ICT and Data Centers in the Czech Republic
Czech ICT Sector at a Glance

+ Long tradition of excellence in technical fields
+ Creative, innovative, experienced and skilled professionals
+ World renowned Czech IT companies, such as Avast, GoodData, Y-SOFT, Socialbakers
+ Developed IT infrastructure, robust fiber-optic network
+ Top cyber security companies
+ Start-ups & incubation centers
+ Financial support through EU funds and national investment incentives
Specialisation in Software and IT Services

<table>
<thead>
<tr>
<th>Country</th>
<th>ICT companies per 100,000 population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Czech Republic</td>
<td>400</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>330</td>
</tr>
<tr>
<td>Slovakia</td>
<td>300</td>
</tr>
<tr>
<td>Poland</td>
<td>250</td>
</tr>
<tr>
<td>Hungary</td>
<td>200</td>
</tr>
<tr>
<td>Austria</td>
<td>200</td>
</tr>
<tr>
<td>Germany</td>
<td>200</td>
</tr>
<tr>
<td>USA</td>
<td>150</td>
</tr>
</tbody>
</table>

ICT Expenditure (% GDP)

<table>
<thead>
<tr>
<th>Country</th>
<th>ICT expenditure (% GDP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hungary</td>
<td>8.0%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>7.0%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>6.0%</td>
</tr>
<tr>
<td>USA</td>
<td>5.5%</td>
</tr>
<tr>
<td>Slovakia</td>
<td>5.0%</td>
</tr>
<tr>
<td>Poland</td>
<td>4.5%</td>
</tr>
<tr>
<td>Austria</td>
<td>4.0%</td>
</tr>
<tr>
<td>Germany</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

Source: fDi Benchmark, a service from the Financial Times Limited 2017
Czech ICT Sector in Numbers

- **35,000** ICT Companies
- **150,000** People employed in the sector
- **728** Billion CZK in revenues
- **33,222** University students & graduates in ICT programs
Average Connection Speed (IPv4, Mbps)

- Czech Republic
- United Kingdom
- Lithuania
- Germany
- Hungary
- Austria
- Slovakia
- Poland

0% 5% 10% 15% 20%

10 Mbps Broadband Adoption (% of households)

- United Kingdom
- Czech Republic
- Lithuania
- Hungary
- Germany
- Austria
- Poland
- Slovakia

0% 20% 40% 60%

Source: Akamai, State of the Internet Report, 2016
Selected Investors and Clusters
<table>
<thead>
<tr>
<th>University</th>
<th>Students</th>
<th>Graduates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brno University of Technology</td>
<td>6,252</td>
<td>1,496</td>
</tr>
<tr>
<td>Czech Technical University in Prague</td>
<td>5,665</td>
<td>1,157</td>
</tr>
<tr>
<td>VSB – Technical University in Ostrava</td>
<td>3,142</td>
<td>687</td>
</tr>
<tr>
<td>Masaryk University, Brno</td>
<td>2,143</td>
<td>487</td>
</tr>
<tr>
<td>University of Economics, Prague</td>
<td>2,046</td>
<td>528</td>
</tr>
<tr>
<td>The University of West Bohemia Plzen</td>
<td>2,044</td>
<td>457</td>
</tr>
<tr>
<td>Tomas Bata University in Zlin</td>
<td>1,561</td>
<td>373</td>
</tr>
<tr>
<td>University of Hradec Králové</td>
<td>1,502</td>
<td>321</td>
</tr>
</tbody>
</table>

Source: Ministry of Education, Youth and Sport, 2016
Data Centers in the Czech Republic

Thanks to its stable, predictable and attractive environment for large-scale digital infrastructures, the Czech Republic ranks among the European Union countries that are excellent locations for digital business. The country offers a sufficient electricity grid infrastructure, fibre-optic network connected to major European peering nodes and a stable economy with a supportive regulatory environment.

Robust and Stable Electricity Grid Infrastructure

Competitive and Predictable Electricity Prices (EUR/kWh)

Source: ČEPS, 2016
Source: Eurostat, 2017; Electricity prices by types of user, EUR/kWh
Selected Data Centers

25%
Renewable energy sources by 2040

2.7x
Production of electricity from renewable sources compared to 2006

505 Gbps
Peak Speed at Prague IXP
Neutral Internet Exchange (NIX.CZ)
“For IT companies, The Czech Republic is a great place to do business. Czech engineers and developers are known to be on the forefront of innovation and the region is very friendly to foreign investments. Founded in Prague in 1988, it is only thanks to our employees that Avast managed to grow from a family company to a global leader in digital security.”

Ondrej Vlcek, CTO, Avast

“IBM Watson has picked Prague to expand its activities in AI research and engineering. We did so because Czech Republic is a great source of AI scientific talent, is known for the culture of team work and open-mindedness, and has very strategic location in the center of Europe. And yes, the word ROBOT was invented in CZ as well :-)

Jan Kleindienst, Head of IBM Watson Lab, Prague

“Following the success of the MSD Information Technology Hub that has grown into a technology center with more than 600 people in just three years we have opened the regional MSD Finance Center in Prague in May 2017. The business service center is responsible for the execution and delivery of a broad range of financial services and processes across MSD business divisions and markets in Europe.”

Anita Zubak, Executive Director, IT Global Operations Management & Prague IT Hub Lead
About CzechInvest

CzechInvest plays a key role in the area of supporting business and investments in its comprehensive form. The agency’s unique combination of regional, central and international operations ensures the integrity of services and the ability to connect global trends with regional conditions in the Czech Republic.

CzechInvest’s activities:

- Development of Czech technology firms’ potential
- Support for “smart” investments
- Motivation of foreign investors already established in the Czech Republic toward sophisticated complementary investments
- Development and cultivation of the national start-up and spin-off environment
- Assistance for Czech firms when entering foreign markets
- Promotion of the Czech economy, technologies and R&D abroad
- Cultivation of the business and investment environment in all regions of the Czech Republic
- Linking of partners from the business and R&D spheres
- Use of trends in progressive sectors of the global economy

One of CzechInvest’s main objectives is transformation of the Czech Republic into an innovation leader of Europe.

Established in 1992, CzechInvest is a state contributory organisation subordinate to the Ministry of Industry and Trade of the Czech Republic.
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Canada | Toronto
To be opened

Ukraine | Kiev
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