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ADVANTAGE AUSTRIA Ljubljana

# INVESTMENT CLIMATE SLOVENIA 2026

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Ljubljana, 27 January 2026





# CONTENT

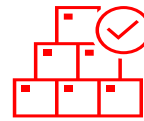
1. Economic relations between Slovenia and Austria: facts and figures
2. Results of the annual survey of Advantage Austria on the investment and economic climate in Slovenia
3. Key messages

Austria & Slovenia, World-class Partners

# Slovenia Austria

**€ 2,400** per capita

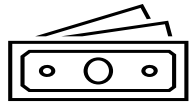
consumption of Austrian  
goods and services  
in Slovenia



Trade Volume (goods and services)

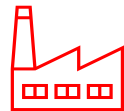
2024 **€ 6.87 bn**

2025 approx. **€ 6.64 bn**

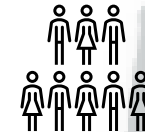


approx. **€ 4.8 bn**  
FDI volume

→ most important foreign investor  
in Slovenia (21,6 %)



**1,150+**  
Austrian subsidiaries



**20,000+**  
employees



**25,000+**  
Slovenian  
commuters to  
Austria

Austria & Slovenia, World-class Partners

# + 1,150 Austrian subsidiaries in Slovenia

PORSCHE  
SLOVENIJA

 **GRAWE**  
Zavarovalnica d.d.

  
**WIENER  
STÄDTISCHE**  
VIENNA INSURANCE GROUP

**merkur**  
ZAVAROVALNICA 

**SPARKASSE** 

**SUPERNOVA** 

 **ses**

  
**SPAR**

  
**HOFER**

**MM**  
KARTON

  
cargo-partner

**PREIS SEVNICA**   
WELDED CONSTRUCTIONS

 interEnergo  
a **kelag** company

 **rosenbauer**

**STRABAG**

**voestalpine**  
ONE STEP AHEAD.

**KNAUFINSULATION**

**PALFINGER**

*Saubermacher*

**A1**

  
**Eterna**  
Part of Telefónica Tech

**kontron**

leitner**leitner**

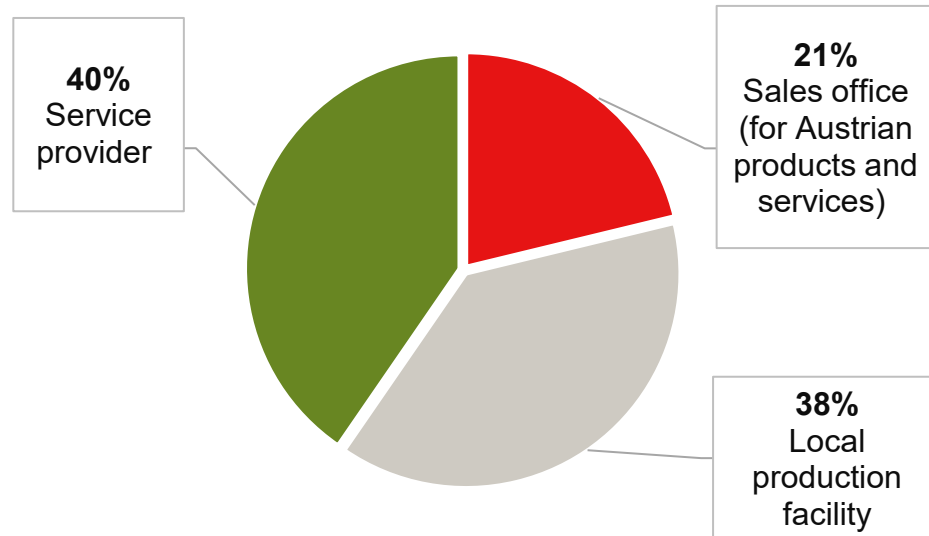
 **ADVANTAGE  
AUSTRIA** 

# SURVEY ON THE BUSINESS AND INVESTMENT CLIMATE IN SLOVENIA

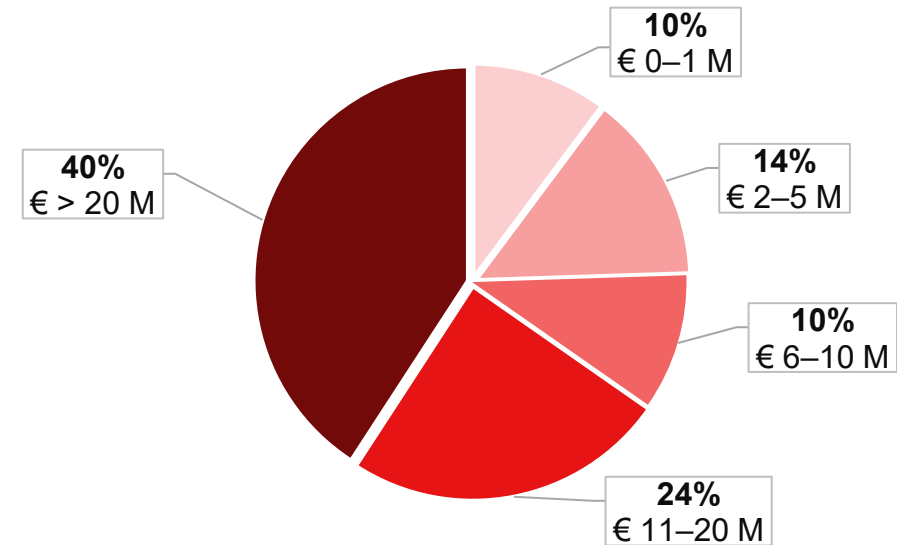
- **Method:** Quantitative online survey, conducted by ADVANTAGE AUSTRIA Ljubljana, in cooperation with the Institute for International Economics at the Vienna University of Economics and Business (WU)
- **Target group:** Austrian subsidiaries in Slovenia
- **Implementation period:** Q4 2025
- **Respondents:** n=60

# AUSTRIAN SUBSIDIARIES IN SLOVENIA: COMPANY PROFILE

MAIN ACTIVITY IN SLOVENIA

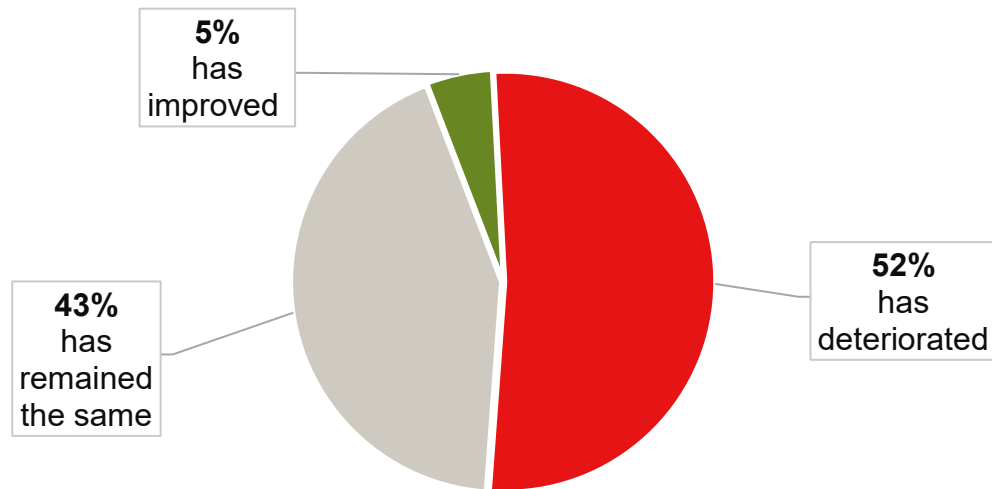


TOTAL TURNOVER IN MILLION EUR

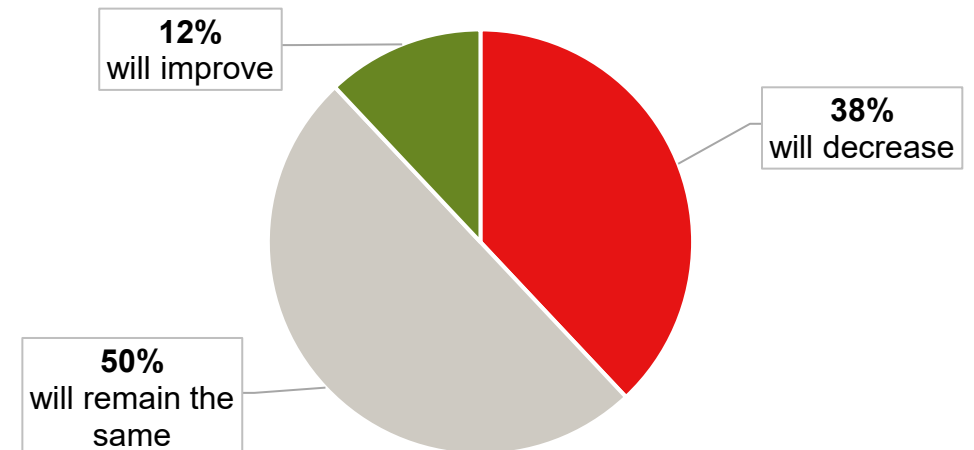


# From your company's perspective, how do you assess the development of the general economic situation in Slovenia?

Past 12 months (2025)



Upcoming 12 months (2026)



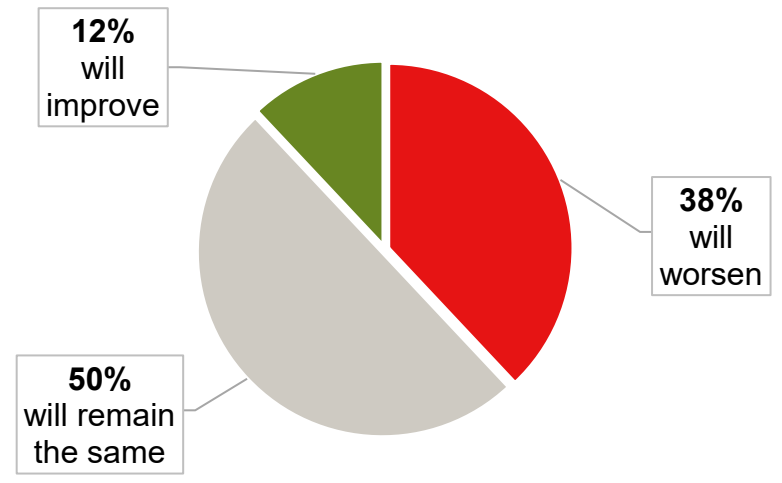
# Comparison of the SEE region: Economic Sentiment in Slovenia aligns with the SEE Region”



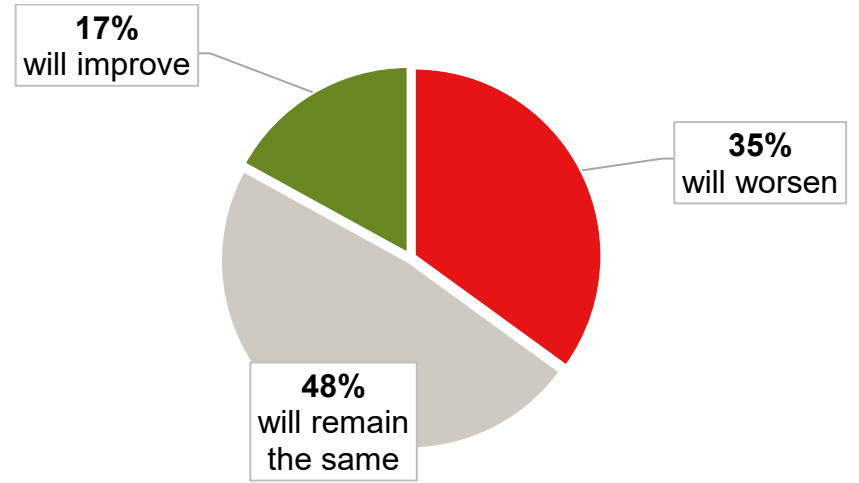
Slovenia, Croatia, Bosnia and Herzegovina, Serbia, Montenegro, North Macedonia, Albania, Kosovo, Romania, Bulgaria, Greece

2026

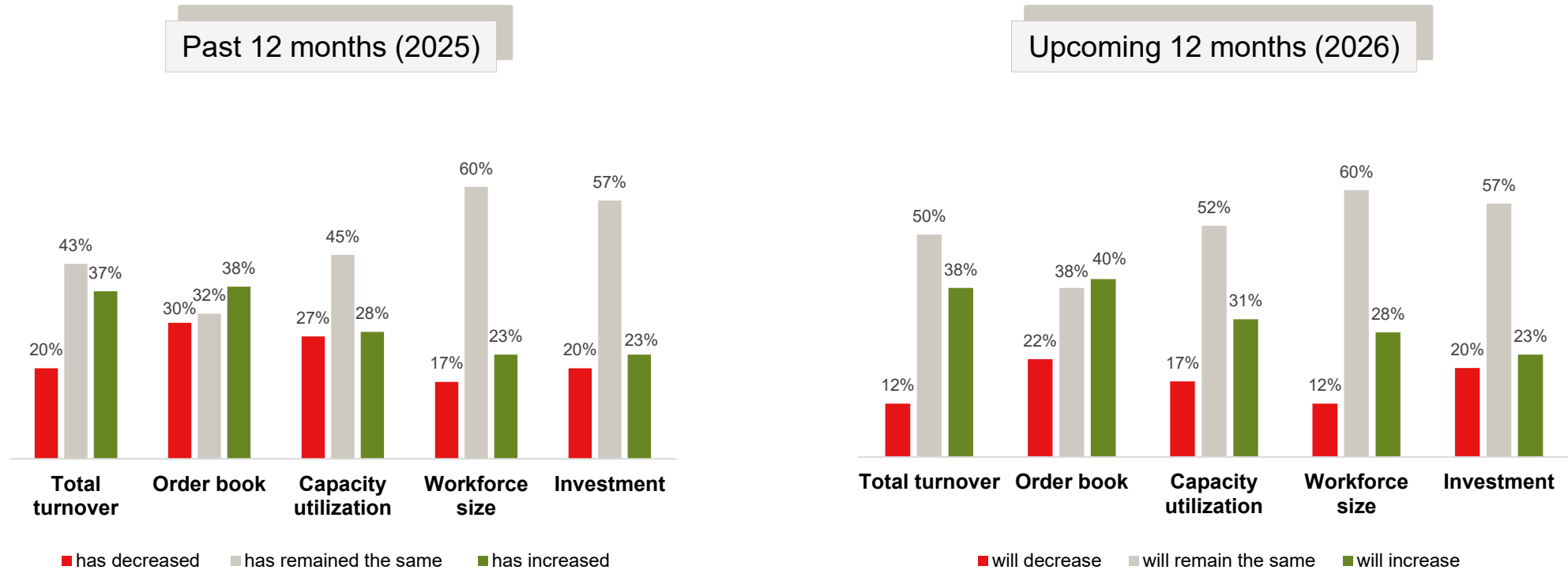
SLOVENIA



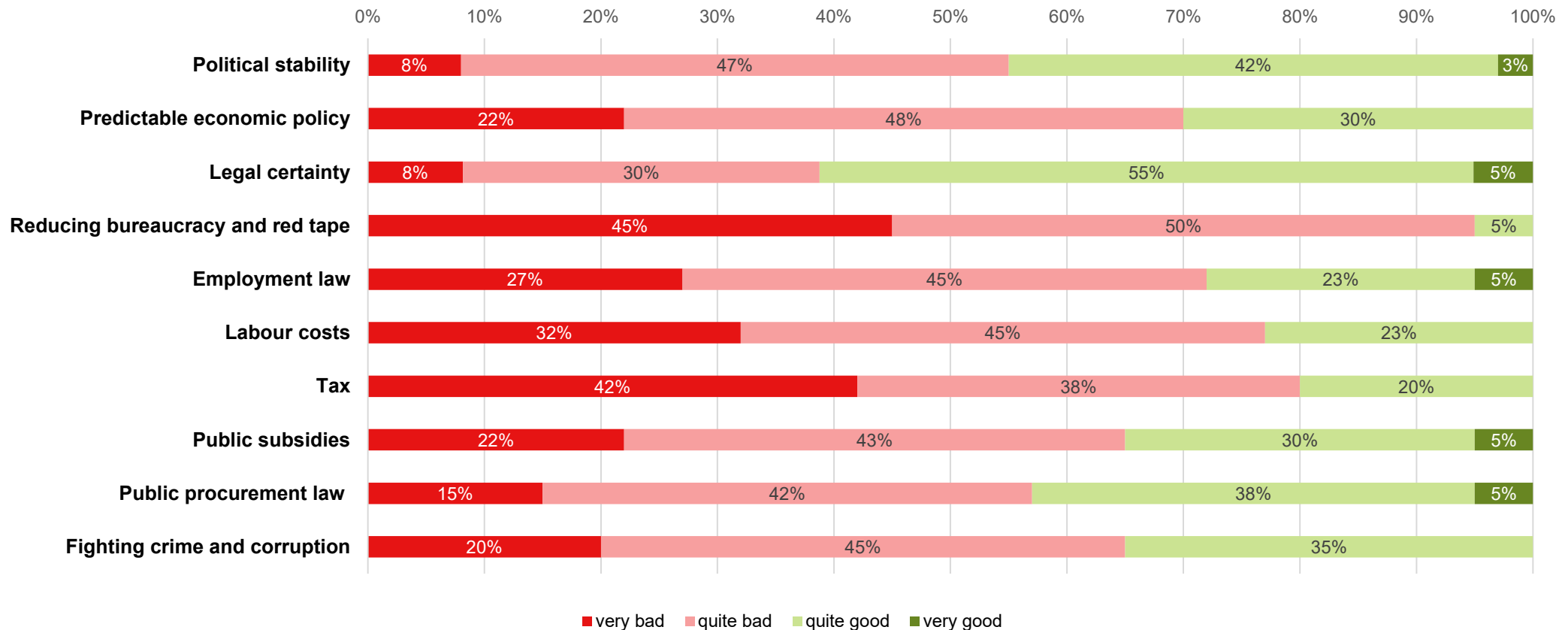
SEE REGION



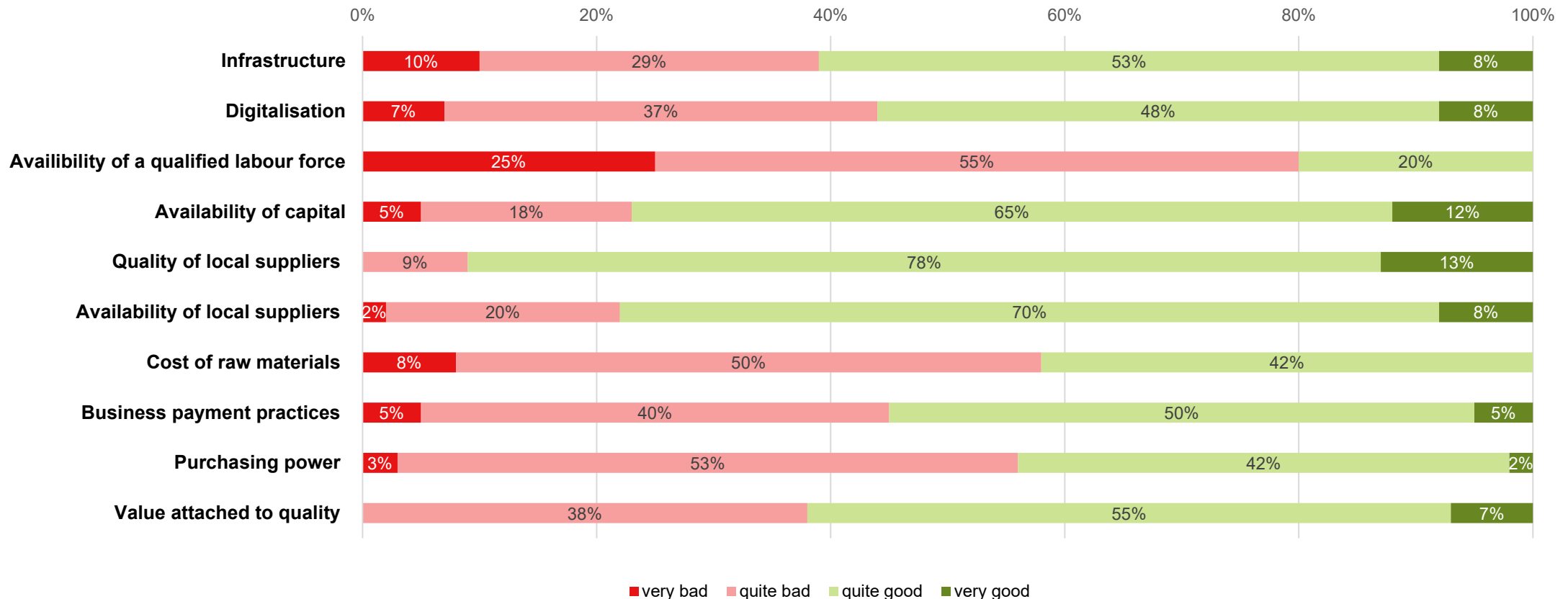
# How do you assess the development of the following key indicators for your company in Slovenia?

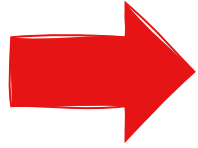


# How do you assess the following regulatory and market-related issues for Slovenia as a business location? (1/2)



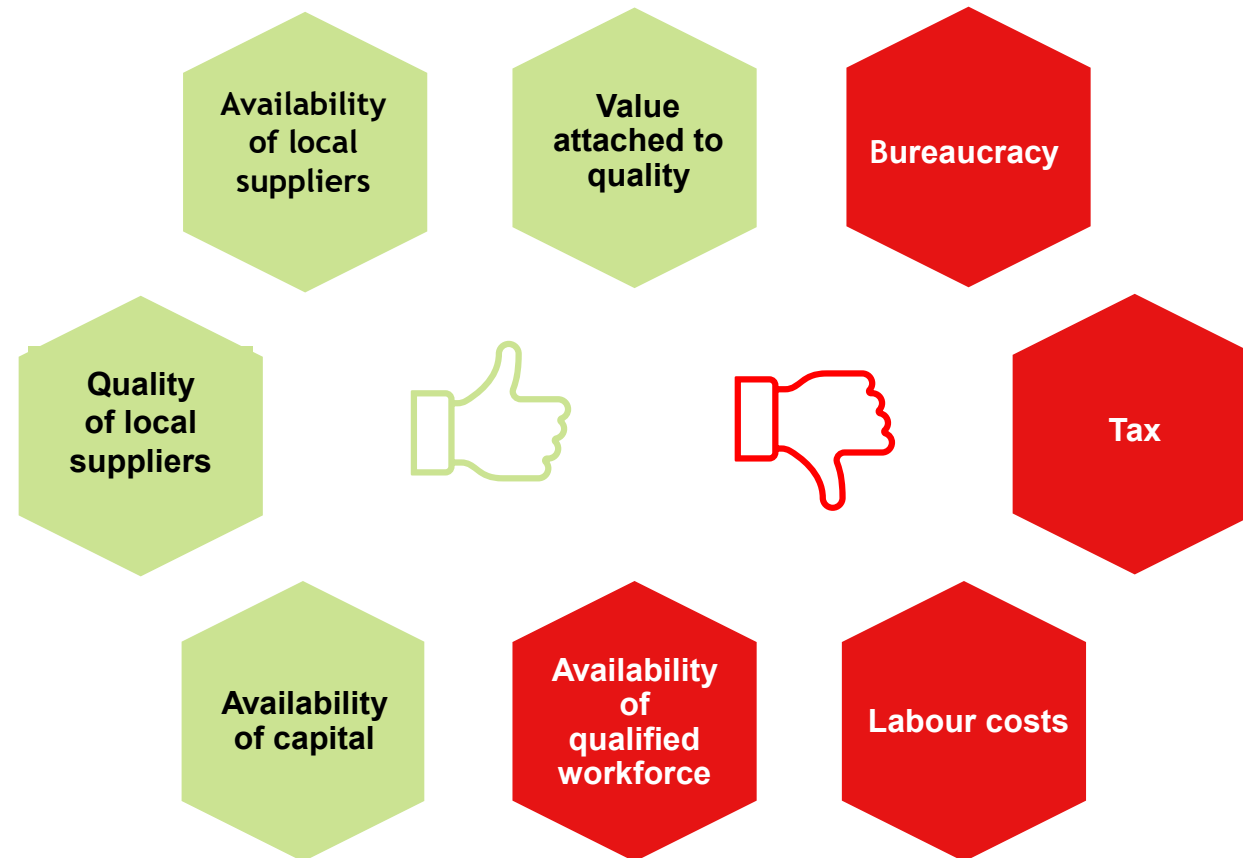
# How do you assess the following regulatory and market-related issues for Slovenia as a business location? (2/2)





The main critical issues have remained unresolved for years.

Specific actions are required to create favorable conditions for maintaining the attractiveness of the business location.

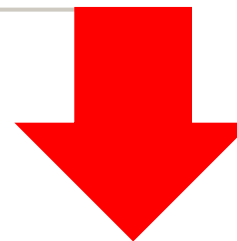




Will Slovenia remain an  
**interesting investment location**  
for your company in 2025?

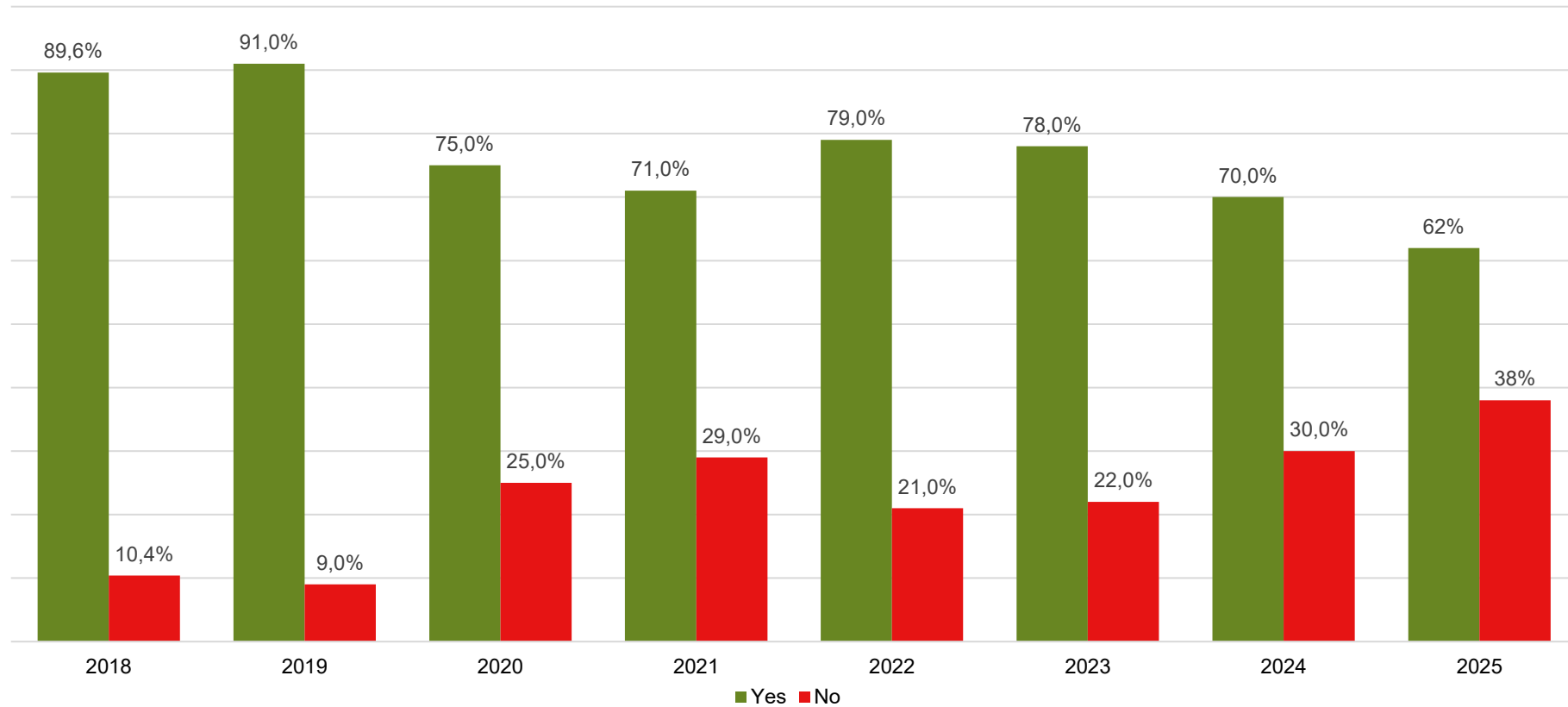


**Yes – 62 %**



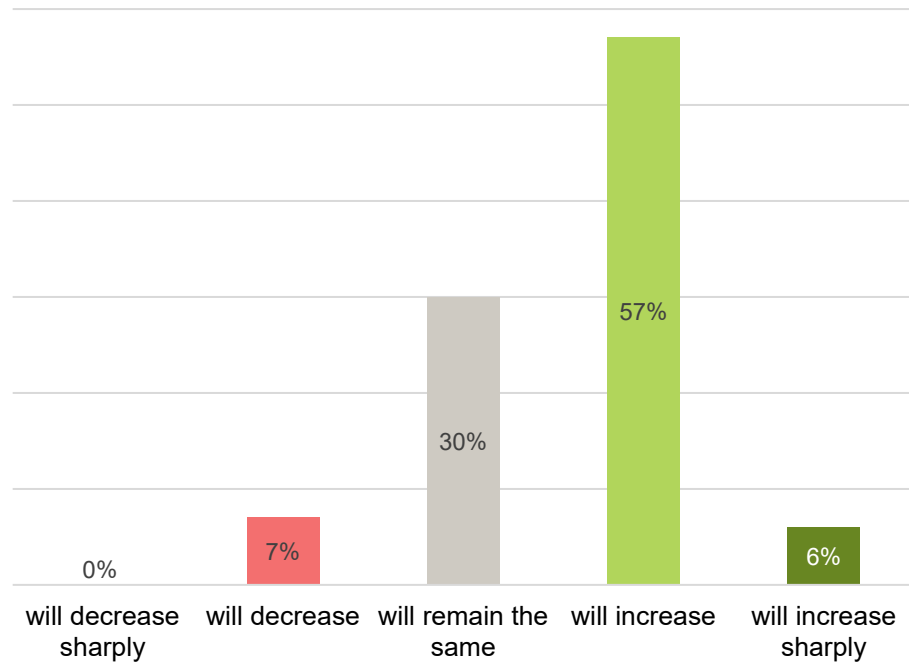
**No – 38 %**

# ATTRACTIVENESS OF SLOVENIA AS INVESTMENT LOCATION

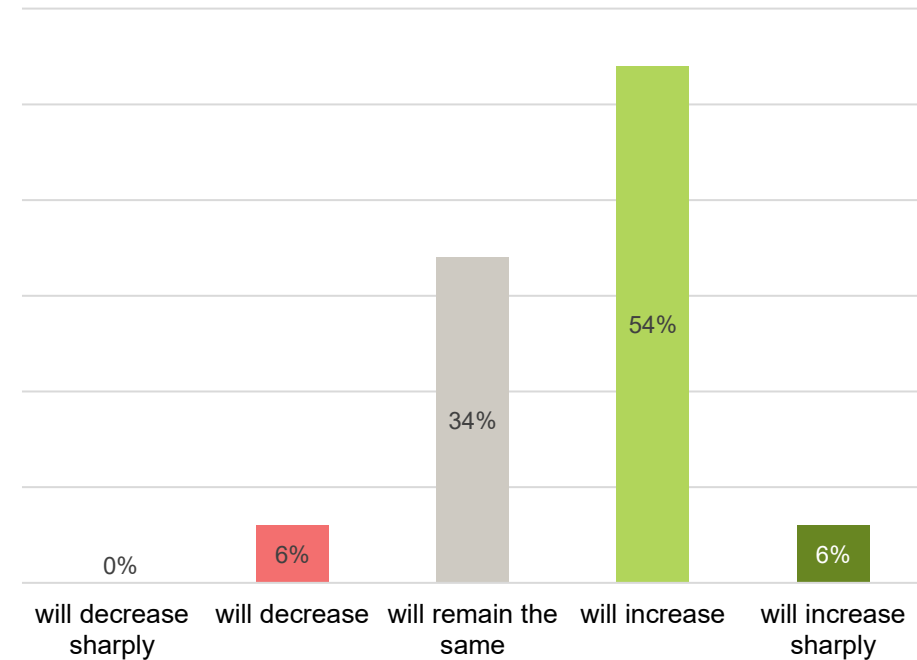


# How do you assess the development of products and services based on artificial intelligence from your company's perspective over the next 12 months?

According to the demand in Slovenia

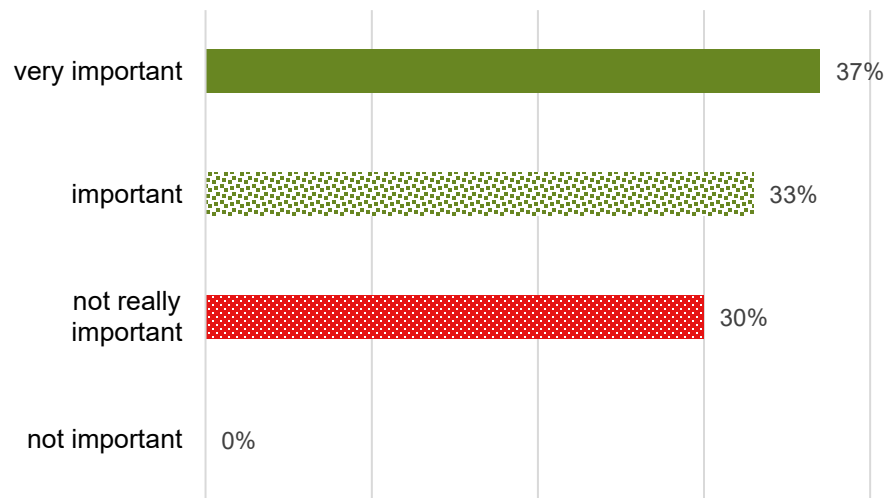


According to the applicability in your company

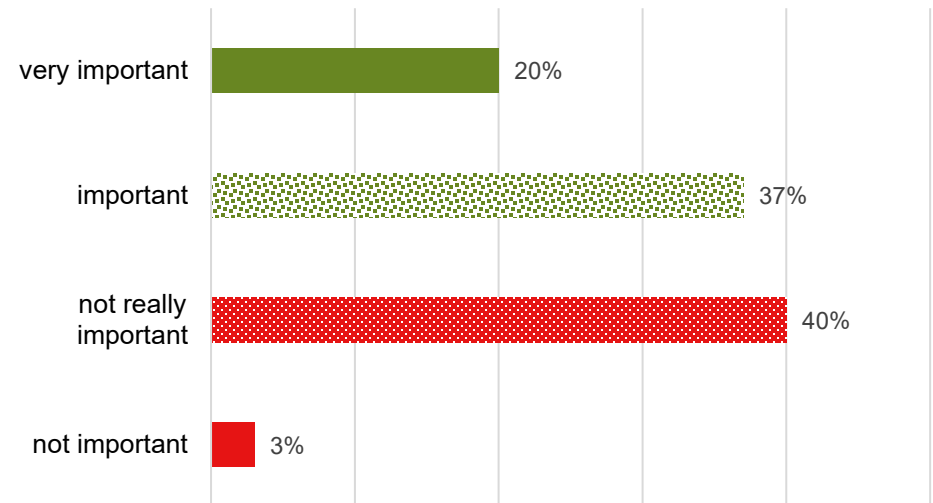


# How important is the topic of sustainability?

**With respect to your company in the subsidiary's country?**

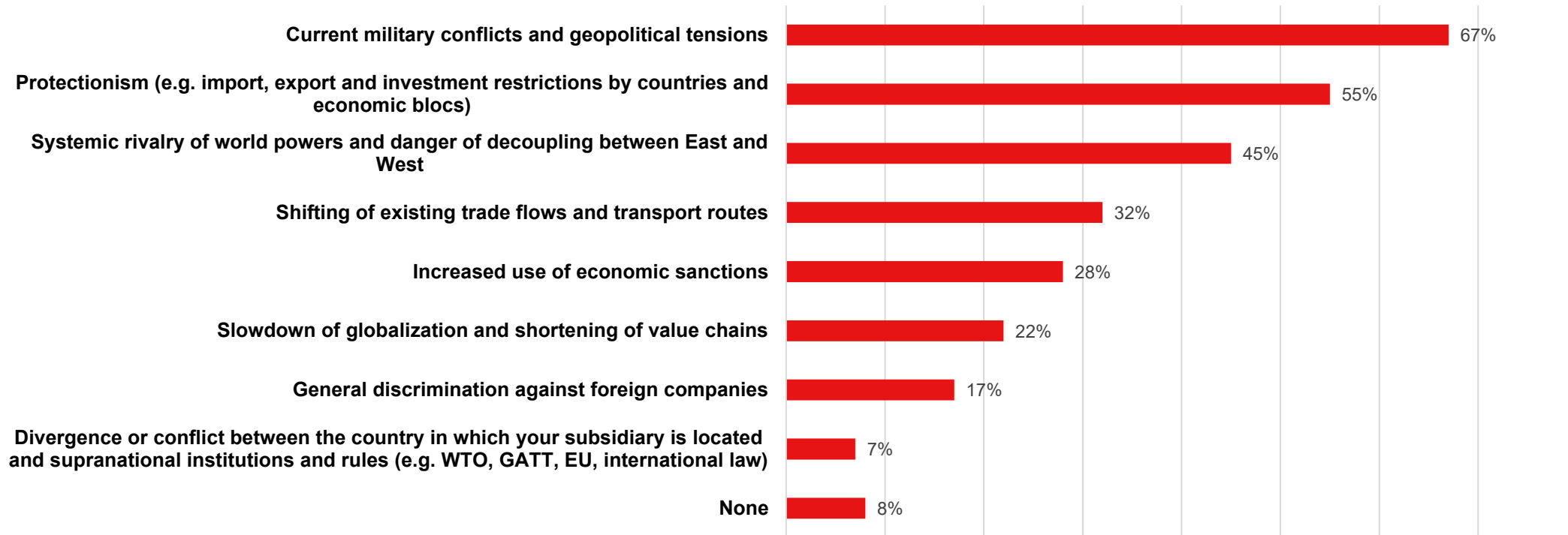


**In your subsidiary's country?**



# Which current geopolitical phenomena pose the greatest risk potential for the economic activity of your company in the subsidiary's country?

(multiple answers possible)



# Key messages

- **Economic sentiment weakened significantly in 2025:** only 5% of companies report an improvement, 43% see no change, while 52% assess the situation as having deteriorated.
- **Despite the challenging environment, Austrian investors in Slovenia are moderately satisfied with their performance in 2025.** Employment, turnover and investment levels are expected to remain stable at a solid level.
- Slovenia continues to be valued for its **high-quality local suppliers** and **strong quality orientation**.
- **Bureaucracy, high tax burden and rising labour costs remain key structural challenges.** The shortage of qualified labour continues to constrain growth potential.
- **Geopolitical uncertainties** are increasing risk awareness among Austrian investors.
- **Commitment to Slovenia as an investment location has declined and is at its lowest level since the start of the survey.**
- **Persistent structural weaknesses indicate that policy measures taken so far have not been sufficient to improve Slovenia's attractiveness as a business location.** Targeted and effective reforms are needed to strengthen competitiveness.
- Advantage Austria Slovenia actively contributes to the Economic Circle (Gospodarski Krog) to support dialogue and concrete improvement measures.

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Thank you

for your attention!

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