Information & Communications Technology Sector in SLOVAKIA
Information & Communications Technology (ICT) Sector in Slovakia

The purpose of this publication is to introduce Slovakia's dynamically expanding ICT sector — activities especially related to telecommunication, computer programming or internet services & present why Slovakia is an outstanding destination for setting up ICT businesses and outsourcing.

TOTAL AREA 49,035 km²
POPULATION 5.4 million
CAPITAL CITY Bratislava
MEMBER OF European Union, Euro-zone, Schengen, OECD, WTO, NATO
TIME ZONE GMT +1 hour

300 million clients in a radius of 1,000 km
600 million clients in a radius of 2,000 km
ICT in Slovakia at a Glance

The ICT sector plays an important role in the Slovak economy and has significant potential for the growth. Due to a favorable combination of business advantages Slovakia has become an attractive destination for ICT investors.

ICT Adoption
Based on the Global Competitiveness Report, Slovakia is the best in ICT adoption among Visegrad group countries (Poland, Czechia, Hungary, Slovakia)

Value added per employee
The value added per employee of TOP 200 IT companies ranked by revenue reaches over 85 ths. EUR

ICT share on the total employment
The sector creates more than 87,000 job opportunities

Growing employment in the ICT sector
The total number of employees in the sector grew by 60% between 2008 and 2020

ICT’s contribution to Slovakia’s GDP
Significant footprint in the Slovak economy

Top Reasons to Establish an ICT Company in Slovakia

1. Adaptable, educated and cost-effective workforce
2. The highest labour productivity in the region
3. Well-developed ICT institutional network
4. High quality data & network coverage
5. Strategic geographical location from the perspective of time zonation
6. Political & economic stability
7. Euro currency as one of the few in CEE
8. Special tax regime for intellectual property revenues (patent box)
9. Additional tax deduction for R&D expenses up to 200% from 2020
10. Attractive investment incentives for the ICT sector


www.sario.sk
Qualified Labour Force

The Slovak labour force is perceived by foreign investors as educated, motivated, adaptable to culturally different management styles with great multilingual competences and very positive attitude to work habits.

LANGUAGE COMPETENCES
88% of Slovaks speak at least one other language besides their mother tongue. Multilingualism is rising also among young generation. Students learn at least one foreign language already at primary school and continue these studies at higher levels.

The Most Common Foreign Languages Taught at Slovak Secondary Schools
% of all students learning foreign languages

<table>
<thead>
<tr>
<th>Language</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>95%</td>
</tr>
<tr>
<td>German</td>
<td>39%</td>
</tr>
<tr>
<td>Russian</td>
<td>12%</td>
</tr>
<tr>
<td>Spanish</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Slovak Centre of Scientific & Technical Information, 2019, Eurostat, 2019

ICT COMPETENCES OF SLOVAK LABOUR FORCE
ICT technologies became an integrated part of the daily life in Slovakia. Their role continues to grow which is reflected by steadily raising adaptability of the Slovak population to ICT technologies.

4G Coverage
89%
4G coverage of households increased to 89% (+18% within last 3 years), furthermore 5G coverage is in preparation

Individuals Using Internet
89%
% of population actively using internet is continuously increasing

Households with Access to the Internet
82%
More than 2/3 of all households in Slovakia are connected to the internet

Source: Digital Economy and Society Index Report, 2020, Eurostat, 2019
Almost half of secondary school graduates keep on studying at universities, thus creating qualified and skilled labour force. Programs including ICT studies are becoming more and more popular & sought after by young generation.

7 ICT Faculties at 6 Slovak Universities

- 10,688 students enrolled in ICT study fields
- 2,672 graduates of ICT study fields per year

9 Arts Faculties Relevant for Game Development Industry

- 2,489 students enrolled in arts faculties relevant for game development industry
- 778 graduates of arts faculties relevant for game development industry

ACADEMIC PARTNERSHIPS

Success Stories of T–Systems In Košice

DUAL EDUCATION*
As a pioneer in this field, since the academic year 2013/2014 T–Systems has implemented ICT dual education initiative where students receive 70% of practical education.

INDIVIDUAL PROGRAMS
T–Systems Slovakia, in cooperation with the Faculty of Business Economics of the University of Economics in Bratislava, launched the Honoris PM Program with the focus on project management.

SKILLS FOR SUCCESS — FROM UNIVERSITY TO WORKPLACE
At the Faculty of Economics of the Technical University in Košice, experts from T-Systems are involved in teaching the subject of SAP, used by most of the centres.

*Note: Education and training adapted to the employer’s requirements at secondary grammar schools.
Source: Slovak Centre of Scientific & Technical Information, 2019, SARIO, T-Systems
Inside the Slovak ICT Market

The majority of IT services in Slovakia are composed by application support and other tailor-made services (such as helpdesk, network administration, cloud storage, remote support, etc.) followed by tailor-made software development and outsourcing.

Source: Trend, 2019
Competitive Salaries in Slovak ICT Sector

Although salaries in the ICT sector are above the Slovak average, in comparison with the Western EU countries remain significantly lower and still competitive in the CEE region.

### Average Gross Monthly Salary in EUR (Selected Positions)

<table>
<thead>
<tr>
<th>AREA</th>
<th>POSITION</th>
<th>BRATISLAVA</th>
<th>KOŠICE</th>
<th>OTHER REGIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>MIN</td>
<td>MAX</td>
<td>MIN</td>
</tr>
<tr>
<td><strong>Technical Support</strong></td>
<td>Technical Support Team Leader</td>
<td>1,900</td>
<td>2,700</td>
<td>1,500</td>
</tr>
<tr>
<td></td>
<td>Technical Support Level 1</td>
<td>1,200</td>
<td>1,500</td>
<td>800</td>
</tr>
<tr>
<td><strong>SW Development</strong></td>
<td>SW Technical Lead</td>
<td>2,800</td>
<td>4,000</td>
<td>2,500</td>
</tr>
<tr>
<td></td>
<td>SW Engineer (C++, .Net, Java, Javascript), 1–3 years experience</td>
<td>1,600</td>
<td>2,200</td>
<td>1,400</td>
</tr>
<tr>
<td></td>
<td>SW Engineer (C++, .Net, Java, Javascript), 3 and more years experience</td>
<td>2,000</td>
<td>3,500</td>
<td>1,800</td>
</tr>
<tr>
<td><strong>IT Consulting</strong></td>
<td>Business Analyst (more than 3 years of experience)</td>
<td>2,200</td>
<td>3,500</td>
<td>2,000</td>
</tr>
<tr>
<td></td>
<td>BI Consultant</td>
<td>2,500</td>
<td>3,500</td>
<td>2,200</td>
</tr>
<tr>
<td></td>
<td>ERP Consultant</td>
<td>2,500</td>
<td>3,200</td>
<td>2,200</td>
</tr>
<tr>
<td></td>
<td>ERP Developer</td>
<td>1,600</td>
<td>3,000</td>
<td>1,400</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td>Network Engineer (3–5 years experience)</td>
<td>1,700</td>
<td>2,200</td>
<td>1,500</td>
</tr>
<tr>
<td></td>
<td>Linux System Administrator</td>
<td>1,500</td>
<td>3,000</td>
<td>1,400</td>
</tr>
<tr>
<td></td>
<td>Window Administrator</td>
<td>1,600</td>
<td>2,500</td>
<td>1,200</td>
</tr>
</tbody>
</table>

Source: Grafton Recruitment Slovakia, 2019

Differences in salaries occur also on the regional level in Slovakia allowing the investors to explore regions outside the main hubs.
ICT Companies in Slovakia

The ICT Sector has a solid position in the Slovak economy, what is demonstrated by the presence of foreign–owned companies as well as strongly growing domestic companies.

**TOP ICT EMPLOYERS — IT & Telecommunication Service (TS) Providers in Slovakia**

<table>
<thead>
<tr>
<th>COMPANY NAME</th>
<th>COUNTRY ORIGIN</th>
<th>FIELD</th>
<th>HQ</th>
<th>EMPLOYEES</th>
</tr>
</thead>
<tbody>
<tr>
<td>T-Systems Slovakia</td>
<td>Germany</td>
<td>IT</td>
<td>Košice</td>
<td>3,891</td>
</tr>
<tr>
<td>Slovak Telekom</td>
<td>Germany</td>
<td>TS</td>
<td>Bratislava</td>
<td>2,932</td>
</tr>
<tr>
<td>Siemens*</td>
<td>Germany</td>
<td>IT</td>
<td>Bratislava</td>
<td>1,552</td>
</tr>
<tr>
<td>DXC Technology Slovakia</td>
<td>United States</td>
<td>IT</td>
<td>Bratislava</td>
<td>1,221</td>
</tr>
<tr>
<td>Orange Slovensko</td>
<td>France</td>
<td>TS</td>
<td>Bratislava</td>
<td>1,146</td>
</tr>
<tr>
<td>Accenture</td>
<td>Ireland</td>
<td>IT</td>
<td>Bratislava</td>
<td>1,121</td>
</tr>
<tr>
<td>Eset</td>
<td>Slovakia</td>
<td>IT</td>
<td>Bratislava</td>
<td>849</td>
</tr>
<tr>
<td>IBM Slovensko</td>
<td>United States</td>
<td>IT</td>
<td>Bratislava</td>
<td>787</td>
</tr>
<tr>
<td>Soitron</td>
<td>Slovakia</td>
<td>IT</td>
<td>Bratislava</td>
<td>769</td>
</tr>
<tr>
<td>O2 Slovakia</td>
<td>Czechia</td>
<td>TS</td>
<td>Bratislava</td>
<td>704</td>
</tr>
<tr>
<td>Scheidt &amp; Bachmann Slovensko</td>
<td>Germany</td>
<td>IT</td>
<td>Žilina</td>
<td>630</td>
</tr>
<tr>
<td>Uniqa Group Service Center Slovakia</td>
<td>Austria</td>
<td>IT</td>
<td>Nitra</td>
<td>589</td>
</tr>
<tr>
<td>Asseco Central Europe</td>
<td>Slovakia</td>
<td>IT</td>
<td>Bratislava</td>
<td>404</td>
</tr>
<tr>
<td>Slovanet</td>
<td>Slovakia</td>
<td>TS</td>
<td>Bratislava</td>
<td>371</td>
</tr>
<tr>
<td>GlobalLogic</td>
<td>United States</td>
<td>IT</td>
<td>Košice</td>
<td>355</td>
</tr>
<tr>
<td>PosAm</td>
<td>Germany</td>
<td>IT</td>
<td>Bratislava</td>
<td>331</td>
</tr>
<tr>
<td>Softec</td>
<td>Slovakia</td>
<td>IT</td>
<td>Bratislava</td>
<td>316</td>
</tr>
<tr>
<td>Tempest</td>
<td>Slovakia</td>
<td>IT</td>
<td>Bratislava</td>
<td>280</td>
</tr>
<tr>
<td>Atos</td>
<td>France</td>
<td>IT</td>
<td>Bratislava</td>
<td>251</td>
</tr>
<tr>
<td>Datalan</td>
<td>Slovakia</td>
<td>IT</td>
<td>Bratislava</td>
<td>214</td>
</tr>
</tbody>
</table>

*Note: All entities (Siemens s.r.o, Siemens Healthcare s.r.o., Siemens Mobility s.r.o.)
Source: Register of Financial Statements (2019); Trend (2020); SARIO

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**Diversification of Telecommunication Segment**

Traditional activities of telecommunication operators are gradually expanding beyond mere provision of telecommunication services. Building a diversified portfolio enriched by internet sales or IT services, data centers or software houses, is becoming an integrated part of their business.

**Increase of profitability in telecommunication sector in 2019**

12.6%
Notable Slovak Patents

Did you know that a Slovak companies stands behind numerous globally well-known products? Here are some examples of successful Slovak brands.

**ESET**
Protects users in 180 countries
One of the global leaders in security software development including award winning NOD32® Antivirus

**RESCO**
One of the global leaders in developing cross-platform mobile software solutions
Resco Cloud solution is the ultimate tool for offline access to data, interactive maps for businesses & more

**NG AVIATION**
One of a kind software for safe & smooth aviation
NG Aviation is an unique platform for digitization of aeronautical data making Aviation digital for Airports, Air Navigation Service Provider and Airlines

**PHOTONEO**
A leading provider of robotic vision & intelligence
Development of the world’s highest resolution and highest accuracy 3D camera solutions

**SOITRON**
Soitron developed a system for intelligent police cars
Developer of IT solutions from integrated communication systems to mobile police units

**SYGIC**
Developer of GPS navigation software for mobile devices and solutions for businesses. The most downloaded offline navigation in the world.

**INNOVATRICS**
Wide range of application — from attendance system to presidential elections
Biometric Software for identity management based on fingerprint & face recognition technology

Source: SARIO, 2019
Slovak Fastest Growing IT Companies of 2019

Ranking positions in top 50 fastest growing companies in Central Europe based on the Deloitte Technology Fast 50 Central Europe 2019 programme.

EXPANDECO
Founded: 2014
Helps e-shops to expand abroad using its own technological and human infrastructure. Currently the only company in CEE with linguistic, logistical and legislative barriers solutions.

ITRINITY
Founded: 2009
One of the world’s most popular keyword-analysis tools providing bot crawlers protection, reliable & affordable email verification and number one SEO tool package with more than 400,000 users worldwide.

EXPONEA
Founded: 2015
Powered by Artificial Intelligence, Exponea offers customer experience and data management platform with the aim to accelerate the growth of e-commerce by using automated engagement.

ZELENÁ POŠTA
Founded: 2012
A Slovak start-up and currently the only provider of ‘hybrid’ postal transformation services saving the customer both cost and time.

SUPERSCALE
 Founded: 2013
The growth partner of the world’s top game developers and publishers, which helps to launch and scale new games into leading charts (f.e. Hill Climb Racing 2 — Top 1 Worldwide).

Source: SARIO, Deloitte, 2019
ICT Supporting Platforms

ITAS
- Headquartered in Bratislava
- Established in 1999
- Slovak association of 100+ ICT companies representing about 80% of the Slovak IT market
- Members employ more than 30,000 people

ITAS runs several projects including:
- Digital transformation of private sector interlinking the ICT sector with other Slovak industries
- Digital transformation of public sector via active cooperation on Digital Coalition project
- Support of educational initiatives at all levels — from academic programs to requalification
- IT Testing — verification of IT skills among population in Slovakia among population in Slovakia

KOŠICE IT VALLEY
- Headquartered in Košice
- Established in 2007
- Slovak association of 55 members and sympathizers, including the private, public and academic sector
- Cluster Management Excellence Gold Label — in 2015 certificated as the 1st in Central Europe

Activities of Košice IT Valley are carried out in Eastern Slovakia:
- Over the years focus on education stays as one of the priorities, but scope of the cluster itself has gone beyond
- Innovations, research & development, support of collaboration within the cluster and support of investments become an integral part of the cluster

ZAICT
- Headquartered in Žilina
- Established in 2008
- Slovak association of 14 members, including the private, public and academic sector
- In 2014 certificated as European Cluster Excellence Initiative Bronze Label

ZAICT activities that are mainly in the Žilina region at:
- Interconnection of private sector and R&D institutions
- Supporting lectures of ICT companies at secondary schools
- Offering educational programs and organizing school camps for raising IT skills

Source: ITAS, Košice IT Valley, ZAICT
Emerging Slovak Game Development Industry

The game development industry in Slovakia has been gaining pace by uniting a wide range of studios. This rapidly growing market with nearly doubled revenues in the past two years is a result of the world’s top industry professionals presence and together with relevant educational programs are shaping new generations of game developers.

YEARLY REVENUE (IN MILLION OF EUR)

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue (in Million of EUR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>36.1</td>
</tr>
<tr>
<td>2018</td>
<td>45.7</td>
</tr>
<tr>
<td>2019</td>
<td>51</td>
</tr>
<tr>
<td>2020 (Forecast)</td>
<td>55</td>
</tr>
</tbody>
</table>

NUMBER OF PROFESSIONALS

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Professionals</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>476</td>
</tr>
<tr>
<td>2018</td>
<td>524</td>
</tr>
<tr>
<td>2019</td>
<td>762</td>
</tr>
<tr>
<td>2020 (Forecast)</td>
<td>900</td>
</tr>
</tbody>
</table>

Source: Slovak Game Developers Association, 2020, SkillValue, 2019
Top Game Studios in Slovakia — Based on Turnover in 2019

<table>
<thead>
<tr>
<th>STUDIO</th>
<th>EMPLOYEES</th>
<th>YEAR OF ESTABLISHMENT</th>
<th>HQ</th>
<th>TURNOVER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pixel Federation</td>
<td>216</td>
<td>2007</td>
<td>Bratislava</td>
<td>31,981,808</td>
</tr>
<tr>
<td>PowerPlay Studio</td>
<td>65</td>
<td>2007</td>
<td>Bratislava</td>
<td>3,767,781</td>
</tr>
<tr>
<td>Inlogic Software</td>
<td>&lt;20</td>
<td>2005</td>
<td>Banská Bystrica</td>
<td>2,363,315</td>
</tr>
<tr>
<td>Bohemia Interactive</td>
<td>46</td>
<td>2014</td>
<td>Bratislava</td>
<td>2,053,563</td>
</tr>
<tr>
<td>Studio 727</td>
<td>20</td>
<td>1997</td>
<td>Pezinok</td>
<td>1,529,770</td>
</tr>
<tr>
<td>3Division</td>
<td>&lt;5</td>
<td>2005</td>
<td>Košice</td>
<td>1,191,193</td>
</tr>
<tr>
<td>SuperScale</td>
<td>65</td>
<td>2016</td>
<td>Bratislava</td>
<td>1,073,830</td>
</tr>
<tr>
<td>Blue Brain Games</td>
<td>&lt;20</td>
<td>2016</td>
<td>Bratislava</td>
<td>1,010,622</td>
</tr>
<tr>
<td>Games Farm</td>
<td>50</td>
<td>2001</td>
<td>Košice</td>
<td>897,587</td>
</tr>
<tr>
<td>Outerra</td>
<td>&lt;20</td>
<td>2010</td>
<td>Bratislava</td>
<td>519,629</td>
</tr>
</tbody>
</table>

Game Development Platform in Slovakia

As a civic association supports digital game development as well as game developers and start–ups in Slovakia. The association helps new talents to improve their artistic, technological and business skills, and promotes education of professionals and general public in the field of digital games.

Game Events in Slovakia

**ART & TECH DAYS**
**KOŠICE (ANNUALLY)**
An international platform explaining the impact of Digitalization, AI and Industry 4.0 on our communication and work through workshops, networking activities, exhibitions and interactive installations.

**BRATISLAVA GAME JAM**
**BRATISLAVA (ANNUALLY)**
A contest for individuals and teams of programmers, script writers, graphics, philosophers and illustrators whose main aim is to make a video game prototype in just 40 hours and to experiment with bold game design.

**GAME DAYS**
**KOŠICE/TRNAVA (ANNUALLY)**
The only international videogame festival in Slovakia providing opportunities for leading figures of the sector to present their experience with progressive video game creation. The event combines digital games with artistic qualities.

**SLOVAK GAME DEVELOPERS ASSOCIATION**
**BRATISLAVA, KOŠICE (MONTHLY)**
Community meetings of digital game developers to present their work, to exchange know–how and to encourage networking among them, creating a compact and collaborative meetup platform.

Source: FinStat, Slovak Game Developers Association, 2019
Investment Incentives

The primary role of the investment incentives is to motivate investors to place their new projects in regions with higher unemployment and to attract projects with higher added value.

<table>
<thead>
<tr>
<th>Maximum Regional Intensities of Investment Aid in Slovakia</th>
</tr>
</thead>
<tbody>
<tr>
<td>for SMEs additional 10 to 20 %</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Technology Centers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum investment of 100 ths. EUR on fixed assets in all regions</td>
</tr>
<tr>
<td>Minimum of 10 newly created jobs</td>
</tr>
<tr>
<td>Minimum 1.7 fold of average salary in the district paid to new employees**</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Shared Services Centers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum of 25 newly created jobs</td>
</tr>
<tr>
<td>Minimum 1.5 fold of average salary in the district paid to new employees**</td>
</tr>
</tbody>
</table>

*Conditions differ for projects from 'Priority areas'. Please contact us at invest@sario.sk for more information.

**Condition is considered automatically fulfilled for years 2021 and 2022.

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**Eligible Projects**
The Act on Investment Aid divides the projects which may be supported into four categories:
- Industry
- Technology Centers
- Combined Projects of Industrial Production and Technology Center
- Shared Services Centers

**Eligible Costs**
- Costs of land acquisition
- Costs of buildings acquisition & construction
- Costs of new technological equipment and machinery acquisition
- Intangible long-term assets — licences, patents, etc.
- Rent of new land/building
- Wage costs of new employees for the period of 2 years

**Forms of Investment Incentives**
- Tax relief
- Cash grant
- Contributions for the newly created jobs
- Rent/Sale of real estate for a discounted price

**Superdeduction — Special R&D Tax Regime**
Companies with the R&D activities can benefit from the special tax regime. By the calculation of the income tax, the additional 200% of the R&D expenses can be deducted from the tax base. As a result, for every 100 EUR spent on the R&D activities, company can save 42 EUR (respecting the current income tax rate 21%).

**Superdeduction Rate Growth**

<table>
<thead>
<tr>
<th>Year</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>25%</td>
</tr>
<tr>
<td>2018</td>
<td>100%</td>
</tr>
<tr>
<td>2019</td>
<td>150%</td>
</tr>
<tr>
<td>2020</td>
<td>200%</td>
</tr>
</tbody>
</table>

**Examples of Deductible Costs**
- Wages and related contributions
- Material and inventory
- Power and utility supplies
- Tax depreciation of long-term assets
- Certification expenses
- Specialised software licence, etc.
SARIO Profile

Slovak Investment & Trade Development Agency (SARIO) is a governmental investment and trade promotion agency of the Slovak Republic. The agency was established in 2001 and it operates under the Slovak Ministry of Economy.

01 INVESTMENT SERVICES

FOR POTENTIAL INVESTORS
- investment environment overview
- assistance with investment projects implementation
- starting a business consultancy
- sector and regional analyses
- investment incentives consultancy
- site location & suitable real estate consultancy

FOR ESTABLISHED INVESTORS
- identification of local suppliers, service providers
- assistance with expansion preparation and execution
- relocation assistance, work/stay permits
- business networking

02 FOREIGN TRADE SERVICES

IF YOU ARE LOOKING FOR
- Slovak supplier or sub-contractor
- information about Slovak export/trade environment
- sourcing opportunities
- forming a joint venture, production cooperation or other forms of partnership with a Slovak partner

SERVICES FOR EXPORTERS
- information on foreign territories
- customized search for foreign partners
- on-line database of business opportunities
- export Training Centre
- subcontracting assistance

03 INNOVATION SERVICES

- supporting business development of Slovak innovative technology companies by connecting them to SARIO’s major clients — large investors established in Slovakia in order to innovate their technological processes
- the service is not limited to the borders of Slovakia, it focuses mainly on — industry, product development, service sector
- the service also aims to direct venture funds to Slovak technology companies open to capital investments

04 DIVERSIFICATION SERVICES

- supporting diversification of Slovak companies towards high-tech areas with significant growth potential
- focus on, but not limited to: space industry, aviation industry, and innovative mobility
- include consultancy for companies regarding the potential and possibilities of entering the new sectors as well as creation of new business and R&D cooperation opportunities on the national and international level
SARIO IS YOUR ONE STOP SHOP FOR INVESTMENT & TRADE IN SLOVAKIA.
TALK TO US TODAY!

SARIO | Slovak Investment and Trade Development Agency
Trnavská cesta 100 | 821 01 Bratislava | Slovakia
📍 GPS +48° 9' 52.77", +17° 9' 20.27"

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