THE AEROSPACE AND DEFENCE INDUSTRY

THE AEROSPACE AND DEFENCE INDUSTRY IN THE SLOVAK REPUBLIC

SARIO
Slovak Investment
and Trade Development Agency

1. Introduction to Slovakia's aerospace and defence sector

Slovakia's aerospace and defence (A&D) sector, must be seen in context of both Europe and the entire world. This sector always includes both civil and defence/military elements. On the **civil side** this sector and its market is cyclical depending on the acquisition plans of airlines, which fluctuate considerably, especially in a period of uncertain economic expectations and global security concerns. On the **defence side**, demand depends on the defence budgets and procurement policies of governments, which in turn depend on geopolitical developments and the changing perception of threats.

The main trends and the position of the sector should be understood in the context of the following aspects.

Civil aviation

Industrial restructuring combined with the development of common programmes within a coherent political framework across European borders is essential for future success in all of the aerospace sectors.

Defence aviation

The defence side of the business is the area where the scope and need for progress is the greatest. It still lacks one of the basic foundations of a competitive European industry: an effective internal market. Over the years, the reluctance of EU member states to take a common approach at the European level to improve the efficiency of the defence sector has, however, become a serious handicap with regard to the industry's strong competitors, especially from the US, whose growth in terms of both the structure and volume of the security and defence budget means it has many more opportunities for the development of new products and thus achieving the economic advantages of large-scale production.

Space

The need for a European approach to space has long been recognised and led to the establishment of the European Space Agency (ESA) in 1975. Within the ESA, individual states have pooled important parts of their civilian space activities. Through ESA programmes and via national efforts, it has been possible to develop considerable European space capabilities and a worldclass industrial capacity in launchers and satellites. However, space defence programmes have been generally conducted nationally or bilaterally in Europe, with some major successes, but on limited budgets (only about 7 per cent of that of the US).
The drop in demand in the space sector for satellite communications has affected both the satellite and the launching business, and no significant improvement is expected in the coming years.
To maintain a European space industry and the freedom of action which it provides, Europe needs to develop a consolidated industrial and institutional approach to further integrate its space-related activities. In this context, the implementation of Galileo plays an important role. Galileo will be Europe's own global navigation satellite system, providing a highly sophisticated, guaranteed global positioning service under civilian control. It will be inter-operable with the American GPS system and the Russian GLONASS system, the other two global satellite navigation systems. In this context is positive that Slovakia is destined to achieve full range membership in ESA what is expected within next few years.

Research

There is a large consensus among all interested parties that the coordination of European aerospace research must be improved. In numerous statements, agreements and joint declarations, such coordination is seen as a natural corollary of greater industrial integration. However, experience has shown that recognition of the need for greater coordination is not itself sufficient to bring about the required changes to Europe's complex system of aerospace technology acquisition. New mechanisms will therefore have to be developed to give practical effect to this common objective.

Market Access

Aerospace companies operate in a global market and therefore depend on fair conditions in international trade and access to markets.

The market for large civilian aircraft is regulated by a system of bilateral and multilateral agreements. The bilateral 1992 EU-US Agreement on Trade in Large Civil Aircraft specifically regulates different forms of government support, such as support for research and development or repayable launch aid for new programmes. While Europe has respected its obligations under the 1992 agreement and will continue to do so in the future, the levels of support provided in the US regularly exceed those permitted by the agreement. The Commission has criticised this violation in bilateral consultations foreseen by the agreement and it will continue to monitor the situation closely in the future in order to preserve open and fair competition in this important market.
Concerning access to defence equipment markets, two specific difficulties for European companies emerge from current US legislation.
First, the US defence equipment market is itself very difficult to enter. Moreover, US restrictions on the procurement of foreign defence equipment limit European industry's access to the US market. This weighs heavily on any participation of foreign contractors in US programmes.
Largely as a result of these restrictions, the EU-US defence trade balance tilts very heavily toward the United States: 24% of European defence procurement is of US origin, whereas only 0.5% of US defence procurement is of European origin.
Second, US authorities can block exports of European equipment to third countries if the products contain components that are covered by US regulations. Compared with the European system, these regulations are wider in scope and more rigid.

The main factors influencing the position of the sector in Slovakia:

- Slovakia's defence budget for 2014 is 744,7 million EUR (exchange rate: 30,126 SKK/EUR)
- Slovakia is a member of both the European Union (since 2004) and NATO (since 2004), thus the Slovak Republic requires advanced technologies to modernize its defence inventories for participation in the activities of these organisations.
- Most Slovak aerospace firms produce ultra light aircrafts and aircraft turbines components.
- The Ministry of Defence is the largest customer for A&D components and systems in Slovakia.
- Import and export regulations fully comply with EU directives.
- Some defence components and systems may require export licenses from the countries of origin and import licenses from Slovakia.

2. The current situation in the A&D industry

The aerospace and defence market in Slovakia has had difficulty to develop a strong customer base since the dissolution of its biggest customer, the former Soviet Union. However, the A&D industry in Slovakia is attracting foreign and domestic investment and is in the process of developing supply relationships with major international A&D prime systems integrators (primes), as well as tier 1 and 2 firms.

Slovakia has still a relatively large potential in defence industry and lower order aerospace industry at the same time. The Slovak defence industry focuses on the design, development and manufacture of ammunition and artillery systems, armoured combat and transport vehicles, short- and long-range radar and navigation systems and mine-clearing equipment. Several manufacturers are focused on development and manufacture of small arms and ammunition for this weapons and they have achieved very good results so far.

Although some Slovak defence companies have successfully exported their defence products to Western Europe and North America, domestic and regional customers continue to be the primary clients for the Slovak defence industry.

Firms in the Slovak aerospace sector focus on the manufacture of light and ultra light aircraft, as well as engine components for aircraft engines.

The defence inventory of the Slovak Armed Forces is also undergoing modernisation for the country's participation in NATO and EU missions. As a result, Slovakia had planned the following modernisation plan for 2011-2014:

- modernization and regular maintenance of fight aircrafts MiG-29
- modernization and upgrade of Mi-17 M combat helicopters to meet NATO standards and utilization in areas with higher threats level
- procure transport helicopters and tactical transport aircrafts
- procurement and reconstruction of radilocation devices
- completion and commissioning of the mobile communication system MOKYS for the Slovak Armed Forces

These modernisations are taking place slowly because of the limited size of the Slovak defence budget - the 2013 defence budget was only EUR 748,4 million what represented only 1,047 % of our GDP.

TOP 5 EXPORTING AND IMPORTING COUNTRIES AND VOLUMES TO AND FROM SLOVAKIA 2012-2013

IMPORT TO SLOVAKIA (EUR)				EXPORT FROM SLOVAKIA (EUR)			
Year/ Country	**2012**	**2013**	**Total 2012-13**	**Year / Country**	**2012**	**2013**	**Total 2012-13**
DE	923 538 418	689 253 180	1 612 791 598	**DE**	4 021 718 250	3 632 683 120	7 654 401 370
CZ	175 726 827	349 992 270	525 719 097	**CZ**	1 586 817 603	1 681 584 084	3 268 401 687
TR	260 018 256	253 041 760	513 060 016	**HU**	346 899 465	216 639 909	563 539 374
FR	60 40 477	115 885 649	176 126 126	**FR**	162 631 524	162 186 310	324 817 834
HU	83 102 301	90 514 098	104 136 582	**RU**	131369704	144340120	275 709 824

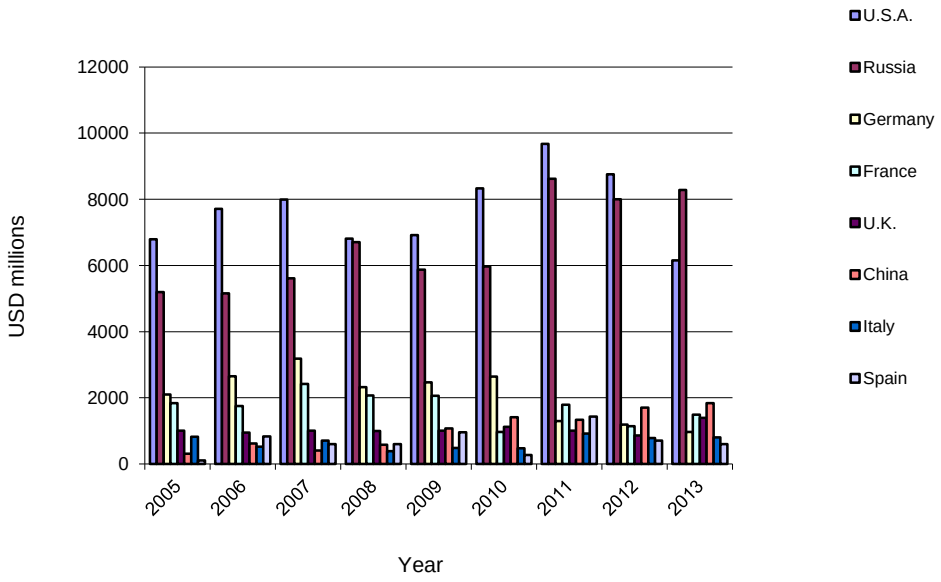
Source: The Ministry of Economy of the Slovak Republic, 2014

From the above mentioned table, it is quite obvious that the biggest importer and export destination of A&D products to and from Slovakia in the given years was Germany.

WORLDWIDE A&D SUPPLIES, BY SUPPLYING COUNTRY, 2005-2013 (in millions of U.S. dollars)

	2005	*2006*	*2007*	*2008*	*2009*	*2010*	*2011*	*2012*	*2013*	*TOTAL*
U.S.A.	6796	7711	7990	6808	6921	8335	9672	8760	6153	69146
Russia	5196	5156	5608	6710	5877	5974	8620	8003	8283	59427
Germany	2104	2654	3184	2319	2465	2647	1295	1193	972	18833
France	1842	1752	2416	2071	2065	971	1796	1139	1489	15541
U.K.	1039	973	1009	1002	1021	1137	1040	923	1394	9538
China	315	625	406	581	1077	1419	1342	1704	1837	9306
Spain	107	839	600	602	961	277	1437	706	605	6134
Italy	827	527	713	388	489	476	924	790	807	5941
T O T A L	18226	20237	21926	20481	20876	21236	26126	23218	21540	193866

Source: Stockholm International Peace Research Institute (SIPRI), 2013



WORLDWIDE A&D SUPPLIES, BY SUPPLYING COUNTRY, 2005-2013 (expressed as a percent of total, by year)

	2005	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**
U.S.A.	37,29	33,66	32,94	34,02	32,64	29,58	30,80	35,37	35,67
Russia	28,51	30,28	25,24	23,26	22,13	28,00	25,79	31,52	30,65
Germany	11,54	13,11	10,23	11,72	13,03	11,76	11,25	4,74	9,71
France	7,44	10,88	8,48	7,50	9,92	9,38	8,63	6,57	8,02
U.K.	5,70	6,45	5,11	3,90	4,15	4,62	4,73	3,68	4,92
China	3,68	1,43	1,49	2,73	1,75	2,76	4,63	5,51	4,80
Spain	1,73	1,02	2,87	5,42	5,41	2,49	2,52	2,06	3,16
Italy	4,54	1,04	3,80	2,29	2,79	1,96	2,38	3,21	3,06

Source: Stockholm International Peace Research Institute (SIPRI), 2013

Data indicated in the above tables and chart show the most recent trends in arms contract activity by major suppliers. Data on worldwide arms deliveries confirm the dominance of the USA. Even though the United States, Russia and the four major West European suppliers dominate the delivery of A&D, it is

quite obvious that other European countries, including Slovakia, and some non-European suppliers, especially China, are capable of being significant suppliers of selected types of A&D equipment.

3. Producers of components for aircraft engines and providers of aircraft services

In Slovakia any potential investor can find relatively wide base of suppliers of components for the A&D sector, mainly for aircraft engines.

Company and No of employees		Webpage	Seat	Description
DMD Group Inc.	12	http://www.dmdgroup.eu	Dubnica nad Váhom	Consorcium of companies ZTS-SPECIAL, KONSTRUKTA- DEFENCE and ZVS HOLDING
KINEX-KLF Inc.	488	www.kinex-klf.sk	Kysucké Nové Mesto	Aerospace KINEX division is integrated base for R&D, technical, consulting, producing, business and service activities. Their production line is equipped with technological and machines equipment which satisfy strict standards and requirements for aerospace industry manufacturing.
Virtual Reality Media Jsc.	60	www.vrm.sk	Trenčín	Full Flight/Full Mission Simulators
Ales Inc.	44	www.ales.sk	Trenčín	develops and produces advanced systems for air traffic control (ATC), air traffic management (ATM) and air defense applications. The company also specializes in radar modernization and consoles manufacturing for ATC/ATM applications.
Spinea,s.r.o.	235	www.spinea.sk	Prešov	Navigation systems
Aero Nitra Ltd.	n/a	http://aero-nitra.slovakiatrade.cz	Nitra	Maintenance, modifications, repairs of aircrafts; new and repairs paint
Aero Slovakia Ltd.	18	www.aeroslovakia.sk	Nitra	Aerial works (agriculture, photo, environment monitoring); flight school - basic tuition on Cessna; aircraft maintenance services
Aeropro Ltd.	18	www.aeropro.sk	Nitra	Production of UL planes, Manufacturing and sale of Eurofox aircraft
Aeroengineers International s.r.o.	28	https://www.aei.sk/	Bratislava	The company business concept is to create grid of small and flexible line maintenance stations which are capable to serve the customers by providing professional line maintenance services. Focal point is situated in Bratislava. Served aircraft types are dependent on the market demand.
Agrolet Ltd.	13	www.agrolet.host.sk	Bratislava	Aerial works for agriculture, forest and water management; maintenance of aviation equipment; ultralight aircraft production; aviation school; sightseeing flights; aerial promotion services - banners towing
Aircraft Repair company Trenčín JSC – LOTN, Inc.	310	www.lotn.sk	Trenčín	one of Slovakia's oldest repair companies with almost 60 years of tradition providing major overhauls, repairs and revision of aircraft and helicopters; major overhauls of aviation ground support equipment; modernization of aircraft and helicopter equipment
Aerospool spol. S.r.o.	44	www.aerospool.sk	Prievidza	general overhauls of composite glider surfaces and various other damages, production of stabilizers, elevators and winglets for Ventus-2c gliders, as well as their pre-assembly, painting and final

				assembly, production of the composite ,ultralight, airplane WT9 Dynamic
Tech- Mont Helicopter Company Ltd.	19	www.techmont.sk	Poprad	Aerial works by helicopters Mi-8 and Mi-2, airplanes Z-37; maintenance, service and repairs of aeroplanes and helicopters; purchase and sale of aeroplanes and aviation technology
Techniserv	35	http://www.techniserv.sk/	Bratislava	The company deals with systems used for air traffic operation at airports and heliports, and systems navigation services. It focuses on complex solutions including aviation operational evaluation, production of project documentation, engineering, realization, implementation, supervision, system integration and maintenance.
Jakor, Ltd.	11	http://www.jakor.sk/	Vranov nad Topľou	Development of flight systems and turbopropeller aircrafts
Plastpol	5	http://www.plastpol.sk	Sobotište	The company deals with the prototype and serial production of composite parts and moulds for aerospace and energy industries. It has years of experience in manufacturing composite parts and repairs of composite parts for certified aircrafts.
Strojkov Engineering,s.r.o.	62	www.strojkovengineering.com	Košice	Contract based mechanical, structural, electronic and aeronautical engineering services for global industrial and aerospace companies

Source:SARIO, Global Slovakia, 2014

4. Producers of defence technics and components

Slovak defense industry remains relatively stable subsector of A&D and you can find many renowned companies utilizing long-term know-how add production capability, mostly in production of heavy artillery arms, multiple rocket lounchers, armored wehicles, ammunition as well as high quality selfloading pistols.

Company	No of empl	Webpage	Seat	Description
DMD Group Inc.	12	http://www.dmdgroup.eu	Dubnica nad Váhom	Consorcium of companies ZTS-SPECIAL, KONSTRUKTA- DEFENCE and ZVS HOLDING
ZTS ŠPECIAL, Inc.	149	http://www.dmdgroup.eu/en/our-company/zts-special-en	Dubnica nad Váhom	artillery systems, howitzers, rocket launchers,mortars,combat turrers, gun barrels
KONSTRUKTA DEFENCE, Inc.	99	http://www.kotadef.sk/en/	Dubnica nad Váhom	howitzers, rocket launchers,mortar systems, mine laying and mine clearing systems
ZVS HOLDING, Inc.	127	http://www.zvsholding.sk/index-en.php?page=templates/en/profil/index	Dubnica nad Váhom	Medium and large calibre ammunition, ammunition for tank, mortar ammunition, artillery ammunition
GRAND POWER, Ltd.	99	http://www.grandpower.eu/en/index.php	Slovenská Ľupča	high quality selfloading pistols
ORICA SLOVAKIA, Ltd.	25	http://www.orica.com	Humenné	explosive powders, chemical agents
WAY INDUSTRIES,	200	http://www.way.sk	Krupina	remotely controlled light demining system designed for mine clearance
TANAX TRUCKS, Inc.		http://www.tanaxtrucks.sk/en/about-us	Bánovce nad Bebravou	production of military trucks AKTIS and MAN
VOP Trencin, Inc.	499	http://www.voptrencin.sk/en.html	Trenčín	mobile workshop facilities for repair of tank and automobile technics, mobile laboratories for NBC detection for military purposes, Mobile Field Multiprofile Hospital, mobile radio communication system

Source:SARIO, Global Slovakia , 2014

5. Opportunities for investors

The aerospace market in Slovakia offers significant potential to foreign exporters in the following areas:

- regional and business aircraft
- components and systems for avionics upgrade
- aircraft parts components and systems for civil and military aircraft

As with most Western forces, Slovakia is looking to procure off-the-shelf (OTS) equipment to assist their respective efforts at modernizing their military forces. Each country's NATO commitments have forced their respective governments to invest heavily in modernizing their current inventory of defence equipment. Opportunities may be available for foreign A&D components and systems, especially the OTS equipment to be used toward these modernisation programs.

Foreign firms involved in A&D simulation and training systems can find export opportunities in Slovakia as well as opportunities for the creation of partnership companies.

The market for maintenance, repair and overhaul (MRO) in Slovakia also continues to be strong and may require advanced MRO technologies.

The Slovak government is gradually divesting the majority of its shares in individual A&D firms. As a result of this privatization, there are significant opportunities for foreign firms to invest in these top Slovak manufacturers, as well as tier-1, -2 and -3 suppliers.

Import of Aerospace and Defence Components and Systems to Slovakia, 2012-13

Category	Country Rank		Import Value (EUR)		Total 2012-2013
			2012	2013	
Aircraft Avionics - Component and Systems	USA	1.	17 445 690	76 429 557	93 875 247
	Czech Republic	2.	3 438 972	44 325 207	47 764 179
	Russia	3.	12 030 600	6 739 264	18 769 864
Aircraft Engines– Components and Systems	Germany	1.	7 867 684	84 72 849	16 340 533
	Czech Republic	2.	1 618 218	4 744 116	6 362 334
	Italy	3.	1 879 911	2 232 010	4 111 921
Aircraft Structures and Parts – Components and Systems	Germany	1.	12 533 994	12 663 442	25 197 436
	Czech Republic	2.	8 392 518	10 611 351	19 003 869
	Czech Republic	3.	6 738 080	12 171 080	18 909 160
Defence – Components and Systems	Czech Republic	1.	18 371 817	57 876 579	76 248 396
	Germany	2.	15 315 190	18 986 836	34 302 026
	Hungary	3.	2 690 676	9 924 516	12 615 192

Source: The Ministry of Economy of the Slovak Republic, 2014

Since entry into NATO, Slovakia has been undertaking a significant force modernisation programme, which is taking up much of the defence budget. The table above confirms the permanent increase in A&D imports to Slovakia which is connected mainly with the upgrade and modernisation of the military air combat and transport fleet. The dominant position of Czech Republic, Germany and USA in individual segments of aircraft technology imports to Slovakia is evident.

Export of Aerospace and Defence Components and Systems from Slovakia, 2012-2013

Category	Country Rank		Export Value (EUR)		Total 2012-2013
			2012	2013	
Aircraft Avionics - Component and Systems	Cyprus	1.	0	34024734	34 024 734
	Czech Republic	2.	25 004 637	7 350 871	32 355 508
	France	3.	14 632 101	14 925 086	29 557 187
Aircraft Engines– Components and Systems	Czech Republic	1.	18 710 073	3 081 960	21 792 033
	Russia	2.	4 425 920	6 781 640	11 207 560
	Kazachstan	3.	813 589	3 157	816 746
Aircraft Structures and Parts – Components and Systems	Turkey	1.	203 072	25 826 688	26 029 760
	Russia	2.	1 180 712	15 973 168	17 153 880
	Germany	3.	8 320 449	7 665 020	15 985 469
Defence – Components and Systems	Egypt	1.	49 350 084	9 778 821	59 128 905
	Czech Republic	2.	20 302 686	18 468 999	38 771 685
	Russia	3.	4 425 920	6 781 640	11 207 560

Source: The Ministry of Economy of the Slovak Republic, 2014

As shown in the table above, the export of A&D equipment from Slovakia has mostly permanent progressive trend. Prevail mainly exports of Aircraft Structures / Parts, Components and Systems. Significant is also segment of Defence components and systems.

6. Potential customers for A&D production

Slovak customers in the A&D markets are looking for cost-effective, low-risk and mature components and systems. Both private and public sector customers also require that products meet basic certification standards (AS/ISO:9000/9001).

The Ministry of Defence is the largest customer for A&D equipment in Slovakia. Most tenders for defence equipment are published online by the Slovak Public Procurement Office (http://www.uvo.gov.sk).

7. University cooperation in the A&D industry

The following Slovak universities are directly involved in the R&D activities for the aerospace industry:

Faculty of Mechanical Engineering, University of Žilina

The university has a tradition of aerospace transport development. There are departments specialized on the construction of aircraft engines. The highest standards of hardware and software are at the disposal of scientists and students for R&D projects with aerospace companies.

the University	the Faculty of	as of December 31, 2013	
		students	graduates
University of Žilina	Mechanical Engineering	1344	414
	Special Engineering	1047	390
	Total	2391	804

Source: University of Žilina, 2014 Web link: http://www.uniza.sk/menu/inc.asp?ver=EN
Data from: Institute for Information and Forecasting in Education, 31.12.2013

Faculty of Operation and Economics of Transport and Communications , University of Žilina

The study program is focused on management of aerospace transport.

the University	the Faculty of	as of December 31, 2013	
		students	graduates
University of Žilina	Operation and Economics of Transport	2750	992

Source: University of Žilina, 2014, Web link: http://fpedas.uniza.sk/en
Data from: Institute for Information and Forecasting in Education, 31.12.2013

Institute of Competitiveness and Innovations

The Institute of Competitiveness and Innovation was founded as an entity at the University of Žilina in February 2004. The foundation was initiated by the Faculty of Mechanical Engineering and the Faculty of Electrical Engineering at the University of Žilina.

Mission

- support of development of the University of Žilina with the introduction of technology, product and process innovations,
- research and development in the high-tech field,
- transfer of new technologies, knowledge and innovations into industry,
- research and analysis of factors influencing competitiveness of Slovak industry,
- design of policies, methodologies, procedures and technologies for improving competitiveness

Main activities

- product, process, technology and system innovations,
- integration of new manufacturing technologies,
- improving productivity and competitiveness with advanced methods,
- transfer of research results into practice,
- management of EU, governmental, departmental and regional projects focused on innovation,
- education and support of talented students and young researchers,
- lifetime education related to scientific activities of UKaI

Web link: http://ukai.utc.sk/index.php?s=7&lang=en

Faculty of Aeronautics, Technical University in Košice

The following Civil Engineering degree studies are offered in three accredited branches of study:

1. Air Traffic Management
   - Control, Operation and Automated Command in the Air Force
   - Air Traffic Control
2. Aviation Mechanical Engineering
   - Airport Technical and Operational Support
   - Operation, Maintenance and Repairs of Aircraft and Aviation Engines
3. Aviation Electrotechnics
   - Radiotechnical Support of Air Traffic
   - Avionics and Airborne Electrical Systems
   - Aircraft Radio and Radio-technical Systems

the University	The Faculty of	as of December 31, 2013	
		Students	Graduates
Technical University in Košice	Aeronautics	898	399

Source: Technical University in Košice, 2013 Web link: http://www.tuke.sk/tuke?set_language=en&cl=en
Data from: Institute for Information and Forecasting in Education, 31.12.2013

Faculty of Materials Science and Technology, Slovak University of Technology in Bratislava

The following engineering programs can be studied at the Faculty:
- Automatization and Information Processes
- Technical materials
- Non-metallic materials
- Production machinery and systems
- Computer Support for design and production

the University	the Faculty of	as of December 31,2013	
		Students	Graduates
Slovak Technical University	Material Science and Technology	3255	1022

Source: Slovak University of Technology in Bratislava, 2013 Web link: http://www.mtf.stuba.sk
Data from: Institute for Information and Forecasting in Education, 31.12.2013

Institute of Materials and Machine Mechanics, Slovak Academy of Sciences

The Institute of materials & machine mechanics of the Slovak academy of sciences is research institution oriented to development of advanced nonferrous materials, technologies of their preparation and research in applied mechanics.

Web link : http:// www.umms.savba.sk

Institute of Electrical Engineering, Slovak Academy of Sciences

The Institute is focused on the research and development of semiconductor, superconductor, oxide and magnetic materials and devices, including theoretical and experimental study of their structural, optical, transport properties and devices for *the information technology and power engineering*.

Web link: http://www.elu.sav.sk

Association of Industrial Research and Development Organisations of Slovak Republic

Main activities:
- Systematic and legislative support on R&D
- Co-operation with particular sectors of research , technical entities and regional municipalities as well
- Exploitation of EU structural funds on R&D support
- Information and organizational support on R&D

Web link: http://www.zpvvo.sk

Slovak Organization for Space Activities

Main activities:
- Space research popularization in Slovakia
- Identification, search and information service for slovak enterpreneurial subjects with potential play active role in space business (electronic, electrotechnic, software, aerospace, machine industry)

Web link: http://www.sosa.sk

8. Slovak aerospace institutions

Institution	Seat	Web link	Activities and services
Aviation Services of Slovak Republic, State Company	Letisko M.R.Štefánika 823 05 Bratislava	http://www.lps.sk	Provision of air traffic services, aeronautical information service, coordinating civil, military and security elements during search operations, performing telecommunication services for aviation
Aviation Bureau of Slovak Republic	Letisko M.R.Štefánika 823 05 Bratislava	http://www.caa.sk	State expert supervision in civil aviation; issuance of licenses; inspection of aircraft airworthiness; conducts the flight testing of the ground aeronautical facilities

Source: SARIO, 2014

9. Useful contacts and links

Association of the Defence Industry (ZOP)
Kožušnícka 4
911 50 Trencin, Slovakia
Tel.: (421-3) 2657 2561/3
Fax: (421-3) 2658 3744
E-mail: zopsr@dmd.sk
Internet: http://www.zop.sk

Ministry of Defence
Kutuzovova 8
832 47 Bratislava, Slovakia
Tel.: (421-2) 4425 0320
Fax: (421-2) 4425 3242
Internet: http://www.mosr.sk

Ministry of Economy
Sensitive Goods and Trade Management Department
Mierova 19
827 15 Bratislava, Slovakia
Tel.: (421-2) 4854 2183
Fax: (421-2) 4342 3915
E-mail: babuska@economy.gov.sk
Internet: http://www.economy.gov.sk

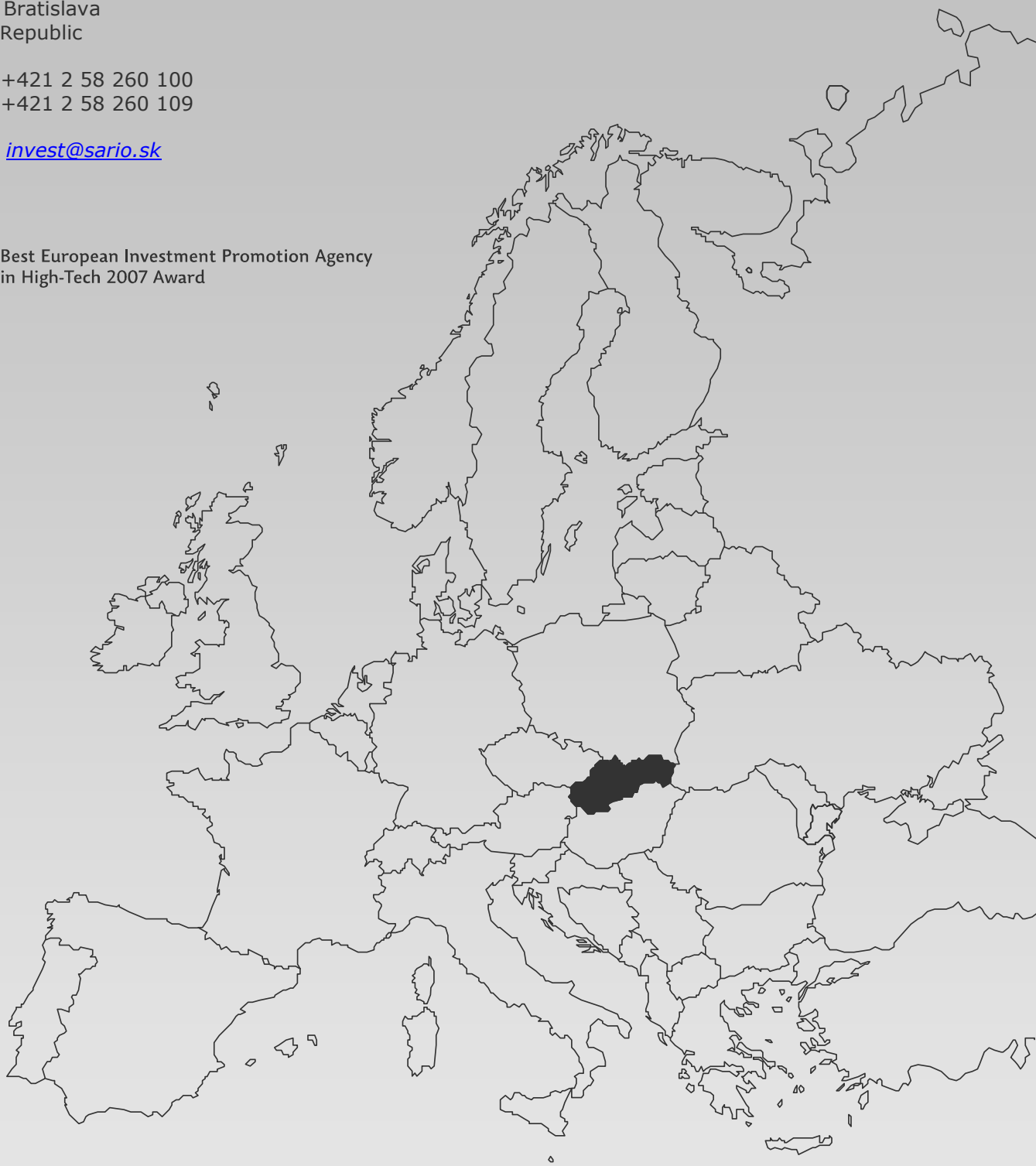
National Security Authority (NBU)
Budatinska 30
850 07 Bratislava, Slovakia
Tel.: (421-2) 6869 1111
Fax: (421-2) 6382 4005
E-mail: info@nbusr.sk
Internet: http://www.nbu.gov.sk

Slovak Investment
and Trade Development Agency
Trnavska cesta 100
821 01 Bratislava
Slovak Republic

Tel: +421 2 58 260 100
Fax: +421 2 58 260 109

E-mail: *invest@sario.sk*

Best European Investment Promotion Agency
in High-Tech 2007 Award



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