



Banská Bystrica Region

S A R I O

Slovak Investment
and Trade Development Agency

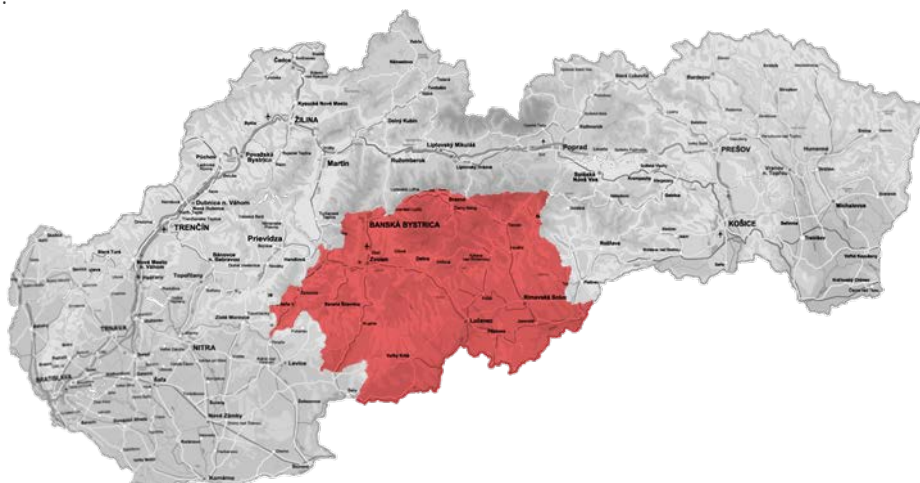
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1. General information

The Banská Bystrica region is the largest and the least densely populated region of Slovakia. It is situated in the southern part of Central Slovakia and is formed by lowlands in the south and mountains in the north. The region shares a common national border only with Hungary. It shares its remaining borders with five other regions of Slovakia: Nitra, Trenčín, Žilina, Prešov and Košice. The region has several types of settlements, ranging from the city of Banská Bystrica itself, to medium-sized cities, towns, villages and small settlements throughout the mountains and lowlands. From an ethnic point of view, the Banská Bystrica region is relatively heterogeneous. While Slovaks form 97% of the entire population in its northern districts, in the south there is a considerable national group of Hungarians, who represent almost 30% of the region's population. The Banská Bystrica region comprises 13 districts, 24 towns and 516 villages. It has a population of 658 490 inhabitants and a population density of 69/km².

Strong points of the region are: affluence of work force; high educational level in regional centres; big base of raw materials for many sectors, good position in export of metallurgy, wood processing, glass processing, ceramic and chemical industry; affluence of available brownfields and greenfields suitable for building of industrial parks and zones; potential for bonds foreign investor-subcontractor from region; suitable natural, climate and cultural conditions for development of tourism with sources of mineral, thermal and healing springs; insertion of south railway corridor Bratislava - Zvolen - Košice (including the relay Filákov - Šiatorská Bukovinka) to the net of trans-European railroads TEN under the project TINA and highway connection from Banská Bystrica to Bratislava (capital).



| Region (district) | Area (km ²) | Municipalities | Towns | Inhabitants | Population density (per km ²) |
|-------------------------------|-------------------------|----------------|-----------|----------------|---|
| Banská Bystrica | 809. 426 | 42 | 1 | 111 148 | 137 |
| Banská Štiavnica | 292. 287 | 15 | 1 | 16 509 | 57 |
| Brezno | 1 265. 211 | 30 | 1 | 63 696 | 50 |
| Detva | 449. 219 | 15 | 2 | 32 871 | 72 |
| Krupina | 584. 900 | 36 | 2 | 22 779 | 39 |
| Lučenec | 825. 639 | 57 | 2 | 74 681 | 88 |
| Poltár | 476. 246 | 22 | 1 | 22 400 | 47 |
| Revúca | 730. 384 | 42 | 3 | 40 326 | 55 |
| Rimavská Sobota | 1 471. 081 | 107 | 3 | 84 837 | 56 |
| Veľký Krtíš | 848. 400 | 71 | 2 | 45 280 | 54 |
| Zvolen | 759. 068 | 26 | 2 | 68 994 | 89 |
| Žarnovica | 425. 549 | 18 | 2 | 26 915 | 63 |
| Žiar nad Hronom | 517. 676 | 35 | 2 | 48 054 | 92 |
| Banská Bystrica region | 9 455. 083 | 516 | 24 | 658 490 | 69 |

Source: Statistical Office of the Slovak Republic, data as of 31 December 2013

1.1. Transport and Infrastructure

The entire road system in the region includes 3 144 km of roads, of which 574 are the I. class roads. There are two significant roads crossing the region, the north-south one, classified as E 77 in the European road network, and the east-west road, classified as E 571. The highway R1 from Banská Bystrica to Bratislava has been completed recently. The International Airport Sliac is used for chartered flights and private flights.

Two main railways connecting Slovakia's south with north and west with east cross the region. They are integrated into an extensive network of regional railroads.

The suppliers of telephone services are Slovak Telekom, a.s., which offers fixed lines, and T-Mobile Slovensko, a.s., Orange Slovensko, a.s., and Telefónica O2 Slovakia, s.r.o., all of which offer mobile services. Rates are the same throughout the entire Slovak Republic. Gas and electricity supply rates are the same for each whole region. The price of water supply and sewage are independent and thus vary within each region's districts.

2. Economy and Industry

The industry is distributed unevenly across the region, with a high concentration in the north, where the most productive sectors are located, including metallurgy, machinery, automotive, wood processing, pharmaceutical, electrotechnical, defence and polygraph industries. The south is home to mining industry, food processing and other industries complementary to agriculture.

2.1. Structure of Industry

Mainly because of the region's long mining tradition, its dominant industry is metallurgy, which represents more than 60% of all industrial exports and is the primary area of activity of the region's largest enterprises. Other important sectors are woodwork, machinery, chemistry, pharmacy, defence, mining and food processing. The regional centre of Banská Bystrica is becoming more service and trade oriented destination.

Main Production Sectors

- Pharmaceutical Industry
- Machinery Industry
- Mining Industry
- Food Industry
- Wood, Paper and Furniture Industry
- Defence Industry
- Chemical Industry
- Electrotechnical Industry
- Automotive Industry
- Building Industry

2.2. Non-industrial Sectors in the Region

The economic structure of the region is strongly influenced by its geographical conditions. The mountainous north has always been a centre of mining and manufacturing, while the south has had a rural character.

Agricultural land of middle quality forms 44% of the region's area. It is used primarily for growing corn and maize. In the north, the presence of meadows and grassy plains provide a base for the raising of livestock. The largest woodland areas in Slovakia are also found here, covering 49% of the entire region.

The region has a long tradition in mining. Deposits of various metals, especially in Kremnica and Banská Štiavnica, have been exploited since the 13th century. Today, however, mining activities in those cities are in decline. The centre of mining is shifting into areas focusing on the production of non-metallic materials. One important activity for the future is the silicate zone near Lučenec and Revúca.

3. Significant Companies

| Company | Country of origin | Employees | Sector/Product | Investment location |
|---|-------------------|-----------|---------------------------------------|-------------------------|
| Slovenská Pošta a.s. | Slovakia | 14 847 | Post service | Banská Bystrica |
| Slovenský Vodohospodársky Podnik š.p. | Slovakia | 3 600 | Water management | Banská Štiavnica |
| LESY Slovenskej Republiky | Slovakia | 3 547 | Forestry | Banská Bystrica |
| Železiarne Podbrezová a.s. | Slovakia | 3 120 | Steel pipes and canals | Podbrezová |
| CBA Slovakia s.r.o. | Slovakia | 2 480 | Supermarkets and Retail | Lučenec |
| Yura Eltec Corporation Slovakia, s.r.o. | South Korea | 1 700 | Cables for Automotive | Rimavská Sobota, Hnúšťa |
| PPS Group a.s. | Slovakia | 1 400 | Metal construction and Machinery | Detva |
| Stredoslovenská Vodárenská Prevádzková Spoločnosť | Slovakia | 1 110 | Water distribution | Banská Bystrica |
| Slovenská autobusová doprava Zvolen, a.s. | Slovakia | 980 | National and International Transport | Zvolen |
| COOP Jednota, Krupina, spotrebné družstvo | Slovakia | 960 | Retail | Krupina |
| Slovenské Magnezitové Závody | Slovakia | 898 | Magnesite production and distribution | Jeľšava |
| EKOLTECH, spol. s r.o. | Slovakia | 850 | Furniture Production | Fíľakovo |
| Slovmag a.s., Lubeník | Russia | 600 | Magnesite Mining | Lubeník |
| ŽELEZNIČNÉ OPRAVOVNE A STROJÁRNE ZVOLEN a.s. | Slovakia | 600 | Railways repair system | Zvolen |
| Continental Automotive Systems Slovakia, s.r.o | Germany | 600 | Brakes Production | Zvolen |
| Banskobystrická regionálna správa ciest, a.s. | Slovakia | 524 | Roads Administration | Banská Bystrica |
| Nemak Slovakia s.r.o. | Germany | 540 | Aluminium Metalurgy | Žiar nad Hronom |
| Biotika, a.s. | Slovakia | 502 | Pharmacy | Slovenská Ľupča |
| Slovalco, a.s. | UK/Norway | 470 | Aluminium Metalurgy | Žiar nad Hronom |

Source: GLOBAL Slovakia, 2013

4. Industrial parks

Industrial parks in the Banská Bystrica region and some of the companies established within those industrial parks:

| Industrial Park | Municipality | Total Area (Ha) | Available Area (Ha) | Type of IP |
|--|-----------------|-----------------|---------------------|------------|
| Industrial Park Majer - Šalková | Banská Bystrica | 35.7 | 20 | GF |
| Industrial Park ZSNP Žiar and Hronom | Žiar and Hronom | 287 | 15 | GF |
| Industrial Park Žarnovica Pod Lipou | Žarnovica | 19 | 19 | GF |
| Industrial Park Žarnovica - Pregeljka | Žarnovica | 10.3 | 10.3 | BF |
| Industrial Park Malý Krtíš | Malý Krtíš | 25 | 2.5 | GF |
| Industrial Park Vígľaš | Vígľaš | 37.5 | 20 | GF |
| Industrial Park INOPARK Vígľaš | Vígľaš | 166 | 166 | GF |
| Industrial Park Detva – Areál PPS | Detva | 3 | 0 | BF |
| Industrial Park Kriváň | Kriváň | 20 | 12 | GF |
| Industrial Park Lučenec JUH – Phase II. | Lučenec | 6.2 | 1.9 | GF |
| Industrial Park Poľana Lučenec | Lučenec | 11.7 | 1.3 | BF |
| Industrial Park Tomášovce | Tomášovce | 32 | 32 | GF |
| Industrial Park Gemer – Rimavská Sobota | Rimavská Sobota | 11.5 | 11.5 | BF |
| Industrial Park Cukrovar – Rimavská Sobota | Rimavská Sobota | 34 | 24 | BF |
| Industrial Park Kasárne – Rimavská Sobota | Rimavská Sobota | 9.7 | 4.1 | BF |
| Industrial Zone NORTH – Rimavská Sobota | Rimavská Sobota | 13.8 | 13.8 | GF |
| Industrial Park Poltár | Poltár | 23 | 20 | GF |
| Industrial Park Tornaľa | Tornaľa | 4.2 | 1.6 (GF) | BF |
| Industrial Park Hnúšťa | Hnúšťa | 38.4 | 5 | BF |
| Industrial Zone Krupina | Krupina | 26 | 3 | GF |
| Industrial Park Utekáč | Utekáč | 2.7 | 0.5 | BF |

Source: SARIO, 2013

Caption: GF – Greenfield, BF – Brownfield



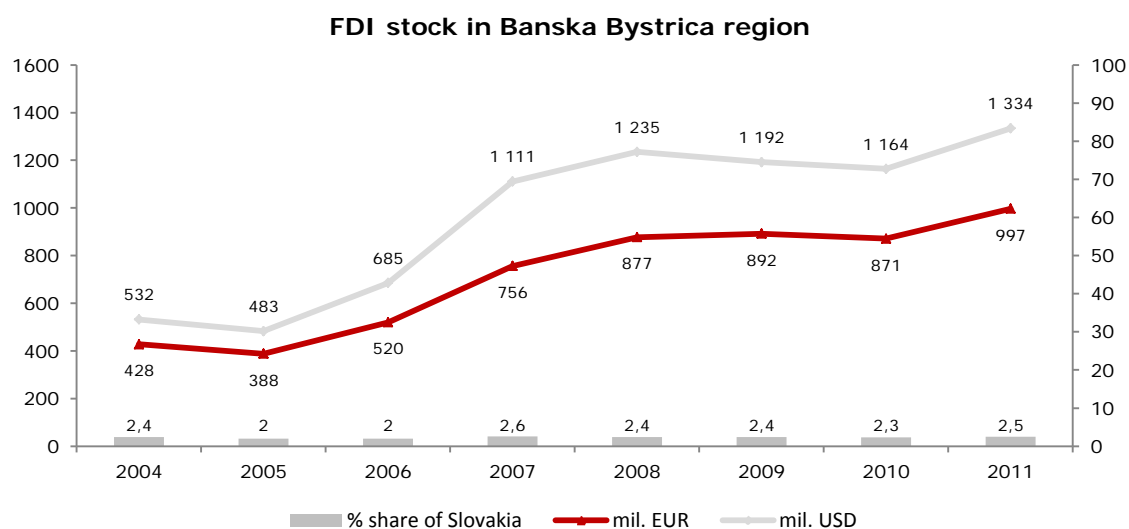
| Industrial park/Companies established within IP | Employees* | Sector | Product | Country of origin |
|---|------------|-------------------|--|---|
| 1. Industrial Park Krupina South | | | | |
| Lind Mobler Slovakia, s.r.o. | 356 | Furniture | Upholstered furniture | Denmark |
| Way Industry, a.s. | 237 | Machinery | Instruments and machines for mining and construction | Slovakia |
| Wittur, s.r.o. | 112 | Machinery | Elevators, escalators, lifting and towing equipment | Austria |
| Brother Industries, Ltd. | 266 | Electrotechnical | Production and retrofitting of PC printer cartridges | Japan |
| 2. Industrial Park Lučenec South | | | | |
| Johnson Controls Lučenec, s.r.o. | 819 | Automotive | Automotive interior systems made of polyurethane foam | USA |
| D&J Design, s.r.o. | 130 | Furniture | Furniture components | Slovakia |
| 3. Industrial Park Majer Šalková | | | | |
| Burgmaier Precision Slovakia s.r.o. | 70 | Machinery | Accurate machining parts for automotive industry | Germany |
| MED-ART, spol.s.r.o. | 110 | Pharmaceutical | Distribution of medicines, medical supplies, cosmetics, diagnostics and homeopathics | Slovakia |
| AS Trading s.r.o. | 23 | Wholesale | Sale of formwork and scaffolding systems and of mobile scaffolds | Slovakia |
| 4. Industrial Park Malý Krtíš | | | | |
| Technogym E.E., s.r.o. | 500 | Machinery | Exercise equipment and machines for fitness centers | Italy |
| Sisme Slovakia s.r.o. | 152 | Electrotechnical | Electric motors, generators and a transformers | Italy |
| 5. Industrial Park ZNSP Žiar and Hronom | | | | |
| Slovalco, a.s. | 470 | Metallurgy | Aluminium metals | UK, Norway |
| Nemak Slovakia, s.r.o. | 540 | Metallurgy | Aluminium parts for automotive industry | Germany |
| Fagor Ederlan Slovakia | 175 | Metallurgy | Metals for automotive industry | Spain |
| Sapa Profily, a.s. | 409 | Metallurgy | Pressed aluminium profiles | Sweden |
| Remeslo Strojal, s.r.o. | 200 | Machinery | Metal constructions | Slovakia, USA |
| Dalkia Industry | 120 | Power Engineering | Supply of electricity, gas, steam and cold air | Slovakia |
| 6. Industrial Park Detva – Areál PPS | | | | |
| PPS Group, a.s. | 1400 | Machinery | Metal constructions | Slovakia, The Czech Republic, Austria, Sweden |
| PPS Personálne služby, s.r.o. | 150 | Administration | Administrative and Human Resources services | Slovakia |
| 7. Industrial Park Hnúšťa | | | | |
| Yura Eltec Corpoarition Slovakia, s.r.o. | 960 | Automotive | Cable harnesses for automotive industry | South Korea |

| | | | | |
|--|-----|------------------|---|----------------------|
| Reisner & Wolff Slovakia, s.r.o. | 100 | Machinery | Bridge bearings | Austria |
| Gallai & Wolff Slovakia s.r.o. | 25 | Machinery | Metal constructions | Austria |
| 8. Industrial Park Tornaľa | | | | |
| Himolla Group | 150 | Furniture | Leather sofas | Germany |
| LVD S2,a.s. | 54 | Machinery | Forming and sheet processing machines | Belgium |
| 9. Industrial Park Kriváň | | | | |
| Kops, s.r.o. | 42 | Machinery | Components for hydraulic systems | Slovakia |
| Ojala Slovakia,s.r.o. | 201 | Electrotechnical | Distribution boxes | Finland |
| Luka Masív - Katarína Očenášová | 23 | Furniture | Furniture and furniture components | Slovakia |
| 10. Industrial Park Filákov | | | | |
| Ekoltech, spol.s.r.o. | 850 | Furniture | Furniture | Slovakia |
| Thorma Výroba,k.s. | 320 | Home Appliances | Stoves,cookers and fireplaces | Germany |
| Festap s.r.o. | 150 | Home Appliances | Enamel bathtubs and shower bowls | Slovakia |
| 11. Industrial Park Kasárne – Rimavská Sobota | | | | |
| Yura Eltec Corporation Slovakia, s.r.o. | 740 | Automotive | Cable harnesses for automotive industry | South Korea |
| Kissling Slovensko,s.r.o. | 48 | Electrotechnical | Industrial microswitches and switches | Switzerland, Germany |

Source: SARIO, 2013 * Informative data, exact data not available

5. Foreign Direct Investment

FDI inflow to the Banská Bystrica region is growing rapidly. A significant inflow was recorded in the period 2007-2010, when the amount of FDI in the region reached in average 878 mil. EUR, which accounted more than 2.5% of the FDI for the whole Slovakia.



Source: National Bank of Slovakia

Structure of companies according to the number of employees

| Number of employees | 0 – 19 ^{*)} | | 20 – 49 | | 50 – 249 | | 250 or more | |
|---------------------|----------------------|---------|---------|---------|----------|-------|-------------|-------|
| | Total | Share % | Total | Share % | Region | Total | Share % | Total |
| Banská Bystrica | 12 615 | 9.9 | 367 | 8.3 | 251 | 9.1 | 46 | 7.7 |
| SR | 146 110 | 100 | 4 412 | 100 | 2 761 | 100 | 598 | 100 |

^{*)} Including companies where the number of employees is not available
 Source: Statistical Office of the Slovak Republic, data as of 31 December 2012

6. Labour Market

The Banská Bystrica region registered more than 122 thousand employees in 2012, with slightly less than a quarter employed in the industry sector. Less than 6% work in agriculture.

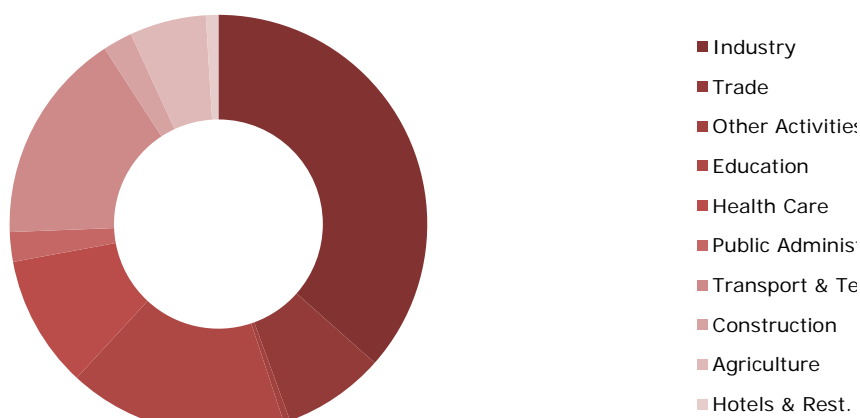
6.1. Employment

Number of employees and % share in sectoral classification

| Sector | Employees | Share (%) |
|--|----------------|------------|
| Industry | 39 194 | 32,1 |
| Education | 18 171 | 14,9 |
| Transport, Storage, Post, Telecommunications | 17 633 | 14,4 |
| Public Administration, Defence, Compulsory Social Security | 11 683 | 9,6 |
| Health Care and Social Welfare | 10 983 | 9,0 |
| Wholesale and retail | 8 459 | 6,9 |
| Agriculture | 6 347 | 5,2 |
| Administrative and Support Services | 2 454 | 2,0 |
| Construction | 2 451 | 2,0 |
| Art, amusement and recreational activities | 1 951 | 1,6 |
| Hotels and Restaurants | 1 037 | 0,8 |
| R&D, other technical activities | 937 | 0,8 |
| Other Activities | 528 | 0,4 |
| ICT | 406 | 0,3 |
| Banská Bystrica Region | 122 234 | 100 |

Source: Statistical Office of the Slovak Republic, data as of 31 December 2012

Sector-specific Employment Breakdown

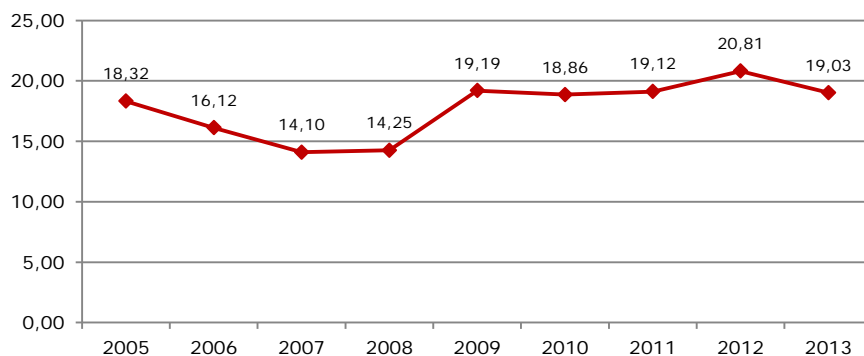


Data as of 31 December 2012
Source: Statistical Office of the Slovak Republic

6.2. Unemployment

The unemployment rate has been steadily decreasing in the last few years, with some growth in 2009 and 2012 due to the effects of the financial crisis. It reached 20.81 % in 2012. Besides the unemployed, there is the possibility of the economically active population in the region commuting to other regions or to neighbouring countries. In the case of the Banská Bystrica region this amounts to approximately 10 000 economically active inhabitants.

Unemployment rate in the Banska Bystrica region (%)



Source: Centre for Labour, Social Affairs and Family, 2013

The following chart shows data on the economically active population in the Banská Bystrica region, including the number of unemployed, their structure and the resulting unemployment rate.

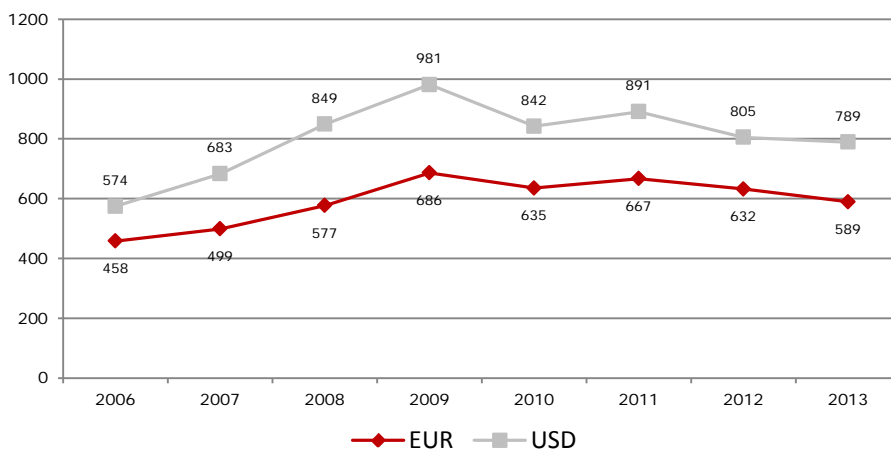
| District | Economically active population | The unemployed | of which | | Available job applicants | Registered unemployment rate (%) |
|-------------------------------|--------------------------------|----------------|---------------|-------------|--------------------------|----------------------------------|
| | | | Women | Graduates | | |
| Banská Bystrica | 58 292 | 6 200 | 2 818 | 527 | 5 738 | 9,84 |
| Banská Štiavnica | 8 121 | 1 740 | 822 | 124 | 1 620 | 19,95 |
| Brezno | 31 057 | 5 713 | 2 647 | 244 | 5 258 | 16,93 |
| Detva | 16 086 | 2 642 | 1 398 | 160 | 2 428 | 15,09 |
| Krupina | 10 885 | 2 193 | 862 | 120 | 1 962 | 18,02 |
| Lučenec | 35 132 | 8 502 | 3 782 | 333 | 7 926 | 22,56 |
| Poltár | 10 869 | 3 220 | 1 329 | 169 | 3 009 | 27,68 |
| Revúca | 19 278 | 6 798 | 2 961 | 190 | 6 123 | 31,76 |
| Rimavská Sobota | 40 747 | 14 514 | 6 336 | 421 | 13 136 | 32,24 |
| Veľký Krtíš | 21 841 | 5 545 | 2 415 | 275 | 5 197 | 23,79 |
| Zvolen | 34 313 | 3 986 | 2 032 | 378 | 3 633 | 10,59 |
| Žarnovica | 13 040 | 2 572 | 1 308 | 125 | 2 419 | 18,55 |
| Žiar nad Hronom | 23 753 | 3 724 | 1 989 | 247 | 3 479 | 14,65 |
| Banská Bystrica region | 323 414 | 67 349 | 30 699 | 3313 | 61 928 | 19,15 |

Data as of 31 January 2014

Source: Centre of Labour, Social Affairs and Family

7. Wages and Salaries

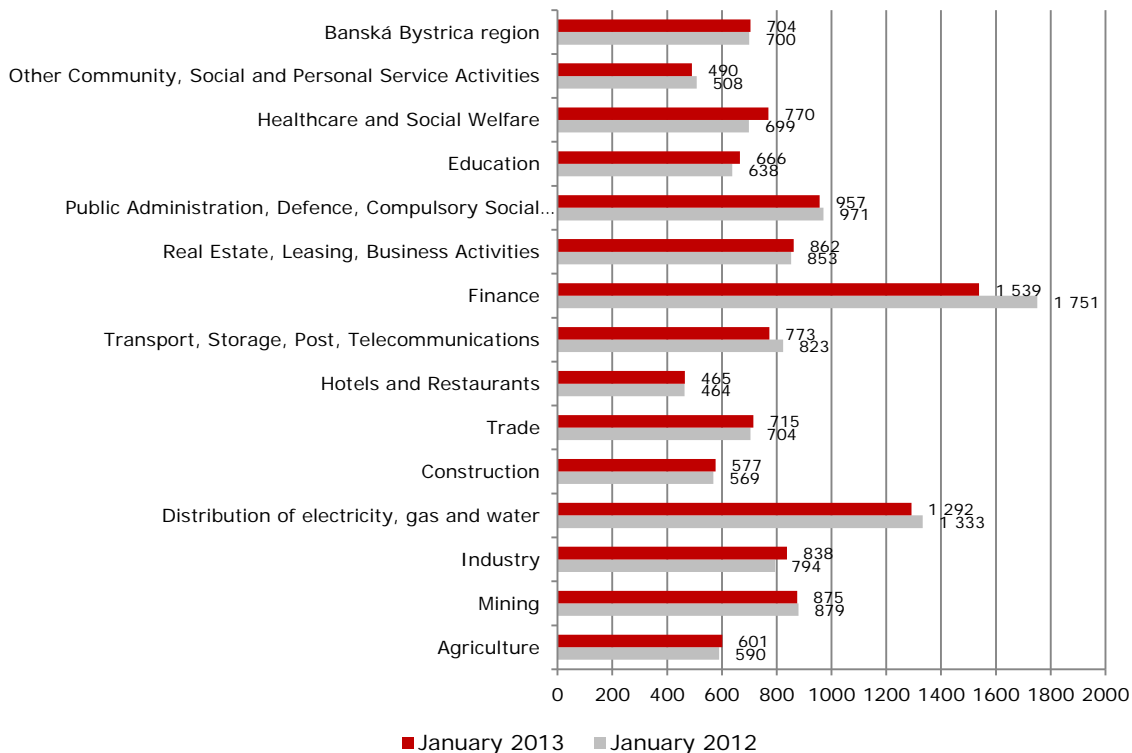
Average monthly wage (salary) growth in EUR in the Banská Bystrica region.



Source: Statistical Office of the Slovak Republic, Exchange rate used based on central parity of the given year

Average monthly wage (salary) in EUR in specific sectors in 1Q 2013 in comparison to 2012.

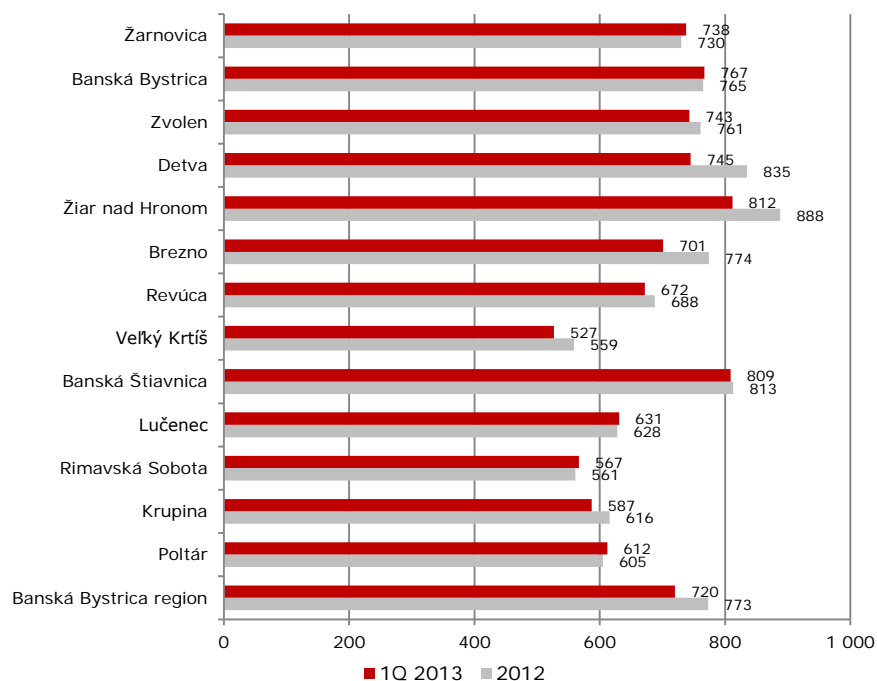
The highest nominal salaries are being earned in finance, distribution of electricity, gas and water and public administration.



Source: Statistical Office of the Slovak Republic, Exchange rate used based on central parity of the given year

Average monthly wage (salary) in EUR by district in 2013

The following table shows average salaries by districts in the region, in companies with 20 or more employees. The highest average monthly wages (salary) within the Banská Bystrica region are paid in the Žiar nad Hronom, Banská Bystrica and Zvolen districts.



Source: Statistical Office of the Slovak Republic, Exchange rate used based on central parity of the given year

7.1. Education

The following table shows the number of students and graduates in high schools last year, divided by field of education in the region.

| Specialization/Field of study | Students 2012/2013 | Graduates 2011/2012 |
|---|--------------------|---------------------|
| Electrotechnics | 2 461 | 623 |
| Machinery and other metal processing production | 1 344 | 443 |
| Construction | 1 298 | 331 |
| Chemistry | 99 | 34 |
| Agriculture | 903 | 275 |
| Woodprocessing & Furniture | 322 | 137 |
| Transport and telecommunications | 706 | 240 |
| Business Academy | 7 656 | 1 876 |
| General Education | 8 336 | 2 070 |
| Medical | 1 156 | 376 |
| Arts | 931 | 266 |
| Other | 2 010 | 362 |

Source: Institute for Information and Forecasting in Education, school year 2012/2013

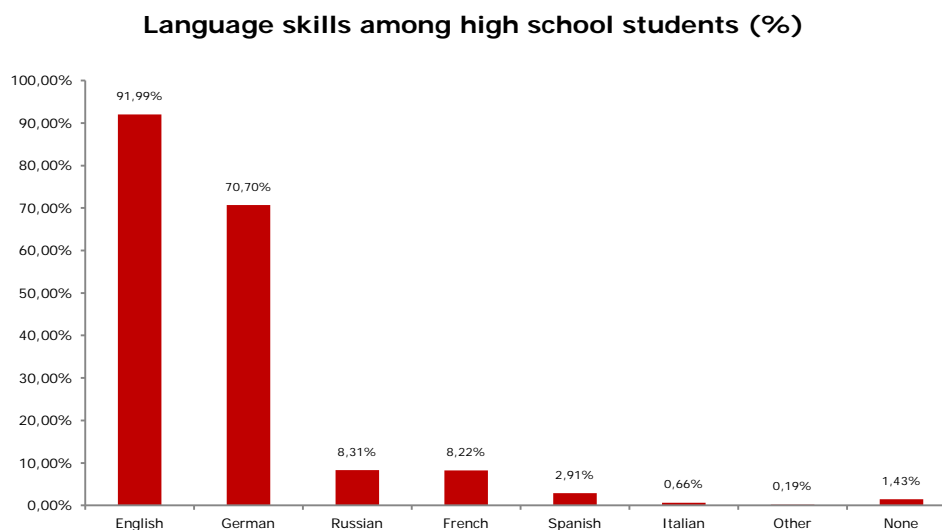
The following table shows the number of students and university graduates last year, divided by field of study in the region.

| University, Faculty | Town | Students | Graduates |
|--------------------------------------|------------------------|---------------|--------------|
| SLOVAK HEALTH UNIVERSITY | | 611 | 336 |
| Faculty of health | Banská Bystrica | 611 | 336 |
| UNIVERSITY OF MATEJ BEL | | 11 387 | 3 924 |
| Natural Science | Banská Bystrica 1 | 1 468 | 606 |
| Economics | Banská Bystrica 1 | 2 773 | 986 |
| Law | Banská Bystrica 1 | 1 176 | 444 |
| Political Sciences | Banská Bystrica 1 | 787 | 259 |
| Humanities | Banská Bystrica 1 | 2 872 | 875 |
| Education | Banská Bystrica 1 | 2 310 | 754 |
| ACADEMY OF ARTS | Banská Bystrica | 586 | 212 |
| TECHNICAL UNIVERSITY ZVOLEN | | 4 482 | 1 463 |
| Environmental science and Production | Zvolen 1 | 437 | 140 |
| Forestry | Zvolen 1 | 732 | 274 |
| Wood Technology | Zvolen 1 | 1 625 | 586 |
| Ecology and Environmental sciences | Zvolen 1 | 601 | 247 |

Source: Institute for Information and Forecasting in Education
Students, as to date 31.12.2012, Graduates, as to date 31.12.2012

7.2. Language skills

The following chart shows data on foreign language skills among high school students.



Source: Institute for Information and Forecasting in Education, school year 2010/2011

Students and graduates attending bilingual high schools in the Banská Bystrica region

| Town | Language | Students | Graduates |
|------------------|----------------|----------|-----------|
| Banská Bystrica | Slovak/German | 107 | 37 |
| Banská Bystrica | Slovak/French | 141 | 21 |
| Banská Bystrica | Slovak/Spanish | 148 | 30 |
| Banská Štiavnica | Slovak/English | 106 | 0 |
| Tisovec | Slovak/English | 294 | 54 |

Source: Institute for Information and Forecasting in Education, school year 2011/2012, data as 15 July 2013

8. Regional public authority, central municipality and regional development institutions

Town Hall Banska Bystrica

Ul. CSA 26, 974 01 Banska Bystrica

URL: www.banskabystrica.sk

E-mail: kancelariaprimatora@banskabystrica.sk ; prednosta@banskabystrica.sk

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President of the Banska Bystrica Regional Self-Governing Office

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Regional institutions for Entrepreneurs Activities Support

Slovak Chamber of Commerce and Industry

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Euro Info Centre in Banska Bystrica Region

Rudohorská 33, 974 11 Banská Bystrica

Tel.: 00421-48-4174250

Fax: 00421-48-4174252

URL: www.reic.sk

E-mail: info@reic.sk

Slovak Investment and Trade Development Agency (SARIO)

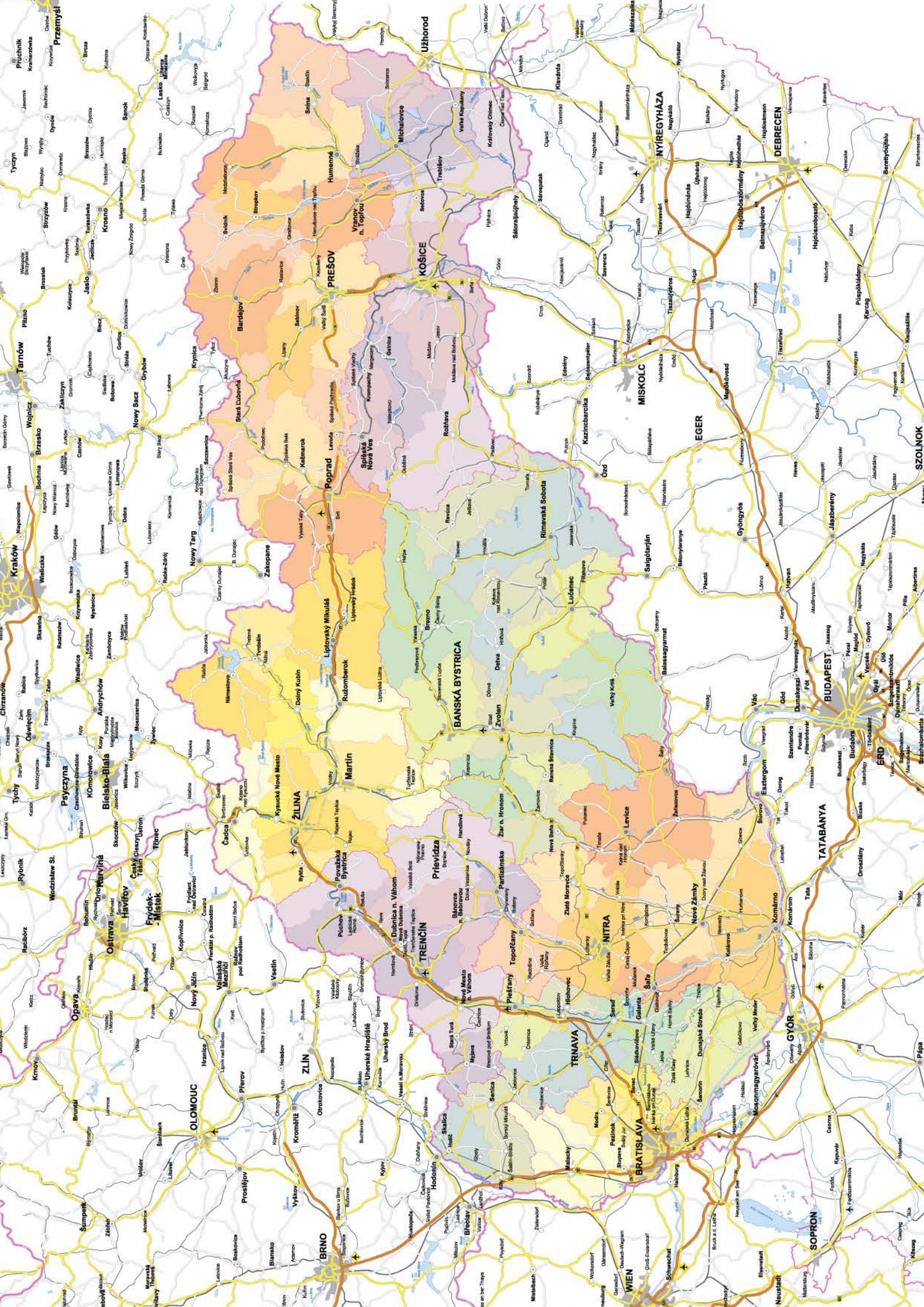
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