

THE VOICE
OF SLOVAK
BUSINESS

AUTOMOTIVE SUPPLY CHAIN ROADSHOW
MARCH 20 – 21
BIRMINGHAM UK

THE VOICE
OF SLOVAK
BUSINESS

POWERED BY

SARIO
SLOVAK INVESTMENT AND
TRADE DEVELOPMENT AGENCY

HEADLINE PARTNERS



Grant Thornton

An instinct for growth™



TATRA BANKA

AUTOMOTIVE SUPPLY CHAIN ROADSHOW

OPPORTUNITIES IN SLOVAKIA

**COMING TO THE UK
20/21 MARCH**

CONTACT US: OFFICE@THEVOICEOFBUSINESS.EU

STRATEGIC PARTNERS



KOSIT



LUGERA
THE PEOPLE REPUBLIC



KOŠICE
DEVELOPMENT
CENTER



PART 1: THE SLOVAK AUTOMOTIVE MARKET – INTRODUCTION TO THE SLOVAK AUTOMOTIVE SECTOR

THE VOICE OF SLOVAK BUSINESS

POWERED BY SARIO SLOVAK INVESTMENT AND TRADE DEVELOPMENT AGENCY

20-21 MARCH 2017

HEADLINE PARTNERS

Grant Thornton
An instinct for growth™

TATRA BANKA

AUTOMOTIVE SUPPLY CHAIN ROADSHOW

STRATEGIC PARTNER FOCUS

 EMBASSY
OF SLOVAKIA
LONDON

OPPORTUNITY IN THE SLOVAK REPUBLIC

STRATEGIC PARTNERS

AKTRION INTERNATIONAL
AUTOMOTIVE

CEIT

Colliers INTERNATIONAL

GEFCO

KOSIT

LUGERA
THE PEOPLE REPUBLIC

NESS

KOŠICE DEVELOPMENT CENTER

ZAP



- THE OFFICIAL OPENING & WELCOME PROVIDED BY GUEST OF HONOUR, AMBASSADOR OF THE SLOVAK REPUBLIC TO THE UNITED KINGDOM
- HIS EXCELLENCY HIGHLIGHTED HIS COUNTRY'S POLITICAL STABILITY, TRANSPARENT ECONOMIC RULES, PREDICTABLE LEGAL ENVIRONMENT AND STABLE CURRENCY.
- HOST: MR DAVID HILLAN – INTRODUCTION TO THE GRANT THORNTON OFFICE, THE TEAM & THE PREMISES
- HEADLINE PARTNERS GRANT THORNTON & TATRA BANKA WITH THE AMBASSADOR

PART 1: INTRODUCTION TO THE SLOVAK AUTOMOTIVE SECTOR



DR WILFRED SERLES;
HEADLINE PARTNER AND MANAGING PARTNER OF GRANT THORNTON, SLOVAKIA
OPENING PLENARY SESSION AND KEYNOTE SPEECH
SLOVAKIA AND ITS POSITION IN CENTRAL AND EASTERN EUROPE –
A KEY FORCE IN BUSINESS.

DR SERLES DEMONSTRATED ERY KEEN INTEREST & VERY CLOSE RELATIONSHIP THAT HE HAS WITH SLOVAKIA, AS AN AUSTRIAN THERE IS NO HIGHER PRAISE FOR “THE MOST OUTSTANDING COUNTRY IN CENTRAL AND EASTERN EUROPE.” HE WENT ON TO GIVE US A VERY INFORMATIVE AND INTERESTING OVERVIEW OF THE COUNTRY.



PART 1: INTRODUCTION TO THE SLOVAK AUTOMOTIVE SECTOR



**MR MILAN GAVLAK,
HEAD OF STRATEGIC PROJECTS, SARIO –
THE SLOVAK TRADE & INVESTMENT AGENCY
KEY FACTS OF THE AUTOMOTIVE SECTOR IN
SLOVAKIA**

AN INTRODUCTION TO CAR PRODUCTION
AND THE SLOVAK REPUBLIC IN WHICH THE
AUDIENCE RECEIVED A VERY FULL AND
CLEAR PICTURE OF THE OEM SET UP AND
TIER ONE COMPANIES THAT ARE LOCATED
WITHIN SLOVAKIA.

SARIO
SLOVAK INVESTMENT AND
TRADE DEVELOPMENT AGENCY



PART 1: INTRODUCTION TO THE SLOVAK AUTOMOTIVE SECTOR



MR JURAJ VALACHY, SENIOR ECONOMIC ANALYST FROM THE TATRA BANKA MACROECONOMICS AND BANKING SECTOR IN SLOVAKIA

AFTER A VERY ACCURATE AND INFORMATIVE PRESENTATION CONTAINING UPDATES ON HR, EMPLOYMENT AS WELL AS INFORMATION THE AUDIENCE NEEDED TO KNOW ON MACROECONOMICS AND SLOVAKIA.



PART 2: THE SLOVAK AUTOMOTIVE MARKET OPPORTUNITY WITHIN THE SLOVAK AUTOMOTIVE SECTOR



THE VOICE OF SLOVAK BUSINESS
POWERED BY SARIO SLOVAK INVESTMENT AND TRADE DEVELOPMENT AGENCY
20-21 MARCH 2017
HEADLINE PARTNERS
Grant Thornton
An instinct for growth™
TATRA BANKA

AUTOMOTIVE SUPPLY CHAIN ROADSHOW

GUEST SPEAKER
JAGUAR
LAND-ROVER

STRATEGIC PARTNERS
AKTRION AUTOMOTIVE
CEIT
Colliers INTERNATIONAL
GEFCO
KOSIT
LUGERA THE PEOPLE REPUBLIC
KOŠICE DEVELOPMENT CENTER
ZAP

MR GRAHAM THOMPSETT, HEAD OF TALENT ACQUISITION JLR
THE AUTOMOTIVE RECRUITMENT VISION

THE VOICE OF SLOVAK BUSINESS
POWERED BY SARIO SLOVAK INVESTMENT AND TRADE DEVELOPMENT AGENCY
20-21 MARCH 2017
HEADLINE PARTNERS
Grant Thornton
An instinct for growth™
TATRA BANKA

AUTOMOTIVE SUPPLY CHAIN ROADSHOW

GUEST SPEAKER
JAGUAR
LAND-ROVER

STRATEGIC PARTNERS
AKTRION AUTOMOTIVE
CEIT
Colliers INTERNATIONAL
GEFCO
KOSIT
LUGERA THE PEOPLE REPUBLIC
KOŠICE DEVELOPMENT CENTER
ZAP

MR LES RATCLIFFE, MBE, HEAD OF COMMUNITY RELATIONS, JLR
JLR & THE ROLE OF CSR IN AUTOMOTIVE & THE COMMUNITY

PART 2 - OPPORTUNITY WITHIN THE SLOVAK AUTOMOTIVE SECTOR



MR GRAHAM THOMPSETT, HEAD OF TALENT ACQUISITION JLR THE AUTOMOTIVE RECRUITMENT VISION

MR THOMPSETT IS CURRENTLY WORKING AS HEAD OF TALENT ACQUISITION GLOBALLY. IN THIS ROLE GRAHAM IS RESPONSIBLE FOR FUTURE TALENT (GRADS/UNDER GRADS & APPRENTICES). MR THOMPSETT GAVE US A VERY DYNAMIC PRESENTATION CAPTURING THE TRUE “JLR” EMOTION VERY NICELY. AN EXCELLENT ACCOUNT OF SETTING UP AN INTERNATIONAL BUSINESS IN CHINA.



MR LES RATCLIFFE, MBE, HEAD OF COMMUNITY RELATIONS, JLR JLR & THE ROLE OF CSR IN AUTOMOTIVE & THE COMMUNITY

A KEY ELEMENT OF LES' ROLE IS DELIVERING A COMMUNITY RELATIONS STRATEGY THAT SUPPORTS INVESTMENT INTO CHARITABLE GIVING, EDUCATION DEVELOPMENT, VOLUNTEERING AND COMMUNITY COHESION. THIS HAS NOW BEEN DEVELOPED INTO A GLOBAL COMMUNITY CSR PROGRAMME INCLUDING BRAZIL AND MORE RECENTLY SLOVAKIA WHERE JLR ARE CONSTRUCTING NEW MANUFACTURING FACILITIES.

PART 2 - OPPORTUNITY WITHIN THE SLOVAK AUTOMOTIVE SECTOR



MR CHARLES JD TOOSEY, ASSOCIATE DIRECTOR FROM GRANT THORNTON UK KEY DRIVERS IN THE FUTURE OF MANUFACTURING & AUTOMOTIVE SUPPLY CHAINS

MR TOOSEY IS AN AUTHORITY ON AUTOMOTIVE. HE LEADS THE AUTOMOTIVE ADVISORY DIVISION OF GRANT THORNTON IN THE UK. PRIOR TO JOINING GRANT THORNTON, HE WORKED FOR 25 YEARS IN THE AUTOMOTIVE INDUSTRY FOR GENERAL MOTORS AND SAAB. FORMERLY THE GLOBAL SALES AND MARKETING DIRECTOR FOR ORIO AB.



PART 2 - OPPORTUNITY WITHIN THE SLOVAK AUTOMOTIVE SECTOR



MR BORIS DULA., CEO OF CEIT THE LOGISTICS REVOLUTION FROM SLOVAKIA

CEIT IS A VERY WELL KNOWN COMPANY IN SLOVAKIA AND VERY INNOVATIVE. IT HAS ITS OWN UNIQUE CONCEPT OF INTELLIGENT LOGISTICS SYSTEMS FOR SMART FACTORIES, A CONNECTION TO A REAL, DIGITAL AND VIRTUAL FACTORY.

THE PRESENTATION ILLUSTRATED THE TECHNOLOGY OF CEIT AND SOME OF THE NEW INNOVATIONS THAT THE COMPANY IS WORKING ON.



PART 2 - OPPORTUNITY WITHIN THE SLOVAK AUTOMOTIVE SECTOR



MR PETE ROGERS, GENERAL MANAGER OF EUROPE FOR NESS DIGITAL ENGINEERING

MR ROGERS HAS WORKED CLOSELY WITH ORGANISATIONS ACROSS 15 COUNTRIES IN SECTORS INCLUDING DIGITAL MEDIA, AUTOMOTIVE, BROADCASTING, FINANCIAL SERVICES AND TELECOMS."

MR ROGERS' GAVE A VERY INFORMATIVE PRESENTATION. HE EXPLAINED ALL ABOUT NESS KDC AND ITS SET UP IN THE EAST OF SLOVAKIA , KOSICE. HE ALSO EXPLAINED WHY A GLOBAL PRESENCE LIKE NESS FOUND IT SO IMPORTANT TO OPEN UP OFFICES IN SLOVAKIA 12 YEARS AGO.



PART 3: THE SLOVAK AUTOMOTIVE MARKET – BUSINESS CASE STUDIES

EXPERT PANEL DISCUSSION ON SLOVAKIA

THE VOICE
OF SLOVAK
BUSINESS



PANELLISTS

MS ZUZANA KOSTIALOVA, HEAD OF LARGE CORPORATE CLIENTS DIVISION, TATRA BANKA. THE VOICE OF SLOVAK BUSINESS, CHRISTOPHER PLANT. MR LES RATCLIFFE, MBE, HEAD OF COMMUNITY RELATIONS, JAGUAR LAND ROVER. MR WILFRIED SERLES, MANAGING PARTNER, GRANT THORNTON, SLOVAKIA. MR BORIS DULA, CEO AND CHAIRMAN OF THE BOARD, CEIT. MR PETE ROGERS, GENERAL MANAGER EUROPE, NESS DIGITAL ENGINEERING AND FINALLY MR MILAN GAVLAK, HEAD OF STRATEGIC PROJECTS, SLOVAK INVESTMENT & TRADE DEVELOPMENT AGENCY (SARIO).



PART 3: THE SLOVAK AUTOMOTIVE MARKET – BUSINESS CASE STUDIES



**MR CHRIS BAUMANN,
AKTRION GROUP,
GROUP MANAGING DIRECTOR
BRITISH EXPERIENCE AND
DEVELOPMENT IN SLOVAKIA**

MR BAUMANN TALKED ABOUT THE POSITIVES OF DOING BUSINESS IN SLOVAKIA, ECHOING WHAT HE HAD HEARD IN THE EARLIER PANEL OF EXPERTS AND HOW STRAIGHT FORWARD IT WAS COMPARED TO MANY OTHER CENTRAL AND EASTERN EUROPEAN COUNTRIES WHERE AKTRION ALSO HAVE BUSINESS SET UP.



PART 3: THE SLOVAK AUTOMOTIVE MARKET – BUSINESS CASE STUDIES



MR DAMIAN WILLIAMS, KEY ACCOUNT MANAGER FOR GEFCO UK GLOBAL AND INTERNATIONAL LOGISTICS FOR MANUFACTURES

WITH MANY YEARS OF AUTOMOTIVE LEASING, RENTAL AND FLEET MANAGEMENT EXPERIENCE. NOT ONLY IN THE UK BUT ALSO INTERNATIONALLY AND HAS SUCCESSFULLY WORKED WITH MOTOR MANUFACTURERS, LEASING COMPANIES AND TIER 1 FINANCE HOUSES IN EUROPE, THE MIDDLE EAST, USA AND CHINA.

DAMIEN INFORMED THE AUDIENCE ABOUT THE GLOBAL SOLUTIONS OF GEFCO AND ITS LOGISTIC CAPABILITIES IN THE SLOVAK REPUBLIC.

HE ALSO PROVIDED A VERY GOOD ACCOUNT OF THE GEFCO VISION.



PART 3: THE SLOVAK AUTOMOTIVE MARKET – BUSINESS CASE STUDIES



**MR MARIAN CHRISTENKO, CEO OF KOSIT
WITH KATARINA MANDELOVA,
EXECUTIVE MANAGER OF KOSIT WEST**

**WASTE MANAGEMENT AND THE IMPACT
ON THE ENVIRONMENT IN SLOVAKIA AND
AUTOMOTIVE**

**KOSIT DEAL WITH WASTE MANAGEMENT
SERVICES FOR THE CITY OF KOSICE.
KOSIT PRESENTED THEIR CONCEPT FOR
WASTE MANAGEMENT AND HOW
SLOVAKIA COPE WITH WASTE IN
COMPARISON WITH OTHER EUROPEAN
COUNTRIES.**

**THE PRESENTATION WAS INTERESTING
NOT ONLY TO UNDERSTAND ABOUT THE
MANAGEMENT OF WASTE BUT ALSO HOW
IT EFFECTS AUTOMOTIVE.**



PART 3: THE SLOVAK AUTOMOTIVE MARKET – BUSINESS CASE STUDIES



LUGERA & MAKLER – OUR SERVICES

SEARCH & SELECTION

ARE YOU LOOKING FOR NEW TALENTS? WE ARE MORE THAN HAPPY TO INTRODUCE THEM TO YOU

EXECUTIVE SEARCH

WE WILL FIND THE BEST SPECIALISTS FOR YOUR TEAM.

MASS RECRUITMENT

LUGERA CAN DELIVER BOTH QUALITY AND QUANTITY IN A SHORT PERIOD OF TIME.



PART 3: THE SLOVAK AUTOMOTIVE MARKET – BUSINESS CASE STUDIES



COLLIERS INTERNATIONAL

COLLIERS INTERNATIONAL IS ONE OF THE LEADING COMMERCIAL PROPERTY ADVISORY FIRMS IN SLOVAKIA PROVIDING A COMPLETE RANGE OF REAL ESTATE SERVICES TO MULTINATIONAL CORPORATIONS, INVESTORS, FUNDS, FOREIGN, AND DOMESTIC DEVELOPERS.

OUR MARKET RESEARCH TRACKS ALL COMMERCIAL SALES AND LEASING ACTIVITY IN BRATISLAVA AND OTHER PARTS OF SLOVAKIA ON A REGULAR BASIS.

THIS INFORMATION, COUPLED WITH PROJECTIONS OF VACANCY, ABSORPTION AND RENTAL RATES, ARE IMPORTANT TOOLS FOR OUR AGENTS.



PART 4: B2B CUSTOMER MEETING SESSION



PART 5: AFTER DRINKS RECEPTION

THE VOICE
OF SLOVAK
BUSINESS



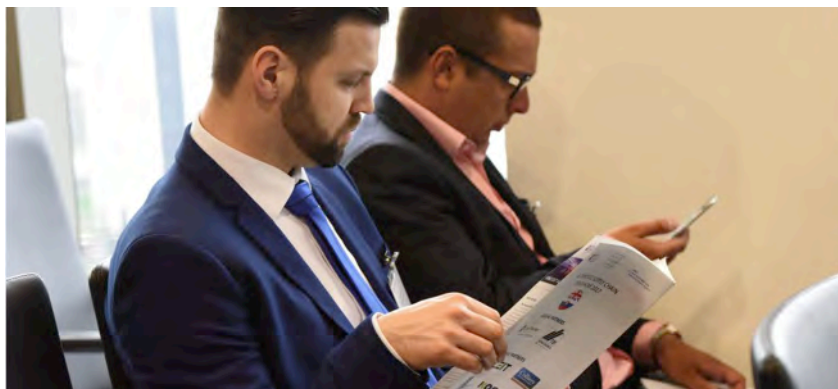
PART 5: AFTER DRINKS RECEPTION

THE VOICE
OF SLOVAK
BUSINESS



THE AUDIENCE: AUTOMOTIVE SUPPLY CHAIN ROADSHOW

THE VOICE
OF SLOVAK
BUSINESS



DAY 02 PART 6: FORUM SLOVAKIA

THE VOICE
OF SLOVAK
BUSINESS



DAY 2 WOULD BE A VERY RELAXED AFFAIR WITH AUDIENCE PARTICIPATION AND A VERY OPEN SET OF DISCUSSIONS. WITH JAGUAR LAND ROVER, GRANT THORNTON, SARIO, NESS, AND FINALLY THE BRITISH AUTOMOTIVE PANEL WHO WOULD DISCUSS THEIR EXPANSION INTO SLOVAKIA.



PART 6: FORUM SLOVAKIA – STATE AID & INVESTMENT OPPORTUNITY IN SLOVAKIA



THE VOICE
OF SLOVAK
BUSINESS



**DR WILFRIED SERLES,
MANAGING PARTNER, GRANT THORNTON, SLOVAKIA**

AN OPEN DISCUSSION BASED ON STATE AID AND
INVESTMENT OPPORTUNITIES IN SLOVAKIA.

MR MILAN GAVLAK & MR CHRISTOPHER PLANT WE ASKED
TO JOIN DR SERLES IN DISCUSSIONS AND TO ENGAGE IN
THIS INTERACTIVE SESSION, THEY SPENT 40 MINUTES
DISCUSSING VARIOUS AREAS INCLUDING TAX, FINANCE &
ALL THAT WOULD BE INTERESTING TO OUR AUDIENCE.

PART 6 – FORUM SLOVAKIA



MR LES RATCLIFFE, MBE, HEAD OF COMMUNITY RELATIONS, JLR
CSR & ENGAGING WITH THE FUTURE AUTOMOTIVE WORKFORCE.

THIS IS WHERE MR RATCLIFFE EXPLAINED IN MORE DETAIL ABOUT JLR'S SUCCESSFUL CHINA AND BRAZIL CSR PROGRAM THAT IS COMING TO SLOVAKIA AND WHY IT IS SO IMPORTANT TO HAVE A FIRST CLASS CSR STRATEGY IN PLACE IN AUTOMOTIVE. MR PLANT THANKED MR RATCLIFFE AGAIN FOR HIS TIME AND SUPPORT DURING THE LAST ONE AND A HALF YEARS.



PART 6 – FORUM SLOVAKIA



MR TOMAS FUTAS, PROGRAM DIRECTOR & MR RUDOLF SLAVKA, SENIOR DEVELOPMENT MANAGER, NESS KDC

MR FUTAS WOULD GIVE US A VERY INFORMATIVE OVERVIEW OF IT IN AUTOMOTIVE INCLUDING NEW PRODUCTS ON THE MARKET AND THE SOFTWARE DEVELOPMENT FOR AUTONOMOUS DRIVING, HD MAPS, ADVANCED DRIVER ASSISTANCE SYSTEMS WHICH MADE FOR A VERY INTERESTING SHOW.

CONTINUING ON FROM HIM WITH “FLEET MANAGEMENT AT A GLANCE”, WAS MR RUDOLF SLAVKA, SENIOR DEVELOPMENT MANAGER, NESS KDC. HE EXPLAINED ABOUT 3D ROAD SYSTEM MODELS FOR HELPING SYSTEMS IN THE CAR AND THE VISUALS TECHNOLOGY AND PORTFOLIO. THE BIGGER YOUR FLEET IS, THE MORE IMPORTANT IS TO MANAGE IT EFFECTIVELY AND BENEFIT FROM IT ON RETURN. THERE ARE WAYS TO KEEP YOUR DRIVERS SAFE AND SAVE COSTS IN ADDITION STATED MR SLAVKA.



PART 6 – FORUM SLOVAKIA



MR MILAN GAVLAK, HEAD OF STRATEGIC PROJECTS, SARIO – THE SLOVAK TRADE & INVESTMENT AGENCY KEY FACTS OF THE AUTOMOTIVE SECTOR IN SLOVAKIA

MR PLANT, FOUNDER AND MANAGING DIRECTOR OF THE VOICE OF SLOVAK BUSINESS AND MR MILAN GAVLAK, HEAD OF STRATEGIC PROJECTS FROM SARIO TOOK THEIR SEATS TO DISCUSS THE OVERVIEW OF THE OEMS: KIA, VW, PSA.

THERE WAS SOME GREAT INPUT FROM THE AUDIENCE WITH PARTICULAR REFERENCE TO KIA AND VW.

THE GENTLEMEN HAD A VERY INTERESTING DISCUSSION ABOUT HOW THESE OEMS WERE POSITIONED AND WHAT THEIR MODEL IN SLOVAKIA WAS, HOW THE COMPANIES WERE WORKING WITH TIER 1 COMPANIES AND WHAT OPPORTUNITY MAY ARISE IN THE FUTURE.

SARIO
SLOVAK INVESTMENT AND
TRADE DEVELOPMENT AGENCY

THE VOICE
OF SLOVAK
BUSINESS



PART 6: FORUM SLOVAKIA – BUSINESS CASE STUDIES

EXPERT PANEL DISCUSSION ON BRITISH BUSINESS IN SLOVAKIA

Arlington
Automotive

AKTRION
AUTOMOTIVE

LANDER

hi-technology
GROUP LIMITED



PANELLISTS

MR CHRIS BAUMANN, GROUP MANAGING DIRECTOR, AKTRION GROUP. MR CHRIS SIPOS, NEW BUSINESS DIRECTOR, ARLINGTON AUTOMOTIVE. MR SEAN DOWNEY, BUSINESS DEVELOPMENT MANAGER, HI-TECHNOLOGY GROUP AND MR MICHAEL MELVIN, FINANCE & IT DIRECTOR, LANDER AUTOMOTIVE



PART 6: FORUM SLOVAKIA BUSINESS CASE STUDIES EXPERT PANEL DISCUSSION ON SLOVAKIA



THE VOICE
OF SLOVAK
BUSINESS

THE VOICE OF SLOVAK BUSINESS:

MR CHRISTOPHER PLANT
FOUNDER & MANAGING DIRECTOR

MS ADELA KOVAROVA
DIRECTOR PROJECT MANAGEMENT

