence.



The Made in EU Label Counts, As Do Knowledge and Ouality

Matjaž Cokan, who represents the well-known large and small appliance brand Gorenje in Brazil, says that they have succeeded in positioning themselves in the premium segment. "We sell mainly designer line appliances with high added value. This is a highly specialised niche market, and in six years of presence on the market we have established ourselves as a reputable brand," he says.



You Have to Be Able to Visualise Your Desires

Maja Mikek, who works in the USA, believes that in order to succeed in any country, but especially in the US, you have to have a strong desire, "which has to be very well visualised, as it has to be continuously communicated expressively and convincingly. You need courage and persistence. And of course it won't happen without hard work, which however cannot be experienced as stress. The pleasure of creating, learning and progressing has to outweigh the effort

As a young country, Slovenia has to do more to build recognition. whether through diplomacy, sport, science, culture or business.

The Slovenian

comparable with

those of the most

developed parts of the world.

workforce is

required to make any kind of profit. I believe that positive stress is not harmful, but actually makes you stronger."

The Celtra Group helps marketers improve the quality and relevance of their digital advertising at scale. It employs around 200 people, of whom around 100 are Slovenes and 100 of other nationalities. "The innovativeness, services, extra effort, the beauty of the product, love for work and more that the Slovenian team directs towards its customers and partners on a daily basis are undoubtedly noticed and positively received. Our customers are excited, since an exceptional product and services made with an eye for detail, which surpasses requirements, and is infused with a sense of real purpose, is something that people always recognise and which will undoubtedly be even more prized in the future. In this respect robots will never replace us," says Mikek.

She says that in terms of quality, the Slovenian workforce is comparable with those of the most developed parts of the world. "But it's true that exceptional opportunities accelerate people's growth and development. That's why we have to bring more exceptional opportunities to Slovenia (and enthusiastically support local ones!), so that Slovenes will be able to develop, learn and prove themselves even faster," she says.



Photo: Isk

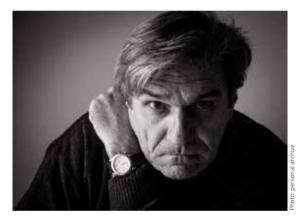
Slovenia Highly Rated

Those who know the "Made in Slovenia" label mostly rate it highly. According to the head of Iskratel's representative office in the Russian Federation Marko Luštrek, Iskratel has a long tradition in the Russian Federation. "We have had a representative office in Moscow since 1992, and we have a local subsidiary in Ekaterinburg that is celebrating its 25th anniversary in 2019. In order to succeed on this exceptionally large and advanced market it is very important that our Russian company Iskrauraltel has the status of a domestic manufacturer and service provider. We have local development and production software, and we know the characteristics of the Russian market and customers, and therefore we can adjust to their requirements and operate in accordance with the law," says Luštrek.

He says that Slovenia is highly rated in the Russian Federation. A lot rides on maintaining excellent relations between the two countries at the highest level, for example Slovenian Prime Minister Marjan Šarec's visit to Russia with an economic delegation. "It is important to them that they be familiar with the firms that they do business with, and they value knowledge and professionalism very highly. In this field we also cooperate frequently with their knowledge institutions," notes Luštrek.

Ivan Fornazarič, CEO of the Gorica Group, a manufacturer of world-class trailers and commercial bodies based in Dubai, agrees that success in business generally requires hard work and a little luck. "And also being in the right place at the right time. We started in Dubai at the end of 1990, during the time of the Gulf War. Dubai has been building and developing ever since. One part of our business is the construction of large infrastructure projects, concrete construction, etc.," says Fornazarič.

The Made in Slovenia label is not that well known in this part of the world, but those who know it mostly rate it highly. "In civil engineering and our field the most highly rated label is Made in Germany. Slovenian products are easier to sell under the Made in EU label. I believe and hope that things will right themselves now that the Slovenian Embassy has been opened in Abu Dhabi," says a realistic Fornazarič.



Tunisians Know Slovenes Through Tourism

Vili Gosnak works on another continent – in Tunisia in Africa, where he moved 20 years ago. He runs a company called Assa Abloy Hospitality (VingCard Elsafe), which specialises in controlled access systems, energy management systems and support for information technology users in the hotels and catering industry, "which is definitely the largest branch in Tunisia". They don't know much about Slovenes, and the ones that do are tourism employees due to visits by Slovenian tourists, though there aren't many of them.

Gosnak's company – he founded it together with a friend from France – operates despite the huge economic difficulties that arose after the change of the political regime and the terrorist attacks, which have totally exhausted the local economy. He does not represent Slovenian knowledge or products in Tunisia, since there is no systematic cooperation between the two countries.

"I see opportunities for cooperation with Slovenia in agriculture, water purification and enrichment technologies, waste collection and management technologies, and consultancy in the field of installation and management of urban infrastructure (water supply, sewage systems, public lighting)," says Gosnak.



A Nation That Reaches for The Stars and Thrills The Entire World

Žiga Vavpotič lives in Cyprus, but he works with the entire world – America, India, China, the United Arab Emirates, Europe... "We Slovenes are an exceptional nation, when we speak of individuals. We reach for the stars and thrill the entire world. Everyone who comes to Slovenia says that we live in paradise," says Vavpotič, but he adds that small countries undoubtedly have to deal with the problem that everybody knows each other and that therefore the best do not necessarily come out on top in the market. If our entrepreneurs and everyone else knew how to work together better, in his opinion there would be "even more global penetration". He says that in a global world, the key to success is a good idea, and even more the implementation of that idea.



They Admire Creativity, Resourcefulness and Flexibility, but also Structure and Reliability

Saša Bavec, Managing Director Systems Division and Group Marketing Director at Knauf Insulation, says that thanks to the success of Knauf Insulation Škofja Loka he received an invitation to join the management board of the Knauf Insulation Group. "I took over the management of the company in the crisis year of 2009, and within two years we had managed to establish new business processes and restructure the business model. With the help of innovations and a customer-oriented approach we have managed to get out of the red and into the black, which has also been demonstrated by our above-average performance. The Škofja Loka firm became a success at the level of the Knauf Insulation Group, and the CEO at the time wanted to apply their success to other parts of the company," says Bavec, who then joined the group's management board as global marketing director.

He then built a cluster of companies around Knauf Insulation Škofja Loka, which now form the Systems Division, which is in charge of sales of insulation to industrial clients, and where all of the group's startups and all of the business units whose operating model differs from the group's standard operating model find a home. "Knauf Insulation Škofja Loka operates globally from Australia to Chile. Regardless of the cultural or regulatory differences, we always find a way to offer the customer some kind of added value that other suppliers cannot," says Bavec.

According to Bavec, what makes Slovenia and Slovenian professionals competitive could be described in the words of one of the owners of Knauf. He told Bavec that they admire him and his colleagues from Slovenia for their creativity, resourcefulness and flexibility, but also their structured approach and reliability.



Our Customers Know They Can Trust Us

At Fluidmaster they say that they like challenges, so in 2016 they decided to open a subsidiary in Dubai in order to support sales in the UAE and the countries of the Near East. Matej Cimperman, head of the branch office in Dubai since its inception, told us that those markets have a lot of traits in common, but that they differ considerably with regard to their political and economic situations, and therefore constant adjustment is required.

"We concluded that we could also sell Slovenian products on these markets, and the main drivers behind the sales success were high quality, excellent technical support, and above all hard work, persistence, a great deal of business flexibility and local presence," explains Cimperman. It often happens that customers conclude a certain deal or receive payment at the last moment, so companies also have to be Slovenes reach for the stars and thrill the entire world.

Foreigners admire Slovenes for their creativity, resourcefulness and flexibility, but also their structured approach and reliability. Foreign customers associate Slovenia with natural beauty, good organisation, high quality and professionals who know how to make excellent products. responsive and capable of supplying products at short notice, even if this means flying the goods out of Europe by plane.

They are given additional credibility by the fact that Fluidmaster is a global company with a dominant market share in the toilet fill valves segment, and that the group includes companies with long histories (the oldest was established in 1865). "So when we are talking about a 10-year warranty on our products and about 25-year availability of original spare parts, our customers believe us and know that they can trust us.

In Slovenia and on the neighbouring markets we have been present for years with products marketed under the well-known and respected LIV brand, while on the aforementioned markets we market our products under the brand name Schwab," says Cimperman.

He also noted that in the toilet parts segment, at the beginning everyone expected products that were Made in Germany, as this is a very important factor for product sales. "But gradually their opinion has changed quite a bit; a lot of our customers have already visited Slovenia and seen our production facilities, which include automated and robot production. They now associate Slovenia with natural beauty, good organisation, high quality and professionals who know how to make excellent products."

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Since its foundation in 2006, our company produces a wide range of customizable tool frames and plates. We also offer our customers additional services such as CNC machined tool plates. We are the market leader in Slovenia and, due to our rapid growth in recent years, have been awarded several times for the fastest growing company as the "Gazelle of the Primorsko-notranjska Region" and in 2015 as the "Bronze Gazelle of Slovenia". Since 2017, we are also holder of the Gold Triple AAA Certificate of Business Credibility issued by the international company Bisnode.



Our main product line includes

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- CNC machined tool frames for all tool types up to the size 3000 x 2000 mm for
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 - aluminium die-casting
 - rubber injection
 - bending tools
 - cutting tools
 - deep drawing
 - machine buidling

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- · CNC machining precision: All CNC machined

tool plates are measured in our own measuring laboratory. As a result, the number of complaints is reduced to a minimum and the number of satisfied customers is growing steadily.

- Flexibility: We always consider the individual needs and demands of our customers.
- Delivery reliability: Each request is comprehensively handled and we adhere to the agreed delivery time. Our customers do not have to create any stock and there are no hidden storage costs.
- Price competitiveness: We offer our customers individual purchasing conditions. We strive for competitiveness.
- All product information in one place: Certificates of reference materials will be included with each delivery upon request of the customer.

What Does the Future of Global Trade Look Like?

Ivan Fornazarič, CEO of the Gorica Group, says that globalisation ran into trouble with the election of US President Donald Trump and that its future development is uncertain. "Of course, difficulties and limitations occur on the Gulf markets that are not necessarily related to American politics. Over the past few decades they have developed a common market called the Gulf Cooperation Council (GCC), which has been generally positive for the development of trade and business, but which is currently falling apart. The reasons for this are the blockade of Qatar and the new political situation in Saudi Arabia, which is supported to a certain extent by the UAE and Bahrain, while Kuwait and Oman are sort of neutral," says Fornazarič, who adds that the "America First" approach is not good for global trade. "The other countries are following this and will continue to follow it." He states clearly that "business has to adapt to political and economic changes". "I believe that the EU will have to strengthen its foreign policy. Various European organisations will have to become more pragmatically and effectively involved in solving the problems in the Near East and Africa, and not just wait for the USA to do something." He adds that certain countries where America and Europe do not do business - in some cases due to sanctions - are also "easy prey for China".

Matej Cimperman, head of Fluidmaster's branch office in Dubai, says that in the UAE they are currently focusing a lot of attention on preparations for Expo 2020, at which Slovenia will also have an exhibit. "It is of course the wish of the hosts that all major projects be completed by then and that Dubai presents itself in its best light. What will happen after that is hard to predict."

The UAE real estate market is fairly saturated, which is being reflected in falling real estate prices and rents, and therefore it is uncertain how much more construction will take place in the UAE in the future. On these markets, toilet parts are primarily imported, as there are no major local manufacturers, and according to Cimperman we can expect it to stay that way in the future. "We see new opportunities in the neighbouring countries – such as Saudi Arabia, which recently opened up to tourists, and Qatar, where there is the prospect of major construction projects before the World Cup in 2022," he says.

Žiga Vavpotič, initiator of the Simbioza project, co-founder of the Ypsilon Institute, former president and current non-executive director of Outfit7, says that the world is spinning faster every year, and that in his opinion in the future we will undoubtedly not be able to overlook events in the area of technology – especially artificial intelligence, and – despite its current cooling – the role of China. "Although we can be concerned about the rise of populists, globalisation has become a part of everyday life, and the limits to operations will fall even further, even though some people will want to set artificial ones. The young generation sees the world as a whole, which they demonstrate for example in their stance towards climate change. This will also become an important issue for companies, finally. They will have to understand that they have an important role in this as we are in the last moments before the collapse," says Vavpotič.

Matjaž Cokan, head of Gorenje do Brasil, says that with regard to Brazil and Mercosul, the free trade agreement between the EU and Mercosul is exceptionally important for both sides. "We are talking about 25% of global trade. The agreement still needs to be ratified by the parliaments of all of the Mercosul countries and the EU Member States, but there is a great danger that the whole thing will go up in smoke," warns Cokan. He says that the Brazilian government is showing a greater inclination towards economic association with the USA, and that there are also reservations among several EU Member States. "Trade between Slovenia and Brazil is currently in excess of half a billion euros, of which Slovenian firms export approximately EUR 70 million in products with high added value. By lowering customs tariffs these exports can be increased and our products will be more competitive on the Brazilian market. The Slovenian government has to support the ratification of the agreement," says Cokan.

Maja Mikek, Co-founder & CFO, Celtra, says that we can look on global trade from a perspective that reveals a great deal of unfairness. "Although I believe that I am a realist, I always take the position of a utopian idealist in these matters, and I believe that those who work better, more resourcefully, and more pleasantly, for the long term and with crystal-clear natural values, will get their fair share in global trade."

Saša Bavec, Managing Director Systems Division and Group Marketing Director at Knauf Insulation, says that products with high added value will continue to circulate around the world in the future, and therefore he does not see a problem for small domestic markets like Slovenia's. However, the production of general consumer goods without added value will migrate to the places where they will be used. "Automation and increasing environmental awareness (the increasing importance of products' carbon footprint) will allow the production of general consumer goods to return to Europe, the USA and Japan, where it has not been price-competitive in recent years."

Marko Luštrek, head of Iskratel's representative office in the Russian Federation, expects to see an increased presence of Chinese companies on the Russian market in the future, particularly in IT, due to the sanctions that are the result of the trade war between the global superpowers. "This consequently means more pressure on prices, and at the same time, local presence, local development and local production will be of increased importance. Russia is by all means a promising market, on which all of the major global players are now present, and therefore the competition is strong."



Nearly a century of high-quality knives and technical support

"We are not merely a supplier to our customers; we also support them with technical knowledge and experience in planning and manufacturing new machinery and equipment, and are effective partners in the development of new tools," say sources at the TRO cutting tools company in Prevalje, Slovenia.

The majority of the company's development and manufacturing activities is focused on knives for plastic industry and recycling, and knives and blades for the wood-processing, metals and paper industries.

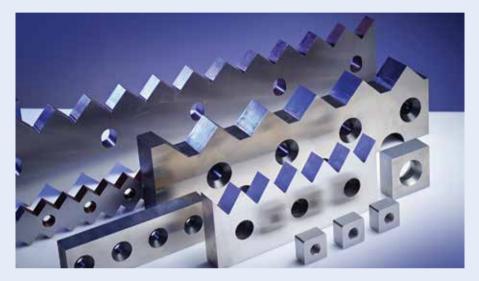
Their knives and blades are made of high-quality steel sourced exclusively from Europe, which separates them from the competition in terms of quality. Their development and manufacturing process takes place entirely in-house. They focus strongly on various thermal treatment methods for their blades, such as oil quenching and vacuum and induction hardening, which is of key importance for the quality of their products.



A knife for every purpose

"Different branches of industry have specific requirements for knives and blades. Therefore our development department is continually searching for different types of new materials and various coatings that are the best application for a certain branch of industry, and it is also important that our tools be as longlived as possible," say sources at TRO.

Confirmation of the quality of their tools can be found in the award received



from the well-known firm Maag Automatik GmbH, a part of the Dover Corporation, which awarded its Slovenian partner the title of 'Gold Supplier of the Year', while Bomag, part of the Fayat Group, have given the company a quality award.

In order to maintain quality they also use state-of-the-art manufacturing equipment, and invest heavily in the education and training of their professionals in order to raise their level of professional qualifications. They also care for their employees' well-being by providing good working conditions, as the management is aware that this is the best way to get the most from their employees.

Slovenian blades all over the world

The origins of the TRO tool manufacturing company go back to 1926, when a file-making shop was established in Prevalje. The company's further development was adapted to the needs of its customers. While they were once known as a producer of woodworking tools (saws, routers, drills), today they are a strategic supplier of industrial knives to the most demanding European machinery manufacturers, who demand the highest quality from their suppliers, on time and at a competitive price. Today, their needs are being met by more than 155 experts of various profiles, whose development and sales of TRO products have resulted in increased turnover every year. In the last few years it has risen by more than 60%; last year they generated sales of EUR 13.3 million, and in the coming year they are planning on increasing this figure by another two million.

Through successful sales, high quality and competitive pricing they have penetrated the markets of more than 55 countries, and new markets are appearing in Saudi Arabia, Egypt, South Africa, Australia and China.

They also attribute the expansion of the market for their tools to intensive, regular and clearly successful promotion at numerous specialised trade fairs such as Plastics Recycling Show Europe PRS Amsterdam, TechExpo Celje, and IFAT Munich. They also participated at the K Trade Fair in Düsseldorf, which is the world's largest plastics and rubber trade fair, and the provisional schedule of trade fair presentations for 2020 is already known: IERC Salzburg, PRS Amsterdam, IFAT Munich and other major specialised trade fairs.

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Foreign Investors Value Knowledge and Experience

The development of their company in Slovenia exceeded the initial expectations of BSH, while the Kofola Group is betting on Radenska as the "queen of waters".

Darja Kocbek and Ana Vučina Vršnak

In 2017 there were 8018 foreignowned companies operating in Slovenia.

The largest

amount of added

with owners from

Germany, Austria,

Switzerland, France, Croatia and Italy.

value is created by companies In 2017 there were 8018 foreign-owned companies operating in Slovenia. They accounted for 5.6% of all firms in Slovenia, generated 27.2% of all added value, employed 25.8% of all employees and provided 39% of all expenditure on R&D in Slovenia, according to the national statistical office. Foreign company owners in Slovenia in 2017 came from 106 countries, of which 90% were from Europe and 3% were from the USA and Asia.

According to data from the national statistical office, nearly two thirds of foreign company owners in Slovenia come from Italy, Serbia, the Russian Federation, Bosnia and Herzegovina, Austria, Croatia and Germany. The largest amount of added value is created by companies with owners from Germany, Austria, Switzerland, France, Croatia and Italy. In 2017 they generated nearly two thirds of all added value created by foreign-owned companies. Industrial firms generated more than half of all added value created by foreign-owned companies.

A third of all added value was generated and a third of all investments were made by companies with owners from Germany and Austria. Companies with owners from Switzerland and Germany accounted for a nearly 60-percent share of expenditure for research and development among foreign-owned companies in Slovenia.

In 10 years, the BSH company has invested more than EUR 140 million in Slovenia, of which EUR 90 million for new product development.



New Kitchen Appliance Latest Innovation from Slovenia

The German company BSH, which became the sole owner of the Slovenian household appliances firm Gorenje MGA in Nazarje in 1993 (renamed BSH Hišni aparati d.o.o. Nazarje in 1998) is very satisfied with its operations in Slovenia. The main reasons that BSH decided to acquire a company in Slovenia and make all of the subsequent investments are the company's knowledge and experience and its ability to adapt quickly to changes.

"The company's development has exceeded our initial expectations. Over the past 10 years we have earmarked more than EUR 140 million just for investment, the majority of which (EUR 90 million) was allocated for new product development," explains Tomaž Setničar, business manager at the BSH Hišni aparati plant.

He says that from the European perspective, Slovenia's competitive advantages for foreign investors are its geographical proximity to large markets, its familiarity with the market and above all its awareness of and rapid adaptation to the needs of end users. Among the products developed in Slovenia, BSH is most proud of the new Hardware+ food processor.

"We in Slovenia were the first to develop it within the BSH Group, and production will begin in 2020. We are speaking about an innovative kitchen appliance, which combines the functions of small food processors and large home appliances (i.e. a stove top). The entire device is equipped with an eco system, appropriate to our times, with which users can exchange and share their experiences and recipes," said Setničar. BSH Hišni aparati is planning to increase revenues by 5 to 8% in 2020.

High Level of Safety Also a Selling Point

The Kofola Group from the Czech Republic became the majority owner of Radenska in 2015. "At Kofola we immediately recognised Radenska as an excellent



investment opportunity. It is an excellent brand with a long-standing tradition and a strong local presence. We set Radenska – as both a brand and a company – as a strategic starting point for launching onto a new market, which had been unknown to us up to that point," explained Marián Šefčovič, director and CEO of Radenska Adriatic.

Along with the fact that Slovenia is a member of the European Union and a part of both the Schengen Area and the euro area, its high level of safety is also an important selling point for foreign investors. However, the Kofola Group see Slovenia's bureaucratic procedures as a challenge. Bureaucracy in Slovenia is a pretty tough nut to crack.

When it comes to development and innovation, Kofola pays the most attention to Radenska mineral water, which Šefčovič calls "our queen of waters". "When we speak about development and innovation, we're talking about the corporate culture. Our culture dictates that we always look for innovations, develop new methods and find new challenges. In Slovenia we pay particular attention to searching for new ways to introduce our "queen of waters" to the younger generations. On this basis, in the spring of 2019 we launched Radenska in cans, which became the first and only Slovenian mineral water available in that packaging," says Šefčovič.

Swedish Trelleborg and Slovenian Savatech: Trelleborg Slovenija

The Swedish Trelleborg Group became the owners of the Slovenian company Savatech in 2016 in order to continue the development and manufacturing of high-quality rubber composite products and tyres. In May of 2018 Savatech was renamed Trelleborg Slovenija. "Trelleborg Slovenija is strongly export-oriented. Through its activities, which are being upgraded, developed and rationalised, it makes an excellent contribution to the inclusion of the Slovenian economy in international trade flows. It carries out the majority of its export business via foreign trade partners in Germany, England, the Czech Republic, Poland and the USA and its representative office in Russia," state company sources.

AquafilSLO - the Successor to Julon

AquafilSLO is the successor to the Slovenian firm Julon, a polymerisation plant and nylon manufacturer. In Slovenia it has factories in Ljubljana, Senožeče, Ajdovščina and Celje, at which it employs more than 850 people. In 2011, AquafilSLO opened the first regeneration plant for production of ECONYL® nylon from waste, which remains a revolutionary project of the Aquafil Group. It has invested more than EUR 25 million in the project. In its annual report for 2018 among major investments it lists the optimisation and automation of its cleaning line, valued at EUR 2.57 million, and the expansion of the plant for making fibre out of recycled polyamide, for which they allocated more than EUR 2 million.

German Gea Group Purchases Slovenian Family Firm Vipoll

The German corporation the Gea Group purchased the Slovenian family-owned company in 2017, which has done business under the name Gea Vipoll since 2018. The company, whose headquarters are in the town of Križevci pri Ljutomeru, sells beverage filling lines to customers all over the world. Gea Vipoll's corporate vision is to become the most recognisable manufacturer of high-quality equipment for the drinks industry in Europe and beyond. In 2019 they broke ground on a new plant in Križevci pri Ljutomeru, in which they are planning to invest EUR 7 million. Radenska mineral water is an excellent brand with a longstanding tradition and a strong local presence.

Gea Vipoll's corporate vision is to become the most recognisable manufacturer of high-quality equipment for the drinks industry in Europe and beyond.



Yaskawa Opens New Robot Factory in Slovenia

The Japanese Yaskawa technology group has two companies in Slovenia – Yaskawa Slovenija and Yaskawa Ristro. Yaskawa Slovenija, which has been present on the Slovenian market since 1990, is a systems supplier of robotics and automation of work processes in industry. It produces systemic and specialised applications using Motoman robots produced by Yaskawa. The Yaskawa Ristro company is a manufacturing company that supports Yaskawa's subsidiaries all over Europe with systemic solutions.

Following two years of construction, Yaskawa opened its new robot production facility with European robotics development centre at Kočevje, Slovenia, in April 2019. Yaskawa already started European production of its Motoman robots at the end of 2018. Japan's Yaskawa opened its new robot production facility and European robotics development centre in Kočevje, Slovenia in April 2019.

Foreign Companies in Slovenia

The British DS Smith Plc completed the acquisition of Duropack in 2015. Yaskawa is pursuing the i3-Mechatronics concept, which they have already implemented in a factory near Tokyo and which involves a threefold increase in production rates and significantly shorter supply times. It will be launched in Slovenia in 2020.



Once Duropack and Valkarton, Now DS Smith Slovenia: Redefining Packaging for a Changing World

The British DS Smith Plc, a leading provider of sustainable packaging solutions in Europe, completed the acquisition of Duropack in 2015. Duropack had high quality assets with leading market positions in South East Europe, including Slovenia, where the corrugated packaging business has had a long tradition. The business unit in Brestanica, as part of the Paper Factory and Krško Pulp, already started processing corrugated cardboard in 1960. Another unit, in Logatec, which was later known as Kartonažna tovarna Ljubljana and afterwards Valkarton, started producing the first corrugated cardboard in Slovenia in 1971.

In addition to units in Brestanica and Logatec, DS Smith Slovenia also runs a pharma unit, Rakek, focusing on commercial packaging (solid and laminated board with high quality offset printing). With DS Smith, Slovenia gained an innovation and design centre – PackRight Centre in Brestanica, which is one of 39 PackRight Centres in Europe.

"The role of packaging has never been more relevant, and our priority is the development of sustainable packaging solutions. The PackRight Centre is a hub of expertise and creativity," explains Majda Androjna, General Manager of DS Smith Slovenia. "We are now focusing more on e-commerce business, as its volume is expected to double in the next six years. This is creating significant recycling challenges. Our current innovations focus on solving global innovation challenges such as reducing void fill, eliminating shipped air, first mile recycling and others," said Androjna.



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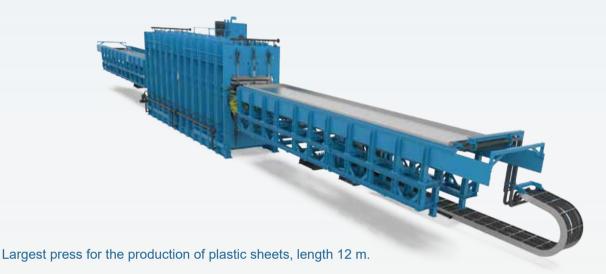
Our production is based on modern and acknowledged machines and equipment such as Mori, Seiki, Mazak, Index, Hunyadi, Daewoo, etc.





Stiskalnice d.o.o.

SiTOR stiskalnice d.o.o. is the leading manufacturer of hydraulic presses for use in the production of plastic sheets (PP, PE and UHMWPE). The presses account for 80% of the company's entire output, the remainder being made up of semi-products and of hydraulic presses for the rubber and wood industries. Semi-products include tools for presses used in the production of plastic sheets and heating panels.



Last year, the company celebrated its 40th anniversary. In that time it has made its presence felt on markets and in sectors around the world, and its production programme has been adapted to those markets and sectors. Hydraulic presses have remained its main production programme for each of those four decades. The company began making presses for the production of plastic sheets in the mid-1990s, and they have manufactured over 80 to date. The users of the presses are some of the leading plastic sheets manufacturers in Europe and the US, which is proof of their reliability and their ability to satisfy the toughest requirements. The presses are manufactured in line with the customers' requirements. Improvements and modifications are being introduced constantly; these are the fruit of the company's many years of experience and collaboration with customers. The company also has a laboratory press that enables sheets to be produced from various different materials using different technological procedures, and potential customers to test new samples.

The company fully intends to retain its position as the leading manufacturer of hydraulic presses for the production of plastic sheets, and upgrade its activities through greater presence in the rubber and wood industries, where it already has a significant amount of experience. The company regularly attends trade fairs in its fields of operations, where it is more than happy to detail its products to potential customers.



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Slovenia's Exporters More Successful Than Ever

In July 2019, Slovenia broke its previous export record thanks largely to companies that are constantly expanding and perfecting their range of products and services.

Nina Šprohar

Iskraemeco's Fair Meter Sets New Standards in the Energy Sector

For more than 70 years, Iskraemeco have been delivering quality products and services that make efficient energy use a reality to energy companies worldwide. Their key markets are Europe and the MEA region. They are currently exporting to more than 80 countries, and their biggest markets are Germany, the Netherlands, Egypt, Austria, the UAE and North Macedonia.

They have developed a smart metering platform, the Fair Meter project, which received the company's second consecutive golden Innovation Award from the Chamber of Commerce and Industry of Slovenia (CCIS) in 2018. The solution is based on the integration of sustainable development into the company's business model and strategy.

Photo: Iskraemecc



They point out, however, that the energy market is facing a huge transformation. "The business model employed by utilities today will change in fundamental ways. Utilities have started to adopt smart technologies (smart meters, automated demand respond, grid-integrated distributed generation and micro grids). Smart-metering produces large amounts of data that needs to be analysed, processed and safely stored – so data security is and will remain a huge concern for utilities. Sustainability and circularity are becoming important issues," say the company.

They add that the most significant change in how we live our lives and do business will be the increasing prevalence and importance of the Internet of Things (IoT). "IoT is the next wave of connecting devices to improve business models," explain Iskraemeco, who will nevertheless continue to invest in R&D, production, IT, smart-metering solutions, energy IoT and energy analytics, as well as in the regions of Latin America, Africa, Asia/Pacific and, not least, Europe.

TKK Are Prepared for All Eventualities

TKK, a Slovenian manufacturer of sealants, adhesives, polyurethane foams, industrial sprays and additives for concrete and mortar, currently operates in over 70 countries, the key markets being Italy, Germany, Bosnia and Herzegovina, Spain and Serbia.

"We have five subsidiaries operating in Croatia, Bosnia and Herzegovina, Serbia, Bulgaria and Russia, and sales representatives employed by the parent company (in Germany, Italy, Austria, Hungary, Ukraine, Greece, North Macedonia, Kosovo, Montenegro, Romania and, until recently, Iran). We also have distributors in the Czech Republic, Slovakia, Switzerland, Albania, Algeria, Libya and Chile," they explain.

For the sale of products under a different brand name, regional managers are employed at company headquarters tasked with developing business with For more than 70 years, Iskraemeco have been delivering quality products and services that make efficient energy use a reality to energy companies worldwide.

Iskraemeco developed a smart metering platform, the Fair Meter project, which received a golden CCIS Innovation Award in 2018.

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In 2017, TKK began an intensive investment cycle (EUR 11 million), which will be completed in 2020.

The Adria Dom's 'Aurora' mobile home is aimed mainly at the demanding northern markets, and has been developed in order to fill the gap in the range of products for yearround living. other brands in Western Europe, North and South America, the MEA region and Asia.

As to what the company are expecting in 2020, it is difficult to give a simple answer, as the conditions on the markets on which they operate vary a great deal. "At home, we are anticipating several major investment projects, and expecting the current trends in the construction of commercial and residential buildings to continue. As far as our key markets go, we estimate that while construction activities may decline slightly, there will still be enough space for us to grow or to increase our market shares. We are expecting an increase in demand in the MEA region as well as in North and South America," they add.

They are currently most focused on expanding their sales network and strengthening their brands via increased investments, organic customer growth and new sales projects. In 2017 they began an intensive investment cycle to expand and modernise their production and storage capacities, and to overhaul projects and equipment. They will therefore earmark around EUR 11 million for these investments, the energy renovation of buildings and additional improvements to environmental parameters in the 2017–2020 period.

TKK have also developed quite a large number of new products, including a family of DIY additives for concrete and mortar, a line of premium-quality adhesives (Fi-X.expert), the Hydroblocker line of hydro-insulation products, a family of coloured



MS polymer-based hybrid sealants, a family of acrylic products (Acryl, Acryl Profi, Acryl Fast, Acryl Transparent, Acryl Rough), a line of premium coloured silicones (Tekasil Color), and a completely new TKK product segment for gardens and outdoors called TKK Garden.

Adria Dom Developing the Mobile Home of the Future

Adria Dom are a fast-growing, development-focused company that have, in the last two seasons, unveiled new developments in almost all their product segments. "We have improved our entire range of mobile homes and added an even bigger version of the attractive 'Loft' model, which is part of our 'Safari' range of mobile tents, and also unveiled a completely new 'Adriatic' series. On northern markets, we have successfully begun to market our 'Alpline' modular house, which is suitable for year-round living. We have also begun to market floating houses. The first has already been erected in Italy," say the company.

The company understands development as a yearround process in which products are upgraded and new ones developed in rapid response to the results of market research, communication with customers and the monitoring of trends. They are extremely satisfied with the innovative proposals coming from their employees.

They are in the process of preparing a few new products for the 2020 season. "We will be unveiling our new 'Aurora' mobile home, which is somewhere between the 'Alpline' modular house and a standard mobile home." The 'Aurora', which is aimed mainly at the demanding northern markets, has been developed largely in order to fill the gap in the year-round housing range. "An equally important project is the development of the concept of the 'Phoenix' mobile home of the future. This will be innovative in every respect, as the guiding principle of the project is the incorporation of modular elements and innovative architectural details, such as an integrated terrace, and smart and multifunctional furniture made from new materials," say the company.

As they explain, the new products comply with the construction standards on each individual market and incorporate energy and architectural solutions (smart solutions regarding modern floor layouts). "New technologies and the Internet of Things (IoT) are also introducing new concepts into the areas of connectivity, energy and sensor technology."

Until recently their most important markets were Croatia and Italy – even two years ago, these two countries were responsible for 90% of their sales. However, by developing new products Adria Dom are also beginning to target other markets and looking for new target groups, a process that has proven to be quite successful. Sales on other markets are constantly growing and now account for 38% of total sales. Sales are strengthening in Germany, the Netherlands, Sweden, Denmark and Austria, the company have entered the French market, and they have fitted-out their first mobile homes in Israel. In September 2019, they even erected their first tents in the Philippines.

"We are most proud of the fact that we are a stable company enjoying constant growth. We have been successful on the market for 16 years in a row and are known at home as a company that values and respects its employees and offers them the opportunity to grow," they say, adding that they also devote considerable attention to their organisational culture as they want staff to be well-informed and to feel an important part of the company story. The company ended 2018 with income of EUR 30 million and profits of EUR 2.3 million. "We have seen growth in income of over 20% in 2019 and estimate that our net profits will be considerably higher than last year. We have greatly increased our value added per employee, which already exceeds EUR 50,000. High profitability ensures that our assets grow without taking on extra borrowing," they conclude.

Hidria's Solutions Will Drive BMW and Mercedes

Hidria, one of the world's leading automotive and industrial technology corporations, generates over 90% of its income from exports. They operate throughout the world, with their key markets being Germany, France, Italy, the USA, Hungary and China. "We have manufacturing locations in Germany, Hungary and China, in addition to Slovenia, as well as a strategic partnership with Orchid International in the USA," say the company.

They focus on providing environment-friendly, competitive products that prolong the service life of internal combustion engines. "Our innovative and international award-winning diesel engine cold start system using the Optymus PSG pressure sensor is already being installed in modern diesel engines to ensure that they are as clean as required. Together with the development of key components of the 48V hybrid system using starter-generator technology, which enables energy to be stored when braking and assists acceleration by means of an electric motor, they constitute state-of-the-art technology that radically improves diesel engine performance and lowers emissions that are harmful to health and the environment," they say.

To ensure the top-quality manufacture of key components of the high-performance engines

without which we could no longer imagine living, Hidria have developed a completely new, competitive and innovative process for fixing laminations to rotor and stator stacks – a process called Hidria Bond. "With this process, the electrical sheet metal laminations crucial to the manufacture of the electric motor are efficiently integrated into the stamping tool across the entire surface during the process of manufacturing the rotor and stator, which involves several hundred strikes a minute. This innovative solution will be incorporated into the completely new starter-generator or 'soft hybrid' system in BMW and Mercedes vehicles for the first time in 2020. After that, we will expand it quickly, as it is a major development opportunity for us," say Hidria.

All this requires accelerated investments in development, high-tech capacities and equipment and, most of all, in "our specialist staff, who are the heart and engine of the Hidria corporation." Between 2013 and 2018, the company invested over EUR 100 million in new high-tech equipment, as well as an additional EUR 50 million in pre-development and development activities. "We are expecting to make even higher levels of investment in the next five years," they add.

Despite the slowdown in growth on global markets, Hidria are creating new projects because of their innovativeness, competitiveness and quality. "Some of the world's most important automotive and industrial manufacturers have placed their trust in us." The company are optimistic: "We are expecting sales in 2019 to be similar to those in 2018, which was a record year. And we expect 2020 to be no different."

Argeta – Europe's Most Popular Meat Pâté

The food processing company Droga Kolinska, which is part of Atlantic Grupa, manufactures and markets some of the leading food brands in the region. These include the well-known Argeta meat and fish pâtés and vegetable pastes, Barcaffè coffee for home use and Horeca coffee for catering establishments, Hidria is involved in automotive and industrial technology around the world. Its key markets are Germany, France, Italy, the USA, Hungary and China.

Droga Kolinska's products can be found on all the markets of SE Europe, where they also occupy a leading market position. They can also be found on other markets in Europe and the rest of the world.



Donat Mg has been around since 1908, which means that it is more than 110 years old. Cockta was launched in 1953, and so is 67 years old, while Argeta first appeared in 1977.

²hoto: Droga Kolinska

the fizzy soft drink Cockta and Donat Mg natural mineral water.

"Atlantic Grupa's operations, and therefore those of Droga Kolinska, are focused on the consumer and on recognising, anticipating and even co-creating their needs. Our success is demonstrated by our exceptional sales figures as well as the strength of our brands and our enviably high market shares. On the majority of our markets, we are the leading company in the category," they say.



Indeed, their products can be found on all the markets of SE Europe, where they also occupy a leading market position. On other markets in Europe and the rest of the world, the brands are mainly found in smaller world food shops and delicatessens, while Argeta and Donat Mg have their own special and highly successful globalisation story. "Today, Argeta is the number one meat pâté in Europe, as confirmed by the Nielsen market research company. It is the leading brand on nine European markets. In terms of value, it has a 36% share of the pâté market in Austria and a 32% share in Switzerland. We should add that four packs of Argeta are opened across the world almost every second," say the company.

As a product and brand, Donat Mg natural mineral water has a completely different character, being something that buyers consume for health reasons. It can be found on more than 20 markets and, because of its medicinal properties, is sold abroad mainly in specialist shops, such as pharmacies, as well as online.



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For many years, the company's focus has been on the German automotive industry. In 2020, the company is planning to construct a new production hall and purchase production presses.





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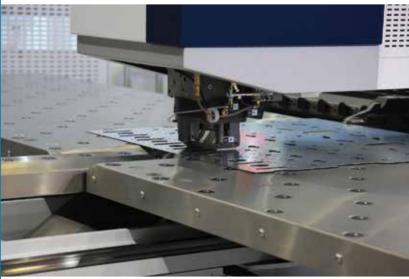


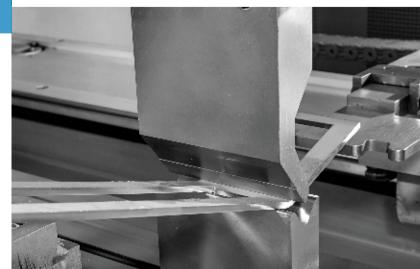


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Two Thirds of FDI to Slovenia from EU Companies

The biggest foreign investors in Slovenia are from Germany, Austria, the USA, Italy and Switzerland. Together these countries account for 55% of all foreign investments.

Bojan Ivanc, CFA, CAIA, Chief Economist at Chamber of Commerce and Industry's Analytics Department

In the last few years the importance of foreign investments in the Slovenian economy has grown considerably . But, at 32% of GDP it is still lower than in comparable Visegrad countries (median: 55% of GDP), although higher than in more developed Germany (23%). Owing to its small size and integration into value chains, along with the absence of a functioning domestic capital market, the importance of foreign investments can only be expected to grow. On the other hand the importance of Slovenian FDI abroad is nominally just being maintained, while dropping to 13% of GDP. This is mainly a consequence of the past economic crisis, when companies reduced investments and became very selective over new ones.

The stock of inward FDI in Slovenia stood at EUR 15.2 billion at the end of 2018 (32% of GDP), up 8.6% on the end of 2017. There was an inflow of EUR 535 million of equity in 2018, the largest factors in which were inward investments in manufacturing and in wholesale and retail trade and repair of motor vehicles and motorcycles. This inflow was the consequence mainly of a change in the ownership of domestic investors to foreign ones. Owing in part to the relatively high valuation of companies, quite a few Slovenian companies opted for being sold to foreign owners, and among the biggest sellers was the Bank Assets Management Company (BAMC).

German-speaking Countries the Biggest Foreign Investors

The complex structures of multinational firms, which are a response to several factors (financing of global production networks, optimisation of the tax burden and other regulatory burdens, etc.), can conceal the ultimate source of FDI, so we analysed inward FDI in terms of the ultimate country of ownership. This kind of analysis reveals the actual control of investments. There should be an awareness of the limitations in determining ultimate investing countries, as certain domestic entities do not have the detailed ownership schemes of their owners available, the best possible assessment being used.

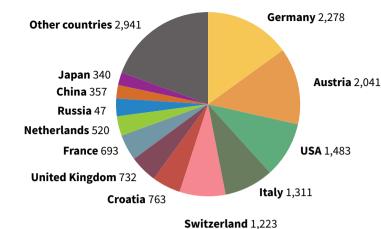
Under this methodology the biggest foreign investors in Slovenia are from Germany, Austria, the USA, Italy and Switzerland. Together these countries account for 55% of all foreign investments. German ultimate investors hold the majority of their indirect investments in Slovenia via Austria in the form of affiliates and branches. Investors from the USA have conducted a large portion of their investments in Slovenia via companies in Luxembourg and Austria. UK investors' largest holdings of FDI in Slovenia were also via affiliates in Luxembourg. Russia as the ultimate investing country held EUR 471 million in FDI in 2018, with Russian

investors holding the majority of their indirect investments in Slovenia via affiliates in Austria and the Netherlands. In terms of relative importance as ultimate investing country compared with immediate partner country, there are also significant advances by China, mostly via branches in Luxembourg, and Japan, mostly via Austrian branches. Production, trade and financial business are the most popular sectors for foreign investors, since in tandem with their parent companies they can most often offer an appropriate level of economy of scale. German, Austrian, Italian, Swiss and Croatian companies are the most prominent in manufacturing. In finance the powerful investors are from the USA, Italy and Austria. Croatian, Austrian and German companies occupy an important position in tourism. In trade the big investors are from Germany, Austria, Croatia and Italy.

In the last few years the importance of foreign investments in the Slovenian economy has grown considerably, while the importance of Slovenian FDI abroad has nominally just been maintained.

Investors from the USA have conducted a large portion of their investments in Slovenia via companies in Luxembourg and Austria.

Production, trade and financial business are the most popular sectors for foreign investors.



Inward FDI as at 31 December 2019 (in EUR millions)

Source: Direct Investment, 2018 - Bank of Slovenia

Firms with foreign owners generated their largest profits to date in 2018 (EUR 1.3 billion), and consequently made their largest profit distributions to date (EUR 739 million). Firms with foreign owners generated their largest profits to date in 2018 (EUR 1.3 billion), and consequently made their largest profit distributions to date (EUR 739 million). Retained (reinvested) earnings amounted to EUR 540 million in 2018, up EUR 188 million or 53.6% on 2017. A key reason for this was the higher planned investments in the 2019-2021 period. The average return on the average stock of total inward FDI stood at 5.4% in 2018, up slightly on the average between 2010 and 2017 (5.2%). FDI statistics lend an above average weighting to capital-intensive activities, and less to services, which with reduced capital are also creating a lot of jobs in Slovenia.

The stock of Slovenian outward FDI amounted to EUR 6.1 billion at the end of 2018, up 1.6% on the previous year.

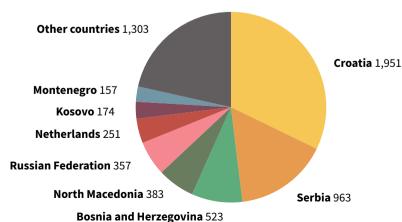
Major Importance of Former Yugoslav Republics for Outward FDI

The stock of Slovenian outward FDI amounted to EUR 6.1 billion at the end of 2018, up 1.6% on the previous year. The value of investments was almost unchanged from 2008, while the intervening period saw a decline owing mainly to the lower value of certain currencies

(Serbian dinar) as well as in a certain period owing to a reduction in financing from Slovenian companies.

Approximately a guarter of outward Slovenian investment is under indirect foreign ownership, with domestic investors having foreign owners. This means that they are using Slovenian companies as management centres for the south-eastern region. The entry of Croatia into the EU signalled a major boost to Croatia's attractiveness as a management centre, especially owing to its bigger market, knowledge of foreign languages and above all better transport connections. In certain segments Belgrade is also a centre for group management, mainly because of the size of the market. Equity accounted for 77.7% of total outward FDI. Slovenian investors recorded net payments of equity totalling EUR 314 million in 2018, while positive reinvested earnings also contributed to the increase in the amount of EUR 118 million.

Almost half of Slovenian outward FDI was accounted for by EU countries at the end of 2018 (EUR 3 billion), with Croatia standing out (EUR 2 billion),



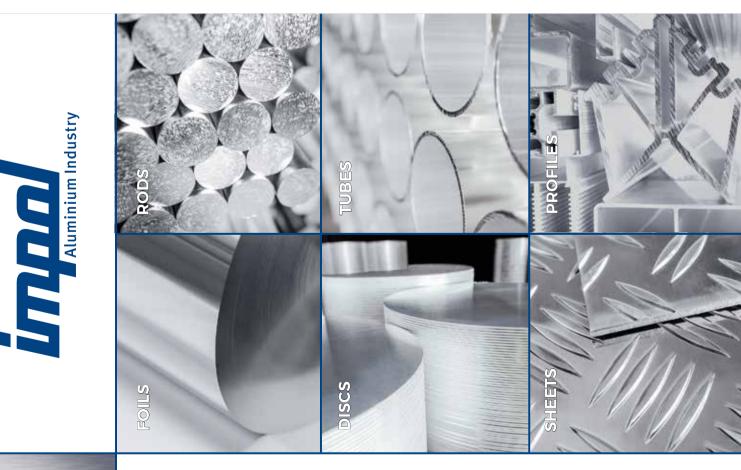
Outward FDI as at 31 December 2018 (in EUR millions)

followed by the Netherlands (EUR 250 million). Important among the other big investment countries are Serbia (EUR 1 billion), Bosnia and Herzegovina (EUR 0.5 billion), North Macedonia (EUR 380 million), Russian Federation (EUR 360 million), Kosovo (EUR 170 million) and Montenegro (EUR 160 million). Just how important the regional economies of the former Yugoslavia are for Slovenian companies is demonstrated by the fact that FDI in Germany (EUR 150 million) was even lower than in Montenegro.

Firms in the rest of the world with Slovenian owners/co-owners generated a profit of EUR 183 million in 2018. The average return on the average stock of total Slovenian outward FDI stood at 2.9% in 2018, higher than the average between 2010 and 2017 (2.2%). The five largest recipients of Slovenian outward FDI at the end of 2018 included four former Yugoslav republics, which accounted for 63.1% of total outward FDI, and Russia. Domestic firms in manufacturing held the largest stock of outward FDI at the end of 2018, accounting for approximately a third of total outward FDI. This was followed in importance by trade (1/6) and finance (1/7). The region of the former Yugoslavia is especially important for Slovenian financial companies, since it offers growth potential, while in manufacturing, local production in these countries is boosting their competitive advantage in Western markets.

Some 71.1% of total outward FDI held by Slovenian firms in 2018 was in partner firms that pursue the same activities. This means that Slovenian companies are transferring their expertise in their line of business to less developed markets, but this is yielding higher anticipated growth. In certain cases the lower labour costs are the deciding factor in transferring companies. Almost half of Slovenian outward FDI was accounted for by EU countries at the end of 2018 (EUR 3 billion).

Firms in the rest of the world with Slovenian owners/co-owners generated a profit in 2018 in the amount of EUR 183 million.



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Empowering Slovenian Business: Green. Creative. Smart.

In 2019, SPIRIT Slovenia launched an international communications campaign called Green. Creative. Smart. under the national brand I feel Slovenia.

Ana Vučina Vršnak

The Slovenian public agency SPIRIT Slovenia is an entrepreneur-friendly institution for both potential and existing investors, providing assistance to businesses during their start-up, growth and development phases. "In designing our services portfolio, we monitor the needs of the economy, follow the global trends, and tailor support services for the entrepreneurs of tomorrow. We are working towards establishing a single point of information with fast and transparent compilation of support activities for companies. This will help them increase their work in the innovation area, improve their international competitiveness, and expand globally," said Ajda Cuderman, the director of SPIRIT Slovenia.



Cuderman strives for a win-win situation for both Slovenian and foreign investors who recognise Slovenia's highly educated and productive workforce as well as the country's advantageous geostrategic location. "This is confirmed by the fact that Slovenia doubled its exports and FDI stock in the last 10 years," added Cuderman.

The **Green. Creative. Smart.** campaign highlights the key competitive advantages of the Slovenian economy in the fields of environmental technologies, robotics, mobility, digitisation, development and research, and the creative industries. The Green. Creative. Smart. campaign highlights the key competitive advantages of the Slovenian economy in the fields of environmental technologies, robotics, mobility, digitisation, development and research, and the creative industries.

Slovenia is known for its green landscape, however, its economy is green as well. It is focused on sustainability, green technologies, corporate social responsibility, and is committed to reducing the carbon footprint and caring for the natural and social environment.

In addition, the Slovenian economy is creative. It recognizes and promotes human talent and the creativity of professionals who create added value in companies.

The Slovenian economy is also smart, with numerous efficient, globally recognised high-tech solutions, services and products that help companies gain a competitive edge on the global market.

Through the Green. Creative. Smart. campaign, SPIRIT Slovenia aims to help companies enter global value chains and make it easier for them to find foreign business partners.

The impact of the promotion of the Slovenian economy abroad is being enhanced with the help of other partners in the economic ecosystem, including the Ministry of Economic Development and Technology; Slovenia's business points system (SPOT); the Ministry of Foreign Affairs with its network of diplomatic missions and consular posts abroad; the Government Communication Office; regional chambers of commerce and the Slovenian Chamber of Commerce and Industry; business associations, etc.

Ministry of Economic Development Supports R&D, Digitalisation and Internationalisation

A stable business environment means that the economy is healthy and that operations can be successful. "Therefore the government's job is first of all to The Slovenian economy has a numerous key competitive advantages in the fields of environmental technologies, robotics, mobility, digitisation, development and research, and the creative industries.

More about the Green.Creative Smart. campaign



The government's job is first of all to provide a stable, predictable and competitive business and investment environment, and a supportive environment for companies.

The government allocated nearly **1 billion euros** from 2016-2018 to implement the Smart Specialisation

(S4) Strategy.

One of the main challenges for the Slovenian foreign ministry in 2020 will be to promote effective economic diplomacy.

Slovenia's economic diplomacy team analyses bilateral economic cooperation with other countries and develops proposals for expanding cooperation. provide a stable, predictable and competitive business and investment environment, and a supportive environment for companies," says Slovenian Minister of Economics and Technology Zdravko Počivalšek.

The stability of the economy is affected by several factors: from legislative changes and changes in consumer needs to technological innovations that determine who can keep up with the changes and how well. The Slovenian Ministry of Economic Development and Technology is therefore carrying out several measures designed to increase competitiveness. It is focusing on support for research and development and promoting innovative organisations, and supporting digitalisation and internationalisation, i.e. increasing exports.

Investments in research, development and innovation are a key factor in this area. From 2016-2018, the Smart Specialisation (S4) Strategy was supported by measures with a total value of more than EUR 939 million for R&D projects, development of corporate skills and innovation potentials, pilot/demonstration projects, support for development innovation partnerships, etc.

The ministry developed the Digitalisation and Digital Transformation Programme in order to help firms carry out the digital transformation of their operations.



"The year 2020 brings the additional challenge of providing as stable a business environment as possible for the Slovenian economy despite a globally changing political and economic situation. An environment that will allow for further development and growth," says Slovenian Minister of Economics and Technology Zdravko Počivalšek.

A country's competitiveness also depends on its global positioning and its economy, therefore the economics ministry encourages internationalisation and supports the efforts of Slovenian firms on foreign markets, participation in trade fairs, market research, partnerships, e-business, new business models for easier inclusion in global value chains, trademarks and other activities through which we respond to the specific needs of companies.

Experienced and Responsive Team at the Slovenian Foreign Ministry

Slovenian economic diplomacy under the aegis of the foreign ministry includes 138 honorary consuls abroad, 56 diplomatic missions and consular posts and 23 economic advisers.



Minister of Foreign Affairs Miro Cerar: "Since I am aware of the importance of supporting the Slovenian economy on foreign markets, one of the main challenges in 2020 will be to promote effective economic diplomacy, through which we hope to contribute further to the promotion and spread of Slovenian exports of goods and services, to encourage the inflow of foreign direct investment and to protect Slovenian investments abroad."

The team analyses bilateral economic cooperation with other countries and develops proposals for expanding cooperation, for which it also establishes appropriate legal bases (treaties, memorandums). It also promotes the internationalisation of the Slovenian economy, with the objective of increasing Slovenian exports and achieving increased geographic diversification, and on the other hand it promotes inflows of foreign direct investment into Slovenia.

The economic advisers primarily help to establish contacts with institutions – ministries, other state institutions, chambers of commerce, business associations, and media at the national and regional levels, and to connect them with the corresponding institutions in Slovenia.

We should also mention B2D (Business to Diplomacy), where Slovenian diplomats present Slovenian economic operators to the diplomatic community in Slovenia.



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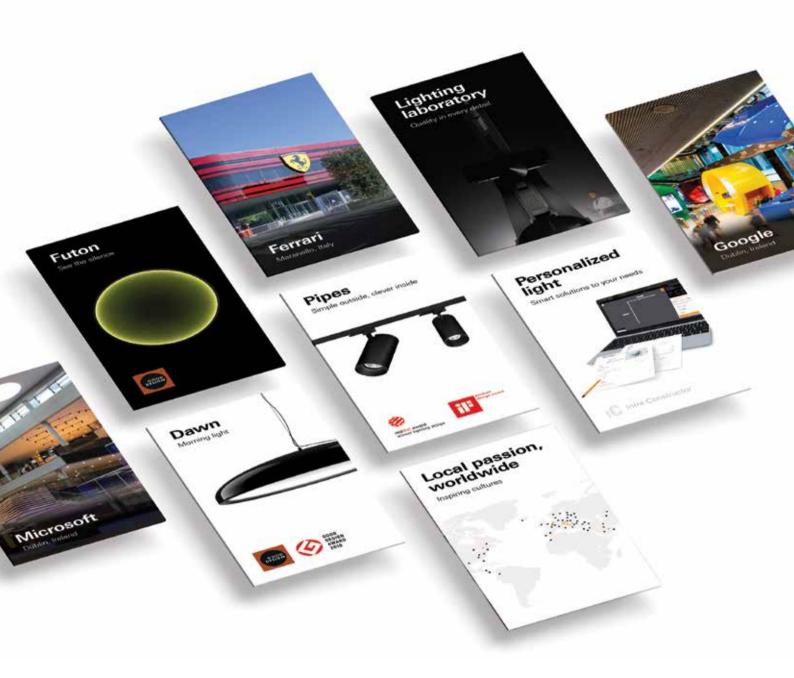
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We Can Compete With the Best

With the appropriate skills development, high level of qualification, professional knowledge, experience and commitment, Slovenian companies are often recognised as valuable strategic partners in the development of new product platforms.

Andreja Šalamun

In Slovenia, Europe's third-most developed industrial nation after Ireland and the Czech Republic, industrial companies account for nearly a guarter of the gross domestic product (GDP), and their exports are steadily increasing. According to data from the national statistical office (SURS), around 18,000 companies, which employ more than 200,000 people, generated revenues of more than EUR 30 billion in 2018, which is just under a third of total revenues generated by the Slovenian economy, and accounted for more than half of Slovenian goods exports. Sales of products and services by Slovenian industrial companies amounted to nearly EUR 26 billion in 2018, up 9.4% on 2017. Taking into account the multiplier effects that these companies have on the Slovenian economy, the role of industry in Slovenia is clearly extremely important.

Industry also accounts for four fifths of all private-sector investment in research, innovations and development. Average value added per employee at industrial firms stood at EUR 45,000 in 2018. A full 35,000 employees worked at firms that generated more than EUR 60,000 in value added per employee and collectively exported more than EUR 10 billion in industrial products. The 100 largest Slovenian companies generate more than half of Slovenia's total exports.

We asked the CEOs of some of Slovenia's most successful companies about what makes Slovenian industry able to stand shoulder-to-shoulder with the world's best.

Boštjan Šifrar, CEO, SIBO G.:

"Success is always the result of the influence of many factors. This is particularly true in industry, where both the economic and social environments are variable, and procedural changes are a constant. However, the human factor is an exceptional opportunity. At SIBO G. we believe that the success of Slovenian industry is the result of the coming together of various factors. The good education system predisposes individuals to having successful careers, and this brings corporate growth. The fact that we work in a stimulating environment close to Europe's most powerful markets is just an additional plus; the possibilities for the development of Slovenian industry are actually in the palm of our hands. Although we have exceptional opportunities for success, the Slovenian business environment presents a substantial challenge for Slovenian industry. While for instance all of the German-speaking countries in Europe and Poland, as the most visible manufacturing hub for global companies, have a stimulating environment and a business-friendly tax rate, in Slovenia the cost of labour alone has risen nearly 80 % in the last 13 years. But productivity at our company has followed the growth trend in wages, and has risen from EUR 40,000 per employee to EUR 75,000. Nevertheless, we are satisfied with the business environment in Slovenia, but if we wish to continue to progress we have to expand into new countries and thereby shorten delivery times for both global and local customers."





Photo: Barbara Reya

Andrej Kolmanič, CEO, Impol 2000:

"The main advantages of Slovenian industry are the high level of qualification and training of employees, which is supported by the high level of education among the general population, well-developed business ethics and the willingness to adapt. As a small nation, we are very capable of adapting to conditions quickly and searching for optimal solutions. This type of thinking has of course been applied in business, and the values of flexibility, innovativeness and adaptability are part of the organisational culture of many Slovenian industrial companies. At the same time, Slovenia's advantageous location in Central Europe and its industrial tradition which goes back to the beginning of the 19th century also undoubtedly contribute to the development of Slovenian industry, and this also applies to the Impol Group, whose origins date back to 1825. A lot of knowhow has been accumulated in these companies over the decades, and we have to know how to make the best use of it. In order to assure ourselves a good future it will be extremely important to catch the Industry 4.0 wave on time and adapt to it as quickly as possible, and thereby create a significant advantage over less agile competitors."

Mirko Strašek, CEO, KLS Ljubno:

progress of Slovenian industrial companies."





noto: Zare Moduo

Matjaž Čemažar, CEO, Domel Holding:

"The success of Slovenian industry depends most of all on innovative solutions that development-oriented companies can market successfully on global markets. Despite the general opinion that Slovenia does not have enough successful brands, a large number of companies rank among the leaders in their market niches on the global scale. With our appropriate skills development, high level of qualification, professional knowledge, experience and commitment, Slovenian companies are often recognised as strategic partners in the development of new product platforms, particularly at the level of interorganisational markets. Slovenian exporters are faced with very strong competition from the neighbouring countries in Eastern and Southeast Europe, particularly with respect to their cheaper workforce, and therefore being aware of cost-effectiveness, continuous improvement and productivity growth is all the more important. Process automation and the use of robots in technical procedures have become standard procedure, our awareness of the changes to our processes brought by digitalisation is increasing, and we have more and more advanced companies that demonstrate elements of the factory of the future."

"In the last few years, Slovenian industry has achieved encouraging growth and progress, since we have recognised that our companies have to take care of themselves and to achieve a sufficient level of growth and above-average results in order to survive. Just as important in my opinion is the realisation that in order to be successful, Slovenian companies have to increase their competitiveness on global markets and compete with the world's best. We have excellent human resources, who are prepared to learn, progress and set high targets. In the last 20 years, a large number of high-quality

small and medium-sized companies have appeared in Slovenia, which provide quality support to Slovenian industry so that it can develop, grow and advance. I should also mention the very positive role of the Slovenian media and non-governmental organisations in promoting the growth and

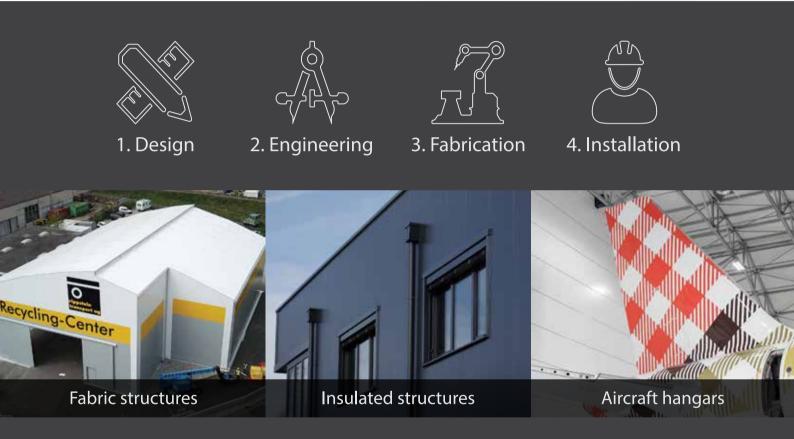
Rok Rozman, CEO, Livar:

"The main competitive advantage of the most successful segment of Slovenian industry is flexibility and the ability to adapt quickly to changes in the business environment. The relatively small domestic market dictates a clear export orientation and consequently constant competition on the competitive international market. In this environment, the keys to long-term successful operation are innovative approaches, continuous improvements in order to achieve optimal operation, and constant development. In this regard, investments in the planned development of professional staff are a key precondition for Slovenian industry to be able to maintain its competitive position in the future."



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The company MONTER DRAVOGRAD d.o.o. was established in the year 1947 and works more than 70 years in the field of manufacturing of steel products. Today the company is active in a field of building and constructing special purpose machinery and devices according to customer documentation and plans. Production program includes manufacturing of welded components, mechanical processing and final assembling (mechanical, electrical assembling, hydraulic assembling and pneumatics) and as well the final paintwork of products.

Working field:

- Machine building
- · Mining
- · Shipbuilding
- Building industry
- Automotive industry
- Wood processing industry
- Electro industry
- Forklift renovation

Company in numbers:

- · 240 employees
- Producing products up to a total weight of 64 tons
- 12.000 m² modern equipped halls

In year 2018 we also setup new welding robot FD-V20S-7th axis

- Tandem welding
- 7 axis
- payload 20 kg



TYPE:									
CNC TOS	TO5 1	TOS 2	TOS 3	TO5 4	TOS 5	TOS 6	TOS 7	TOS 8	ŠKODA
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Maximum load:	12000 kg	12000 kg	20000 kg	20000 kg	3000 kg	23000 kg	25000 kg	zocokg	65000 kg
Spindle diameter:	DIA 130 / 150 50	DIA 130 / 150 50	DIA 130 / 150 50	DIA 1307 ISO 50	DIA 125	dia 130 / 190 50	DIA 1307 ISO 50	D ∧ 125	031 / 63 / ISO 50

OUR REFERENCES:



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Being Ready to Adapt Is the Quality That Distinguishes Those Capable of Long-Term Survival

There are quite a few Slovenian companies that can boast of having a more than 100-year tradition. We can't talk about the industry of the future if we don't know the past and the present, say business leaders.

Ana Vučina Vršnak

Ironworks in Štore Since 1851

"Our wealth of past experience can always serve as a basis for anticipating and forecasting the future, and particularly for management decisions," says Jani Jurkošek, managing director of Štore Steel. Štore Steel is a mini steel production company that continues a tradition of ironworking in the town of Štore that dates back to the middle of the 19th century (1851).

The company was among the first industrial firms in Slovenia to use steam engines to run its production lines and to carry out its internal transport using industrial railways, and it connected with the global market of the time via the newly built Vienna – Trieste railway.

"The history of ironworking is full of events that are now a constant in the business world: the fulfilment of business ideas, making use of the employees' knowledge and experience, the use of the best-available technologies, and also changes of ownership and cyclical alternation of good and bad times," says a realistic Jurkošek.



In 2019, the company started up a new production line for peeled steel, an investment worth EUR 3.6 million. This was necessary due to the increasing demand for peeled steel, particularly from the car industry. In addition, they invested another EUR 1.9 million in a new furnace and a new hall in 2019. However, for environmental and other reasons they are unable to continually increase their production, so they are increasingly focusing on manufacturing steel with high added value.

First Steam Engine at the Ljubljana Sugar Works in 1835

The first industrial plants in Slovenia began to spring up during the 1820s. In 1835 the first steam engine on the territory of present-day Slovenia was installed at the Ljubljana sugar works. It was used to drive a water pump and lift materials to the higher levels of the factory building.

Exports Today Five Times Higher Than in the 80s

As many as 30,000 people were employed in industry and mining as early as 1912, while by 1946 this figure had jumped to 75,000, and at the beginning of the 1980s to over 350,000. The economic transition in the 90s came at a high price, as did the crisis in 2008, but Slovenian industry has weathered those storms successfully. Employment is on the rise again, and 210,000 employees are generating five times as many exports as were generated in the 80s, while value-added per employee has reached EUR 45,000. It should be noted that in 2018, 35,000 employees worked at firms that generated more than EUR 60,000 in value-added per employee and exported more than EUR 10 billion in industrial products. The first industrial plants in Slovenia began to spring up during the 1820s.



Jani Jurkošek of Štore Steel, which was among the first industrial firms in Slovenia to use steam engines to run its production lines. Impol reprocesses aluminium into state-of-the-art semi-finished goods that are built into a wide range of products.



Darko Hrastnik of Unior has hit the proverbial nail on the head

nail on the head with excellent tools adapted to the needs of professional users, which are essentially indestructible.

History tells us that flexibility is essential to success; when it is supported by excellent, visionary ideas, you are already halfway to succeeding.

Paper Production: 100 Years of Količevo Karton

Paper production is one of the world's oldest handcrafts. The Slovenian Količevo Karton Mill produces recycled cardboard, virgin fibre cardboard, and white top coated recycled liner on two machines. It was founded in 1920 and has been a part of Mayr-Melnhof Karton since 1998. "An unconditional focus has been the strength of the company for decades," says Irena Rupnik, Mill Service Manager.

The industry's principles have not changed for thousands of years, according to Rupnik. The process is about the dissolution of fibres in water followed by drying into the desired shape: "The sources that have been used since ancient times are more or less the same: fibres, energy and water. Količevo Karton Mill is no exception."

The heart of Količevo Karton is a cardboard machine, a giant in dimensions, which produces hundreds of tonnes of paper board day after day, but under the condition that it is properly fed and supported from all sides. All activities of the business are focused on one goal only: to ensure the stable operation of the machine 24 hours a day, 7 days a week, year after year, in order to secure stable supply and reliable quality of products required and expected by the market.

A task which in itself, says Rupnik, is likely to be considered nothing special, if it would not involve an exceptionally wide range of stakeholders. Even if one step in the production process fails, the final product could be unacceptable. Therefore, a constant control is a daily challenge of all the employees. They need to take care of a stable running of the machine, regardless of what is happening outside the company.

"The focus is clearly and unequivocally determined, one does not deviate from it and each member of our team is always prepared to understand and accept progress and constant improvement as purely natural law to maintain the system's growing success," says Rupnik of Količevo Karton.



History of Impol Dates Back to 1825

Impol's origins go back even further. Impol is a flexible, innovative and development-oriented company engaged in reprocessing aluminium in state-of-theart semi-finished goods that constitute the wide range of products and successfully meet the needs of various industries. In 1825 a company was founded that manufactured forged copper products. Gradual expansion of copper, brass and bronze finished and semi-finished goods range followed. In the 60's a gradual reorientation of manufacturing from copper to aluminium came about due to increased consumption of aluminium and estimates of its potential. This decision was also facilitated by the construction of an aluminium plant in Kidričevo (Talum).

Unior: A Century of Experience for the New Millennium

Unior's first steps were dictated primarily by the natural environment, the needs of the region and a management team that knew exactly what it expected from its employees. They continually adapted to the needs of the market. "Over the decades, we went from manufacturer of high-quality, dependable tools for do-it-yourselfers to a leading manufacturer of tools for specialised applications. Do-it-yourselfers can find tools of questionable quality in any supermarket at a significantly lower price than we can provide. We have hit the proverbial nail on the head with excellent tools adapted to the needs of professional users, which are essentially indestructible," said Darko Hrastnik, president of the management board of Unior.

Hrastnik says that the crucial decisions also include focusing on foreign markets after the closing of the former Yugoslavian market, when the car parts in our Forgings programme were marketed internationally. "Our competitiveness is further bolstered by our participating interest in Štore Steel, as well as our going beyond European borders and our jump onto the world stage. And the story is completed by our Machinery programme," says Hrastnik.

He says that the hundred-year path (1919-2019) from a simple blacksmith's to a company whose products are found in four out of every five cars manufactured in Europe was "anything but flat and smooth". "Unior faced the challenges that every company has to face. However, there is a big difference between companies that get mowed over by the first recession and companies like Unior. Upon our one-hundredth anniversary we wrote that we have been blessed with an iron will since the beginning, and if we add to that our vision and the fact that we engage in continuous development, innovation, the taking of reasonable risks and industriousness, we are already approaching the equation that now ensures us a solid place on the international market," says Hrastnik

In his opinion, history tells us that flexibility is essential to success; when it is supported by excellent, visionary ideas, you are already halfway to succeeding. "The trend indicates that we will continue to be strongly connected at the global level in the future, since with modern technology the distances are shorter and easier to overcome every day. Our trump card continues to be our commitment to tradition. Unior, despite its numerous adaptations, is still basically a blacksmith's, and the upgrading of our activities is a product of our vision. And the vision is soething we do not lack," says the president of the Unior management board.

TRO, a Strategic Supplier of Industrial Knives to the Most Demanding European Machine Manufacturers

The TRO company is just a few years short of its 100th anniversary. In 2019 the company received a silver medal from the Chamber of Commerce and Industry (CCIS) for the innovation "Production of Cutting Tool Bodies Using 3D-Printing Technology". The company is amongst the largest manufacturers of industrial knives and woodworking tools in Europe. Their products are sold in more than 50 countries worldwide.

The beginning of tool production at TRO dates back to 1926, when the production of files began in



the town of Prevalje. New ideas and know-how led to new production programmes at the factory. They used to be known as a high-quality manufacturer of woodworking tools (saw blades, cutters, borers). In 2019 the TRO company received a silver medal for the innovation "Production of Cutting Tool Bodies Using 3D-Printing Technology".





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An Active and Successful Organisation Is Based on People

Transformation Lighthouse from Ajdovščina is on a mission to transform today's digital and neoliberal business environment, which will benefit society as well as help companies succeed in the long run.

An active and successful organisation is based on human capital, Transformation Lighthouse believes. They achieve these objectives via "internal and external, offline and online hackathons". In other words: events aimed at individuals from all company segments who harbour innovative ideas or would like to meet business challenges in a more successful way - through workshops on team-building, conflict resolution, time management and various soft skills. Essentially, the aim is to connect employees, foster team spirit, and establish a holistic company culture that will attract young job seekers. These activities include innovation and looking for future models or "engines of innovation", identifying and developing new products or services, as well as connecting with startups both at home and abroad.

Company Management Should Care About Employees

"Our clients must be ready for change and significant involvement on their part. If they only take this path because everyone else is doing so, our efforts will not bear fruit," explains Urška Jež, Managing Director of Transformation Lighthouse. "The personal involvement of company management and their unwavering support are essential. Employees need to feel and know that the management cares about what they experience, create and learn. We offer to our clients a personalised, in-depth approach, passion, great energy, and playfulness that encourages thinking outside the box. We introduce them to a pool of talented potential employees, connect them with startups and an international circle of high-profile individuals who contribute their experience of working with business giants like Apple, Google, Oracle, Airbus, NASA, US Air Force and others. The coaches in our network have been involved in transformation and innovative culture in companies around the world for decades."

Good Consulting Brings Out a Sparkle in the Eyes

Jež says that she and her team are most gratified when their approach brings out a "sparkle in the eyes of the employees who learn how their methods can make their business and private lives easier, and realise what the full potential of innovation is when you aim high". They have seen such



"Working with foreign companies and coaches enhances our knowledge and experience, which we are very happy to share at home," says Urška Jež, Managing Director of Transformation Lighthouse.

"sparkles" in companies like Lidl Slovenia, UniCredit Slovenia and Akrapovič.

Past successes motivate Transformation Lighthouse to regularly participate in international projects. Together with the American partner company Ideascale they developed a virtual hackathon project aimed at finding talented employees, and implemented it in collaboration with MojeDelo.com and Petrol. They are also developing a Slovenian version of the CO-STAR book with EDG in Palo Alto, as well as an upgrade of the Silicon Valley experience week, which gives their clients an insight into innovation at the very centre of new technologies and startups.







Eight Gold Medals for Best Innovation in Slovenia 2019

New drugs, better communication among emergency medical services teams, a new generation of camper vans, the most efficient electric motors on the market, new solutions for shielding electrical installations and devices, and an innovation that will save you 50% of your time when assembling furniture – all of these ideas of Slovenian innovators won gold!

Dr Aleš Ugovšek, Head of Technological Development and Innovation, Chamber of Commerce and Industry

Every year, the Chamber of Commerce and Industry of Slovenia (CCIS) chooses the best innovations developed by the Slovenian industrial sector. This September on Innovation Day, the Chamber awarded 8 gold medals, 2 special awards for young enterprises, 26 silver medals, 4 bronze medals and 4 awards for contributions to innovation. Additional innovations were nominated to receive two special awards for this year's special challenge: developmental and innovation cooperation between the business sector and educational and research institutions. This year the CCIS is celebrating its 23rd year of selecting and conferring awards for innovation at the regional level and its 17th year at the national level. Over the past 16 years, more than 9,150 innovators and over 2,780 innovations throughout Slovenia have received awards. This year, applications for 199 innovations were received at the regional level, behind which stand more than 1,000 innovators. The regional chambers of commerce awarded 47 gold, 72 silver and 50 bronze medals, and 25 awards for contributions were received at the national level. To date, 9,150 innovators have received awards for innovations from the CCIS.

Over the past 16 years, 2,780 innovations have received CCIS awards.

8 Gold Medals in 2019

Adria Mobil: New Generation of Adria Mobil Vans - 2019 Twin - Because Every Centimetre Counts

The new generation of Adria Mobil camper vans, called the Twin series, is both a smart innovation and a new approach to product development through design management. The entire concept of the new generation is based on spaciousness, attention to detail, compatibility, functionality and utility. Since every centimetre in a limited living space is precious, the spatial challenges have to be met with smart solutions, and the components and materials have to be connected with the space in terms of both design and function. The greatest emphasis in the development of the new generation of vans is on the open forward living area, which is somewhat cramped in traditional designs. Therefore the living area and the cabin are connected without dividers, the living area is expanded with an entrance directly into the body, and an innovative new panoramic window was introduced, followed by an integrated sun-roof. The increased space means more legroom and more height in the cabin, which gives the camper van a motorhome-like feel.



Domel: Development of the NZ 270 PM Motor - The Most Efficient on the Market

Above all, legislative changes in the area of energy efficiency have created new opportunities on the market for the development of highly efficient high-power motors. Domel has produced highly efficient motors in the past, but with relatively low power. However, with the development of the new NZ270 motor, Domel now covers a power range up to 50kW. These motors offer the highest efficiency currently available on the market. They are used for the most demanding applications, where they have to operate reliably 24 hours a day for a period of 10 years, for instance at data centres, where they are used to cool servers for the world's most renowned software companies. In 2018, 1700 11 kW motors were delivered to one of these clients, with an annual potential energy savings of EUR 0.8 million.

ETI Elektroelement and RC eNeM Novi Materiali: A New Generation of Plastic Bases for D0 Fuses - PFB D0 Fuse Bases - Convincing the Big Brands

The innovation of PFB D0 plastic fuse bases covers a wide range of products designed to protect electrical installations and devices. The fuse bases provide protection over a range from 2A to 63A at 400V AC and 250V DC. The key innovations are the simple and minimised product design without the need for additional protective covers and the specially designed terminals that offer a significant savings in materials. The products also feature electronic indication of a blown fuse. These innovative solutions are a new arrival on the global market and are protected by two international patents. The quality of the products is certified according to IEC standards and confirmed with the VDE and OVE certification marks. The innovations follow global trends and have convinced several new buyers among major brands such as Siemens, Schneider and Jean Muller.

Krka: The First Generic Drug with Extended Release of Paliperidone Based on Osmotic Pump Technology – A Modern Approach to Treatment

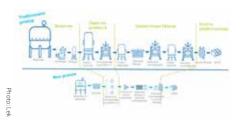
Schizophrenia is caused by a disruption of the balance between neurotransmitters and hormones in the brain. This disease can be controlled and the symptoms alleviated through appropriate treatment. Krka has developed a new generic drug that provides a new approach to the treatment of this disease, with a new high-technology procedure allowing for the development of new modern medicines. The pharmaceutical form operates on the basis of osmosis, which controls the release of the active pharmaceutical ingredient. The key to its functioning are two openings on the top of the tablet, through which the active pharmaceutical ingredient is released due to increased pressure in the tablet. The openings are made with a laser, which creates them in fractions of a second using precisely measured impulses, and they are less than a millimetre in diameter.







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Lek: A Continuous and Connected Process for Cleaning Biopharmaceuticals -Making Biopharmaceuticals More Accessible to Patients

Biopharmaceuticals are modern and highly effective medicines whose complexity and high production costs keep them out of reach of many patients. They are currently manufactured using a series of individual steps, which is highly time consuming and not cost effective. Therefore the participants in the nextBioPharmDSP project have developed and validated on the production level a new continuous and connected process for cleaning biopharmaceuticals, by establishing continuous isolation of the product with efficient removal of impurities and the final formulation, and integrating advanced analytics for taking measurements in real time. This brings numerous advantages, such as a significant reduction in costs, increased productivity and reduced environmental impacts, which taken together results in increased patient access to biopharmaceuticals.

Lek: LinComplex™: A New Generation of High-Quality Probiotics with the Most Highly-Researched Strain Lactobacillus rhamnosus GG – A New-Generation Probiotic

More than 60% of people with digestive issues and weakened immune systems take probiotic products, but international market research indicates that many of those products are of insufficient quality and/or efficacy. Therefore Lek's development team has developed the new-generation probiotic LINCOMPLEXTM, a high-quality innovative nutritional supplement developed and manufactured according to standards for medic-inal products, with carefully selected original ingredients including the most frequently clinically documented strain in the world – L. rhamnosus GG, zinc and vitamins B1, B2 and B6.

Mediainteractive - Franc Dolenc: A Mobile Cooperative Education Environment for Emergency Medical Assistance - Digital Transformation in the Field of Urgent Care

The MiTeam MediColl is an advanced mobile communication and education environment that significantly improves communication among emergency medical assistance teams. It is used for medical emergencies and allows for the transfer of patient data and video communication between teams in the field, first responders and hospital emergency rooms. In the event of mass fatality incidents, it allows for the optimisation of medical and logistical decisions and increases chances for survival. The integrated digital educational environment facilitates training and monitoring the knowledge of medical teams. MediColl has been available on the market for two years in the Gorenjska region, the only digitalised region in this part of Europe, and received excellent marks in the RDI call for tenders and the Seal of Excellence Phase 1 and 2 at Horizon 2020.



Titus and Lama Automation: Quickfit TL5 'Full Metal Jacket' Expansion Bolt and Development of a Machine for Installing New Quickfit TL5 'Full Metal Jacket' Connecting Hardware – How to Reduce Furniture Assembly Time by 50%

Using a philosophy of 'Consumer Assembly Friendliness', they have developed a new device that saves time during furniture assembly. The Quickfit TL5 expansion bolt is a new solution for 5mm holes, which uses a steel expansion sleeve which gives the joint increased load-bearing capacity and is universally applicable in several types of wood materials. They have also improved the actual process of assembling furniture panels. The Quickfit TL5 expansion bolt has a special quality that allows it to be installed in the side of the furniture panel during manufacturing, as the bolt locks in and does not fall from the hole during packing or transport. The combination of an innovative expansion bolt and the FastFit machine for automatic pre-installation into furniture panels improves the competitiveness of the furniture manufacturer, as they can offer customers a new product which is significantly easier and faster to assemble at home. It reduces furniture assembly time by up to 50% and can be used in a wide range of furniture, and installed in an automated process.

Special Awards for Young Enterprises

Highfly: An Electric Foil that Rides Above the Surface - Passion Developed Into an Idea

The Highfly company has developed an innovative electric foil, which rises to 60 cm above the water surface, can reach up to 45 km/h and is environmentally friendly, as it does not produce any noise, waves or emissions, and can therefore be used on any water surface. The Flying Rodeo was born out of enthusiasm for water sports and a passion for design and construction.

EVEGREEN Ecological Consulting Firm, Eva Štraser: 100% Biodegradable Flowerpot Made of Cereal Waste - Proving That Biodegradable Materials Are a Lot More Than Just a Substitute for Plastic

The large number of plastic cups in the nearby hop fields inspired this innovator to develop a biodegradable EKO pot: after planting in soil it provides effective protection against garden pests, and after 4-6 months it becomes an effective fertiliser. This allows the bioplastic manufacturer to achieve higher prices while eliminating long-lasting waste, and provides the population with information about the accessibility of environmentally-friendly alternatives.

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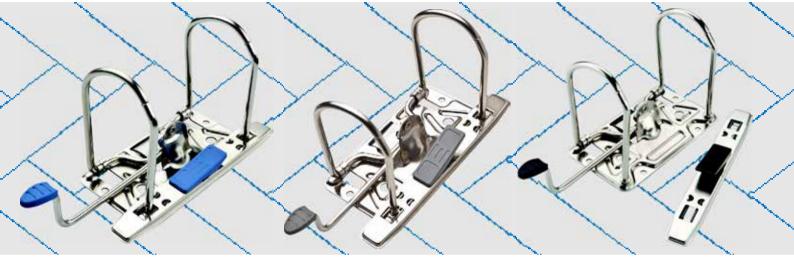




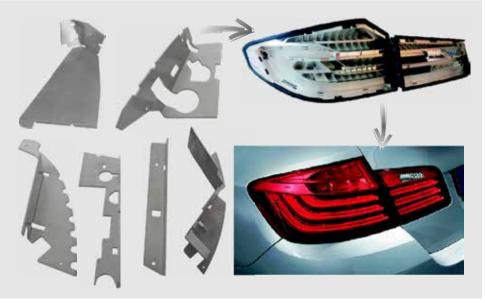


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I Have Always Spent My Holidays in Adria Products

Ana Vučina Vršnak, photo: Branko Ceak

Sonja Gole is General Manager of Adria Mobil, one of Europe's leading manufacturers of caravans, motorhomes and mobile homes. For her, products have to stand out and be different.

Sonja Gole became the general manager of Adria Mobil in 1996. Under her leadership, a new period of revitalisation is taking place at the company, with Adria Mobil emerging from the crisis to become once again one of the leading European manufacturers in the sector.

The beginnings of Adria Mobil stretch all the way back to 1965, when the first caravan, the Adria 375, was produced in Novo Mesto. You exported that first caravan to Sweden. Is there any country on whose roads an Adria Mobil caravan, motorhome or van hasn't been driven?

The Adria brand was created in the mid-1960s under the umbrella of the Novo Mesto-based industrial giant IMV, while the Adria Mobil company was founded in 1995, when it took over the Adria brand name, raising it from the doldrums and propelling it steeply upwards once again. As a company, Adria Mobil is explicitly oriented towards exports. We are present on more than 30 markets across three continents (Europe, Asia and Australia), with an extensive sales and service network of over 500 outlets. As our aim is to provide our customers with hassle-free touring and a top-quality user experience, we invest a great deal to ensure that cooperation with our distribution partners is of the highest possible quality. There are also countries where Adria products are not yet being sold - the United States, for example, where they have a completely different product definition - but we are certainly present in most of the key caravanning sales markets. At the same time, we are actively looking for opportunities to enter new markets, which can be an important generator of growth in the future, given that growth is becoming increasingly subdued in the European market.

Adria has been creating recreational vehicles for over 50 years. In your experience, which market has been the most demanding in that time, and why?

In our experience, the most demanding markets are those that have a larger number of domestic manufacturers offering high-quality, competitive services or products. On markets like that, you usually have to offer something different or something more – in short, you have to stand out in some way and be different, and find the niche in which you can be the best. At Adria Mobil, when defining our competitive advantages, we are focused on quality, innovation and top product design, which we further enhance by adapting our products to the particularities and requirements of a specific market. For this, of course, you need a great deal of knowledge and experience which are in no short supply at Adria Mobil. We are well aware that people who are fully committed to the work they do are always and everywhere the key to success. In my opinion, we actually have the best team of co-workers at Adria Mobil.

It seems that travellers have to take everything and the kitchen sink with them on the road these days. So, I'm interested in knowing how creative you have to be when developing and designing your vehicles? How does your innovation and development department work? How many people work there?

A holiday vehicle is by its nature a complex product. On the one hand, these are vehicles that have to meet all the requirements for road safety; on the other, they are homes on wheels, where the ambience, the functionalities of the interior fittings and, for example, the lighting are all key to a comfortable and high-quality holiday. At Adria Mobil, we have an abundance of ideas, but one has to accept that not all of them can be realised. So, when we are innovating, we usually focus on several ideas that we think are key and then try and develop them by a suitable deadline (the caravanning sector is very seasonal in nature) and to a level that enables us to incorporate them into serial production and offer them to customers. More than 50 members of staff are involved in development activities. As far as innovation is concerned, we rely on all employees at the company, as each one of them is able to locate, in their area of work, a way of doing something better, more quickly, more efficiently or more cheaply. We also realise the value of small improvements to the process, so we encourage and reward them. We also pay a great deal of attention to our customers' opinions and to accommodating their needs and wishes. At this point, our distributors and retailers make a big contribution, as they are the first to perceive what customers are thinking "in the field". The Adria brand can therefore offer more and better things than the competition, and this is also why it has become known over the last decade as a brand that creates trends rather than merely following them. Adria are basically a real handful for the competition.

Do you work on development with other prestigious vehicle manufacturers? Some Adria vehicles have been "integrated" into various models of Fiat, Mercedes-Benz and Renault, for example. When deciding which make of vehicle to use as the

base, several factors are important – from how far the base vehicle is adapted to the demands of the caravanning industry to the extent to which the manufacturer is represented on all the markets on Adria Mobil is present on more than 30 markets across three continents (Europe, Asia and Australia), with an extensive sales and service network of over 500 outlets.

A holiday vehicle is by its nature a complex product. On the one hand, these are vehicles that have to meet all the requirements for road safety; on the other, they are homes on wheels.

The Slovenian Business Excellence Award and the 5-star award from the European Foundation for Quality Management (EFQM) have a special significance for us. Caravanning is one of the most environmentally friendly ways to spend your free time. which we also have a retail network. This is because we have to be able to offer the customer service options on the base vehicle as well as the superstructure. Not least, price is also an important factor. The base vehicle is the most expensive component, if I can call it that, of any motorhome or van (van conversion). Fiat base vehicles have the strongest presence in the sector. A few years ago, the company adopted a strategy towards the caravanning sector and took all our needs into consideration when developing the new Ducato. This has paid off for them, as Fiat's share of the motorhomes and vans segment in Europe today hovers around the 70% mark. We also work very well with Renault and Citroen, as our operating results make clear.



You have received quite a few awards for design and innovation. Do any of them particularly stand out for you and, if so, why?

Every award represents a big recognition of our work. Each has its own specificities and meaning, so it is difficult to pick one. But perhaps the most interesting one is the König Kunde award, which is voted on in Germany by customers themselves. Adria Mobil was in the top three for this award for six years running, and we took first place on several occasions. The organiser and awarding body then decided that the award would be restricted to German manufacturers of recreational vehicles - so, in common with other foreign manufacturers, we were left empty-handed. That said, we still have our German customers, as Adria has been present on that market for almost 55 years and customers there hold us in very high regard. Of course, the Slovenian Business Excellence Award, which we received in 2017, and the 5-star award from the European Foundation for Quality Management (EFQM), also have a special significance for us. These two awards are, for me, a reflection of our efforts towards excellence in all areas of the business. It is something we strive for practically every day, every season and with every product. But one should realise that every award also brings with it great responsibility, as the trust it expresses has to be maintained.

Thirty or 40 years ago you introduced an aerodynamic front end for your caravans that was something of a competitive advantage during the fuel crisis in around 1982. Is fuel consumption even more important these days because of greater environmental awareness? Fuel consumption is a factor these days, of course. In the recreational vehicles sector, this primarily means focusing on aerodynamics, the final weight of the vehicle itself and the selection of appropriate materials. At Adria Mobil, we strive to use wood in our products, both in the interior and in the bodywork, as I think it is important for us to reduce our carbon footprint. That said, caravanning is one of the most environmentally friendly ways to spend your free time, if we compare the overall travelling cycle with other ways of taking a holiday. This does not mean, however, that Adria Mobil can rest on its laurels in this regard. Unfortunately, when looking for suitable alternatives for our products, we are often limited by the fact that, for example, the materials should be suitably light and, more than anything, have to be able to withstand different climatic conditions - winter and cold in Scandinavia as well as the summer heat of Australia. Weight, for example, is one of the reasons why we still don't see any electric motorhomes on the road, as a category B driving license can only be used with vehicles weighing up to 3.5 tonnes. This upper limit is too low for the size and equipment of the modern motorhome and would require numerous compromises to be made.

I'm interested in how you think caravanning will adapt to the demands of sustainable mobility?

As far as sustainable mobility goes, I see the main opportunities in integration with other forms of mobility, something that is already a strong part of the caravanning sector. It is practically impossible these days to see a motorhome or holiday caravan without a bicycle or electric bike attached to it. Another advantage of caravanning is that it allows you to access more remote destinations, farmstays, etc. that see fewer visitors. This helps develop rural tourism, which has a great deal to offer in Slovenia. Above all, we should not forget the integrity of product lifecycles, with so many different possibilities today for dismantling and reusing materials, something we have perhaps slightly overlooked among the myriad opportunities offered by sustainable mobility.

You have headed the company since 1996. What have been the toughest challenges for you personally and for Adria Mobil in that time?

If I look back at the first few years after I took over, this once great Adria brand was on its knees. We had to get the entire business back on its feet and breathe new life into the Adria name. Then came a very trying time after 2008, when the most recent global financial and economic crisis began, which Adria Mobil were among the first companies to feel. In Slovenia at that time, it was difficult to explain what was happening, as the crisis had not yet hit the country. There were certainly moments when the company had to adjust itself to a reduction in business volume. This is the most difficult part of a manager's career, not professionally but purely in human terms, as you're forced, if you want the company to survive and be ready to rise again, to make some less than pleasant decisions. The challenges that we face in periods of rapid business growth are no less challenging, although they are what we could call "sweet" difficulties - although they aren't really. Every challenge has to be accepted with complete seriousness and a sense of responsibility.

The French company Trigano became the majority owner of Adria Mobil in 2017. You thereby acquired an extremely important strategic owner and, at the same time, partner. What has happened since then, i.e. in the last three years?

Not a great deal has changed for us in the two years since Trigano became an owner of the Adria Mobil company and group. Our cooperation is excellent: they know the sector inside out, and we have similar views and values when it comes to managing the company. Above all, Adria Mobil has managed to preserve its autonomy and own business model, which is extremely important for the future development of the company. In fact, we are the leading company in the Trigano Group for all business parameters.

What are your plans for the next three years? Will you expand production further, perhaps into other continents?

We are not planning to shift production to other continents, but we will be expanding production and increasing production capacities at the existing location in Novo Mesto in the next year. There, we will be using new technology to increase capacity in the manufacturing of bodywork components, where we currently have a bottleneck. This will provide us with options for the further expansion of business volumes, if the upwards trend in the European recreational vehicles market continues into the future. Product development for the next season is always a challenge, as we are always keen to keep demonstrating our innovativeness and consequently capitalise successfully on our development investments. We are currently wowing the market and our customers with the star of our 2020 product range, the Astella holiday caravan, which we unveiled at the world's biggest caravanning fair in Düsseldorf at the end of August 2019. It is somewhere between a holiday caravan and mobile home. We have surprised the market with it, and the response has been exceptional. Of course, we offer something new every season in other segments something our customers have come to expect.

What kind of holidays do you take? Do you have your own "Adria"?

I have always spent my holidays in Adria products, first in holiday caravans, then in a motorhome and, more recently, in mobile homes. In my opinion, Slovenia is a destination tailor-made for caravanning. It offers numerous experiences in culture, gastronomy and architecture, is a safe destination with relatively decent infrastructure, and is geographically varied, which gives opportunities for a wide range of activities. However, it's not enough merely for the Slovenes to be aware of these advantages. Slovenia therefore has to be promoted as a tourist destination over the long-term and consistently, as recognition and results will not come overnight.

Weight, for example, is one of the reasons why we still don't see any electric motorhomes on the road. We are not planning to shift production to other continents, but we will be expanding production at the existing location in Novo Mesto in 2020.

Astella holiday caravan, unveiled at the world's biggest caravanning fair in Düsseldorf in August 2019, has surprised the market and the response has been exceptional.

I have always spent my holidays in Adria products, first in holiday caravans, then in a motorhome and, more recently, in mobile homes. In my opinion, Slovenia is a destination tailor-made for caravanning.







Interservice d.o.o. Koper, a logistics company with more than 25 years of experience, boasts an AEO Certificate, a Triple A creditworthiness certificate and a certificate for the import of organic products. The company is based in Koper, where it has two branch offices. It also operates a third unit at Ljubljana's Brnik airport.

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Slovenia Investing in New Rail Links and Modernising its Logistics Network

Still a great deal of potential for logistics development due to growing trade between Asia and Europe.

Andreja Šalamun

Those familiar with the situation agree that Slovenia is highly competitive in logistics, mainly due to the fact that it sits at the crossroads of two major European routes (European Transport Corridors V and X). Corridor V leads from Lisbon via Barcelona to Ljubljana and Kiev, and connects Southern, Central and Eastern Europe, while Corridor X connects Central and Southeast Europe with Asia and runs from Munich via Jesenice and Ljubljana to Belgrade and Istanbul.

"This competitiveness is reflected above all in servicing goods flows between Asia and Europe via the port in Koper and goods flows between Western and Central Europe and the countries of the Western Balkans," says Intereuropa CEO Ernest Gortan. He finds that the first relation in particular has exceptional potential due to the immense flow of goods between Asia and Europe. "The main obstacle to the exploitation of that potential is the need for additional rail and storage infrastructure in Slovenia," says Gortan.

At Pošta Slovenije they see that country as an important meeting point between the north, south, east and west, which in their opinion is insufficiently exploited. "The main reason is the transport connections, i.e. the delay in the construction of the second track on the Divača-Koper line," say sources Slovenia sits at the crossroads of two major European routes – European Transport Corridors V and X. SŽ-Tovorni promet is expanding both sales and production activities to the markets of Central and Southeast Europe, and particularly to the countries of the former pan-European Corridor X (the planned Corridor RFC 10).

SŽ-Tovorni promet has taken on the role of the integrator of rail transporters in the area of Southeast Europe.

The Sava Express from Ljubljana to Belgrade is a regular route that connects goods flows from Western and Central Europe with transport flows through Serbia. at Pošta Slovenije, who add that Slovenia also lacks spatial capacities in the area of logistics. Sources at the Port of Koper also state that we are currently lagging behind in the area of rail connections, which are still not at the level of Western European countries. "However, we have to admit that in the last few years Slovenia has invested substantially in new rail connections and the modernisation of the entire network," they say.

The Second Track on the Divača-Koper Line Has to Be Built as Soon as Possible

According to sources at SŽ-Tovorni promet, Slovenian Railways' freight subsidiary, the efforts of the logistics companies, which are able to compete on an equal footing with foreign firms, are not enough to take full advantage of Slovenia's potential for the development of logistics. "The most important thing is to create a modern, state-owned transport infrastructure. In the area of rail transport, the second track between Divača and Koper and the modernisation of at least the main transport axis, which is also partially included in European Corridors RFC 5 and RFC 6, have to be completed as quickly as possible" they say, and add that the neighbouring countries are rapidly upgrading and modernising their rail infrastructures, "which creates the danger of the long-term re-direction of goods flows. However, the state, like many other European countries, could implement appropriate financial and other measures in order to support combined transport and the transport of individual wagons." Sources at SŽ-Tovorni promet state that this would put rail transport in Slovenia on an equal economic footing with goods transporters using other types of transport and with rail transporters in other European countries.

Hoping to Revive the Transport Route Through the Countries of the Former Yugoslavia

SŽ-Tovorni promet has taken on the role of the integrator of rail transporters in the area of Southeast Europe. "In 2018, at our initiative and in cooperation



with the Croatian and Serbian railways, we launched a new product called the Sava Express, which runs from Ljubljana to Belgrade. This is a regular route that connects goods flows from Western and Central Europe with transport flows through Serbia," they state. They note that this product is an integrated solution that includes all necessary handling, regular deliveries and flexibility of schedule.

"This is an important step towards the revival of the transport route through the countries of the former Yugoslavia, which carried nearly 12 million tons of freight every year before 1990, while today this figure is less than four million. The share of goods transported by rail in the region is between 15 and 20%, which means there is a lot of potential," say sources at SŽ-Tovorni promet, which provides integrated transport and logistics services using standard rail transport (transport of wagons with different types of goods, tankers, car transport trains, hazardous goods transport, etc.) and combined transport (containers, exchangeable containers, lorries, etc.). In both Slovenia and elsewhere in Europe they offer the organisation and provision of door-to-door transport services, including road delivery to the final recipient and additional services. "We are also expanding our activities abroad. In addition to Slovenia we also transport goods as an independent operator in Austria and Croatia."

Intereuropa Upgrades Warehouse Capacities and Operating Technology

Intereuropa has recently upgraded their storage capacities and operating technology for several customers, thereby providing them with easier access to new markets. "We invest a great deal in ensuring the safety of the goods and informatisation of operations, and through IT connections throughout the entire chain we offer our customers faster and more reliable services, and in particular real-time information on the status of the goods," says Gortan. He adds that Intereuropa offers integrated logistics services via its three areas of operation (land transport, logistics and intercontinental transport), and that it can meet all needs for logistics services for all types of goods and for any destination.

Port of Koper in the Middle of Investment Cycle

The Port of Koper is in the middle of an investment cycle in which they are expanding their capacities. "At the moment we are working on extending the first pier, i.e. the shoreline at the container terminal, and we will soon begin construction of the parking garage. With regard to vehicles we should also mention the dedicated berth in the third basin and the construction of additional rail lines for the car terminal," state sources at the Port of Koper, whose core activities are port and logistics services, but which as the port operator also oversees the connecting of all of the stakeholders in the logistics chain. "Customers nowadays are looking for integrated solutions for moving goods from point A to point B, i.e. a competitive solution for the maritime and overland parts of the transport route."

Pošta Slovenije Now Using Robot

In 2018, Pošta Slovenije installed a EUR 14.7 million parcel sorter at the postal logistics centre in Ljubljana, which is one of their largest investments in the recent period. They say that they kept up with the state-of-the-art technology and that this investment significantly improved their intralogistic parcel distribution processes, as they have expanded their processing capacities. Last year they also installed a third production line for machine sorting of unaddressed direct mail (promotional mail) and at the same time introduced a new palletising line with a robot and automatic wrapping of pallets, which means that their first robot is now part of their work process. They have introduced a new online and mobile application which allows recipients to choose an alternative delivery location and time during the shipping procedure.

In the area of next-generation delivery they have begun working with the start-up company Locodels, which offers extremely fast and intra-city express delivery of products purchased online according to the 'sharing economy' model. The essence of the business model is the combining of delivery orders with automatic optimisation through a delivery platform.



Sources at Pošta Slovenije say that standard postal services are in decline worldwide, and therefore they are developing more advanced services that are competitive in the wider region, and not just in Slovenia. "The key growth areas are parcel delivery, logistics and information services, while in addition to standard postal services we are also offering more complex individual solutions that provide complete supply chains in the area of parcel logistics, as well as effective IT solutions."

Intereuropa invests a great deal in ensuring the safety of the goods it carries and in the informatisation of operations.

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Looking for New Partners

The core activities of the Port of Koper are port and logistics services, but as the port operator it also oversees the connecting of all of the stakeholders in the logistics chain.



European and global

markets via their

business partners.

Intereuropa has subsidiaries on the markets of the Western Balkans, and cover other

area of parcel delivery and logistics services in the Adriatic region and the markets of Southeast Europe, where it is already present in the form of bilateral agreements and through its subsidiary PS Logistika. "The goal is to become one of the most important providers of parcel delivery and logistics services on the individual regional markets." At the Port of Koper they are constantly searching

Pošta Slovenije wants to increase its presence in the

for opportunities on the market and are targeting both shipping and logistics companies and the owners of the goods. "We have already achieved a satisfactory market share in the countries of Central Europe, which we are intending to increase, and we are also increasing our presence on markets on which we have a smaller market share, such as southern Germany. On the other hand there are the Asian markets, where we also see opportunities for expansion," they state.

"We want to grow and to meet the needs of both our existing and new customers. We are capable of offering integrated logistics services," says Gortan of Intereuropa. He says that they have subsidiaries on the markets of the Western Balkans, and cover other European and global markets via their business partners.

Expansion is also planned at SŽ-Tovorni promet, where they will be expanding both sales and production activities to the markets of Central and Southeast Europe, and particularly to the countries of the former pan-European Corridor X (the planned Corridor RFC 10). They will be trying to increase their presence on key markets in order to obtain access to customers and manage goods flows. "This primarily refers to Austria, Italy, the Czech Republic, Slovakia, Poland, Hungary, Croatia, Serbia, Romania and Bulgaria," say company sources, who add that they will be cooperating with existing and new partners. "In cases where it makes sense and when there is demand on the market, we will also provide transport services ourselves using our own stock, without involving foreign railway companies."

SŽ-Tovorni promet: Expecting an Exceptionally Challenging Business Year

SŽ-Tovorni promet is expecting 2020 to be an exceptionally difficult business year. "Economic growth is slowing, and negative trends are already appearing in some important segments, for instance the car industry." They are also expecting their competitive position to suffer with the entry of new railway companies onto the Slovenian market, and that the numerous construction and maintenance works on the public rail infrastructure will have a negative



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The logistics and transport firm BRANKO KOLENC S.P. is a family operation established in 1986. The company offers the following services:

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effect on their work and reduce the quality of their transport services. "Despite these negative factors, in 2020 we are planning to maintain the quantities of goods carried and work performed at the 2019 level and to achieve profitability. We will consolidate our role as an important regional carrier and operator, and we will expand our capacities through the gradual updating of our rolling stock and other equipment, and our information system," say company sources.

Intereuropa is not yet able to speak about the concrete numbers that they will achieve in 2020, but according to CEO Gortan, their strategy up to 2022 foresees growth in all areas of operations and on the majority of markets, and particularly in products with high added value. "In order to provide competitive logistics services your employees also need to have the right know-how, skills and motivation, excellent IT support, and the company's operations have to be financially stable", says Gortan.

Fewer Postal and Payment Services, More Logistics

At Pošta Slovenije, they find that the volume of postal and payment services has been declining in recent years, while the structure of such business is also changing due to the migration to e-operations, legislative changes, changing customer habits and competition on the postal and financial services market. They explain that other postal operators in the EU and around the world are also experiencing similar trends and that they are recording growth in logistics services, parcel delivery and express mail services as a result of market growth (particularly online sales)



and sales activities. Therefore they are upgrading their existing services in this area and developing new services, and following global trends, good practices and user needs. They are also planning new business in the area of logistics services (warehouse services, supply chains, transport, distribution, etc.) and are focusing additional development activities on expanding onto new markets and new logistics segments. The group's key projects are therefore directed towards optimisation of the network, informatisation of operations, upgrading the range of services and automation and digitalisation of operations in order to increase efficiency, and their applications will also be adapted for use on mobile devices. Among other things they will also be introducing "a network of smart parcel lockers, which in the future will make it possible for all parcels to be delivered directly to the addressee at the selected address."

Sources at Pošta Slovenije say that standard postal services are in decline worldwide, and therefore they are developing more advanced services that are competitive in the wider region, and not just in Slovenia.

Trends in Logistics

Larger Ships, More Online Trade and Increased Rail Capacity

One of the most significant trends is the digitalisation of the logistics industry, which means faster processes, lower costs in the transport chain and therefore increased competitiveness, say sources at SŽ-Tovorni promet. They say that the introduction of standardised rail traffic management systems at the European level (ERTMS/ETCS) will also bring major changes. "This will mean increased capacity of the existing lines (more trains at the same time) and will additionally stimulate cross-border rail transport. In the area of production and sales we will have to react appropriately to the increased demand for transport and to the increasing pressures from competing transport methods, and this will require better responsiveness and custom tailoring solutions to the needs of individual customers and markets," say company sources, who add that the manner in which the United Kingdom leaves the EU will undoubtedly also affect the position of European logistics providers.

Shipping Companies Facing Increasing Challenges

"Logistics depends greatly on the global economic situation, and therefore it is not immune to economic slowdowns," say sources at the Port of Koper. They add that e.g. shipping companies are facing numerous challenges, such as International Maritime Organisation (IMO) regulations on reduction of emissions and the use of cleaner fuels, and increasingly large container ships that shipping companies have to fill, and the fact that ports also have to follow and adapt their infrastructure to developments in the shipping industry.

Lack of Manpower in Postal Services and Logistics

Numerous trends are indicating that automation, robotisation and digitalisation are the main priorities at postal logistics companies, and the postal logistics field is also facing an increasing lack of workforce, while at the same time the field can also take advantage of technological advances in advanced robotics in warehousing, analytics for transport and warehousing, autonomous transport and delivery, the Internet of Things and smart sensors, and virtual and enhanced reality, according to sources at Pošta Slovenije. The Port of Koper is planning to build on its already satisfactory market share in the countries of Central Europe, and is increasing its presence in southern Germany. They are also looking towards Asia.



Pošta Slovenije sees the country as an important meeting point between the north, south, east and west, which could be much better exploited.

Despite the slowdown of the global economy, forecasts indicate the growth of online trade, which is the main driver of the logistics industry.

Pošta Slovenije Enjoying Growth of Online Sales

Despite the slowdown in the global economy, forecasts for the growth of online trade, both national and cross-border, are positive, and this growth is the primary driver for the logistics field, which the people at Pošta Slovenije are aware of. They say that in recent years postal operators have had to deal with various crucial sector-specific factors impacting operations, such as the decline of letter mail (forecast to reach five percent globally by 2025). The growth of e-trade has brought about growth in parcel quantities, but also pressures to optimise networks, lower costs and raise prices.

"According to the consulting firm Accenture, revenues/parcel have decreased for many operators in recent years, as much as 5.4% for FedEx, 3.3% for Poste Italiane, and 1.7% for La Poste. E-trade has also brought about the growth of logistics services, but this is accompanied by pressures to develop and expand logistics networks," say sources at Pošta Slovenije. Operations are also being affected by increasingly demanding consumers – a full 70% of whom for example expect free delivery of goods from online retailers, and they are also expanding the categories that they purchase online, e.g. furniture and food. The competition is also continuously growing and the online retailer market is becoming consolidated - a full 40% of online sales on seven of the ten key markets take place on portals operated

by Amazon, Alibaba and JD.com, according to sources at Pošta Slovenije.

They also point out the costs for postal operators. "Labour costs for postal operators usually amount to between 50 and 60% of all costs and are often 20 to 40% higher than for competitors that do not have trade unions (e.g. DPD or Hermes in Europe), as postal operators' wage policies and HR models are less flexible, which lowers productivity. Similarly, postal operators are often among the largest employers in the country, which means increased public exposure when changes are needed, regulations in the area of universal service dictate a wide network of branch offices and frequent delivery, and in addition the price is regulated." They also note the lack of digital literacy among postal operators, who are lagging behind their online competitors in this area.

"Logistics is an activity that is on the one hand exceptionally important to the successful sale of goods by producers and traders, but on the other hand represents a large percentage of the cost in the final price of the goods," says Intereuropa CEO Ernest Gortan. "It is a continuous challenge to find a compromise between the demand for the constant availability of goods and providing lower costs of logistics along with changing conditions on the market and the risks that appear with them," he adds.

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Links being built between Central and Eastern Europe and with overseas markets

Trade Trans Adria is an important component of the Trade Trans Group, which has a presence throughout Europe and is a bridge between the Old World and overseas market.

Trade Trans Adria is part of the Trade Trans Group, which comprises independent forwarding and logistics companies with headquarters throughout Europe. It was established in 2010 as the basis for the formation of the Trade Trans Group network in the Adriatic region.

Strategic pillar of the Trade Trans Group

Its mission is to establish road, rail and maritime transport links between Central and Eastern Europe and with overseas markets. Railway services are provided with the help of local providers. As it is part of a large logistics group, it is able to act as a 4PL operator offering global logistics services in collaboration with local logistics providers.

"We would like to develop as a strategic pillar of the Trade Trans Group and, in doing so, grow as a regional rail 4PL provider of logistics services," say Trade Trans Adria.

Fruit and vegetables from Egypt

This year they are planning a project to establish a direct shipping service between Egypt and the Port of Koper. The short transit time and flexible logistics service would provide Koper stakeholders with more competitive operations on the Egyptian market and particularly the European market of fruit and vegetables, where Egyptian exporters have been leading the way for the last few years.

PROMO

Key business policies of Trade Trans Adria

- to strengthen its market position and railway services in the Adriatic region, particularly via the North-South corridor linking the Baltic and the Adriatic and the West-East corridor linking the Northern Adriatic and the Black Sea
- to grow with the help of a regional network and use its own intermodal hub in Arad to establish a link between key European logistics points and overseas markets
- to extend the services that the Trade Trans Group offers in Eastern Europe and thereby provide its customers with cost-effective and sustainable transport solutions.

Through its own development operations, efforts are being made to provide innovation-related advice, which is the basis for the creation of innovative services.

Trade Trans Adriatic services are based on:

- the creation of road, rail and maritime services tailored to customers and co-designed with local partners
- the collection of freight at selected hubs in order to form transboundary block trains
- the creation of integrated logistics services that include transhipment at port and land terminals
- the use of multimodal and combined transport solutions to ensure that customers remain competitive



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Pomurje has a strategic position in the north-east of Slovenia, in the heart of Central Europe and at the intersection of one of EU's most strategic routes. The vicinity of neighbouring capital cities and a favourable aeostrategic position make the region an important centre for transport and logistics activities.

Pomurje is also the flattest region of Slovenia, stretching for 1,337 km² along the River Mura. It has extensive arable land, fertile soil, wine-growing hills, natural surroundings and a continental climate, all of which create favourable conditions for agriculture and the production of fresh, local food.

Owing to the rich geothermal resources and the diversity and integrity of the landscape, Pomurje is a great environment for investing in sustainable tourism. A long industrial tradition, in-depth knowledge of the markets of south-eastern Europe, integrity, competence and motivation, as well as a good command of foreign languages, are some of the qualities appreciated by the foreign investors employing local people at their production facilities in Pomurje Region.

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The Slovenian economy is green. It is focused on sustainability, green technologies, and corporate social responsibility. Slovenian tourism offers authentic green experiences, including high quality local food. In addition, Slovenian companies in the fields of energy and mobility are committed to reducing the carbon footprint of this and future generations.

Tourism in Slovenia Generates Over 10% of GDP

According to the Statistical Office of the Republic of Slovenia (SURS), in the first eight months of 2019 the highest number of visitors to Slovenia from Europe were from Germany, while the highest numbers from other continents came from South Korea and the USA.

Darja Kocbek

Tourism is an important economic sector in Slovenia. Tourism's total contribution to the gross domestic product in 2018 was 12.3%, and 12.8% of all employees in Slovenia were employed in the sector. From January to August 2019, more than 3.4 million foreign tourists visited Slovenia, which is just under 8% more than in the same period in 2018, reports SURS. This accounts for 76% of all guests recorded by Slovenian tourism workers during that period. In the first eight months of 2019 Slovenia recorded just under 8.6 million overnights by foreign guests, up 4.3% on the same period in 2018.

The highest numbers of foreign guests were Germans, who accounted for 433,000 arrivals and 1.1 million overnights in the first eight months of 2019, followed by Italians with 413,000 arrivals and 910,000 overnights and Austrians with 268,000 arrivals and 693,000 overnights. According to SURS data, from January to August 2019 more than 150,000 guests also visited Slovenia from the Netherlands (163,000 arrivals and 525,000 overnights), the Czech Republic (156,000 arrivals and 425,000 overnights), Croatia (156,000 arrivals and 376,000 overnights) and Hungary (151,000 arrivals and 404,000 overnights).

Highest Numbers of Overnights in Ljubljana, Piran and Bled

The highest number of visitors to Slovenia from non-European countries in the first eight months of 2019 were from South Korea and the USA. 101,000 visitors came from each country, with guests from the USA accounting for 223,000 overnights and guests from South Korea accounting for 118,000. According to SURS data, 51,000 visitors arrived from the Russian Federation during the same period, and accounted for 224,000 overnights. According to data from the national statistical office, the highest numbers of overnights by foreign visitors were recorded in Ljubljana, Piran and Bled. In the first eight months of 2019, Ljubljana recorded 7.7% more overnights than in the same period last year, of which 96% were accounted for by foreign guests. The highest growth, 18%, was recorded in April, which is in line with the strategic objective of increasing growth outside the warmest months, said Nina Kosin of Turizem Ljubljana. In 2018 and 2019, the highest numbers of visitors to Ljubljana came from Italy, Germany, the USA, Great Britain, China, Japan, Israel, Korea, France and Spain.

Meetings Between Visitors and Locals

We are looking to attract visitors with stories about life, history, food, its ingredients and their local origin, and therefore complex experiences are being offered, so-called integrated tourism products, where the guests are "employed" for a half day or even a whole one. During that time they meet with locals from the town, learn about their history and cultural heritage, enjoy traditional cuisine and also have the opportunity to spend a night in the town, says Kosin. From January to August 2019, more than 3.4 million foreign tourists visited Slovenia, which is just under 8% more than in the same period in 2018.

In the first eight months of 2019, Ljubljana recorded 7.7% more overnights than in the same period in 2017, of which 96% were accounted for by foreign guests.



Central Market Designed by Jože Plečnik

Turizem Ljubljana also support projects that promote

Slovenia was awarded the title of European Region of Gastronomy 2021.

Bled is the main destination for the majority of people who visit it, and is also a starting point for destinations in the vicinity – Triglav National Park, Radovljica, Kropa and Ljubljana. the significance of Ljubljana and Slovenia's rich culinary tradition and contribute to the development of gastronomic tourism. They introduce new features every year, and recently began offering breakfast at the Ljubljana Market under the slogan "Let's meet at the Market". Visitors learn about Slovenia's culinary habits and typical products offered by local farmers, and are then served an authentic Ljubljana breakfast. Visitors also get to explore the central market, which was designed by the famous Slovenian architect Jože Plečnik and which is important from both the cultural aspect and the aspect of Slovenia's culinary tradition. "One of the reasons for introducing new culinary experiences was Slovenia being awarded the title of European Region of Gastronomy 2021," notes Kosin. More information at www.visitljubljana.com.

Increasing Numbers from the Czech Rep., Slovakia and Poland

Portorož and Piran, the most popular tourist destinations on the Slovenian coast, recorded 1.4 million overnights in the first eight months of 2019, which is up 1% on the same period in 2018. Foreign guests accounted for just under 1 million of those overnights, which is also up 1% on the same period last year. The highest numbers of guests come from Austria, Italy, Germany and Hungary, who outpaced the Russians in 2018. "We are seeing major growth in the number of visitors from the Czech Republic, Slovakia and Poland," says Lea Šuligoj of the Portorož Tourist Association.

In its promotional campaign for 2019, the association emphasised the wide range of five-star experiences available in Portorož and Piran and the surrounding area. It invited three Italian influencers to sample them, each of whom experienced them in their own way and presented them to their followers on their social media channels. At tourism fairs and exchanges, Portorož and Piran usually present themselves under the slogan Love Istria, together with the destinations Izola, Koper and Ankaran.





They also invest a great deal in online presentations. According to Lea Šuligoj, the website www. portoroz.si is one of the most frequently visited tourism websites in Slovenia. In September 2019 the redesigned website also received a Websi award.

Pino the Robot Provides Tourist Information 24 Hours a Day

Igor Novel, the director of the Portorož Tourist Association, said that they are using a smart speaking robot named Pino, who offers users tourist information 24 hours a day. Pino "lives" in his Facebook profile, and chats with guests via Facebook Messenger. For now he can only communicate in English. Visitors can ask him about accommodations, activities at the destination, general information about events, the weather or guided tours. He will tell you for example about his favourite hidden corners in Piran, where to find the best coffee in Portorož, the location of the nearest car park, or what is available for visitors with children.

Portorož and Piran the Main Destination for the Majority of Visitors

Portorož and Piran are the main destination for the majority of visitors, while for visitors from more distant countries, such as China, South Korea and Japan, they are just one of the destinations that they visit on their holidays in Slovenia.

Bled and Sustainable Tourism Development

To the end of September 2019, Bled was visited by 5% more guests than in 2018. The large majority of its visitors are foreign, with guests from the UK having been in first place for many years, followed by Germans, Italians and Americans. Increasing numbers are also arriving from Central and Eastern Europe, and Asians and Indians are also visiting more often. "We will continue to pay a great deal of attention to Europe," says Romana Purkart of Turizem Bled.

Bled as a tourist destination is mainly promoted through programmes of the Slovenian Tourist Board (STO) and the Julian Alps community. "We participate in the major fairs and events abroad, and for the last few years we have bet on sustainable tourism development," says Purkart.

Bled Listed on Outdooractive

As part of its online promotions the website bled.si is being redesigned, and promotion of Bled can also be found on the Outdooractive platform. Bled is the main destination for the majority of people who visit it, and is also a starting point for destinations in the vicinity – Triglav National Park, Radovljica, Kropa and Ljubljana.

Postojna Records 20% More Visitors in 2019

The people of Postojna are very satisfied with the 2019 tourism season. By the end of August they had recorded 90,000 visitors, which is up 19% on the same period in 2018. Ninety percent of the guests came from abroad, mostly from Italy, France, Germany and Spain. Slightly higher numbers of visitors in comparison with 2018 arrived above all from America and Russia, said Špela Peric, who is responsible for tourism at the Postojna Knowledge Institute.

More Visitors Seeking Authentic Green Experiences

According to Peric, increasing numbers of visitors are looking for authentic green experiences. In particular, guests who visit Postojna on their own are looking for special experiences with a local flavour. The website visit-postojna.si and social networks such as Facebook and Instagram are excellent promotional resources. Postojna features the renowned tourist attraction the Postojna Cave, so visitors come every year. Since attracting visitors to the town is not a problem, the tourism professionals who work here are more concerned with the question of what type of guests they want to attract. In this case it is undoubtedly the type of guests who value local stories and legends, appreciate the rich cultural heritage and respect the wonderful, unspoiled natural environment. They put a great deal of energy into ensuring that all of the tourism workers and the locals are the destination's primary tourism promoters.

The Galerija tourist information centre in the centre of town received the prestigious award Adventure Experience of the Year 2019, which is conferred by the specialised tourism magazine Travel and Hospitality. It received the award for its high-quality service and the authenticity of its tourist information providers.

Stories and Legends

"Stories and legends are some of the best ways to promote our destination. We are very proud of Postojna Tourism brand, whose logo was partly designed by the well-known illustrator Polona Pačnik. The souvenir collection under the Postojna Tourism brand is distinguished by original, modern interpretations of the motifs of the Proteus salamander, Predjama Castle and Erasmus of Predjama, and of course the dragon from Postojna Cave and the courageous shepherd Jakob," says Špela Peric.

The 2019 product range features guided bike tours, all of which were completely sold out. The visitors were very pleased, as they saw some of the hidden



corners that only the locals know about, and the local tour guide showed them a lot of points of interest that cannot be found in the tourist guide. Visitors are still excited to see forest creatures in their natural environment, particularly the largest predator, the brown bear. Experienced hunters who work as tour guides lead guests into the heart of the forest either on photo tours or on hikes on the many different trails. This year, the advisors at the Galerija and Postojna tourist information centres are also providing information about Europe's longest hiking route, the Via Dinarica, as the first seven stages of the trail are located in the Postojna area.

Increasing Numbers of Foreign Visitors at Terme Krka Spas

The Terme Krka group, which includes the Dolenjske Toplice and Šmarješke Toplice spas, the Talaso Strunjan coastal centre and the Otočec Hotels with golf course, generated EUR 18.4 million in the first half of 2019, which is up 6% on the same period in 2018, said Andreja Zidarič of Terme Krka. Foreign guests accounted for more than a quarter of the visits. Increasing numbers of guests are arriving from Austria and Germany, as well as Croatia, Sweden, Belgium and the Czech Republic. "We believe that there are good opportunities to increase sales in the future on the American market, in Eastern Europe and Asia," says Zidarič. The Galerija tourist information centre in the centre of Postojna received the prestigious award Adventure Experience of the Year 2019.

At Terme Krka they believe that there are good opportunities to increase sales in the future on the American market, in Eastern Europe and Asia.



The new attractions at the Dolenjske Toplice spa include a new pool with a slide, and a wide range of exercise and meditation courses that help increase mindfulness and relaxation and inspire a deeper experience of nature and living in the moment.

This year, the Rogaška Medical Centre hosted part of an international event for luxury travel organisers called Connection Wellbeing.

ROI natural mineral water will be the official mineral water of the Slovenian pavilion at EXPO 2020 in Dubai. Hormone Tests at Šmarješke Toplice Spa

The new attractions for 2019 at the Dolenjske Toplice spa include a new pool with a slide, and a wide range of exercise and meditation courses that help increase mindfulness and relaxation and inspire a deeper experience of nature and living in the moment. At the Šmarješke Toplice spa, guests can also take a hormone test for cortisol, i.e. the "stress hormone", and melatonin, the "sleep hormone", as well as a test for food intolerances. Depending on the test results, experts make adjustments to their diets, and even provide them with menus to take home. Otočec Castle has installed a castle wine bar. Guests at the castle can also enjoy guided tastings.

Rogaška Slatina and Potential in the Gulf States

Rogaška Slatina, which is a popular destination particularly for visitors from the Russian Federation, recorded a 3% increase in overnights by foreign guests in the period from January – September 2019 in comparison with the same period in 2018. Foreign nationals accounted for 84% of all guests who overnighted in the destination in 2019. They are particularly satisfied with the results on the markets of the former Soviet Union (Russia, Ukraine, Kazakhstan and Azerbaijan), which account for 59% of all overnights by foreign visitors. They see the highest growth potential on the markets of the Gulf States, which are already very well represented at various spa locations in Austria, the Czech Republic and Slovakia, and in the reviving Italy.

In 2019, the Rogaška Medical Centre hosted part of an international event for luxury travel organisers called Connection Wellbeing, and in October they hosted this year's Slovenian tourism exchange SPA-CE. "We also hosted several study groups of travel agents from our partner travel agencies, Russian journalists, and Austrian journalists and influencers, and we organised a presentation for representatives of Russian insurance companies and a study group of Ukrainian doctors. Our doctors also



participated in webinars for travel agency representatives. We are also active on social networks. We are planning on carrying out similar activities in 2020," said Manuela Kolar Škrabl of the Rogaška Medical Centre.

Sole Providers of Full Body MRI

Additional medical specialists were hired last year due to an increase in gastroenterological and cardiologic treatments. Due to the additional knowledge that the institution gained, they were able to expand their range of cardiac magnetic resonance imaging, and now plan to conduct this type of examination under sedation. "Full body magnetic resonance imaging continues to be an important part of our range of services, as we are the only ones in Slovenia who provide it, and in the year and a half that we have been offering it we have made some important discoveries which allowed for the timely continuation of treatment. We also updated our Expanded Preventive Programme for Managers, which allows the truly holistic treatment that we are famous for," said Kolar Škrabl.

They introduced new services in the area of testing gut bacteria, which makes it possible to eliminate numerous health issues. Their new programme for treating diabetic wounds will be of great service to diabetic patients. In 2020 they will open some newly renovated areas and put new diagnostics equipment (x-ray, gastroenterology and cardiology) into service. They will begin treating benign lesions in the thyroid and the prostate using laser ablation. They are also preparing to introduce new physiatry services (magnetic resonance therapy) and aesthetic plastic surgery.

Increased Demand from the USA and Canada

The Hotel Sava Rogaška records more than 90,000 overnights per year, which is more than a third of all overnights in Rogaška Slatina. More than 55% of the guests come from Russian-speaking countries, particularly Russia, Ukraine, Kazakhstan and Azerbaijan. They are followed by guests from Italy, who account for more than 20% of all guests. "There has also been increased demand from the USA and Canada recently. Based on the special programmes (Body Slim, Detox, Diabetes and ROI Medico) that we have designed on the basis of our services at the ROI Medico centre and Rogaška's unique mineral water, we also see a great deal of potential in the countries of the Near East and Scandinavia," says Stanislav Pšeničnik, managing director and owner of the Hotel Sava Rogaška.

New services this year include a special diabetes programme with 24-hour blood sugar monitoring and various activities designed to lower and manage blood sugar levels. The entire programme is based on a specially designed diet, sports activities, medical procedures and drinking treatments with multiple award-winning ROI mineral water. "We expect that 2020 will be a successful year for the promotion and sales of our ROI Premium natural mineral water, which we currently market in China, Russia, Ukraine and the Near East. ROI natural mineral water will also be the official mineral water of the Slovenian pavilion at EXPO 2020 in Dubai, from which we are also expecting many new guests for our hotels," said Pšeničnik.

The Shepherds Path at Velika Planina

By October 2019, 15% more foreign visitors had been recorded at Velika Planina than in the entire calendar year 2018. The majority come from European countries: Germany, France, Spain and Italy. There are also increasing numbers of Czech and Dutch visitors. "We see the biggest opportunities to increase the number of arrivals in European countries such as the Czech Republic, the Netherlands, Spain, Croatia, the United Kingdom, Russia and the Scandinavian countries," says Leon Keder, managing director of Velika Planina d.o.o.

Keder spoke about a new feature for 2019: the Shepherds Path interpretive trail, which has several entry points. One of the entry point signboards, with a map and the stations of the interpretive trail, is located at the lower gondola station. It can be walked in approximately two hours, and during that time you can learn a lot of interesting facts about life at Velika Planina, the people's customs and habits, the architecture, the shepherds' lifestyle and the natural attractions that Velika Planina has to offer.

"Winter also offers foreign tourists the fantastic adventure of night tobogganing. Hiking on snow-covered Velika Planina is made easier for guests by providing them with snowshoes. In the 2018/2019 winter season we opened a new children's winter park, which will also be open during the coming winter season. We are also preparing cross-country skiing trails," says Keder.

Velika Planina is usually visited by one-day visitors. However, renting huts similar to those used by the shepherds, but outfitted more luxuriously, is becoming more and more popular. This allows visitors to spend several days on the mountain, experience the life of the shepherds, and enjoy comfort in the huts. We are making more huts available every year; there are currently 15. Based on conversations with foreign





visitors, Keder believes that Velika Planina is one of the top four most popular destinations in Slovenia.

Maribor and Partnership in the Development of the Drava Cycling Trail

From January to July 2019, tourism workers in the Maribor – Pohorje area recorded 14% more overnights and 14% more visitor arrivals than in the same period in 2018. Foreign guests accounted for 77% of those overnights. Slovenia's second-largest city, Maribor, recorded 8% more overnights and 6% more visitor arrivals from January to July 2019 than in the same period in 2018. Foreign guests accounted for 87% of those overnights.

"The highest numbers of overnights were accounted for by guests from Croatia, Germany, Serbia, Austria, Poland and Italy. From more distant countries by far the highest number of overnights was recorded by guests from China and the USA," said Monika Jurišič Hlevnjak of the Maribor – Pohorje Tourism Board.

The main promotional activities in 2019 include the city's partnership in the development of the Drava Cycling Trail. In 2020 they are planning to continue intensive promotional activities on digital advertising channels, and are also planning to update their presentations of the city's attractions via virtual and enhanced reality. In line with the strategy at the national level, the Maribor – Pohorje Tourism Board will also promote the development of boutique, five-star and sustainably-oriented tourism products, particularly in the area of wine and fine dining. In September they launched a new website, www. visitmaribor.si.

Slovenia Increasingly Popular in Germany and France

Kompas travel agency says that Slovenia is becoming increasingly popular among Germans and particularly among French tourists, and more and more Czechs, Hungarians and Poles are becoming interested in visiting Slovenia. Kompas continues to bring the largest numbers of visitors to Slovenia from the By October 2019, 15% more foreign visitors had been recorded at Velika Planina than in the entire calendar year 2018.



a great deal in the markets of Southeast Asia, Japan and China, and opened a new branch office in Malaysia in 2019.

Benelux countries, Israel and the USA. They have also recorded the highest growth in visitor demand on the American market, particularly for trips where they visit Slovenia in combination with other countries. "We are expecting the largest increases in the number of guests in 2020 from Germany and France, and we are also investing quite a bit in the markets of Southeast Asia, Japan and China," says Head of Incoming Vlado Tance.

Kompas carries out an average of 50 promotional activities every year, including participating at trade fairs, Slovenian tourism workshops, and regular sales avenues on key markets. In 2020 together with a French partner they are planning Slovenian Evenings in France. "In 2019 we also opened a new branch office in Malaysia in order to promote our products in Southeast Asia, and we also have sales representatives in Japan, China and Vietnam," says Tance.

Kompas develops and markets programmes for its customers that include outdoor activities, gastronomy, oenology and traditional crafts, for which there is quite a bit of interest particularly in Germany and France. According to data from the Slovenian Tourist Board (STO), 2018 was the fifth year that a record was set in the number of arrivals and overnights by foreign visitors.







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Slovenian Food Combines Tradition and Modernity

A rich selection of food products enhances Slovenian cuisine, and there are growing numbers of small, rapidly growing companies that are inspiring people with craft beers, local wines and other specialities. Nina Šprohar

Perutnina Ptuj's Natural Chicken Cutlets Are a Delight

Besides being one of the rare vertically organized systems in the world, Perutnina Ptuj has also introduced a new standard of breeding which observes the latest findings on animal welfare. Meat and meat products from chickens bred under this standard (PPR) are present in the market under the PP Natur Premium brand. "Currently we are introducing three new products under this brand which are also produced with new packing technology," say the company. "As our focus is on animal welfare, we plan to introduce new value added poultry products from chickens that are bred in the improved living conditions," they add. Perutnina Ptuj is currently exporting to more than 20 markets in the European Union (EU), USA and other countries. "For the near future our focus is on strengthening our position in the markets where we are already present in Central and Western Europe and also on conducting preparations to enter the Chinese market," they say.

Delamaris Offers Fish Preserves as a Healthy Alternative to Fast Food

In the Delamaris range of products, customers most often go for the fish with vegetables, which include the best known items Izola Brand, Weekend and



Picnic, while Delamaris has offered a very wide range of fine food items throughout its history. Store shelves feature canned mackerel fillets, tuna salad and tuna steak, anchovies, sardines and various flavours of fish pâté from Delamaris. One of the secrets of the unique fish with vegetables in tomato sauce is the fermented vegetables, which maintains the flavour and firmness.

The quality of Slovenian recipes is recognised in 23 markets around the world. Slovenians eat as many as 9.78 million cans of food a year. They export around 50% of their products to foreign markets, mainly to Austria, Bosnia and Herzegovina, Croatia and Switzerland. "In the future we plan to grow in the North Macedonian and German markets, and we are also in talks regarding more 'exotic' markets such as Kuwait, Zimbabwe and Eritrea," say the Delamaris managers.

Nimrod Expanding Its Range of Game Meat

Nimrod is the largest Slovenian exporter of game and one of the largest exporters of game in Europe. Their products are present in top-notch restaurants and on shelves of well-known retailers. While marking their 25th anniversary they say they want to strengthen their direct performance on selling and buying European markets. They have four different types of customers - for retail, horeca, industry and pet food.





Perutnina Ptuj has introduced a new standard of breeding which observes the latest findings on animal welfare.

Delamaris has been operating for more than 140 years. Their ready-made fish dishes offer a healthy alternative to fast food.

Nimrod is the largest **Slovene exporter of** game and one of the largest exporters of game in Europe.



The newest products are Skin trays for the Grill Wild

game segment. "At the moment we serve Slovenia,

Italy, Hungary, Croatia, Austria, Germany, Belgium,

the Netherlands, France, Switzerland and Norway,

Sweden and Denmark," they add.

product range.

however, our goal is to enter the markets of Romania,

LUŠT Tomatoes Inspire Top International Chefs

tomatoes in Slovenia. Under the recognisable LUŠT

brand it offers various types of fresh tomatoes. "Our

absolute classic is the vine tomato in both large and

small sizes, while our Luštek-miks range is popular,

ous colours and flavours," as they describe their top

since it is a mixture of small varieties of tomato of vari-

The great majority of their tomatoes are sold on

the domestic market. They are present in all the retail

systems in Slovenia, and plenty of people come to

visit their Luštna domačija homestead (a tiny store

at their home location in Renkovci), while the little

they export goes mainly to the markets in Croatia,

Hungary and Italy. "Recently we have had interest in

our products from various 'starred' chefs, from France

all the way to Dubai. We are particularly proud of this,

since these chefs are looking for special flavours. To produce a tasty tomato is the highest objective, which our entire team is pursuing," the company stresses.

The company Paradajz is the biggest producer of

The company Paradajz is the biggest producer of tomatoes in Slovenia.

The two famous beers Laško Zlatorog and Union Svetlo reflect the passion for quality at the brewery Pivovarna Laško Union.

> Slovenia is also seeing the growth of smaller craft breweries.



Pivovarna Laško Union Offer Even More Non-Alcoholic Beverages

The Laško Union brewery, the biggest beverage producer in Slovenia, boasts the two famous beers Laško Zlatorog and Union Svetlo. Union supplements its range with Radler, a kind of shandy, and Laško with a non-alcoholic malt beverage, while their applebased Jabolčni Tat gives them a presence in the cider product category. With drinks bearing the brand name Izbira 0,0 % (0.0% Choice) they have enhanced the range of beer and shandy with low or zero alcohol content. "We are also supplementing the product portfolio with the refreshing Sola non-alcoholic drinks and Zala natural spring water," the company adds. In the past three years they have launched in the domestic and international markets more than 60 new products under their own brand and under brands from the Heineken family, and have introduced some successful innovations. They overhauled the shandy category and added to it two new flavours: cucumber in an alcoholic variation and 0.0 grapefruit. In the beer category there are three new products – Laško Golding, Laško IPA and Union Pivnica Selection Red Ale, the company explains. In the future they plan to expand the 0.0 portfolio both for 0.0 beer and for beer and malt mixtures. They will also continue the development of beer styles and categories within the Union Pivnica Selection portfolio.

Today exports account for nearly 40% of all the company's production volume. "The largest share of exports is focused on the neighbouring markets of the Adriatic region, but we are also boosting our presence in the markets in Italy, Austria, Hungary and Greece and even Switzerland," they say.

Pelicon Creates the First Real Slovenian Tonic

Slovenia is also seeing the growth of smaller craft breweries. One of these is Pivovarna Pelicon. They have a lot of new features, something almost every week. "We just brought out our seasonal beer Harvest Moon, made with fresh picked and non-dried Slovenian hops. In the next few weeks we will be bringing out a limited series of bottled beer brewed last year, which had matured for several months in a wine barrel. On the first of December, for the seventh year running, we are bringing out our Winter beer, a dark brew with winter spices, hand wrapped in festive white paper," they promise.

In 2019 they launched the production of sodas, featuring the creation of the first real Slovenian tonic – Hoppy Tonic for mixing with gin and a lemonade with hops called Hoppy Collins. The largest amount of Pelicon beer is drunk at home in Slovenia, while exports go to Italy, Croatia, Switzerland, Austria and Hungary.



Klet Brda Raises Added Value

Klet Brda (Brda Cellar), which brings together 400 families, is the biggest producer and exporter of Slovenian wines. "Our mission is to express in wine the unique quality of the Goriška Brda terroir and through successful marketing to contribute to the development of this sector and the prosperity of the local people," they affirm.

At the end of 2018 they launched a new brand of wines in the highest quality class, de Baguer, which matures in the historical cellar of Dobrovo Castle. "The de Baguer chardonnay-sauvignon blanc and merlot-cabernet franc wines are a response to the challenges of the latest cuisine," say Klet Brda, adding that the "oenologist is not looking to find in them a strong body but rather clear varietal aromas and a mineral quality that best expresses the Brda land." In the future they want to give greater emphasis to communicating the sustainable orientation of their cooperative, both in terms of sustainable production of grapes by the vineyard managers and in terms of wine production in the cellar. For now they are exporting to 26 countries, among which the main customers are the USA, China, Japan, the UK, Germany, Italy and Poland.

Pullus Wines from Ptujska Klet

Through its Pullus range of wines, the company Ptujska klet (Ptuj Cellar) is striving to create a synonym for a distinct varietal aroma, full balance, drinkability, health and the highest quality. This is confirmed by more than 250 commendations and medals received over the past decade at prestigious international wine competitions (Decanter, AWC Vienna, Concours Mondial de Bruxelles, Mundus Vini, SFWC S. Francisco, Finger Lakes and more). Alongside wines they also offer spirits, and a new feature in 2019 is the wine cocktails in cans – SpriTzar. They already have a presence in markets of the USA, China, Austria, Germany, Czech Republic and Belgium, and in the future they want to strengthen their line of drinks in Canada.



JNK to Offer Orange Wines in the Future

Behind the JNK brand stands a small producer of natural and high-quality wines from the Vipava Valley, Kristina Mervič. Her products are most prized by those looking for something special. She currently offers white and red bottled wines, but she will start producing orange wine. Her wines are already sold in Italy, Czech Republic, the UK, Belgium and Spain. "Soon I am also planning exports to Denmark, Switzerland, Poland and to two states in the USA," says Mervič.

Žito Offers Healthy Flakes and Crackers

In the area of bakery and confectionery products, one of the leading companies in Slovenia is without doubt Žito. In addition to the above, under the same brand name they produce frozen food, under the Zlato polje and Natura brands they produce milled products, flakes, pasta, rice, porridge, meal, legumes and flour, under the Maestro brand spices, under Gorenjka chocolate, and they also produce Šumi and Herba sweets and within the brand 1001 CVET they offer herbal, fruit and black teas.





Behind the JNK brand stands a small producer of natural and highquality wines from the Vipava Valley, Kristina Mervič.

"In 2019 we brightened up store shelves with Breakfast Bread, Žito Protein sliced bread and glutenfree Crispy crackers in various flavours – Classic, Protein, 5 grain and Quinoa. We also designed four new flavours of our popular Sport müsli breakfast flakes and new oat porridges," they list off.

2itc

The development of new products also reflects how they are keeping pace with food trends and responding to consumer needs, by taking into account the trends of increasing naturally present functional ingredients and introducing the use of legumes and products made from organically produced ingredients. They are also adapting to export markets by obtaining various certificates such as the Halal certificate.

The biggest export markets for Žito are Italy, Germany, Spain and Austria, along with countries in the Adriatic region, while via the Podravka Group they are reaching more distant markets such as China, Russia, Japan, Australia, Saudi Arabia, Israel, the USA and Canada. Exports account for around a quarter of sales, and their most popular export product is buckwheat bread with walnuts.

Don Don Combines Tradition with Modern Recipes

Another company operating in the baked goods sector is Don Don, which has a portfolio including the brands Pekarna Grosuplje and Tvojih5minut. The Pekarna Grosuplje bakery offers various types of bread and rolls, along with pastries, and under the brand Tvojih5minut they offer a range of fried Klet Brda brings together 400 Brda vineyard families. At the end of 2018 they launched a new brand of wines in the highest quality class, de Baguer, which matures in the historical cellar of Dobrovo Castle.

Ptujska klet has received more than 250 commendations and medals over the past decade at prestigious international wine competitions.



In the area of bakery and confectionery products, one of the leading companies in Slovenia is without doubt Žito.

extended shelf life and packaged rolls and sliced bread. "At Pekarna Grosuplje we combine tradition with modern recipes. A large part of our bread was developed through traditional, long processes of preparing dough with the addition of natural sourdough, so this bread has no extra additives," they explain. They also make up products with yeast starter or

'pre-dough'. At the beginning of 2019 they offered Super Bread, and the latest product bearing the Pekarna Grosuplje brand is the LCHF Zdravko bread, a

pastries, packed sandwiches, packaged bread with

They are returning to some old technologies such as using a yeast starter, extended fermentation and the use of sourdough.

cipally of seeds, without yeast and additives. "For the Tvojih5minut brand we are supplementing the sandwiches with new flavours, and we are also planning to enhance the range of sliced bread," they promise. They are present in the markets of SE Europe, and are also planning to enter other markets.

product with a very small amount of flour, made prin-

Incom Offers a Rich and Exciting Selection of Ice Cream

Don Don, which also operates in the baked goods sector, has a portfolio including the brands Pekarna Grosuplje and Tvojih5minut.

> Slovenian companies Incom and Ljubljanske mlekarne offer outstanding ice cream and dairy products, respectively.

Slovenia can also produce outstanding ice cream. When someone asks the company Incom, what do they offer, their answer is that a better question would be, what don't they offer? "We have roughly 600 different ice cream products due to our presence on various markets and cooperation with different retailers. But speaking broadly, we produce cones, sticks, tubs and some special products like mousse shots, winter desserts, bars, and ice cream cakes," say the company, whose focus is on innovative and special products.

In 2019 they've gone through a major rebranding project which included their hero products - LEONE and Leone AL!VE tubs filled in layers, Leone AL!VE protein sticks and LEONE Unicorn Cones. They say that the Unicorn Cones were a great hit. "We've got some breakthrough innovations to be launched in 2020, which will shake up the market," they promise. They are already present on more than 40 markets and their main target for 2020 is China. In the future they will target the Southern Hemisphere in order to balance the seasonality of ice cream sales.

Ljubljanske Mlekarne Launch Icelandic-Style Yoghurt

The Ljubljanske Mlekarne company is the biggest producer of dairy products in Slovenia. They produce fresh and long-life milk, yoghurt, quark, cream, cheese and ice cream. "Our key products for foreign markets are principally long-life milk and various yoghurts, and we are especially proud of Siggi's, an Icelandic-style yoghurt we launched in 2018 and which we are making for eight European countries," they confirm. They are present mainly in the markets of SE Europe, in Sweden, Greece and Italy, although in total they export to more than 40 countries worldwide. "As regards doing business internationally, Ljubljanske Mlekarne are involved with the French group Lactalis, where we take advantage of the synergy from membership in the biggest dairy industry in the world," they explain.



Photo:Ljubljanske Mlekarne

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Challenges in 2020:

Enver Šišič, Perutnina Ptuj:

In 2020, we will focus on increasing our market shares and production capacities in the key markets of Perutnina Ptuj Group, as well as implementing optimisation and automation of production processes in the Group's production facilities. We also plan to carry out investment projects related to ecology within the Group.

Andrej Smodič, Lušt:

The goal in 2020 is to produce high quality products with distinctive flavours that will continue to delight our customers and to complete upgrades that will ensure the year-round presence of our products on the market.

Tomaž Žnidarič, Ljubljanske mlekarne:

We have a challenging year ahead in 2020: the price of our main raw material, milk, has reached its highest level in the last four years, while the prices of energy have grown and labour costs are set to rise. This means our challenge will be how to maintain competitiveness in export markets, where we sell half of our production volume. Our key advantage remains high quality, which is recognised by customers throughout the world.

Silvan Peršolja, Klet Brda:

Rebula, which is our most important and most recognised variety, is produced in the Brda border area and in the Italian area of Collio and Colli orientali. Just as the associated Brda wine makers are more successful in promoting Rebula abroad, in cooperation with the Italian wine makers from Collio and Colli orientali we would be even stronger. For this reason we are striving to join together with Italian producers in raising the value of Rebula, which is cultivated on hilly ground and is thereby different from the Rebula grown in the lowlands, which is certainly more affordable but not comparable in quality. This will without doubt be our biggest challenge in 2020.

Alenka Mozetič Zavrl, Don Don:

The biggest challenge for the entire Don Don group in the coming period will be further industrialisation of production, whereby we will increase capacities including in segments where up until now we have not been competitive and in this way we will enable continued growth of sales.

Boštjan Jerončič, Incom:

Firstly, our biggest challenge is Brexit, since our biggest customer is based in the UK, but we are sure we will find our way around it – if it happens at all. Secondly, balancing out production and turnover between summer and winter months, and thirdly, entry into the Chinese market. Sounds like a big scoop of challenges, but for incom Leone, the sky is the limit.

Zooullis Mina, Pivovarna Laško Union:

In 2020 Pivovarna Laško Union will continue to pursue five key strategic orientations deriving from the Heineken company, specifically: growth in income, increasing efficiency, sustainable development, employee involvement and development and digital connection.

Matej Pelicon, Pivovarna Pelicon:

In 2020 the greatest challenge will be increasing production and replacing the filling line. Of course this will lead also to an expansion of the team and business network and the development of new products. We look forward to all the challenges, since we do all this because we love beer.

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Many Enterprises Have Sustainable Mobility Solutions

As suppliers involved in the development of sustainable mobility, enterprises in Slovenia follow the requirements of automotive companies as well as urban and transport infrastructure development for the introduction of sustainable mobility.

Darja Kocbek

According to Violeta Bulc, the European transport commissioner in the period 2014-2019, Slovenia has a large number of forward-looking companies involved in micromobility, which is a sub-section of sustainable mobility, and is also very advanced in its development of autonomous mobility technologies. Within the European Union, Slovenia is, together with Austria and Hungary, a virtual area for the testing of green and self-driving technologies.

Danilo Rojko, managing director of TBP Tovarna bovdenov in plastike, told us that, as a development supplier to the automotive industry, the company follows trends in the industry and therefore also developments in the field of sustainable mobility. "Of course, this does not encompass merely the transition to electric vehicles or the replacement of vehicles with classic internal combustion engines, but rather a change to the entire concept of mobility. Urban and transport infrastructure development is part of this concept, as are changes to mobility-related habits," he explained.

The TBP company are therefore searching for new opportunities in the development of electric vehicle components, as well as in the development of new conceptual forms of transport within the scope of sustainable mobility. These are adapted for use in city centres where vehicles with internal combustion engines are no longer used or will in future no longer be allowed, or where the movement of classic delivery vehicles, even of the electric type we see today, will be restricted or even prohibited. To this end, TBP are establishing a special development department where operations are already partly under way to develop different models and modes of transport.

Sustainable Mobility Is Also Social Responsibility

Adria Mobil explain that holiday vehicles are a special vehicle segment and compete first and foremost with other tourist products. From this point of view, they are among the greenest forms of leisure activity. If we look at the cycle as a whole, they emit lower levels of carbon dioxide than many other travel combinations. On the other hand, they would like to see faster moves towards sustainable mobility in the field of development. However, as holiday vehicle manufacturers, they are dependent on suppliers of base vehicles – and the increase in weight resulting from the requirement to electrify the powertrains means that sustainable mobility will not become part of the holiday vehicles segment in the near future.

"We are actively involved in the area of social responsibility through general sponsorship of the Adria Mobil Cycling Club, as well as through support for the development of bike-sharing schemes and similar activities that create new possibilities for the development of sustainable mobility," explains Damir Dominić from Adria Mobil. Slovenia is, together with Austria and Hungary, a virtual area for the testing of green and self-driving technologies.

Adria Mobile started the "eco motorhome" project a few years ago with the aim of seeking out materials and technological possibilities for developing and manufacturing sustainable holiday vehicles.



TBP are focusing mainly on those markets on which sustainable mobility, green logistics and the strategic introduction of environmentfriendly vehicles are already routine occurrences.

Hidria are among the leading corporations in Europe and the world for automotive and industrial technologies. They started the "eco motorhome" project a few years ago with the aim of seeking out materials and technological possibilities for developing and manufacturing sustainable holiday vehicles. Despite the fact that there are restrictions in this regard, they are endeavouring to develop and manufacture every product with an eye on the ecological aspect, and thereby to reduce the waste and emissions produced during the holiday vehicle manufacture process. "At Adria Mobil we are, of course, also investing in the acquisition of new knowledge in this field, thereby upgrading our over 50 years of experience in the development, manufacture and marketing of holiday vehicles," says Dominić.

Creating a Carbon-Neutral Society in the Area of Delivery

According to Danilo Rojko, some TBP products are currently in the development and testing phase and are being unveiled at sustainable mobility fairs in Europe and beyond. "These products are oriented towards creating a carbon-neutral society in the area of the delivery or transport of smaller packages in city centres," explains Rojko. The products they are developing are designed to cause fewer harmful exhaust and noise emissions and to take up less space, which is at a premium, in city centres.

TBP are keen to place their products and concepts on European markets first, as they are the markets they are most familiar with, given their proximity. "We are familiar with their laws and, in particular, their trends," says Rojko. TBP are focusing mainly on those markets on which sustainable mobility, high awareness of the use of green logistics and the strategic introduction of environment-friendly vehicles are already routine occurrences. These markets are Scandinavia and the countries close to them. "Of course, we realise that we are not alone and that there is considerable competition. Only after that will we focus on other markets, including outside Europe, where green logistics is still more or less in its infancy. This is a marathon, not a sprint," says TBP's managing director.



As an explicitly export-oriented company, Adria Mobil have a presence on more than 30 markets and on three continents (Europe, Australia and Asia). "In addition to seeking out opportunities for entry onto new markets, where one condition is, of course, suitably developed infrastructure at the destination and adequate scope of demand for such products, we are also focused on expanding the volume of operations on existing markets, where, also because of the increasing importance of sustainable mobility and green tourism, caravanning is gaining a new lease of life and therefore new possibilities," says Dominić.

As their competitive advantages, Adria Mobil highlight their innovativeness, quality and premium design. These are also elements that distinguish Adria's products from the competition. They are keen to be more efficient in transferring innovative projects from the idea stage to the market in the shortest possible time. "Adria covers the entire range of vehicles for all customer segments, and has an extensive sales and servicing network of more than 500 sales outlets capable of delivering consistent and high-quality user experiences," explains Dominić.

In contrast to its rivals, TBP are able to offer tailormade solutions, which also means that, because they are relatively small, they can adapt to the wishes and needs of the individual customer. "At the same time, we make use of our considerable experience in large serial production and quality assurance, which reduces the final product price, creates customer satisfaction and enables rapid response to the needs of the market," explains Danilo Rojko.

TBP's main products are components and modules for first installation exclusively for the automotive industry. These can be roughly divided into Bowden cables, plastic components, coated components and metal components. TBP's main product line currently comprises Bowden cables that perform various functions within vehicles.

The company's business results this year are in line with expectations and the strategic plan. "The forecasts of economic specialists and the position on the car market means that we can expect a reduction in orders and therefore a reduction in income in the last quarter of 2019. It is difficult to say at this point how significant this fall will be. In any case, if there is a recession, or at least a 'technical' recession, the targets will not be met in full. That said, they will not deviate much because of the short time period involved," says Rojko.

Holiday Caravans the Main Product Line

Damir Dominić of Adria Mobil says that the main Adria product line comprises holiday caravans, motorhomes and vans (converted minibuses), supplemented by mobile homes and "glamping" tents, which have, in recent years, become an ever-more popular form of campsite accommodation.

Regarding business operations this year, he says that they have set ambitious operating targets and are happy to announce that they will be met, thereby strengthening Adria's market share on the European holiday vehicles market, which fluctuates around the 6.5% mark for both product lines, the holiday caravan and the motorhome.

Developing Innovative Relays for Engine Cold Start Systems

Hidria say that they are among the leading corporations in Europe and the world for automotive and industrial technologies, and highlight the fact that they have developed innovative relays for engine cold start systems that make today's vehicles operate more efficiently. These systems enable the air heater in an internal combustion engine of emission standard EURO6 to be monitored and controlled. They were awarded a silver medal at this year's Innovation Day, which is organised by the Chamber of Commerce and Industry of Slovenia (CCIS).





Cimos Develops Complex Turbo and Powertrain Modules

At Cimos, which was founded in 1972 and has been an important member of TCH Group since 2017, they ensure that they are able to develop complex turbo and powertrain modules that meet the high technological standards of today's automotive industry. Their advantage is the capability to offer a complete range of services, from product conception to final production. Years of experience, state-of-the-art equipment and efficient production facilities, combined with highly professional and skilled employees, make Cimos a reliable partner.

The company's goal is to become the leading supplier of turbocharger components. In addition, they would like to become one of the best suppliers for specific powertrain products in Europe. Cimos are able to develop complex turbo and powertrain modules that meet the high technological standards of today's automotive industry.

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Our main activity is international road transport. We also offer regular and preventive maintenance of personal and other cargo vehicles, vehicle repairs, washing, replacement of tyres, fuelling and fuel sale, and vehicle parking. In addition, we provide storage services that include temporary storage for groupage cargo and storage for our customers.

The company is focused on the Western European market, mainly Germany. We transport palletised goods and bulk cargo of all kinds. Our fleet is fully equipped for the transport of dangerous goods (ADR) and we specialise in the transport of all types of waste.

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STORAGE

TRANSPORT OF DANGEROUS GOODS AND ALL TYPES OF WA<u>STE</u> The ebm-papst Slovenija company point out that the use of reusable materials free of harmful substances is the company's first requirement when developing new products.

Guiding Principle of Development is the Lowest Possible Environmental Impact

The ebm-papst Slovenija company's aim is to become the leading manufacturing and development location within the ebm-papst concern for small-scale motors, pumps, ventilators and components for household appliances. They highlight the development of motors and ventilators that produce the lowest possible levels of noise pollution. The use of reusable materials free of harmful substances is the company's first requirement when developing new products. At the micromobility conference organised by the European Commission in October 2019, several Slovenian companies unveiled vehicles that they had developed themselves. The conference offered participants the chance to try electric scooters, bikes, a flying taxi and an electric airplane. Docking systems for electric bikes and scooters featuring locking and battery-charging infrastructure were also on show.





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Solutions for Saving the Planet with the Help of the Sun and the Earth

In the future, the growing needs for energy will have to be met at the same time as the harmful effects on the environment are reduced. If we really want to save the planet, we will have to be "green" and "smart" at the same time.

Andreja Šalamun

Petrol Has Solutions for Reducing Consumption and Optimising Needs

Petrol, Slovenia's largest energy company and largest importer, say that electricity needs will certainly increase in the future in all segments – in industry as well as in transport, heating, cooling etc. "New sources of renewable energy will be required and are the only real answer if we want to save the planet," they say.

"Petrol's mission lies in offering energy and environmental solutions that tackle both challenges, as our activities are focused mainly on reducing energy consumption and optimising needs, where we provide the required energy predominantly from renewable sources." They have embarked on numerous energy-efficiency and renewable energy projects, and are also involved in sustainable mobility and sustainable urban development. They see the circular economy as an opportunity for new business models and greater material efficiency, and a chance to create new green jobs.

The company stress that practically all their energy and environmental systems solutions can be classed as green energy or environmental protection solutions. For example, they generate electricity and heat from renewable sources. "We want to be producing 500 GWh of electricity annually from renewable sources alone by 2025. This will be sufficient to supply 100,000 final customers," they say.

They are also offering partners the "DISSy" (Digital Intelligent Smart Systems) comprehensive district heating solution, which enables a sustainable business model to be established and a district heating system to be developed as part of smart urban infrastructure, renovating public lighting systems (as well as interior and exterior building lights), re-using industrial process water and water from automatic car-wash facilities, carrying out the comprehensive technological energy renovation of buildings, and providing solutions for alternative and e-mobility (biofuels, LPG, electricity).

The key markets for Petrol's energy and environmental systems are Slovenia and SE European markets (particularly Croatia, Serbia, Romania and Bulgaria); they also have projects under way in Italy, Austria and several countries in Eastern Europe.

BISOL Group Present on More Than 90 Markets

The BISOL Group are the only Slovenian mass producer of photovoltaic modules, and are one of the leading companies in Europe in this field. In addition to modules, they offer a variety of aluminium and polyethylene support structures for solar power units, hybrid and off-grid solar systems, solar lamps and other solar components.

In 2019 sales should increase by around 20%. The company are consolidating their leading position on several of the most important European markets, as well as expanding into new ones. "In 2018 and 2019 we made extensive investments in the updating of our production equipment and increased our production capacities by approximately 70%. We have also made excellent advances in our support structure solutions, and are awaiting the official launch of a new generation of support structures. We have unveiled higher-performance modules with higher peak power, and a new series of BISOL Duplex photovoltaic modules is just about to come out. We have upgraded our range of modules for niche markets with modules containing coloured glass," say the company.

Petrol see the circular economy as an opportunity for new business models and greater material efficiency, and a chance to create new green jobs.



The BISOL Group are the only Slovenian mass producer of photovoltaic modules, and are one of the leading companies in Europe in this field.

The BISOL Group sell products on more than 90 markets. Although most of their sales are still in Europe, their share of Arabic and Asian markets is growing every year, and they are banking on future success in South America. They are keen to maintain and strengthen their position in Western Europe, focusing on bolstering their activities on those markets they have entered in recent years (including former Soviet countries, SE Asia, the Middle East and South America) and on the more forceful exploitation of new opportunities. When seeking new partners, the markets of the G20 are important to the company from a strategic point of view. As they point out, these are countries where economic growth is, in most cases, above average and where there is, consequently, a large energy deficit; moreover, the vast majority of these countries lie in areas with an abundance of sunshine.

Among the company's medium-term plans are the expansion of production to an additional location and the reintroduction of more active investment in their own solar power plant projects, which was a feature of the company's operations at the start of the decade. They say that their products have been incorporated into thousands of projects, and that they have been working with the large majority of their partners for years, whole decades or even longer. "They include energy multinationals such as ENEL, Engie, EDF and CEZ, some of the largest global distributors of electrical material (Sonepar, Rexel, Marchiol, etc.) as final customers, as well as some of the most globally recognised brands, including Volvo, BMW, IKEA, ALDI and Lidl," they explain.

Kronoterm Unveil a New Generation of Heat Pumps

The Slovenian Kronoterm company, which manufactures heat pumps, is able to boast that their heat pumps have been called "the most efficient in Europe" on multiple occasions. In 2019 they unveiled a new heat pump that is environment-friendly in terms of both carbon footprint and noise pollution reduction. "We are very innovative in pump development, ensuring that the products are efficient, economical to run, environment-friendly and useful – all of which is confirmed by the new generation that we presented to the market in September 2019," say the company. They are the first in Europe to use a new coolant that ensures that the pump's potential contribution to global warming is 78% lower.

They point out that the future lies in smart heat pumps networked into the central heating system so that the user merely has to set the desired room temperature. They have used more easily degradable materials that are more environment-friendly and can be recycled. They see industrial users and energy contractors in the household consumption market as comprising their main customer base.

Kronoterm have their own development laboratory in which they adhere to the relevant environmental parameters as dictated by legislation, conditions



on the market, and their own desire for better and ever more efficient, smart and useful devices. When developing the "Adapt" heat pumps, they focused in particular on listening to all stakeholders involved in the planning, sales, installation, start-up, use and servicing processes.

One important major project is the heating of the Lušt greenhouse operated by the Slovenian company Paradajz (see page 100). "We have produced a system with 2 MW of power that uses waste geothermal energy from geothermal boreholes as its energy source, cools the tomato warehouses and heats 9 ha of greenhouse space. The investment was returned in one year," say Kronoterm, who also point out that they carry out projects like the one above by looking to tailor their solutions to individual challenges and needs.

Almost Half Is Exported

The Slovenian market accounts for around 60% of Kronoterm's sales, with the remainder being exported mainly to nearby countries. "Italy is very much opening up to us, as are Switzerland, Austria, Ireland, the Netherlands, the Czech Republic and neighbouring Balkan countries," say the company, who add that private consumers and those involved in housebuilding (hot water heat pumps and heat pumps for heating smaller buildings) account for the biggest share of their activity abroad. In the last two years, the market for commercial, industrial solutions, involving 30 kW heating systems with up to 3 MW of thermal power, has seen continuous growth.

"We have loads of ideas, which means the challenges will be considerable, mainly in relation to the incorporation of heat pumps into larger systems and their operation. Development is moving towards having devices that are as easy as possible to install, The Slovenian Kronoterm company, which manufactures heat pumps, is able to boast that their heat pumps have been called "the most efficient in Europe" on multiple occasions.

Electricity needs will certainly increase in all segments - in industry, transport, heating, cooling and so on - which means that new renewable energy sources will be needed.



BISOL sell products on more than 90 markets. Their share of Arabic and Asian markets is growing every year, and they are banking on future success in South America.

that can be serviced in line with the 'plug and play' principle, that are as universal as possible regardless of heating system, and that meet the needs to the requisite extent," say Kronoterm. Another challenge is ensuring smarter operation of the whole system.

Increasing desire for energy autonomy

Over the last decade, photovoltaics have trod an interesting path: from their initial installation in larger electrical power plants to their introduction into numerous smaller-scale projects, and from the transmission of all generated electricity into the grid to today's increasing consumption at the location itself. During this time, it has been transformed from one of the most expensive to one of the cheapest renewable energy sources. "In the past, it was dependent on subsidies and these were the main reason for investment. Now it has already become almost an economic imperative, as individuals and companies are investing in it in order to save on energy costs," says Marko Poličnik, vice-president of the management board of the BISOL Group. He adds that they sell most of their production on markets where there is no longer virtually any financial support. He believes that the gap between the market price of electricity and that of solar energy is strengthening in favour of the latter and that the desire for energy autonomy will only increase. "Where investments in renewable energy used to be founded on perceived added value, today it is becoming ever more indispensable for both progress and growth," he adds.

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Creative

The Slovenian economy is creative. It recognises and promotes human talent and the creativity of professionals who create added value in companies. There are a number of hidden gems dotted around the country, aiming at tailored solutions for the most demanding global customers. One would be surprised at how many creative solutions in relation to special materials and intelligent living were found by Slovenian innovators, trying to make everyday life easier for everyone.

Tailor-Made Products

From extremely high-power cameras and biometric documents to gear wheels.

Barbara Perko

Up to 700 High-Quality Images in One Second

The Optomotive company develops, manufactures and sells cameras for machine vision applications. Their embedded cameras with enormous computing power are capable of image pre-processing in real time, and are thus most suited for demanding highspeed applications. They are tailored and equipped with different image processing cores, such as triangulation, blob-detection, edge-detection, RLE compression and the fastest JPEG compression on the market. "The camera itself carries out the basic image processing procedures. Our camera determines what should be visible in the image, which allows us to avoid two bottlenecks: the interface bandwidth and the computer's computing power, so we are able to obtain images in real time," says the company's managing director Barbara Rakovec Gorkič. Since the images are processed in the camera itself, they can offer very high image capture speeds and high resolution. "We have built a camera that can capture 700 images per second at 2.8 megapixels," says Rakovec Gorkič.

Their cameras are therefore used to scan rails used by high-speed trains. The camera is built into a special device installed between the wheels of passenger trains which scans the tracks as the train passes over them. Their cameras are also used in physiotherapy and sports. They place markers on a person's joints, and then track the person's movements using sixteen



cameras placed at various angles. In this way they can determine whether patients have correct mobility after head injuries. They are also used in sports technique analysis.

The majority of their cameras are used for 3D laser scanning, surveillance, robot guidance and artificial intelligence. In the latter category they are introducing a new feature for 2020, an AI camera, which they think will be a very interesting product.

Optomotive generates more than 90% of its sales on foreign markets, with its largest market being Scandinavia, followed by the EU, Israel, the USA and Canada. They develop both new company products and tailor-made products. "One customer wants a different connector, while another wants a different change. Our individualised approach, flexibility and speed separate us from the competition," says Rakovec Gorkič.

From Personal Documents to Packaging Solutions

CETIS is one of the leading European companies in security and commercial printing. In the field of security printing CETIS has been a proud partner of Slovenia with regard to all travel and personal security documents since the country's independence in 1991. Their target markets are in Africa, Latin America and the Middle East. They provide travel and personal documents as well as other security printing materials (e.g. biometric passports, ID documents, visas, birth certificates, driving and vehicle licences, ballot papers). They also offer comprehensive turnkey solutions for identity management and document issuance for a complete e-Government solution. Increasing security challenges all over the world are increasing demand for more effective personal protection and stricter identity control. Therefore they are developing new and better-protected features for security documents as well as comprehensive turnkey solutions for modernisation of e-Government which facilitate work and save time and money.

CETIS, together with its subsidiaries AMBA CO. and EGP, also provides a wide range of packaging solutions for the beverages and food industry, and the



embedded cameras with enormous computing power are capable of image pre-processing in real time, and are thus most suited for demanding highspeed applications.

The company are introducing a new feature for 2020, an artificial intelligence (AI) camera, which they think will be a very interesting product.

CETIS has been a proud partner of Slovenia with regard to all travel and personal security documents since the country's independence in 1991.

Hidden Gems



pharmaceuticals and cosmetics industries in Western and Central Europe (especially Austria, Germany and France). Together these companies form the largest graphic packaging group in Slovenia. They provide labels, sleeves, wraparound labels, various solutions for brand protection, multicolour printed flexible packaging and offset-printed cardboard packaging. Following the industry trends their development is focused on flexible packaging, smart packaging solutions, brand protection and sustainable alternatives.

Development According to Customer Designs

"The Polycom company develops processes and tools for products in accordance with our customers' designs. We are continuing to develop the market, processes and tools for gear wheels," say company sources. They work chiefly with the car industry, followed by household appliances and industrial markets. The majority of their turnover is generated in Germany (32%), followed by Romania (15%), Mexico (over 11%), Austria (at just under 9%) and Slovenia (at 7.3%).

"Current forecasts in the car industry indicate a 5% drop in orders next year, while the household appliances market is forecast to grow by 10-15%. In view of the new projects we have obtained, we believe that in 2020 we will be able to increase sales by 10% over 2019," company sources say.

The industry is facing increased competition due to structural changes in the car industry, increased demand due to supplier consolidation and increased customer interest in establishing local suppliers. In 2020 Polycom will be facing significant challenges, among them, the execution of new projects on industrial markets.



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Our main activity primarily relates to all types of models (made of polystyrene, wood, plastic) for the manufacture of cast parts. For the most part, these are unique polystyrene models to manufacture tool cast parts, for sheet metal forming in the automotive industry. Wooden models are used for the series production of several of the same cast parts.



Our products also include models for the glass industry, models for the construction industry, models for design, decorative models, models for the timber industry, prototypes and casting moulds made of plastic, and repairs and changes to existing models with the technologies of various foundries.

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Konrad Hohler, Managing Director







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Development Dictated by Environmental Protection and Reduction in Environmental Footprint

Consumer awareness of the importance of health and a clean environment is rapidly rising, and demands for the smallest possible environmental footprint are getting ever louder. Consumers are becoming ever more demanding and this is influencing the development of the materials industry.

By 2023 added value per employee in alloy and steel manufacturing companies should increase by 25%.

Andreja Šalamun

MATPRO, one of nine Slovenian strategic development and innovation partnerships (SDIP), is attempting to increase added value per employee in companies engaged in the production of alloys and metals by 25%, exports and added value per employee in the area of smart coatings by 20%, and investments in the development of smart multi-component materials by 15%, added value per employee in the field of multi-component materials by 5% and exports in that field by 10%, all by 2023. As they point out, this goal will be achieved through targeted cooperation, activities in support of internationalisation, human resource development, sustainable development, enterprise, and the sharing of knowledge and resources in the materials field, where Slovenian companies are already creating success stories at the global level. An adequate research and development environment, particularly for small and medium-sized enterprises, must be established. So what are the companies doing?

Talum Enters E-mobility Market

In recent years, Talum have been producing increasing numbers of aluminium products with high added value, in addition to primary aluminium. They say that they are Europe's market leader on slugs and discs market and that "by offering all three of the most commonly used casting technologies, [they] are successfully entering the e-mobility market".

In 2018 Talum were the first (and are so far the only) manufacturer of slugs on the European market that contain more than 25% recycled waste aluminium. They have developed battery housing for Samsung for hybrid and electric cars, wheel brackets for THK (to be incorporated into Jaguar Land Rover products), and the C6 heat exchanger for Bosch TT, and are manufacturing structural aluminium cast alloys and billets with specific characteristics at their own foundry.

They have registered a new trademark, HEATRAPLATES (HEAT TRAnsfer PLATES), aimed primarily at the electric vehicles and vessels markets (cooling plates for battery packs), and their products have also found a use as condensers in hot water heat pumps, in laboratory freezers, in waste-heat recovery units in commercial kitchens and solar receivers. Talum have been producing increasing numbers of aluminium products with high added value, in addition to primary aluminium. They are Europe's largest manufacturer of slugs and discs.



Products for Strong Brands

They have registered a new trademark, HEATRAPLATES (HEAT TRANSfer PLATES), aimed at the electric vehicles and vessels markets.

In the area of castings, the most high-profile companies that Talum work with are KTM, VW, Scania and Wabco.

> Aluminium-based composites have great potential for use in the automotive industry.



Seven Refractories highlight their environmentfriendly taphole clays and cementfree products, which enable rapid installation and a short start-up cycle. company in the packaging business. Alloyed slugs enable thinner-walled aerosol cans to be manufactured, thus saving on material and consequently decrease the CO₂ footprint of the product. "We have therefore been able to successfully position the Talum brand name on the aerosol cans market. Indirectly through our customers, we have managed to persuade multinationals including Unilever, L'Oréal, Henkel and Procter & Gamble of the advantages of using alloyed aerosol cans. As a result, Talum's validation as a supplier of slugs for aerosol cans for

By development of alloyed slugs they became recognised as a developing, sustainable and innovative

those companies' projects is taking place much more quickly and in a much more straightforward way," say the company. In the area of castings, the most high-profile companies that Talum work with are KTM, VW, Scania and Wabco. They are a well-known supplier of cast alloys to an increasing number of European car part foundries (Nemak, Magna, Georg Fischer) and billets for construction, machine construction and the automotive industry (Impol, Kety, Sepal). For many years they have manufactured evaporators for well-known

refrigerator manufacturers such as Gorenje, B/S/H, Whirlpool and Liebherr, and more recently have been working with major manufacturers of battery packs for electric vehicles.

Key Markets Are Packaging and Transport Industries, Heat Technology and Machine Engineering

Their key market for slugs is the packaging industry for food, cosmetics, personal care, chemicals and other products in Europe, while for castings their key markets are the transport industry (cars, commercial vehicles, motorcycles), heat technology (heat exchangers) and general mechanical engineering (filter housings, cableway technology, machine components).

"Our products are in demand in situations where very high efficiency for the heat transfer of plate exchangers is required, and at a moderate price. These are: high-efficiency coolers in household and commercial refrigerators, solar receivers (solar thermal collectors, hybrid photovoltaic (PVT) panels), manufacturers of sanitary heat pumps and manufacturers of battery packs for electric vehicles," say Talum.

They add that cooperation with new business partners is always in full swing in all segments of production, but admit that "the need and desire for growth and the saturation of the market in Europe are forcing us to look for new opportunities for our slugs outside Europe." They have recently developed 21 new products for four existing and seven new customers in the castings segment; these are international corporations that offer great potential for an increase in the scope of collaboration. Efforts have been stepped up in the electric vehicles product



group. While the company has known customers on the European market for its cast alloys and billets, sales on distant markets are of little interest given the high transport costs.

Adding Particles to Improve Mechanical Properties

They are currently developing a process of manufacturing aluminium alloys in an electrolytic cell where, through the continuous or periodic addition of metal oxides into the electrolytic process, they are able to partly produce an alloy for further use. "The guidelines requiring lower product weight and therefore lower CO₂ emissions are guiding us in our efforts to upgrade our aluminium alloys by mixing in particles that significantly improve their mechanical properties. These are aluminium-based composites that have great potential for use in the car industry," the company explain.

In the area of slug manufacture, they are developing new alloys that will upgrade the existing ones and enable aerosol cans to be manufactured even more efficiently, while a starter housing for the BMW R18 motorcycle is in its final stage of development. "Serial production will start in 2020. We are also developing several new motorcycle components for the same customer," they say.

Optimising Inventories

Talum have noticed that the market is cooling in all manufacturing segments. "European economic growth is slowing, so preventive optimisation of inventories along the whole sales chain is taking place," they point out. They are noticing negative trends mainly in the car industry, while the household refrigeration sector is coming under considerable pressure from cheaper imports from the Far East and the new EU Energy Labelling Directive.

Taphole Clays from Seven Refractories Designed for World-leading Companies

That the ecological component of any product is becoming increasingly important is something Seven Refractories are only too well aware of. As chairman of the management board Erik Zobec points out, requirements for high production quality, a reduction in energy costs and the shortest possible interruptions to the production process predominate on the key industries in which they operate, while ecological standards require environment-friendly products and energy efficiency in their installation.

"Of all the products we have developed in recent years, we would like to highlight our environment-friendly taphole clays and cement-free products, which enable rapid installation and a short start-up cycle," says Zobec, who also points out that the clays are manufactured for world-leading iron and steel works such as NLMK, VoestAlpine, U.S. Steel and ArcelorMittal.

"We listen and cater to customers, design and seek out suitable high-quality solutions, present our products and tailor them to our customers' requirements. Our technical teams install materials and provide solutions 'in situ'. The biggest names we do business with are Heidelberg, Isdemir, Danieli, ArcelorMittal and Evraz," says Zobec, adding that they are present on all continents and most heavily on the Russian, German, Italian and Indian markets. "Our joint venture with the Indian giant Dalmia Bharat Group and the establishment of Dalmia Seven has fully consolidated manufacturing and operational



realities in Katna, India after only two years," he says. The next challenge is to expand business into Asia and the United States.

Adapting to Customers

They are constantly expanding their range of products (particularly their cement-free products). Their greatest challenge and, at the same time, greatest advantage lies in development and in tailoring their products to the individual needs of the customer. "In the case of the Shot 92 NR 08 Z 'shotcrete', which enables steel ladles to be repaired very quickly and uses less material than previous technologies, we have already refined several variations this year and achieved the high quality target we set ourselves," says Zobec. They are aware that their activity is also subject to fluctuations in production in heavy industry, which has itself already seen crises of varying magnitudes. "In moments such as those, the development and diversification of the end-product range has enabled Seven Refractories to keep growing," he

They are present on all continents and most heavily on the Russian, German, Italian and Indian markets, with Dalmia Seven operating successfully in Katna, India.



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adds. He is convinced that this will continue in the future and that they will continue to seek out new markets and consolidate their position on existing ones. "What are required are a clear vision, ambitious targets and a little bit of luck."

Helios Develops Innovative Functional Coatings

Helios have been engaged in developing innovative functional coatings for a number of years. They are continually launching new products and development achievements that meet the strictest environmental regulations, offer more protection, and are more cost-effective and durable. "We are focused on the development of water-soluble materials, materials with very high levels of dry matter, various 'functional' coatings, and coatings and polymers from raw materials from sustainable sources," say Helios.

They have gained the trust of many recognised manufacturers of machines, containers, steel structures and equipment for agricultural, construction and excavation work. They also have customers in the commercial transport and wood-processing industries. "We work with larger European transport infrastructure operators and subcontractors, who use our coatings on road surfaces across Europe. Our products are also used by major European household appliance manufacturers, and our architectural coatings can be found on homes across Central and Eastern Europe, as well as on major construction projects such as hotels, shops and so on," they say.

Present in More Than 100 Countries

While they export mainly to EU and ex-Soviet countries, they are also developing successfully on many other markets. Indeed, they have a presence in more than 100 countries.

As Helios point out, the worsening of the situation on Western European markets provides them with additional impetus to expand business operations into new markets in Africa and Central Asia, where they have launched numerous projects. "We should point out here the success enjoyed by the company's car-repair coatings in South Africa."



Reduced Carbon Footprint

The Helios Group are also developing new coatings and solutions with the aim of reducing the consumption of all types of resources and their products' carbon footprint. "We would also like to help our customers improve their processes in terms of coating sustainability or general optimisation of the process," they say.

Most recently, they have introduced several innovative products, including products designed for the generation of energy from renewable sources. "We should highlight the coatings for the photovoltaic industry that provide customers with a cost-effective and permanent solution for supplying cheap and reliable solar energy to end-users. A new backsheet coating for photovoltaic panels offers the functionalities of the existing multi-layered system with a greater number of sheets, but with the same level of efficiency and at a considerably lower price. Using the innovative coating increases the process efficiency of backsheet producers and reduces their carbon footprint considerably," they explain.

They point out that the key guidelines driving development in the coatings industry are a growing awareness of the importance of health, a clean environment and a reduction in environmental footprint, together with ever greater expectations regarding coating properties on the part of customers. In 2020 the company are expecting sales growth to slow on Western European markets and a strong influence exerted by the political and macroeconomic environment, which will have negative effects on demand.

Advanced Tool Steel, Winner of a CCIS Award, Developed by the SIJ Group

In 2019 the SIJ Group successfully launched the SITHERM 2343 hot-work tool steel, which is designed for the manufacture of tools for the hot-working and casting of non-ferrous metals. "We have developed an innovative cost-effective and time-saving manufacturing process in which the steel retains its typical characteristics. We have also successfully developed the SIHARD S671 - DURAWEAR cold-work tool steel, for which we won a national silver innovation award from the Chamber of Commerce and Industry (CCIS). In addition to steels, we should mention two new products from the 'mechanical engineering' line from the SIJ Ravne Systems company. The first involves a unique system for the automated handling of rods, while the second features an adapted technological solution or automatic device for the batching of bulk aluminium into the induction furnace," explains SIJ Group marketing head Aleš Falatov.

The group's SINOXX E770, SINOXX 4923 and SINOXX 4903 steels for turbine blades are incorporated into turbines made by the biggest names in the energy industry, while customers for the SIHARD2363 and SITHERM2344 steels for diesel engine injectors include major global companies. SIJ Group industrial knives are incorporated into internationally renowned brands of machinery for the manufacture and processing of wood, metal, paper, plastic and rubber.



been engaged in developing innovative functional coatings for a number of years, with the raw materials coming from renewable sources.

Helios are expanding business operations into new markets in Africa and Central Asia, where they have launched numerous projects.

Large Majority of Income Generated Abroad

Every year the SIJ Group generates almost 85% of its income on foreign markets, particularly in Germany, Italy, America and Russia. As Falatov says, the Group would like, in future, to forge links with new partners, and particularly with final customers on the European, American and Asian markets.

"We are also focusing on and investing in cooperation with users of high-quality tool and special stainless steels and industrial knives. So we are looking for new distributors to help us expand our sales network to the American market," he explains. They would like to establish a strategic partnership on the European market for the "mechanical engineering" sales programme, specifically for the production of parts, housings and components of machinery and systems equipment. They are also pressing ahead with expanding the portfolio of customers for wrought-iron products for the aluminium industry. "We are always keen to forge new strategic and development partnerships across the world," says Falatov, adding that a process of certification under the AS9100 aviation industry standard is under way for the marketing of a new range of SIJ Metal Ravne specialist steels on the American and European aviation markets.



They are currently developing specialist hot-work tool steel with increased heat conductivity, useful for the manufacture of tools for pressure casting and hot stamping, and are also actively engaged in developing specialist cold-work tool steel with increased wear-resistance for use in industrial knives and rollers for the cold rolling of sheet metal. SIJ's steels for turbine blades are incorporated into turbines made by the biggest names in the energy industry.

In 2019 SIJ Group successfully launched their SITHERM 2343 hot-work tool steel.

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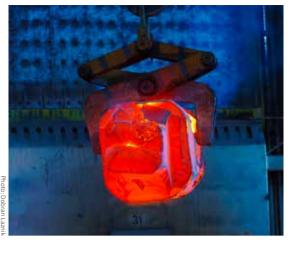
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Every year the SIJ Group generates almost 85% of its income on foreign markets, particularly in Germany, Italy, America and Russia.

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While orders were satisfactory in the first half of 2019, the tool and specialist steels programme has begun to see a reduction in the number of new orders, reflecting reduced demand from the automotive industry and related metalworking and mechanical engineering sectors. Falatov explains that customers have become extremely cautious in their purchasing decisions because of the unstable market conditions, and that they are opting not to buy steel and steel products for inventory. He believes that the slowdown in economic growth in the EU, the increase in geopolitical tensions and tensions between the superpowers, and the protectionist measures taken by the US are all introducing great uncertainty into business decision-making and, at the same time, encouraging the introduction of money-saving measures.

"To ensure that we retain our market position, the SIJ Group will have to invest more effort in maintaining and strengthening partnerships with key customers and ensure cost-effectiveness and the retention of competitive capacities at all levels," he stresses. He adds that the SIJ Group are developing steel for the exacting nuclear industry and, in so doing, exploiting synergies between their two steel-making concerns. At SIJ Metal Ravne, therefore, they are manufacturing the purest forged steel, which is then rolled and heat-treated at SIJ Acroni for the nuclear market.

A strategic development-innovation partnership called SRIP MATPRO (MATerials as final PROducts) is active in Slovenia. Its key objective is to establish a value chain, with an emphasis on the manufacture of materials designed for the production of complex products with high added value and great potential for incorporation into global value chains.



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Nina Šprohar

Gorenje Focused on Digitalising Household Appliances

At the company Gorenje, which manufactures household appliances, they are currently developing the new platform ConnectLife, which will link the operation of smart appliances and services for all the Hisense Group brands via one single application. "This means that your home can have an Asko oven, Gorenje washing machine and Hisense air conditioning, and you can control them all via the same application on your phone, through a Hisense television or by voice commands through a smart speaker or assistant," the company explains.

In addition to this, their appliances will be able to 'take care of themselves', for instance by reporting a fault to the service provider, being able to communicate with each other (for instance the hood will turn off the cooker ring if the temperature in the pot is too high), and will also be able to guide users (for instance on how to prepare a tasty dish). They will be boosting their range of household appliances, and at the end of 2019 under the Atag brand they will be offering users in the Netherlands a complete set of smart kitchen appliances, enhanced with the useful digital services as part of ConnectLife.

Their smart appliances under the Hisense brand are already present in multiple markets, with TV sets and air conditioning in Australia, the USA, South Africa and several European markets, and Hisense TV sets are also available in Slovenia. Sales of smart appliances under other brands, such as Asko and Gorenje, are planned to start at the beginning of 2021.

They say that demand is growing for innovative products such as smart appliances, and for new services such as content platforms on smart televisions. In the words of Vladimir Nardin, head of digital marketing at Gorenje, in the last three years the Gorenje Group has already digitalised extensively, ranging from databases and backup processes to the new digital platform and new products and services, while digitalisation is continuing within the Hisense Group.

Pirnar Makes the First Contactless Entrance Wall

The company Pirnar believes that innovations are vital to the development and competitiveness of the company, since innovative products on a global level increase recognisability and credibility. They have developed the OneTouch door – it has no visible handles and operates by fingerprint – and they have taken this one step further by creating the Theatrica entrance wall, the first contactless and completely automatic entrance wall on the market – it opens by the owner looking at it. Their novel features also include handles with an illuminated pattern or wording called LabelLux, plus Magmalux handles of glowing metal and Crystalux handles of glowing crystal.



The new platform ConnectLife will enable users to manage connectable or smart appliances and services of all Hisense Group brands via a single application.



Pirnar's OneTouch door operates by fingerprint, and the Theatrica entrance wall, the first contactless and completely automatic entrance wall on the market, opens by the owner looking at it.



In its development of bio or recyclable lines the Skaza company is collaborating with external institutions, principally faculties and their laboratories, to develop the best possible products.

Bokashi Organko facilitates for users the implementation of a circular economy at home, where biological waste is generated, in the kitchen. To date their products have earned numerous international awards, such as the Red Dot Product Design Award, German Design Award Winner, German Innovation Award Winner, Architizer and more.

They currently have their own franchises in the USA, Germany, UK, Spain, Austria, Luxembourg and the United Arab Emirates. They are striving to expand their wide network of partners across the world, and they expect to be present soon in new markets. They are ready for new growth; in 2018 to this end they made their production premises several times bigger, thereby doubling their production capacity.

Skaza Battling Against Single Use Plastic

The Skaza company is continuing its development, which involves collaborating with external institutions, principally faculties and their laboratories, to develop the best possible products. They are focused mainly on the development of organic or recyclable lines, and have also created a new, smarter generation of the kitchen composter Bokashi Organko 2, of which they are currently especially proud, since it has received a lot of national and international acclaim, including placement in the Solutions 2019 category and a Red Dot design award. It facilitates the implementation of a circular economy at home, where biological waste is generated, in the kitchen. By means of a special natural grit, the Bokashi Organko converts organic waste into the basis for compost, and the fermentation liquid that is generated can be used to water flowers and garden produce. "The organic waste lifecycle is thereby completed," Skaza explain.

Another novel feature is the EcoCareCup made from sugar cane, which is degradable and intended for multiple use to replace single use plastic coffee cups.

Their products and solutions can be found in more than 50 countries around the world. "Our markets

and their customers are very environmentally aware, they are responsible to themselves and their health and towards preserving the planet in general. This is especially true of the EU countries, all of Scandinavia, Canada and gradually others," they explain. In this way they are pursuing the trends that dictate the sustainable development of new materials and technologies and the transfer of knowledge via products without additional environmental burdens. "The common thread of development is sustainable materials. Not just recycled materials and bio polymers, but also materials where we are increasingly focused on LCA analysis, and in this way we monitor all environmental aspects," they conclude.



Hrastnik Glassworks Make Smart Perfume Bottles

The Steklarna Hrastnik glassworks company is currently intensively involved in the development of the first smart perfume bottle in the world, and they are collaborating with the Slovenian start up company Perfume-Tech. "Modern technology today offers endless possibilities for designing glass to which we add new functionalities – so for instance the smart perfume bottle will enable the personalisation of the fragrance, protection against counterfeiting and the collection of data," the company explains.

They are especially proud of all their reference projects in the area of packaging glass, with pride of place going to their collaboration with the Fragrance Foundation France (a foundation that awards FiFi prizes in the area of perfumes). Recently they expanded their range of products in the HighGlass Spirits collection, developing three new spirit bottles – Jupiter Polaris, Orion and Luna – and adding new sizes to existing bottles.

Parallel to this they are seeking new solutions with the aim of further reducing their environmental footprint. Recently they installed a solar generator, which they will link to a hydrogen pilot plant in which they will generate hydrogen. "In this way we will develop new technologies for melting glass with hydrogen, and consequently reduce the carbon footprint of the glassworks," they add.

Their products are present in 55 different world markets, and they want to consolidate their position in the USA, France and UK. "We are constantly seeking new opportunities and possibilities there to increase cooperation with the owners of spirit and perfume brands, including opening our own sales offices; one is already open, in the French city of Cognac, and the opening of an office in the USA will follow," they say of their plans. They are continuing to invest in automation, digitalisation and the use of robots, in this way



establishing the foundations for the transition to industry 4.0.

Domel's Motors Cool Google and Facebook Server Premises

Domel, which develops electric motors, is currently involved in several development projects to electrify cars and garden equipment. The emphasis is on motors of small and medium power, with importance given to innovative solutions in terms of energy and materials efficiency. Domel recently developed an innovative new motor with a power range from 5 to 50 kW, which in combination with its electronics achieves the highest efficiency of any of its batch-produced motors. "With the new motors we have filled a gap in the product range and can now offer a complete range of motors with over 96% efficiency," they say. The products were created on the basis of years of experience with standard materials and Steklarna Hrastnik is collaborating with the Slovenian start up company Perfume-Tech to develop the first smart perfume bottle in the world.

Domel has developed an innovative new electric motor with a power range from 5 to 50 kW, which in combination with its electronics achieves the highest efficiency of any of its batch-produced motors.

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Development at Marles is geared towards complete energy selfsufficiency for the majority of buildings.

> existing technologies, which is at the same time compatible with control electronics, which offers very high efficiency of the entire system.

In the sector of energy-efficient electric motors to drive ventilators Domel succeeded in breaking into the demanding market of data centres in 2019. Domel are continuing their strategy of diversification, and in 2019 in the sector of energy-efficient electric motors to drive ventilators they entered the demanding market of data centres. "Our motors are used to cool rooms where IT equipment for servers is installed, for instance Facebook and Google," they say. By starting to offer data centre applications their profile has been enhanced, so they anticipate more opportunities with new customers and thereby growth in earnings.

Through new investments they are also strengthening their position in the area of battery powered garden equipment and e-mobility, but in the market they are already sensing the consequences of a slowdown in economic growth, while they will try to compensate for any shortfall in orders through new projects entering production in 2020 and 2021.

Trimo Has Growing Market for Renovating and Remodelling Old Buildings

Trimo offers comprehensive fireproof wall and facade systems. They say that this means they need to be constantly considering lifestyle trends and responding to environmental policy, and in their planning to take into account climate change. They also focus on systems that they can provide in the same time frame and with the same efficiency, but with more rapid installation.

comprehensive fireproof wall and facade systems. Trimo systems are present on more than 100 markets.

Trimo offers

The core of their business is comprised of mineral wool installations. "We were the first in the world to start continuous production of the fireproof sandwich panels with mineral wool – the best known one is our facade system Qbiss One," they say. This is a highly insulating prefabricated facade system with modular facade elements and a smooth metal surface. "In 2019 we developed another new product, a highly innovative ventilated facade with a special middle part of aluminium honeycomb, which stands out for its aesthetics and durability," they add.

Their systems are present in more than 100 markets, with priority going to the countries of Western Europe, especially Germany, the UK, France and Benelux, where they want to consolidate their position, and the Balkan region, where they have a factory in Serbia. Although economic growth might be slowing down, an important market in the renovation of old buildings is opening up.

Marles Aiming for Zero-Energy Buildings

Marles produces wooden prefabricated low-energy, passive or almost zero-energy buildings. "Our system of construction is being adapted as far as possible to environmental construction, which in our opinion will make further gains in the future," they say. In addition to their environmental appeal, renewable materials also enable minimal maintenance costs throughout the lifetime of the building, and an important guideline in development is the individual, since each house is the fruit of individual wishes. Their development is geared towards complete energy self-sufficiency for the majority of buildings.

From now on Marles will design buildings using virtual reality technology. "Using this we will enable customers to walk around a new house even before it's been built," they explain, adding that the new technology also enables a simulation of the daily movement of the sun, which is of great help both for the customer and architect in placing the building in the location. They export around two thirds of their buildings, with their biggest export markets being in Switzerland, Austria, Italy and Germany. In the future they want to strengthen their presence in the Benelux markets and also to gain a presence in Scandinavia. Currently their biggest project is in Germany, involving 18 residential units. They carried out a similar project for the same customer three years ago, and this earned them the Deutscher Holzbau Preis 2017.

They say that in 2020 they are practically fully booked up. Bogdan Božac of Marles adds that the biggest challenges in the first half of 2020 will be associated with the extensive reorganisation and modernisation of production, then they want to further strengthen the distribution network in key markets and consolidate their position as the leading Slovenian manufacturer and exporter of wooden buildings.

Stilles's Innovations in Wooden Furniture

Stilles is one of the best and most successful Slovenian companies involved in the manufacture and installation of top-quality hotel furniture and doors, as well as finishing works in hotel construction worldwide. Stilles is present in more than 30 markets in Europe, Asia and North America. "Our objective for the next five years is to rank among the five largest hotel interior design companies in Central Europe," says Rok Barbič, CEO of the company.

He also explains that the company employs a range of materials – wood, stone, metal, and glass. In 2018, the company developed a wood surface treatment with a patinated brass effect, which was awarded as the best innovation by the Chamber of Commerce and Industry of Slovenia. Even more important is their innovation in wood surface protection, dubbed Re:NEW. This special treatment process produces a matting agent that ensures water repellency and fingerprint and stain resistance on a variety of surfaces. The major advantage of this process is that small scratches on the treated surface can be easily repaired with a cloth and hot water. "This gives a much greater durability to our furniture," explains the CEO. From now on Marles will design buildings using virtual reality technology: customers will be able to walk around a new house even before it's been built.

In the future they want to strengthen their presence in the Benelux markets and also to gain a presence in Scandinavia.



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Slovenia Presents a Smart Factory Demo Centre

A smart factory demo centre opened in Slovenia in June 2019. This is the only such centre in the country, whose goal is to demonstrate the implementation of Industry 4.0 technologies in a real industrial environment.

Ana Vučina Vršnak

A smart factory demo centre was built in the Handling, Assembly and Pneumatics Laboratory (LASIM) at the University of Ljubljana's Faculty of Mechanical Engineering with the financial support of the Kolektor Group. According to Niko Herakovič, Head of the LASIM lab, artificial intelligence will upgrade all current technologies and help people offer solutions faster than they would be able to on their own.

Among the obstacles preventing the faster, more effective and large-scale introduction of such changes, he drew attention to the often superficial understanding of what a smart factory actually is. Because it is conceived "very lightly", and especially because everyone understands it in their own way, now entrepreneurs have the opportunity not only to visit but also spend some time at the smart factory demo centre. The goal is to attract as many companies as possible, and to bring the concept of open innovation to life in practice.

Factories of the Future

Among others, the Director of the Factory of the Future Strategic Development-Innovation Partnership (SRIP ToP), Rudi Pajntar from the Jožef Stefan Institute, is in charge of cooperation in the education-research-industry triangle. At the Future



Factories event held at the Slovenian Chamber of Commerce and Industry (CCIS) at the end of May 2019, Panjtar noted that the digital revolution had already impacted the manufacturing industry. The digital connectivity of all participating stakeholders influences the value added and transforms the manufacturing environment. He sees the future role of factories not only in manufacturing products, but also (and primarily) in accumulating experience and transferring knowledge to new generations.

Future Skills

The Slovenian Chamber of Commerce and Industry CEO, Samo Hribar Milič, reported that the value added per employee in Slovenian industry averaged around EUR 45,000 last year and that over EUR 60,000 per employee were generated by companies that together achieved EUR 10 billion in exports.

As pointed out by the General Manager of the CCIS, Sonja Šmuc, the goal of the economy is to increase the value added per employee to EUR 60,000 by 2025, and therefore it is crucial to invest in human resources and enhance the skills of staff. "It is vital for us to be able to predict which skills we will need in the future," she added.



Niko Herakovič from the Ljubljana Faculty of Mechanical Engineering argues that the concept of the factories of the future is conceived "very lightly."

Among others, the Factory of the Future Strategic Development-Innovation Partnership (SRIP ToP) promotes cooperation in the education-researchindustry triangle.



Domel, Yaskawa, Gorenje Orodjarna and Iskratel: The Importance of Young People and Open Innovation

The goal of the business community is to increase the average value added per employee to EUR 60,000 by 2025.

Newly emerging technologies require skills that people do not have. The training cycles are long, which is why it is vital to adapt the education and professionaltraining system.

> Smart factories are not something we will achieve overnight. Some have not even mastered automation yet.

According to the Chairman of the Board of Domel Holding, Matjaž Čemažar, Domel is pursuing the goal of raising the added value per employee by implementing digitalisation in business and manufacturing processes, and by connecting artificial intelligence with manufacturing processes. In his opinion the biggest current challenge is applying artificial intelligence to manufacturing processes. In turn, he believes the biggest challenge for Slovenian industry in general is connected with the education and training of young people. Completely different expertise than that currently provided by the Slovenian education system will be required in the future. If you do not possess all the required expertise yourself, open innovation is the only way.

Hubert Kosler, Director of Yaskawa Europe Robotics, also highlighted the problem associated with the skills required for managing the factories of the future: both skilled people and a right company strategy are vital for this.

The Director of Gorenje Orodjarna, Boštjan Dokl Menih, agreed with this, adding that they dedicate special attention to training older employees. All three companies also provide scholarships for young people.

For years Kranj-based Iskratel has been cooperating successfully and closely with knowledge institutions in Slovenia and Europe, as well as countries where they sell their products, such as Russia. They organized its first Iskratel Innovation Day for secondary-school and university students, and they have engaged as partners in the socially responsible projects. One of them is called We're Going to

Simple jobs will withdraw from Europe, in as much as they have not already. Asia is driving technological development forward, but we should not be pessimistic because Europe has the tradition and expertise required, it simply needs to invest in development. Be Engineers!, the other one Every Student to the Company! In the past, the company participated in the Slovenian Economy Open Day, which takes place under the aegis of the CCIS.

In addition, they are heavily involved in the Smart Cities and Communities Strategic Development-Innovation Partnership, especially in the area of security. 5G Security is their latest "safe and smart future" project. This is a Slovenian project with international support, with the Ljubljana Faculty of Electrical Engineering, Telekom Slovenije and OSI Sistemske Integracije involved as consortium partners.

Siemens Slovenia: Digitalised Production is the Foundation of a Smart Factory

In practice, smart factories are an environment where intelligent devices, machines and equipment are interconnected into a system capable of permanent improvement and self-optimisation. This is how a smart factory is defined by Matej Kupljenik, Head of Digital Industries at Siemens Slovenia.

According to him, the concept of connectivity is not limited only to physical production, but also includes elements of planning, logistics, development and maintenance, which it combines into an autonomous manufacturing supply chain. Digitalised production is the foundation of a smart factory. Its building blocks are based on the digital twin concept, its production and business systems are interlinked and it has the integrated control of products and processes in place at all stages of their life cycle. The competitive advantages of smart factories are shown in the flexibility of production, which forms the basis for effective adaptations to new business models. In addition, the smart factory concept increases production effectiveness, reduces costs, increases the quality of products, and provides a high level of traceability and energy efficiency.

According to Kupljenik, the effects of digitalisation or the implementation of smart factories are currently most visible in the automobile industry, which launches highly personalised products to the market quickly, effectively and on a large scale. Smart factories entail automatisation and a method of exchanging data in industry, which closely links automatisation with new IT solutions and integrates it into the IoT concept (the introduction of cloud-based technologies). We are talking about new digital technologies, software tools, smart devices, self-learning systems, upgraded human-machine interfaces (HMI), a high level of robotisation and the use of artificial intelligence and cognitive computing – all this constitutes the smart factory concept.

When?

Kosler told us he knows two or three companies that are building factories of the future. In turn, in Kočevje his company is introducing attributes of such a factory at the level of automatisation, but there is still a long way to go before a proper factory of the future is achieved. Yaskawa is pursuing the i3-Mechatronics concept, which they have already implemented in a factory near Tokyo and that involves a triple acceleration of production and significantly shorter supply times. It will be launched in Slovenia next year.

Kolektor Digital

Over the past three years, a new pillar of the Kolektor Group has been taking shape at an accelerated pace: Kolektor Digital, which operates within the domain of smart factories of the future. Kolektor has defined five priority areas: artificial intelligence, digital twins, machine vision, robotics and a smart factory platform.

Valter Leban, a member of Kolektor's Board of Directors, points out that innovation and research go hand in hand. The mission of research is to generate new knowledge about the foundations on which phenomena are based and facts are observed. In turn, the mission of innovation is to create new products, services and business models that generate economic benefits. Kolektor Digital has built a platform that is based on open innovation and combines the area-specific expertise and innovation of the corporation, the innovation of start-ups and the applied development of research institutes and universities.

According to Leban, "it's very important that the companies' innovative development in the applied research segment is also supported by the state. A best-practice example is the GOSTOP project within the framework of SRIP ToP, in which Kolektor developed a smart factory of the future platform up to stage five of digital maturity in cooperation with the Jožef Stefan Institute, the Ljubljana Faculties of Mechanical Engineering, Electrical Engineering, and Computer and Information Science, and other partners". Before that, the corporation had achieved stage four of digital maturity, which means that they knew what was going on and why something happened. With stage five of digital maturity they will reach the stage of predictability, which means they will be able to predict what will happen. According to Leban, the last stage (i.e., stage six) remains the biggest challenge. That is when Kolektor's manufacturing process becomes completely autonomous.

ΙΜ

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Digitalisation and Virtualisation Crafting the Future

Virtualisation and digitalisation are without doubt key technological trends that are already marking the development of technologies and will also strongly shape society in the future.

Andreja Šalamun

Innovations Are the Driver

ETI Elektroelement operates in a conservative market, yet their progress is driven by innovations, for which the company has already earned awards several times on the national level. They have a very wide product range and are present in the segment of protecting electrical installations in residential and commercial buildings, in industry, low and medium voltage electricity distribution, power electronics and semiconductors, photovoltaics and other renewable sources and in the area of special purpose fuses. They also produce technical ceramics and plastic.

They are present in more than 60 countries. "We sell mostly in Europe, where we have created a network of subsidiaries and business partners with whom we have cooperated for a number of years," says the managing director of ETI Elektroelement, Tomaž Berginc.

Banking on Higher Added Value Products

"Through products with higher added value we are securing new customers, generating additional earnings and greater profits which we can invest in the development of new products. Also the firm is ranked among innovative companies in its sector, and thereby among the leaders in the market," says Berginc.

He explains that new business partners are always welcome, but stresses that proper business relations with existing partners is even more important. "Currently we are very interested in the area of sustainable energy, i.e. solar and wind power and protection of battery systems. Of course another opportunity lies in e-mobility, where ETI products already have a presence. Products for what are called smart houses are also of interest," he says. He anticipates that in the coming year they will further increase sales, mainly owing to products with higher added value. Berginc is convinced that one of the significant trends demanding attention is the area of smart networks together with sustainable energy.

Developing a New Generation of the Platform for Smart and Safe Cities

The Iskratel Group's products and systems for a safe and smart future are present in more than 50 countries, and in Germany they are opening a representative office. They are linking up business partners with the digital technologies of the future: cloud systems, virtualisation and the 5G network. Iskratel will be the first partner in setting up the fifth generation network, or 5G, in Slovenia, and currently they are collaborating on 5G development projects in Russia.



ETI Elektroelement has already won several awards for innovations on the national level.



Currently ETI are very interested in the areas of sustainable energy, i.e. solar and wind energy, protection of battery systems and also e-mobility and smart houses.

The Iskratel Group's products and systems for a safe and smart future are present in more than 50 countries.



Iskratel are linking up business partners with the digital technologies of the future: cloud systems, virtualisation and 5G.

> Recently Iskra have devoted considerable attention to maintaining a healthy living environment, specifically the treatment of agricultural and industrial water.

They are developing a new generation of the platform for smart and safe cities, and based on IoT technology they are providing a platform for managing large quantities of data in the energy sector and for responding to emergencies (IRM-R) in rail transport.

"In the area of broadband networks we are proud of the innovation GPON OLT as an 'amphibian', the first such system in the world, which at the end of September received a silver award from the Slovenian Chamber of Commerce (CCIS)," say Iskratel. They point out that they are market leaders with solutions in the area of pLTE in mines. The first such project is already in the testing stage and will take off in the Russian market next year. In 2020 they are also planning to set up a 5G partner programme as a platform for developing a 5G ecosystem in the region.

They point out that with more than 70 years of experience in electronics manufacturing services (EMS) they are entering growing markets and sectors such as renewable sources, waste management, industry 4.0 and medicine. "We received the medical certificate EN ISO 13485 in November 2019. Our goal is to produce niche products to meet complex requirements, and at the same time to produce our own medical accessories. Depending on the agreements with customers, we are planning the first series production items at the end of 2019 or beginning of 2020," they reveal.

They say that their systems in the domain of 5G for transport, energy and public safety will enable partners to digitally transform industry. "We are in the concluding stage of the European research assignment 5G Safety, which focuses on reliable 5G communication systems for stakeholders in the field of PPDR - Public Protection and Disaster Relief," they say.

"Virtualisation and digitalisation are without doubt key technological trends that are already strongly marking the development of technologies and influencing our business and product portfolio, and will also strongly shape society in the future," say Iskratel with confidence.

Products Known All Over the World

Iskra's line of business covers a wide range of different products and systems. "We are proud of our measurement technology, especially the Power Quality Meter MC 784, which is a global leader of such products," they say at Iskra. They manufacture energy condensers, and are widely recognised for their electronic condensers for white goods, as well as being ranked among the best for filters to prevent electromagnetic interference. And their production of professional-grade special-purpose batteries should not be disregarded.

"In the area of telecommunications we have our own production of various types of antennas, both for the general retail market and for special-purpose



Field of business

We are a family business with more than 45 years of experience and more than 50 committed and motivated employees. Currently, we are operating approx. 20

CNC machines manufactured by Japanese top manufacturer MAZAK as well as machines from other manufacturers. We dispose of CNC lathes of different sizes (diameter of the turning head from 250 to 550mm), various vertical and horizontal CNC machining centres and state-of-the-art 5-axis CNC machines. Our equipment enables us to deliver a high productivity and to remain competitive on a highly demanding European market.

Production range/services

In addition to mechanical machining using the CNC machines mentioned above, we also offer our customers mechanical processing with traditional machining centres, pounding, cutting and welding of various components as well as assembly, mounting and painting of individual modules, grinding, heat treatment, surface treatment, gearing, laser cutting and much more.

We process materials such as different types of steel, hardened and tempered piston rods, cast parts, stainless steel (INOX), aluminium, bronze, plastics, etc.

We specialise in the processing of complicated medium-sized modules and we are known for the accomplishment of required tolerances up to 0.01mm.

Our quality is monitored in our own state-of-the-art measuring room, which is equipped with various measuring instruments and other measuring equipment, including a 3D CNC coordinate measuring machine.

Our parts are used in a range of hydraulic components, conveyors, draw-works, cranes, lifting platforms, ironworks, transport facilities, hydropower stations, etc.

Foreign presence Foreign markets: Germany, Austria

Cooperation with German and Austrian companies

Our high quality and professionality have made a name for our company abroad, since most of our customers are based in Germany and Austria. Our long-term goal is based on our flexibility, quality, perseverance, continuous training of our employees and modernisation of our machinery and software portfolio.





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professional uses, which we combine with our devices for wireless data transfer," they say, pointing out also their special devices for data transfer via optics using the SDH protocol principle, special equipment for data transfer through high-voltage lines and low and medium-voltage protection relays. Recently they have devoted considerable attention to the treatment of agricultural irrigation water, treatment of industrial water and also providing drinking water for public water mains or mobile drinking water stations.

Iskra products and systems are present in more than 60 countries. Since they have signed a major contract for the modernisation of the railways in Bulgaria, they opened a branch office there. Recently they implemented major infrastructure projects in North Macedonia, and have carried out a large number of projects in Turkey, where they have been present for a number of years in the area of automation of rail transport. In the coming years they will also focus on the Romanian and Hungarian markets. In the area of process automation they are seeking to break into the German market, so they have established a subsidiary there.

Alongside market expansion, they are also spreading their activities – to the shipbuilding sector, having this year purchased a shipyard in Šibenik. They are convinced that currently several fields are opening up that will demand a lot of attention. They emphasise timely and appropriate digitalisation and robotisation of production processes, since this creates new opportunities for sales and promotion of products and systems.

Iskraemeco Provides Smart Metering

One of the leading suppliers of smart metering systems on the global level, Iskraemeco is working with all the Slovenian electricity distribution companies in implementing smart metering in their networks through various projects. Nevertheless the vast majority – as much as 96% – of their income is generated on foreign markets. Their customers are power distribution companies throughout the world. They include energy giants such as RWE, E.ON, Alliander and Vatenfall, and they export the largest amount of products to countries included in the EMEA (Europe, Middle East and Africa) region. They are looking to expand their business mainly to Latin America and India. They also anticipate securing new business in the area of smart metering in the Scandinavian countries, where they are already preparing to replace the first generation of smart meters.

Iskraemeco works with numerous power distribution companies throughout the world. As much as 96% of their income is generated on foreign markets.



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Internation Internation

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Open logistic platform LogChain

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Six percent of the total added value of all Slovenian companies whose primary activity was trade in 2018 was generated by IT companies.

Darja Kocbek and Ana Vučina Vršnak

According to data from the Slovenian national statistical office, companies in the information and communications technology (ICT) sector generated EUR 4.139 billion in revenues in 2018, which amounts to 4% of the total revenues of all Slovenian companies whose primary activity was trade in 2018. ICT companies generated EUR 1.438 billion in added value, which is 6% of the total added value of all Slovenian companies whose primary activity was trade in 2018.

High Level of Knowledge in Slovenia

According to sources at the Slovenian Chamber of Commerce and Industry (CCIS), when formulating its smart specialisation development programme, Slovenia recognised the importance of the development of human resources in ground-breaking ICT areas and supported a horizontal ICT network in order to develop human resources for the entire Strategic Development and Innovation Partnership.

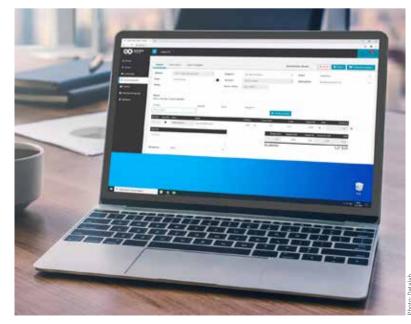
Slovenia should focus on the development of expert knowledge and solutions, and on innovation, as we have a high level of knowledge, high productivity and high-quality software development, says the director of the CCIS's Information Technology and Telecommunications Association Nenad Šutanovac.

Datalab Launches eServices Product Line

One of the leading Slovenian companies in the field of information technology development is Datalab, which develops, installs and maintains PANTHEON Business Operating System, and provides advice and professional training in its use. PANTHEON provides comprehensive coverage of all business processes, from materials handling operations to accounting, finance, HR, manufacturing, wholesale and retail, warehousing and more.

The software is developed by the parent company, located in Slovenia. Within the region it provides localisation, support, sales and other support services, says Maja Fujan, Vice President Marketing. The primary markets on which Datalab is present via subsidiaries are Serbia, Bosnia and Herzegovina, Croatia, North Macedonia, Montenegro, Bulgaria, Kosovo and Ukraine. "Going forward, we see the greatest potential on these markets in business information systems and other complementary services aimed at digitalisation of operations," says Maja Fujan.

In 2018 and 2019, Datalab began the launch of its eServices product line, which includes corporate digitalisation tools such as eDocumentation, certified storage, backup copies, ePosting, etc. "All of these tools and solutions are available to users of the PANTHEON business suite throughout the region that we cover," she adds. In 2018 and 2019, Datalab began the launch of its eServices product line, which includes corporate digitalisation tools such as eDocumentation, certified storage, backup copies, ePosting, etc.



In 2019 they are expanding their product line to include web applications – Pantheon Web.

CRMT is a systems integrator that works with the world's most advanced and highly specialised providers of analytical tools.

CRMT is currently involved in several projects in the area of big data analytics. In 2019 they are expanding their product line to include web applications – PANTHEON Web. According to Maja Fujan, these applications will have a significant impact on operations in the coming years. At first they will be intended for the segment of small businesses, which work closely with their accounting firms, and whose everyday work will be speeded up, automated and digitalised on several levels.

The advantages of this business suite are that it is designed for companies of all sizes and in all areas (the main customers are companies with between 20 and 50 employees), it allows the program to grow together with the company, it can be integrated with external business software, and it is open to various upgrades depending on the specific needs of the user, explains Maja Fujan.

Furthermore, Datalab offers additional services including installation of the business operating system, user support, training, software upgrades, business consulting, digitalisation of processes, etc.

For the financial year ending on 30 June 2019, Datalab surpassed the planned results throughout the region. "These good results are always the result of hard work by the entire team. We put a lot of emphasis on our strategic orientation towards the markets of SE Europe, as we market our PANTHEON ERP product successfully via our subsidiaries and partners. To date we have sold more than 59,000," said Maja Fujan.

CRMT – Systems Solutions Development

CRMT is a systems integrator that works with the world's most advanced and highly specialised providers of analytical tools. They develop custommade systems solutions tailored to the needs of their clients. In the area of regulatory reporting for insurers in the Adriatic region, they are developing solutions for IFRS 17 – the International Financial Reporting Standard that insurers have to satisfy by 2022. In the area of IFRS 17, CRMT is carrying out projects in both the Adriatic region and the USA.

They are also very active in the area of big data analytics, in which they have several ongoing projects. They use various analytical approaches and tools to help companies obtain useful information and indicators that can serve as a basis for improving their existing manufacturing processes, creating new business models, increasing efficiency and profitability, and improving the success of corporate leadership and management. They see additional potential here, as foreign companies in particular ask about establishing a data catalogue, which is the basis for analysis. The new markets that CRMT is targeting include the Scandinavian countries.

Forecasts for the coming year in the areas in which CRMT operates are good. Their solutions in the area of big data analytics are crucially important for a successful transition to the industry 4.0 environment,



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Podjetje MOS Servis je bilo ustanovljeno leta 2006 in je v tem času postalo globalni ponudnik električne in mehanske montaže nove opreme na različnih področjih. Znanja in izkušnje pridobljena pri tem so nas v letu 2014 pripeljale do tega, da bi lahko posamezne sklope ali celotne sisteme izdelovali sami. V zadnjem času pa ponujamo poleg izdelave tudi sodelovanje pri konstruiranju teh sklopov. Podjetje je 100% izvozno usmerjeno in sodeluje z več tujimi partnerji, predvsem nemškimi.



Proizvodni program 7 možnosti

Imamo izkušnje pri izdelavi sklopov ali celotnih transportnih sistemov na področju avtomobilske in prehrambne industrije, logističnih in distribucijskih ponudnikih ter letališčih. Izdelujemo različne vrste tračnih, tirnih ali verižnih transporterjev, sisteme za obračanje in premagovanje nivojskih razlik, valjčne proge ...

Na 3500 m² pokritih površin izvajamo proizvodnjo od razreza materiala in izdelavo kompleksnih zvarjencev, strojno obdelavo najrazličnejših kompleksnih izdelkov ki zajemajo postopke struženja in rezkanja, več vrst površinskih obdelav in zaščit, kakor tudi pred montaže.

Naše zmožnosti zajemajo:

Konstruiranje CAD, programiranje CAM:

 Za zagotavljanje kakovosti, pri konstruiranju in pripravi dokumentacije uporabljamo programski paket Solidworks 2019, s podporo CAM za programiranje naših CNC strojev.



Pred obdelava:

- Razrez jeklenih profilov večjih dimenzij
- Skupaj s partnerji lahko nudimo laserski razrez pločevine do 6 m x 2,5 m
- Vrtanje

Mehansko obdelava:

- Struženje do premera 500 mm in dolžine 3000 mm
- 3D rezkanje od manjših kosov do večjih zvarjencev

Varjenje po postopkih MIG, MAG, TIG:

 Za zagotavljanje natančnosti uporabljamo namenske varilne mize v vseh varilnih celicah, ki nam omogočajo izdelavo varjencev do dimenzij 9000 x 2000 x 1500.

Površinska obdelava:

- Nudimo postopek kaljenja, nitriranja, Bruniranja
- Prašno barvanje 8000 x 2000 x 1000 mm
- Galvansko cinkanje 3000 x 1000 x 500

S predmontažo sistemov zagotovimo pravilnost delovanja in skladnost z zahtevami kupca.

and the same holds for the areas of regulatory reporting and CPM.

The company is most proud of its closely-knit team, who have professional knowledge and experience in the area of leadership of various projects both at home and abroad. This is also the reason that their clients choose long-term cooperation with CRMT.

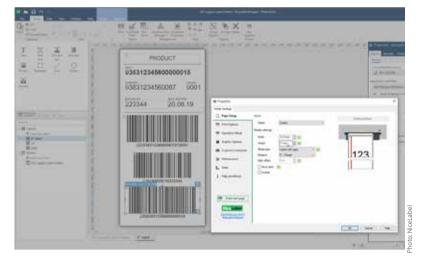
NiceLabel - Streamlining Business Process through Digital Transformation

NiceLabel, established in 1993, is a leading global developer of label design software and label management systems. With its headquarters in Slovenia and offices in Germany, the USA, Singapore and China, and via its network of partner companies NiceLabel offers services and support to customers from all over the world. It employs a diverse team of 160 people based in 12 countries, helping companies of all sizes improve the quality, speed and efficiency of their labelling, while reducing cost. With NiceLabel, organizations are able to digitally transform their entire labelling process, from design to printing to label management. The result is a leaner, more agile operation that enables them to respond more quickly to changing market conditions and requirements, get products to market faster and compete more effectively in the sectors where they do business.

In 2018, the company launched Label Cloud, the world's first public cloud label management system, developed to allow businesses to rapidly digitally transform their factory and warehouse labelling process. Earlier this year, it introduced its global partner programme, which is designed to help NiceLabel channel partners meet the customer demand for the digital transformation of on-demand label printing.

NiceLabel's success has been recognized internationally. In the last years, the company has received several national and international awards for its fast growth and development, including the Golden Gazelle, Top Exporter, European Business Award for growth strategy. NiceLabel is as a member of ELITE - London Stock Exchange Group's international program for ambitious high growth businesses. The company has been recognized by AIM - worldwide association for the automatic identification industry and listed among London Stock Exchange Group's 1000 Companies to Inspire Europe.

"NiceLabel is ambitious. The company has grown rapidly in recent years as it has extended its product range, geographic presence and channel. Focusing on organic growth within its target market, it is investing in a balanced way across its development and commercial teams to extend its technology advantage and to increase global presence. The company's core strategy choice remains differentiation based on domain expertise and superior technology. In the longer term it sees the opportunity to apply its world-class software development skills to adjacent high growth markets," pointed out Chris Walsh, NiceLabel CEO.



Špica First Went South, then to Central Europe, Now to the USA

Špica International has been helping companies automate their processes for 30 years. The company vision is to become a leading provider of digital transformation software in the area of human resources and supply chain management, as they specialise in identification technologies for the widest possible range of applications, which they have harnessed for business applications, particularly software for access control and work time and supply chain management.

They have 50 employees in Slovenia, and the same number in their subsidiaries in the countries of former Yugoslavia. In 2018 they concluded a partnership with the English firm IBCS and began expanding their operations more intensively towards Central Europe (Slovakia, Czech Republic, Poland, Hungary and Bulgaria), and they are now targeting the West. In 2019, Tone Stanovnik, CEO and founder of Špica International in Ljubljana, established the company Spica Global in the USA.

"Technological breakthroughs typically create opportunities for ambitious, creative, ground-breaking companies that break through into the leading ranks. Our development in the last few years has been laser-focused on cloud computing," says Stanovnik, who adds that "this extremely risky decision" has clearly paid off: Gartner, a leading global IT analytics company, recognised them as a representative supplier of solutions in the area of workforce management (WFM). Nearly at the same time, Microsoft invited them to join its Co-Sell partner programme in the USA. "This led to the logical decision to establish a new company in New York," says Stanovnik.

The American market is very different to the European market when it comes to work time management. Špica's cloud-based IT platform www. myhours.com allows the exchange of data on time and activities that freelancers spend and carry out on projects. "We caught the trend of the extremely rapid expansion of freelance work," says Stanovnik, who adds that "time is the key asset, and Špica's mission is to help our clients manage it successfully." NiceLabel / Euro Plus, with its headquarters in Slovenia and branch offices in Germany, the USA, Singapore and China, offers professional label design and printing software.

In 2019, NiceLabel unveiled Label Cloud, the first publicly accessible system for cloudbased labelling.

Špica International wants to become a leading provider of digital transformation software in the area of human resources and supply chain management.



Tone Stanovnik, CEO and founder of Špica International in Ljubljana, established Spica Global in the USA in 2019.

XLAB, with its headquarters in Slovenia and offices in Switzerland, Great Britain and the USA, is one of the leading regional providers of cloud computing services. The company is continually looking at new areas and innovative technologies which have not yet yielded concrete results, but which show a lot of potential. At the same time they are realists and therefore they maintain the balance required for successful operations. They are especially proud of their automatic location detection, which allows them to make records of work time and carry out access controls nearly without the use of readers, "since the room itself detects us via IoT technology and based on our location carries out the necessary services, e.g. recording the time of arrival, opening the door, turning off the alarm and setting the thermostat."

Stanovnik also notes that they work closely with young ground-breaking companies such as Chipolo and Carlock, and have created totally new products "for success tomorrow" – BLE iDentification and location using the new LTE/G5 technology.



XLAB Transfers Complex Research Knowledge into Industry

XLAB is a global IT solution company focused on remote desktop technology (ISL Online), management and automation of hybrid infrastructure (XLAB Steampunk), security and privacy, IoT and data analytics, building on the breakthroughs of its own research team. As a highly professional technology innovator with more than 100 employees, XLAB is renowned for its outstanding execution of complex research and industrial IT projects, and transferring the knowledge and results of complex research projects into industry. It is also a firm believer in open collaboration. Working with different technologies to build agile solutions, XLAB has contributed thousands of lines of code to the open source community.

"Our products are based on the extensive expertise acquired from complex research projects that tackle the real problems of our time," say XLAB, which has one of the strongest computer research departments outside academia in Slovenia. The firm is proud of being "the most successful Slovenian company in terms of acquiring European research projects of the Horizon 2020 programme and among the Top 50 SME's in Europe by the same measure". XLAB Research, established in 2003 for basic and applied research, the development of complex software, and technology transfer to other XLAB departments, has participated in 50 EU and 25 national research projects.

It's prime product, ISL Online, is a remote desktop software that allows users to instantly access and control any computer or mobile device to provide ad-hoc technical support or manage systems remotely. It is used by millions of IT professionals and helpdesk technicians across the world, with significant remote desktop market share in Japan.

XLAB Steampunk, as a trusted Red Hat partner, enables unified automation and management of hybrid infrastructure by integrating third-party technologies into Red Hat Ansible Automation and Red Hat CloudForms. Gaea+ is a customizable 3D visualization solution, awarded by NASA. MedicView 3D dental and radiology imaging solutions are used by medical specialists worldwide.

XLAB is trusted by the world's leading companies, among which are: Red Hat, Konica Minolta, Microsoft, Canon, Idexx, Singtel, AT&T, Mitsubishi Chemical, Avast, World Wide Technology, and Nokia Nuage.

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Lek and Krka World-Leading with New Products

Of the pharmaceutical manufacturing companies in Slovenia, by far the best-known, most profitable and most export-oriented are Krka of Novo Mesto and Lek of Ljubljana.

Nina Šprohar

Krka Present on Almost All Continents

Krka began turning their attention to foreign markets very early on, in the 1960s. Today, it is an internationally focused company which sells its products in more than 70 countries worldwide. Sales outside Slovenia account for just over 94% of Krka Group sales. "We have a strong network of companies and offices abroad. We are also expanding our production capacities outside Slovenia," say the company, which has manufacturing companies in Poland, Russia, Croatia and Germany. They are now increasing their presence on overseas markets, particularly in the Middle and Far East, Africa and Central America, Via Krka and their TAD Pharma concern, they have been on the Chinese market for several years. At the end of 2017, they set up a new company, Ningbo Krka Menovo, which manufactures and markets drugs in collaboration with a local partner.

Emphasis on R&D

"Our main challenges in the future are export orientation, entry onto new markets, investment in knowledge and investment generally, risk management and good corporate governance," say the company.

The half-yearly results indicate that 2019 will be another year of growth. "We are planning sales of EUR 1.375 billion and profits of EUR 172 million." The growth in Krka's sales depends chiefly on the share of new products resulting from the company's own research and development (R&D) work. "The products that we have begun to market in the last five years account for 29% of total sales, so we are investing around one tenth of the value of our annual sales in R&D."

Some 1,700 specialists from more than 30 natural science and technical fields are involved in drug development – and they added 23 new products in 52 pharmaceutical forms and strengths to the product range in 2018 alone. "With our vertically integrated business model we are able to develop drugs in pharmaceutical forms and strengths that are not yet available," say the company.

In October 2019 the company opened a development and control centre in the factory zone in Ločna, Novo Mesto, investing EUR 55.6 million to double R&D and analytical capacities for quality assurance of their own products.

New Krka Project in Russia

"We are investing mainly in increasing and technologically updating production and development, in quality assurance, and in our production and distribution centres around the world. We are planning investments of EUR 124 million by the end of the year," say Krka.

A new project, with production and laboratory capacities, is in the planning phase, and will mark the company's next five-year investment period in Russia. The investment is estimated at EUR 33 million and will enable Krka, in their own words, to increase the manufacturing capacity at the plant to three billion tablets a year. Krka sell their products in more than 70 countries worldwide and have set up a company in China, Ningbo Krka Menovo, in collaboration with a local partner.

The products that Krka have begun to market in the last five years account for 29% of total sales, so they are investing around one tenth of the value of their annual sales in R&D.



In October 2019 Krka invested EUR 55.6 million in the opening of a development and control centre in Slovenia.



Krka are also focusing on combination drugs that can treat two diseases at once.

Since becoming part of Novartis, Lek's products, developed or manufactured in Slovenia, have been marketed throughout the world.

In 2018 Lek completed the development of and filed 20 registration dossiers for drugs on the markets of the US, Russia, Europe, Canada, Thailand and China, and one dossier for an active ingredient in the US and Canada.

In addition, they are completing investment in the manufacture of veterinary products in solid pharmaceutical form in Jastrebarsko, Croatia.

Attention to Combination Drugs

"In accordance with the EU directive, we have introduced security features to the packaging to prevent patients from taking counterfeit drugs. That has required numerous upgrades to technological equipment and manufacturing procedures, and we have invested approximately EUR 20 million in these upgrades in the last three years," they add.

They are also turning their attention to combination drugs. "Their advantage lies in the fact that the patient is able to take one drug instead of two or three, and may even be treated for two diseases at once. This reduces the number of doses and ensures that the drugs work in a coordinated way and in a way that is safer for the patient. At the same time, this improves treatment supervision," they explain. When new European recommendations were issued last year that introduced combination tablets as the first choice for the treatment of hypertension, Krka already had 80 different combination drugs on the market.

Lek's Patient-tailored and Personalised Medications

Since becoming part of Novartis, Lek's products, developed or manufactured in Slovenia, have been marketed throughout the world via the extensive sales network employed by both Sandoz and Novartis. Some key products also contain active ingredients developed and manufactured by the company itself. Novartis's product portfolio will focus in future on patient-tailored and personalised medications in smaller quantities. "In addition to focusing on biologics and complex differentiated generic drugs, we are making huge efforts to design a range of medications with high added value that will offer patients important additional benefits and help to strengthen the sustainability of healthcare systems around the world," they add.

In 2018 the Slovenia Development Centre completed the development of and filed 20

registration dossiers for drugs on the markets of the US, Russia, Europe, Canada, Thailand and China, and one dossier for an active ingredient in the US and Canada.

New Dietary Supplement from Slovenia

"We have completed the development of a high-quality innovative dietary supplement, LincomplexTM, which is already available to Slovenian customers," said the company. They have also launched important anti-inflammatory medications, as well as drugs for balancing cholesterol, easing prostate problems, and treating erectile dysfunction and fungal disorders.

"As the first to submit a dossier to the US Food and Drug Administration (FDA) on registering a drug with the active ingredient amantadine, we have thereby



Lek and Krka both received gold awards for best innovation in Slovenia 2019.

- Krka: First generic drug with extended release of paliperidone based on osmotic pump technology – a modern approach to treatment
- Lek: Continuous and connected process for purifying biopharmaceuticals – making biopharmaceuticals more accessible to patients
- Lek: LinComplex[™]: New generation of high-quality probiotics with the most highly-researched strain *Lactobacillus rhamnosus gg* – a new-generation probiotic.

For more details, turn to the article on Innovation on page 69.

obtained a six-month generic exclusive right to sell to the US market," they explain.

"In Slovenia we are expanding the range of production of active ingredients for the manufacture of innovative drugs. In 2018 we began manufacturing three active ingredients in Mengeš for innovative drugs that will come onto the market in the next few years. The final stages of production of certain innovative medicines are taking place at their other sites in Slovenia," Lek explained. In Mengeš they have collaborated on the development of three new Sandoz biologics, which entered the market in 2018. "We are also involved in various stages of the development of innovative biological drugs, and are building a new facility for the production of biological agents," say Lek.

Lek will focus in future on patient-tailored and personalised medications in smaller quantities.



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CASE STUDY

Improving development of world's largest welding guns with solidworks

KOČEVAR, d. o. o., develops and manufactures some of the largest custom-designed welding guns in the world. Established in 1969 to produce industrial spot, projection, and seam welding machines, the Slovenian company has expanded its offering to include single-phase AC linear action, DC three-phase linear action, and MFDC medium-frequency linear action welding machines, as well as robotic spot and seam welding guns, rocker--arm pedestal spot welders, multi-spot projection welding machines, resistance welding automation systems, resistance welding consumables (electrode caps, shanks, laminated shunts, etc.), and measuring equipment.

To address the challenges associated with developing and producing custom-made welding equipment, KOČEVAR needs to maintain a competitive edge, which is why the company was an early adopter of 3D CAD technology when it replaced its Caddie[®] 2D software with the SOLIDWORKS[®] 3D mechanical design

Challenge:

Achieve a competitive edge by reducing weight and optimizing performance of the the world's largest customer-developed welding guns.

Solution:

Implement SOLIDWORKS 3D mechanical design software.

Results:

- Cut development/delivery time by a factor of 10
- Reduced weight of largest welding gun by 60 percent
- Eliminated cost of repetitive prototyping
- Improved product performance and profit margins



KOČEVAR relies on SOLIDWORKS design tools to produce the largest custom-made welding guns in the world, which are designed for joining together large components of passenger train cars.

system in 1998. The company standardized on SOLIDWORKS software because it's easy to use, provides access to simulation tools, and supports KOČEVAR's efforts to shorten delivery times.

Slashing custom welding gun development by a factor of 10

Since implementing SOLIDWORKS, KOČEVAR has continuously reduced its development cycles and shortened its delivery times, resulting in a factor of 10 improvement over its development/delivery times using 2D design tools. "To develop the welding guns that we produce now would have taken years working in 2D,"Managing Director Jožef Kočevar Jr. stresses.

"Using SOLIDWORKS, we have been able to reduce what would take years to months," Kočevar continues. "The main reason for these productivity gains is that it's so much easier to visualize the design and make changes in SOLIDWORKS. Whenever we need to make a design change in SOLIDWORKS, all of the related drawings and technical documentation update automatically. A similar change in 2D would require a month or more of rework. Custom-designed machines are our core business, which is why we use SOLIDWORKS for every project—it allows us to make changes quickly and easily."

Reducing weight, optimizing performance

The greatest challenge to designing and building the largest welding guns in the world is reducing the weight of the guns and optimizing load capacity. To overcome this challenge, KOČEVAR leverages SOLIDWORKS SimulationXpress[™] finite element analysis (FEA) tools to calculate the weight and simulate the performance of every component, resulting in a 60-percent reduction in weight while improving durability and performance.

Saving customers money while increasing profits

By using SOLIDWORKS design and SOLIDWORKS SimulationXpress analysis tools to reduce the weight of its large welding guns, Kočevar is helping to save its customers money while simultaneously improving profit margins on each project.





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Active

Slovenia is active. No doubt about it, and Slovenians are proud sportsmen. Leon Štukelj (1898-1999), a Yugoslav gymnast of Slovene ethnicity, was the first Slovene ever to win an Olympic medal – and not one, but six: two gold medals (for Yugoslavia) in Paris in 1924, one gold medal and two bronze in Amsterdam in 1928, and a silver medal in Berlin in 1936. Štukelj appeared at the opening ceremony of Atlanta 1996 Olympic Games as thenoldest living Olympic gold medallist.

Slovenia's Athletes – The Pride of the Nation

Although Slovenia is a relatively small country with just two million inhabitants, it has achieved a series of unbelievable successes in nearly all sports disciplines, both individual and team.

Nina Šprohar

Slovenian Volleyball Team, European Runners-Up:

In 2019, the Slovenian volleyball team repeated its success from four years ago and repeated as silver medallists at the European Championships. The completely revamped Slovenian national team, led by their new coach, Alberto Giuliani of Italy, competed in the FIVB Volleyball Challenger Cup and won a place in the Nations League. In September 2019 the Slovenian volleyball players competed in the European Championships on home soil for the first time in history, as the competition was co-hosted by Slovenia, France, Belgium and the Netherlands. They put together a string of victories on home soil and triggered an outpouring of volleyball euphoria. In the final in Paris, they fell to overall victors Serbia.





Tine Urnaut, Captain of the Slovenian Volleyball Team:

"I am proud of all of my teammates, who demonstrated exceptional individual skills, the willingness to sacrifice, team spirit and excellent teamwork by all of the players in the fight for team success. I am proud of the entire staff and the Slovenian Volleyball Association, which was named co-host of the European Championships and organised the entire competition magnificently. But I am most proud of the fact that we managed to raise interest in volleyball in Slovenia and to fill the Stožice arena. The support of our fans was hugely important and gave us the extra strength we needed to overcome our opponents, who have won the biggest competitions in volleyball. I am also happy, proud of and thankful for the support of our fans in Paris and for the amazing receptions in Ljubljana and the Koroška region. This repeat of our success from four years ago shows that our silver medal at the European Championships in 2015 was no fluke, but was the result of the excellent play and teamwork of all the players, the team managers and the association. To get a medal in a big competition like this you have to believe that your team is capable of beating every opponent and winning the entire competition. It is of course based on daily and year-round hard work, training and a sports-oriented lifestyle, and a good atmosphere among the team members. But the biggest encouragement of all is the raucous support of the crowd at those moments when things aren't going that well."

Eva Terčelj, Canoe Slalom World Champion:

Terčelj was Junior World Champion in 2008 and has added to her achievements in the succeeding years. In addition to winning the world championships in 2019 in La Seu d'Urgell, she also finished the World Cup season in second place overall.

"There is no simple answer for what you need in order to succeed, as there are a lot of factors that have to line up at the right time. The most important things are years of hard work, commitment, persistence, a good team and support from your family. If you follow your dreams, your heart will follow too. I recently read an interesting idea – the only thing that top-level sports demand is everything you've got. The most encouraging things for me are the little victories in everyday life, when I succeed in overcoming myself. Being up to the challenge, following your dreams and the personal growth that comes with it is the best reward for all the hard work and time you put in. Bigger challenges mean heavier loads, but they result in greater satisfaction. I am most proud of my own perseverance, diligence and optimism, which helped me through all the ups and downs. I believe that good work in life eventually pays off."



Sport



Luka Dončič, Kia NBA Rookie of the Year 2019:

Dončič started playing basketball at his home club, Union Olimpija, where he was soon spotted by scouts from Real Madrid, which he joined when he was just thirteen. He won a spot as a starter in 2016, and two years later became the youngest player to be named EuroLeague MVP at age 19. He was also awarded the EuroLeague's Rising Star Trophy, the coaches' award for the best player under the age of 22. He and his Slovenian teammates won the European Championships in 2017, and he was named a member of the All-Tournament Team as one of the top five players in the competition. Luka is now enjoying success in the NBA with the Dallas Mavericks, where he is still setting records - for instance, he became the youngest player in Dallas history to score 20 points in a single game, he was named Rookie of the Month at the very beginning of the season, and became the youngest player in NBA history to score seven three-pointers in one game. By the end of his first season in the NBA he had scored 8 triple doubles, overtaking Magic Johnson for third place among rookies, and was named NBA Rookie of the Year 2019.

Primož Roglič, Winner of La Vuelta a España:

All-rounder Primož Roglič began his career as a very successful ski jumper he took gold and silver medals at the Nordic World Junior Championships, and took two victories in the Continental Cup, along with a second place and two thirds. But in 2012 he decided to hang up his skis and start cycling. The successes soon followed. In 2015 he won the Tour of Azerbaijan and the Tour of Slovenia, in 2016 he won a stage at the Giro d'Italia and took tenth at the Olympic time trial in Rio de Janeiro, in 2017 he won the 17th stage at the Tour de France and won the Volta ao Algarve, and took the silver medal at the time trial at the World Championships in Bergen in 2017. Last year was even more successful for Roglič, as he won the Tour of the Basque Country and the Tour de Romandie, the Tour of Slovenia for the second time, and took fourth overall at the Tour de France with two stage wins. But he did not rest on his laurels this year. He won the UAE Tour, the Tirreno Adriatico and the Tour de Romandie, won the prologue and the time trial and took third overall at the Giro d'Italia, and wore the overall leader's pink jersey for five days, the first Slovenian cyclist to win the honour. But his Slovenian fans are most proud of his overall victory in the Vuelta a España in 2019.



Ilka Štuhec, Alpine Skiing World Champion:

One of the rare women skiers who is able to take top results in all five disciplines, she won three gold medals at the World Junior Championships, and debuted on the World Cup on 17 March 2007. In the 2016-2017 she surprised even herself, winning the first downhill of the season (and her first World Cup victory) with a bib number of 29. In 2017 she wrote herself into the history books by becoming the downhill world champion, and soon afterwards won the small crystal globe in the combined, which she followed up with the overall title in the downhill as well. But just six days before the start of the next season she suffered a terrible injury. After a lengthy recovery following knee surgery she got back on her skis only in the following season, 2018-2019, but soon took her first victory in the downhill after her return, and added a further win in the super-G on the very next day. At the World Championships in Are in 2019 she became the world champion in downhill for the second time.





Janja Garnbret, Climbing World Champion:

Janja was a part of the national youth climbing team when she was just in primary school, and soon became European youth champion in lead climbing and bouldering, winning the world youth championships one year later. As she continued climbing she racked up success after success - in 2016, she won the overall World Cup title in lead climbing and once again took the title of World Champion, in 2017 she was second overall in the World Cup in bouldering and first in lead climbing, and finished the season by conquering the 40-metre route on the overhanging Seleccio Natural (9a), taking just five attempts to complete the route. In Paris in 2018 she became the world champion in bouldering and combined, and took first overall in lead climbing. She continued her amazing run of results in 2019, as she once again took the overall World Cup title in bouldering, and at the World Championships in Tokyo became world champion in both bouldering and lead climbing, as well as in the 3x3 format.

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Our guiding principle is »natural and effective«

Tosama have been producing and marketing hygiene and medical products for almost a century. From humble beginnings in 1923, Tosama have evolved into a world-renowned, innovative and highly valued company. Tosama currently employs almost 600 people and generated EUR 37.9 million in net profit from sales in 2018 – a rise of 5.5% on the year before.

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The Vivamel range of modern dressings brings honey back into medicine – after all, our ancestors were using it to treat wounds thousands of years ago.

Our company's reputation is based on many years of tradition in manufacturing high-quality products that are nature- and user-friendly. Our guiding principle when developing new products is the use of natural materials as far as possible. This is also written into our mission statement. Tosama have not made sanitary towels from synthetic materials for a long time, and most of our tampons are made from cotton or organic cotton.

Tosama's flagship product (and the one the company exports most of) is the hygienic tampon. We make 560 million of these a year and export them to over 50 countries worldwide. Our biggest tampon customers are the USA, Germany, Russia, Australia and China.

Our latest 'to.to' range of childcare products are 100% natural, and we are also particularly proud of our Vivamel wound care dressings, which contain chestnut honey.

Our Vivamel wound care dressings, with medical chestnut honey are helping us to break through onto foreign markets

because of their proven effectiveness.

🛱 Clinical studies have shown that they are

successful in treating diabetic and venous ulcers, pressure ulcers, burns, and infected and malodorous wounds. We are already marketing these products successfully in Belgium, France, Austria, Germany, the Czech Republic and Slovakia.

Vivamel was developed by Tosama ten years ago. The idea of treating wounds with nature's help developed into effective wound dressings that used medicinal chestnut honey as their main active ingredient. They are the first modern dressings to be produced in Slovenia – something of which we are especially proud. They were developed in collaboration with the Biotechnical Faculty at the University of Ljubljana, Ljubljana University Medical Centre and the Božnar bee products company.

Why did we choose chestnut honey? We carried out several research studies and a clinical study in the course of developing the dressings. Our own as well as foreign research confirmed that chestnut honey was extremely effective for the treatment of wounds. It is a honey that contains the highest quantities of those elements, antioxidants, proteins and enzymes, that are essential for the growth of new tissue. At the same time, chestnut honey contains the highest levels of kynurenic acid of any honey. This acid is essential for destabilising the biofilm that almost all wounds contain.

Normal eating honey can contain microorganisms and spores that complicate the wound-healing process, so it is important that honey is sterilised before being used for medicinal purposes.

Our modern Vivamel dressings with medicinal chestnut honey therefore promote the cleaning of wounds (a process that also includes destabilisation of the biofilm), are anti-inflammatory and antimicrobial, establish a moist environment, accelerate healing with less scarring and reduce unpleasant odours. They are suitable for acute and chronic wounds alike.



www.tosama.si



Tina Kuhar, brand manager at Tosama: "Vivamel products are of exceptionally high quality, as shown by the large number of wounds they have helped to heal and limbs they have helped to save, as the use of Vivamel on chronic wounds has, on many occasions, removed the need for amputation. They are definitely 'my first choice' for wound treatment. Following on from our good experiences and with a desire to expand the product range, we will shortly be adding a new product, Vivamel PROTECT, to our list of existing Vivamel products (Vivamel ALGINAT, Vivamel CONTACT and Vivamel TUBE). It will be available at the beginning of 2020 and will be aimed at the treatment of sensitive wounds during the new tissue growth phase."



At Tosama, Vivamel products are manufactured in accordance with the regulatory requirements on medical devices and ISO standards.



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The Chamber of Commerce and Industry of Slovenia (CCIS) is the largest independent, voluntary, non-profit association of companies in Slovenia. It was founded in **1851** and today boasts more than **6,200** member companies of all shapes, sizes, branches, and regional backgrounds. Our member organizations power more than **2/3** of the Slovenian economy in terms of capital and human resources. Business in Slovenia starts here!

What Can We Do for You?

The CCIS is the ideal **local partner** for foreign investors and business professionals. It can support and facilitate your entrance into the Slovenian market. It can help you search for **new contacts** and provide you with a wide range of useful business information.

If you are interested in doing business in Slovenia, the CCIS offers you **services** developed especially for your needs.

Looking for Partners in Slovenia?

The Centre for International Business is the perfect contact point for anyone interested in working with Slovenian companies. Along with providing information on the Slovenian market, the Centre also provides support to foreign enterprises and institutions in finding new partners. The Centre is responsive, creative, and tirelessly modern. At the same time it makes sure that all its partners are treated as individuals, on a case by case basis.



What do you gain by knocking on the door of Slovenia's Chamber of Commerce and Industry?

1. The most powerful representative of the Slovenian private sector

A partner who stands by your side as you enter the Slovenian market

2

3. A networking megahub, where best practices are freely exchanged

Market Intelligence

The CCIS provides a wide range of insightfully discerning information on the economic situation in Slovenia. This includes everything from economic indicators and trend forecasts to information on companies' credit ratings. You also get access to contacts for potential business partners.

The CCIS publishes a monthly electronic bulletin in English called **Slovenia Business Link**. This publication features information on upcoming events, op-eds on regulatory issues, and the latest economic data.

Take advantage of the best business opportunities in Slovenia – make an offer or find a supplier. Foreign companies can register and search for trade inquiries through our special inquiry database BORZA (www.borza.org), where you can find both Slovenian and international business partners.

Go International

The CCIS is the primary meeting hub for Slovenian development and export-oriented enterprises, which are the very engine driving the core of development and innovation in the Slovenian economy. Our continuous interaction with foreign enterprises, institutions, and experts is converted into engaging activities like business delegations, educational and other major events, and B2Bs. It is our mission to provide you with our assembled information about inquiries on international markets, assistance in connecting Slovenian and foreign enterprises, and making your business experience here as productive and lucrative as possible.



go international slovenia

Legal Framework

The CCIS can provide you with information about Slovenian legislation or offer you legal consulting on Commercial, Corporate, Property, Enforcement, and Labour Law, as well as information on public procurement and insolvency procedures.

SloExport: All Major Slovenian Companies in One Place

SloExport is a database catalogue containing information on more than 4,500 Slovenian exporters. It is a tool that will be of great assistance in seeking information on individual Slovenian companies.



Excellent SME Certification

In conjunction with the renowned global credit insurer COFACE, the Chamber of Commerce and Industry of Slovenia is now issuing Excellent SME certificates to Slovenia's most successful small and medium-sized enterprises.

This certificate enables potential investors or business partners to verify a company's existence, its actual web address, and, most importantly, its creditworthiness.



Ljubljana Arbitration Centre

The Ljubljana Arbitration Centre is an autonomous and independent arbitration centre providing administrative services for the resolution of disputes between parties through arbitration, mediation, conciliation, and alternative forms of dispute resolution.



Promotion and Advertising

The CCIS offers several packages of promotional opportunities and advertising also to foreign partners to increase their visibility on the Slovenian market.



Environmental Protection

The CCIS can provide information on new and existing environmental legislation, and other environmental aspects, including exchanges of best practice and benchmarking through conferences, training activities, and individual consultations.

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With its rich tradition and expertise, the company focuses on the production of high-end CHP units

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Metalna Power, d.o.o., established last year, continues to develop the know-how and tradition of Metalna Maribor and Eco power CEA. Metalna Maribor's references and business contacts, which still exist today, are mainly based on some of the largest hydroelectric power plants built in the world, e.g. Haditha and Djerdap. The know-how for the construction of hydroelectric power plants and power plants on the basis of municipal waste arise primarily from Metalna Maribor, whereas the Eco power CEA's references and expertise

are related to the construction of CHP units, and from now also for trigeneration units.

The technical perfection of the completed projects is evidenced by the fact that the company has managed to attract authorised repairers for the leading brands in the sector (MAN, MTU, Jenbacher...), setting them up again under the Metalna Power brand.

Numerous references

Metalna Power's competitive advantages lie in CHP facilities, where most of its references are related to successfully completed high power gas engine projects in Slovenia. It upgrades its activities based on this foundation in the gas and steam turbine market niche, where it operates with two business

partners: KAWASAKI Gas Turbine Europe GmbH for lower power units and Siemens d.d. Power and Gas Division for higher power units, as a long-term priority, complemented by natural or synthetic gas cogeneration systems and separate power generation using diesel engines operating on HFO.

The components of their cogeneration plants are selected on the basis of long--term engine/turbine suppliers' experience and the longstanding experience of its own employees. The best possible materials have been chosen for the facilities and simple solutions used with a focus on maintenance, thus adjusting the repair intervals in order to ensure long-term and continuing operation of the facilities.

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List of 100 Largest Slovenian Exporters

Data source: audited and consolidated annual reports of groups/companies for 2018, Agency of the Republic of Slovenia for Public Legal Records and Related Services (AJPES).

Ranking criteria: Sales revenue on foreign markets in 2018.

	Company/Group name	Sector	Exports (in EUR million)	% of foreign sales	Value added (EUR million)	Number of employees	Added value per employee (in EUR)
1	PETROL GROUP	Wholesale and Retail Trade	2,677	49.4	253	3,659	69,257
2	GEN GROUP	Energy	1,887	79.6	139	1,344	103,212
3	REVOZ d.d.	Manufacturing	1,755	99.1	198	2,701	73,127
4	LEK GROUP	Manufacturing	1,323	97.0	478	4,959	96,441
5	KRKA GROUP	Manufacturing	1,238	93.3	727	11,129	65,299
6	GORENJE GROUP	Manufacturing	1,070	90.3	277	11,098	24,931
7	HSE GROUP	Energy	933	63.4	253	3,082	81,976
8	Gorenje, d.o.o.	Manufacturing	758	92.3	72	4,391	16,423
9	BELEKTRON d.o.o.	Wholesale and Retail Trade	725	98.5	29	5	5,608,669
10	IMPOL GROUP	Manufacturing	687	94.4	126	2,348	53,488
11	SIJ GROUP	Manufacturing	679	84.6	184	3,825	48,012
12	Interenergo d.o.o.	Energy	601	90.2	2	32	53,559
13	KOLEKTOR HOLDING GROUP	Manufacturing	522	63.5	251	5,776	43,507
14	LIDL SLOVENIJA GROUP	Wholesale and Retail Trade	387	98.6	62	1,625	38,154
15	HELLA SATURNUS SLOVENIJA d.o.o.	Manufacturing	375	96.4	93	1,703	54,554
16	ELES GROUP	Manufacturing	325	60.7	135	2,081	64,813
17	TAB D.D. GROUP	Manufacturing	325	96.6	86	1,420	60,598
18	LTH CASTINGS GROUP	Manufacturing	314	99.6	146	3,004	48,545
19	ADRIA MOBIL GROUP	Manufacturing	297	96.1	86	1,800	47,829
20	BSH HIŠNI APARATI d.o.o. Nazarje	Manufacturing	287	91.8	59	1,127	52,510
21	HELIOS GROUP	Manufacturing	276	88.4	82	1,723	47,405
22	TAB tovarna akumulatorskih baterij d.d.	Manufacturing	258	92.1	55	652	84,619
23	AquafilSLO d.o.o.	Manufacturing	245	99.5	41	856	47,826
24	HIDRIA HOLDING GROUP	Manufacturing	243	91.4	96	2,129	45,113
25	GEOPLIN d.o.o. Ljubljana	Energy	235	59.4	6	42	139,409
26	MAHLE Electric Drives Slovenija d.o.o.	Manufacturing	227	95.2	54	1,758	30,528
27	CIMOS d.d.	Manufacturing	216	96.2	35	991	34,910
28	UNIOR GROUP	Manufacturing	208	84.5	101	3,112	32,384
29	CARTHAGO d.o.o.	Manufacturing	203	100.0	33	759	43,907
30	odelo Slovenija d.o.o.	Manufacturing	200	99.8	58	1,210	48,268

List of 100 Largest Slovenian Exporters

Company/Group name	Sector	Exports (in EUR million)	% of foreign sales	Value added (EUR million)	Number of employees	Added value per employee (in EUR)
31 PRESKOK d.o.o.	Wholesale and Retail Trade	196	99.3	6	11	574,782
32 SLOVENSKE ŽELEZNICE GROUP	Transport	188	44.4	334	8,543	39,127
33 CIMOS GROUP	Manufacturing	187	91.9	73	2,384	30,800
34 GOODYEAR DUNLOP SAVA TIRES d.o.o.	Manufacturing	180	81.5	76	1,538	49,367
35 LUKA KOPER D.D. GROUP	Transport	156	68.8	162	1,172	137,993
36 KOLIČEVO KARTON, d.o.o.	Manufacturing	154	92.6	42	389	106,866
37 UNIOR d.d.	Manufacturing	152	88.4	65	1,780	36,374
38 BOXMARK LEATHER d.o.o.	Manufacturing	152	99.9	23	1,552	15,062
39 CINKARNA Celje, d.d.	Manufacturing	142	86.8	79	876	90,072
40 CONTITECH SLOVENIJA GROUP	Manufacturing	142	98.7	41	638	64,443
41 VALIANT d.o.o.	Wholesale and Retail Trade	136	99.6	2	8	265,721
42 DOMEL HOLDING GROUP	Manufacturing	136	91.0	50	1,268	39,239
43 LES-MMS GROUP	Wholesale and Retail Trade	134	57.7	59	1,518	38,937
44 ADK d.o.o.	Manufacturing	126	98.7	30	646	46,271
45 I.P.S. D.O.O. GROUP	Manufacturing	126	98.4	38	997	37,720
46 ELRAD INTERNATIONAL GROUP	Manufacturing	125	93.5	42	1,549	26,962



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Company/Group name	Sector	Exports (in EUR million)	% of foreign sales	Value added (EUR million)	Number of employees	Added value per employee (in EUR)
47 ISKRAEMECO GROUP	Manufacturing	122	96.1	37	759	49,294
48 NOVEM CAR INTERIOR DESIGN d.o.o.	Manufacturing	121	99.9	24	806	29,600
49 Droga Kolinska d.d.	Manufacturing	118	69.5	39	472	82,727
50 DANFOSS TRATA, d.o.o.	Manufacturing	115	94.1	37	476	77,049
51 ETI GROUP	Manufacturing	113	91.6	45	1,614	27,953
52 TELEKOM SLOVENIJE GROUP	Information and Communication Technology	111	15.5	298	3,361	88,731
53 AKRAPOVIČ GROUP	Manufacturing	110	98.8	58	1,088	53,139
54 CALCIT GROUP	Manufacturing	108	90.9	29	230	127,790
55 KOVINTRADE GROUP	Wholesale and Retail Trade	107	51.9	16	367	44,424
56 TRIMO GROUP	Manufacturing	105	81.7	25	533	47,461
57 PLASTA GROUP	Manufacturing	104	69.1	45	875	51,769
58 PAPIRNICA VEVČE d.o.o.	Manufacturing	103	95.6	9	147	59,927
59 PALFINGER d.o.o.	Manufacturing	103	94.6	29	624	47,063
60 Trelleborg Slovenija, d.o.o.	Manufacturing	101	89.2	43	822	52,668



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List of 100 Largest Slovenian Exporters

	Company/Group name	Sector	Exports (in EUR million)	% of foreign sales	Value added (EUR million)	Number of employees	Added value per employee (in EUR)
61	Adient Slovenj Gradec d.o.o.	Manufacturing	101	98.2	23	677	34,237
62	KNAUF INSULATION, d.o.o., Škofja Loka	Manufacturing	100	78.2	39	395	97,817
63	GKN Driveline Slovenija, d.o.o.	Manufacturing	100	92.7	22	426	50,675
64	INTEREUROPA GROUP	Transport	95	59.2	42	1,286	32,715
65	ŠTORE STEEL d.o.o.	Manufacturing	94	67.7	33	548	60,182
66	RASTODER GROUP	Wholesale and Retail Trade	91	82.2	13	55	244,636
67	ACH 2 GROUP	Wholesale and Retail Trade	91	25.3	27	532	49,848
68	ELRAD INTERNATIONAL d.o.o.	Manufacturing	90	91.1	26	553	47,832
69	VIPAP GROUP	Manufacturing	89	89.5	18	456	40,412
70	DINOS d.o.o.	Environment and Waste	87	57.2	13	311	41,792
71	TPV GROUP	Manufacturing	87	57.3	39	1,202	32,189
72	STARKOM d.o.o.	Manufacturing	87	97.7	19	328	58,820
73	ETI, d.o.o.	Manufacturing	86	87.1	27	781	34,663
74	BAYER d.o.o.	Wholesale and Retail Trade	85	66.5	17	128	130,460
75	FILC d.o.o.	Manufacturing	80	93.9	33	341	95,663

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Company/Group name	Sector	Exports (in EUR million)	% of foreign sales	Value added (EUR million)	Number of employees	Added value per employee (in EUR)
76 WEILER ABRASIVES GROUP	Manufacturing	79	93.0	30	814	37,234
77 ISKRA MEHANIZMI GROUP	Manufacturing	78	89.1	18	624	29,031
78 ELAN GROUP	Manufacturing	78	92.0	28	781	35,360
79 JUB GROUP	Manufacturing	78	70.1	30	760	38,976
80 ContiTech Slovenija, d.o.o.	Manufacturing	77	97.7	25	353	69,677
81 INTERBLOCK GROUP	Manufacturing	77	95.0	50	375	132,648
82 ebm-papst Slovenija d.o.o.	Manufacturing	74	98.4	14	441	31,274
83 FRUTAROM ETOL GROUP	Manufacturing	72	87.8	31	327	94,262
84 SILKEM PLUS GROUP	Manufacturing	71	94.2	16	226	71,078
85 PALOMA GROUP	Manufacturing	68	83.0	12	592	21,070
86 Calcit d.o.o.	Mining and Quarrying	68	86.4	22	155	139,541
87 PAPIRUS GROUP	Manufacturing	66	89.1	9	213	42,221
88 DON DON GROUP	Manufacturing	65	69.8	29	1,585	18,282
89 BRAVOPHONE d.o.o.	Wholesale and Retail Trade	64	100.0	0	1	316,711
90 ELAN, d.o.o.	Manufacturing	63	93.7	23	665	34,797

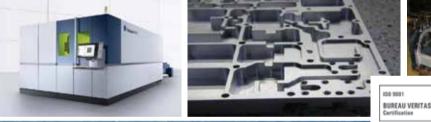
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List of 100 Largest Slovenian Exporters

	Company/Group name	Sector	Exports (in EUR million)	% of foreign sales	Value added (EUR million)	Number of employees	Added value per employee (in EUR)
91	ITW Appliance Components d.o.o.	Manufacturing	63	85.1	22	313	71,664
92	MSIN GROUP	Manufacturing	63	56.7	44	1,210	36,752
93	INTERSPORT GROUP	Wholesale and Retail Trade	63	56.1	19	1,060	17,829
94	TBP d.d.	Manufacturing	62	99.7	25	865	28,439
95	G4 GROUP	Manufacturing	62	69.3	31	799	38,897
96	LJUBLJANSKE MLEKARNE d.o.o.	Manufacturing	61	36.2	30	606	50,302
97	RIKO, d.o.o.	Engineering	61	62.2	8	121	64,828
98	TBP GROUP	Manufacturing	60	93.3	25	865	29,437
99	ISKRA GROUP	Manufacturing	58	64.2	41	1,172	34,599
100	Continental Adria d.o.o.	Wholesale and Retail Trade	58	63.5	5	31	147,094





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MALI-E-TIKO provides a wide range of products and services in the manufacture of elements and components from sheet metal for the needs of the electronics and automotive sectors, including parts for heavy machinery and equipment, which requires expert knowledge of metal processing and machining.

Holding ISO 9001-2015 certification, the Tržič-based MALI-E-TIKO manufactures components for, amongst others, the electronics and car industries, as well as elements for commercial vehicles and construction equipment.





Electronics

In addition to a range of component elements for the automotive industry, the company makes casings and housings for electronics, a variety of custom-made aluminium and alloy heat sinks, together with cases for electronic equipment and amplifiers.

MALI-E-TIKO engineers elements of the most complex design, manufactured using multi-axis CNC milling machines.

Heavy-duty Equipment

MALI-E-TIKO manufactures elements and parts for road vehicles and construction equipment, heavy-duty machines, components for professional ironing systems and heating solutions, inox steel road and other signs, as well as a range of metal cabinets and storage systems.

MALI-E-TIKO's metal processing services include milling and turning, as well as the welding of all types of materials (TIG, MIG and MAG welding). The company employs certified European welding engineers and holds EN ISO 3834-2 and EN 1090-2 certificates. In addition to sandblasting, MALI-E-TIKO's contractors also provide surface protection (galvanised coating), anodising, chromate coating, as well as powder and wet coating. Additional services encompass engraving, including laser engraving, and screen printing.

Product Development

The company collaborates with its clients in product development, employing 3D technology (PTC Creo, AutoCAD) for design, as well as the latest software for CNC programming. Among other services, MALI-E-TIKO provides laser cutting of steel, stainless steel and aluminium, as well as CNC punching and bending of materials using modern CNC machinery (Trumpf, Gasparini and LVD).

Partners in Germany, Austria and Italy

MALI-E-TIKO products supply its partners in Germany, Austria and Italy. Germany is the company's main market, where clients include ANNAX GmbH, BOMAG GmbH and Veit GmbH; in Austria – Swarco Futurit GmbH and Palfinger AG; and CAEN S.p.A. in Italy. Through a number of its Slovenian partners MALI-E-TIKO manufactures can be found in many parts of the world, including the Middle and Far East, South America, the UK, Hong Kong and Japan.

The companies MALI-E-TIKO works with are leaders in their respective fields. Moreover, their partners include them in current and future projects, thereby transferring know-how and engineering expertise.



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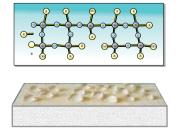
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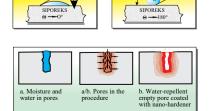
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List of 50 Fastest Growing Exporters

Data source: audited and consolidated annual reports of groups/companies for 2013 and 2018, Agency of the Republic of Slovenia for Public Legal Records and Related Services (AJPES).

Ranking criteria: Growth in exports in the period 2013/2018 for groups/companies and at least EUR 5 million in exports in base year 2013.

	Company/Group name	Sector	Exports (in EUR million)	Growth index of net sales on the foreign market (2018/2013)	proportion of sales on the foreign market	Value added (EUR million)	Number of employees	Added value per employee (in EUR)
1	AVTO TRIGLAV d.o.o., Ljubljana	Wholesale and Retail Trade	75	861.1	47.4	7	93	75,826
2	SCANIA SLOVENIJA d.o.o.	Wholesale and Retail Trade	47	571.9	43.2	11	88	129,480
3	PERUTNINA PTUJ GROUP	Manufacturing	183	532.8	67.8	91	3,513	25,774
4	BELEKTRON d.o.o.	Wholesale and Retail Trade	725	477.3	98.5	29	5	5,608,669
5	Interenergo d.o.o.	Energy	601	469.8	90.2	2	32	53,559
6	BRINOX d.o.o.	Manufacturing	28	434.2	73.4	12	214	56,187
7	GEOPLIN d.o.o. Ljubljana	Energy	235	420.6	59.4	6	42	139,409
8	GEN GROUP	Energy	1,887	397.7	79.6	139	1,344	103,212
9	STILLES d.o.o.	Manufacturing	29	394.3	91.7	9	259	34,860
10	Astellas Pharma d.o.o.	Manufacturing	57	357.1	81.7	6	37	158,977
11	LEDINEK ENGINEERING d.o.o.	Manufacturing	41	355.4	96.4	9	134	66,584
12	MAROVT d.o.o.	Manufacturing	25	348.7	95.9	12	239	49,701
13	GG Bled d.o.o.	Forestry	48	347.6	79.5	8	87	86,429
14	BELIMED d.o.o.	Manufacturing	38	346.7	97.3	10	213	46,574
15	GEA VIPOLL d.o.o.	Manufacturing	28	344.3	99.3	8	127	62,485
16	RLS d.o.o.	Manufacturing	25	331.5	95.6	17	187	89,241
17	VALIANT d.o.o.	Wholesale and Retail Trade	136	328.5	99.6	2	8	265,721
18	PLASTA GROUP	Manufacturing	104	323.1	69.1	45	875	51,769
19	AREX d.o.o. Šentjernej	Manufacturing	21	320.8	84.0	13	121	104,717
20	NOVEM CAR INTERIOR DESIGN d.o.o.	Manufacturing	121	319.6	99.9	24	806	29,600
21	MASS, d.o.o.	Wholesale and Retail Trade	20	301.7	40.9	8	163	51,132
22	VIP VIRANT, d.o.o.	Manufacturing	37	297.4	85.1	4	97	39,269
23	SIJ RAVNE SYSTEMS d.o.o.	Manufacturing	29	296.2	66.1	16	549	29,563
24	TOMPLAST, d.o.o.	Manufacturing	32	285.7	60.4	15	339	43,779
25	G4 GROUP	Manufacturing	62	285.6	69.3	31	799	38,897

(Company/Group name	Sector	Exports (in EUR million)	Growth index of net sales on the foreign market (2018/2013)	proportion of sales on the foreign market	Value added (EUR million)	Number of employees	Added value per employee (in EUR)
26 1	TERMIT d.d.	Mining and Quarrying	15	280.8	69.2	7	198	33,927
27 V	WILLY STADLER d.o.o.	Manufacturing	26	280.3	75.7	11	131	85,281
28 M	MDM d.o.o.	Manufacturing	19	275.6	37.4	7	109	64,218
29 F	REVOZ d.d.	Manufacturing	1,755	272.6	99.1	198	2,701	73,127
30 I	I.H.S. d.o.o.	Manufacturing	21	272.5	99.6	7	125	54,896
31 I	INCOM d.o.o.	Manufacturing	50	268.8	90.8	16	369	44,654
32 F	REM d.o.o.	Manufacturing	22	265.0	75.9	7	146	47,290
33 k	KOVIS-LIVARNA d.o.o.	Manufacturing	17	263.6	68.2	7	171	40,983
34 N	MSIN GROUP	Manufacturing	63	260.9	56.7	44	1,210	36,752
35 N	MEDIS INTAGO GROUP	Wholesale and Retail Trade	57	259.8	57.4	26	320	79,878
36 E	ELRAD INTERNATIONAL GROUP	Manufacturing	90	258.4	91.1	26	553	47,832
37 F	Pivovarna Laško Union d.o.o.	Manufacturing	40	258.3	26.1	64	596	107,166
38 E	ELRAD INTERNATIONAL GROUP	Manufacturing	125	257.5	93.5	42	1,549	26,962

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	Company/Group name	Sector	Exports (in EUR million)	Growth index of net sales on the foreign market (2018/2013)	proportion of sales on the foreign market	Value added (EUR million)	Number of employees	Added value per employee (in EUR)
39	POČKAJ d.o.o.	Manufacturing	25	255.6	99.0	7	105	69,918
40	GMT d.o.o.	Wholesale and Retail Trade	35	251.1	46.5	7	129	52,351
41	INTERBLOCK GROUP	Manufacturing	56	246.2	97.7	27	202	134,779
42	LIV SYSTEMS d.o.o.	Manufacturing	13	244.7	84.1	6	174	33,113
43	PIRNAR d.o.o.	Manufacturing	25	243.2	86.7	5	92	58,379
44	OMEGA AIR d.o.o. Ljubljana	Manufacturing	16	241.3	69.1	9	225	41,121
45	TEKSTINA d.o.o.	Manufacturing	14	236.9	99.4	6	72	89,050
46	FARMTECH d.o.o.	Manufacturing	41	236.7	88.1	10	308	33,947
47	KOLEKTOR KOLING d.o.o.	Civil Engineering	21	234.2	17.5	7	153	46,557
48	PRIMET d.o.o.	Wholesale and Retail Trade	22	233.9	71.5	1	5	123,691
49	FOTONA d.o.o.	Manufacturing	52	232.0	99.0	24	271	90,177
50	POLYCOM Škofja Loka d.o.o.	Manufacturing	27	229.9	76.7	11	258	44,335

Strojegradnja SAS - na trgu z novejšim in izboljšanim modelom hidravličnega krivilnega stroja »HKS-Cs Profi 2 mm«, ki omogoča upogibanje debelejše pločevine.

Nova znanja pridobljena v sodelovanju z fakulteto za strojništvo v Ljubljani, se odražajo v izboljšanem in zmogljivejšem modelu krivilnega stroja. Visoko kvaliteten proizvod je plod vrhunskega strojniškega znanja,dolgoletnih neprecenljivih izkušenj ter sodelovanja.

Prednosti, ki jih ponuja zmogljivejši tip hidravličnega stroja:

- maksimalna debelina jekla primerna za upogibanje je 2,00 mm,
- maksimalna debelina aluminija primerna za upogibanje je 3,00 mm,
- izboljšan sistem upogibanja,
- večja in močnejša upogibna deska,
- toga konstrukcija stroja,
- močnejši hidravlični agregat,
- večje število rok.

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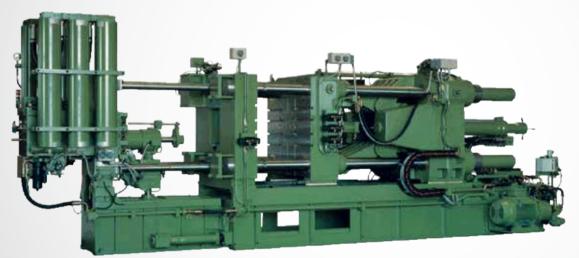
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