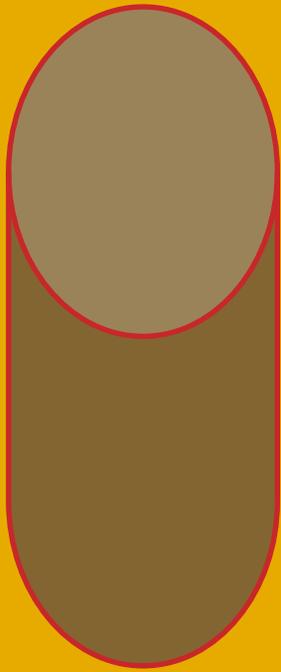


the innovative economy

amcham 2021-22 membership report



What is the difference between an economy that improves incrementally each year and an innovative economy?

You need look no further than your hand.

Spread it before you.

Start with your pinkie. Moderately useful for gripping things. (and help you display status when you drink tea).

Your next finger can do the same things better.

Your middle finger can do the same things even better. (and express anger universally)

Your pointer finger is the most useful of the four, but differs in what it can do only by degree.

Then you get to the thumb. It is a finger, but a whole other type of finger that lets you do so many more things. It is the finger that turns a talon into a hand. Now that is innovation.

(and thumbs up expresses universal positivity created by innovation!).

At our facility in Letňany, GE Aviation design and produce state-of-the-art turboprop engines. Those engines spin bladed discs at the speed of 45,000 rotations a minute and handles temperature inside the combustor chamber of some 1,000C. We fly high and fast which is why technology is everything to us. We constantly push limits of physics to the next level while never compromising on safety.

If we want innovation to provide the lift to our economy that will raise our income to German levels, we also need an innovation process that concentrates ideas through stages of theoretical research, applied research, product development and sustainable production until we consistently can create more commercially successful global technologies for every koruna of research money invested.

That requires very complex policies. Any effort must start with graduating more quality STEM students from our secondary schools and attracting more global technology talent to our universities. That pool of talent is what creates the airflow of ideas, and should be treated as the precious national resource it is. We should measure our status as a innovative nation not only by the talent we generate here who stay here to live and work, but by the number of foreign researchers who pursue their interests within our borders.

The same holds true of companies. We should create global players in our classroom at CVUT, VUTB, and in start-up hubs in Usti, Ostrava, and Prague. Yet, we should learn the lessons of concentration, and recognize that if foreign companies place their product development here, our country has a greater energy to create.

What we need now is a lever that gives incentives and motivation for Czech students to study science and engineering, and foreign students to decide their future is here. We need the market magnet for generating start-ups and attracting foreign enterprises. That tool is key global technologies. Our goal at AmCham is to persuade the government to make big bets in developing multiple key technologies, and to work with the government, companies, and universities to attract the investment and pursue the research that will make Czechia the global leader in innovating new capabilities and uses of those technologies.

Milan Slapak, President



The president's intro.



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Vodafone Czech
Republic
www.vodafone.cz

White & Case, s.r.o. ad-
vokátní kanclář
www.whitecase.com



White Star Real Estate
www.whitestar-realestate.com



Y SOFT Corporation
www.ysoft.com



Zátiší Group
www.zatisigroup.cz

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company	website
AIR Products	www.airproducts.cz
A.T. Kearney GmbH	www.atkearney.com
ACCENTURE CENTRAL EUROPE B.V.	www.accenture.com
ADP Employer Services Česká republika	www.cz.adp.com
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AT&T Global Network Services Czech Republic	www.att.com
Augustine, a Luxury Collection Hotel, Prague	www.augustinehotel.com
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Austin Detonator	www.austin.cz
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BD	www.bd.com
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BNP PARIBAS S.A., pobočka Česká republika	www.bnpparibas.cz
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DXC Technology	www.dxc.technology
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Estée Lauder CZ	www.esteelauder.com
Federal Express Czech	www.federal-mogul.cz

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company	website
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GE Aviation Czech	www.geturboprops.com
Glebus Alloys	www.glebusalloys.com
Google Czech Republic	www.google.cz
Grant Thornton Czech Republic	www.grantthornton.cz
Hewlett Packard Enterprise	www.hpe.com
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Johnson Controls Building Solutions	www.johnsoncontrols.com
Letiště Praha	www.prg.aero
Linet	www.linet.com
LKQ	www.lkq.cz
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MAZARS Group	www.mazars.cz
McDonald's ČR	www.mcdonalds.cz
ModusLink Czech Republic	www.moduslink.com
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Novo Nordisk	www.novonordisk.cz
onsemi	www.onsemi.cz
Panattoni Europe	www.panattonieurope.com
Parker Hannifin Sales CEE	www.parker.cz
Pfizer	www.pfizer.cz
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Plastipak Czech Republic	www.plastipak.com
Prague Congress Centre	www.kcp.cz
Radio Free Europe/Radio Liberty Inc.	www.rferl.org
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RSJ Securities	www.rsj.com
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TaylorWessing e n w c advokáti	www.taylorwessing.com
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Tesco Stores ČR	www.tescocr.cz
Thermo Fisher Scientific Brno	www.thermofisher.com
TOP HOTELS GROUP	www.tophotel.cz
UNITED PARCEL SERVICE CZECH REPUBLIC	www.ups.com
Weinhold Legal, advokátní kancelář	www.weinholdlegal.com
Western Union Business Solutions	cz.business.westernunion.com

amcham small business and entrepreneurial members.

company	website
ACCA (The Association of Chartered Certified Accountants)	www.accaglobal.com
Advanced Risk Management	www.arm.cz
Advokátní kancelář Polverini, Strnad (Law Firm)	www.ak-ps.eu
Alchymist Grand Hotel and Spa	www.alchymisthotel.com
ALIGIER	www.aligier.cz
Allied Moving Services	www.allied.com/moving-services
ALTAVIA Česká	www.altavia.cz
Anglo-American University	www.aauni.edu
Aria Hotel	www.aria.cz
Art Deco Imperial Hotel	www.hotel-imperial.cz
Aspironix	www.aspironix.com
Assessment Systems	cz.asystems.as
Asten Hotels	www.astenhotels.com
Bird & Bird, advokátní kancelář	www.twobirds.com
bnt attorneys-at-law	www.bnt.eu
bpv Braun Partners	www.bpv-bp.com
Bříza & Trubač, advokátní kancelář	www.brizatrubac.cz
Bubenik Partners	www.bubenikpartners.cz
Bubník Myslíl & Partners, attorneys at law	www.bmpartners.cz
Business Institut EDU	www.businessinstitut.cz
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CEC Group	www.cecgr.com
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CMS	www.cmslegal.com
Colibri Capital/Bejk	www.colibril.cz
Concierge Medicine Europe	conciergemedicine.cz
ConductVision	www.conductvision.com
coLEGAL, advokátní kancelář	www.colegal.cz
Coolidge Consulting Services	www.ehc.cz
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company	website
DYNARGIE	www.dynargie.cz
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EXINCO	www.exinco.com
Federal Mogul Friction Products	www.federal-mogul.cz
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FranklinCovey	www.franklincovey.cz
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Genesis Capital Equity	www.genesis.cz
Giese & Partner	www.giese.cz
GIT Consult Czech	www.gitisit.cz
Grayling Czech Republic	www.grayling.cz
HELIS Partners Consulting	www.solutions4life.eu
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House of Wine	www.houseofwine.eu
CHANGE PARTNERSHIP	www.changepartnership.cz
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CHEMICAL SOLUTIONS	www.chemicalsolutions.cz
Ian Bryan Architects (IBA)	www.ibarch.cz
IBI-International	www.ibi.cz
INSPEKT-SERVIS	www.inspekt-servis.cz
International School of Brno	www.isob.cz
JAN Reality JAN Hospitality	www.jan-reality.com ; jan-hospitality.com
JŠK, advokátní kancelář	www.jsklaw.cz
Kentico software	www.kentico.com
KEYNOTE	www.keynote.cz
KLB Legal	www.klblegal.cz
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Kreston A&CE Audit	www.ace.cz
Kunsthalle	www.kunsthallepraha.org
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A word from the executive team.



What is it that AmCham does?

That question arrives from many mouths. From the mouths of government mouths. Business mouths. Academics. The media. All have an idea of what AmCham can do for them. Our job is to create a path along all those different angles that goes in one productive direction,

The measurable thing we do is advocate for policy, share management practices and market intelligence, and promote products, services and investment that will make Czechia a top ten EU economy according to the key indicators in our Prosperity Index.

How we do that day-to-day is construct a business community out of business leaders. For us, leadership does not automatically confer from a job title or employment in a company. A business leader is an individual who wants to make things better for themselves, their companies and their communities, and can connect company success with country success (and increasingly the success of the democratic alliances). AmCham has been lucky to have had several generations of such leaders, including the current vibrant group of individuals driving their businesses and the entire community forward in research, skilled workforce, sophisticated land use planning, health care, energy, tourism, and so many other areas even during the isolated days of COVID.

That is why whenever I am asked what I do, I try to answer by agreeing on what we can do together.

Weston Stacey, Executive Director

what amcham does.



Our advocacy aims and activities.

To become a top ten EU economy, we must develop, produce and export more key technologies. Our focus should be to become a global hub for the highest value-added components of major global sectors.

Achieving this aim means creating a society that places a premium on inventive uses of new technology to improve how we work and live. Government can encourage this mindset by making more data public. This allows us to assess progress, and identify how we can accelerate it. Shifting to evidence-based policy decisions would make it possible to base public procurement on measurable quality criteria rather than the current lowest price approach which stymies innovation.

That is why we advocated upgrading national disease plans (successfully in the case of the new national cancer plan) to include concrete and measurable objectives and creating a tourism scorecard that provides policymakers with a comprehensive view of how tourism impacts the wealth of the country, and how their policies impacts tourism.

AmCham also recognizes that every country wants to achieve the highest possible income for their citizens and therefore are competing to be more in-



novative than their neighbors. The basic resources of innovation— technology, researchers, and financing— are in high demand. We must do all we can to grow those resources here and utilize them more efficiently than our rivals.

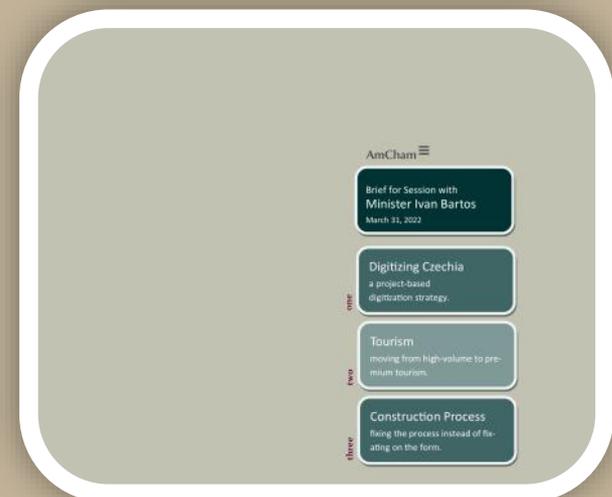
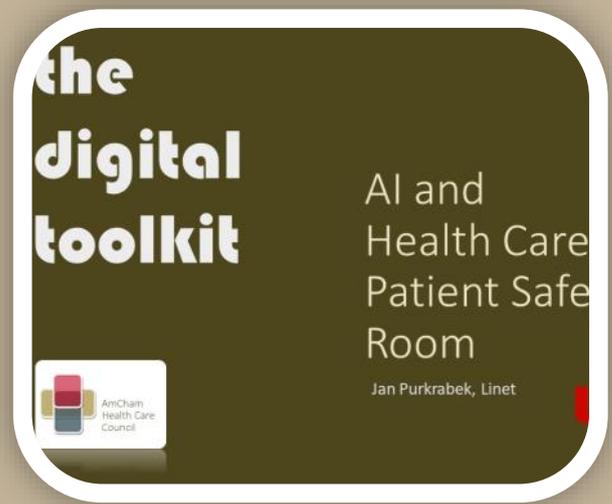
This is why we advocate such policies as digitizing immigration and making it easier and faster for companies to bring in technology workers. We also promote the creation of a government-sponsored program to widen the pool of worldclass researchers that mirrors the highly successful system of the Max Planck Institute. We had the opportunity this year to travel with a group of member research directors to spend a day with top executives at the Max Planck Institute in Dresden to discover how the institute cooperates with business (including generating start-ups) and how they ensure a continuous flow of talented researchers that populate both universities and the private sector.

Finally, we urge accelerating the development of our technology base. New technologies are not often created out of thin air. They are based on existing or related technologies. The deeper and

more advanced our base of technologies, and the better the research and testing infrastructure around them, the more likely we are to create the new cutting edge product. That is why we would like to see government focus on a series of big bets to attract major current technologies here.

One way of attracting new technologies is utilizing them better in public services. The Czech healthcare system is already blessed with highly qualified people and a comprehensive hospital and clinic infrastructure. Coupling those advantages with becoming a leading country for adopting new technologies would not only make the country a greater magnet for technological innovation (and maybe even a few unicorns), but also would result in a healthier population ready to innovate at their own place of work. For the last year, our Health Care Council has been organizing health care roundtables on prevention, diagnosis, treatment and post-treatment of cardiometabolic diseases, including the digitization, innovative medicaments in health care or the Ukrainian aspects.

Our 2021-2022 advocacy activities ended with a Digitizing Czechia conference with Deputy Prime Minister Bartos. Our message here was threefold: the goal of digitization is more effective government, more efficient business, and more informed innovation. Government



should digitize not based on a long-term strategy that no single government can accomplish, but through building block projects. We should become the place that all digital companies come to test their best new technologies. We should aim to be the place other countries visit to model their own technology and digital policies on.



Our best practice aims and activities.

The country's economic future depends on the ability of its pool of managers to make the most of its resources. Am-Cham's best practice activities aim to share how some of the country's most effective managers approached some of the most challenging issues facing us all.

For the last year, that has meant concentrating on the impact of COVID and then the war in Ukraine. We have had regular calls on work from home policies and employee engagement. We tracked the impact of the drop in commuters on downtown retail and hospitality. We discussed the impact of residential real estate prices on the ability to recruit employees in major urban areas, and how it was impacting wages.

Our Human Resource committee prepared sessions on vaccination policy, employee engagement from home, company liability for home office, the labor code's treatment of work outside the office, and wage expectations.

Not everything was about COVID or Ukraine. We also continued the discussion among manufacturers about utilizing digital tools to improve the efficiency of production and reducing the waste of natural resources and energy. Manufacturers also discussed the implications of the EU Green New Deal on their operation, and recently examined how much and how quickly they could transition from being powered by gas. The Manufacturers' Council and the HR Council also teamed up to discuss how the current workforce's digital capabilities.

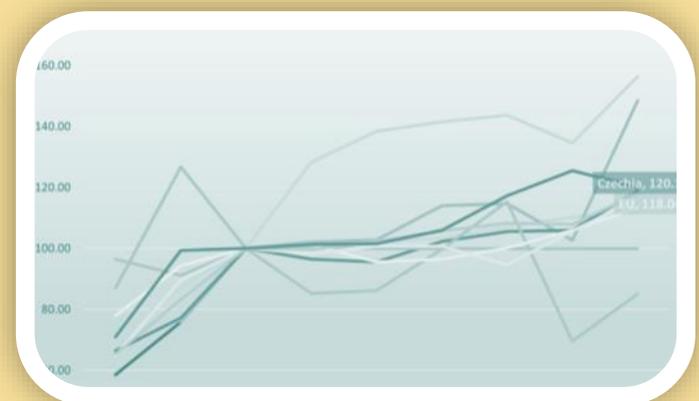
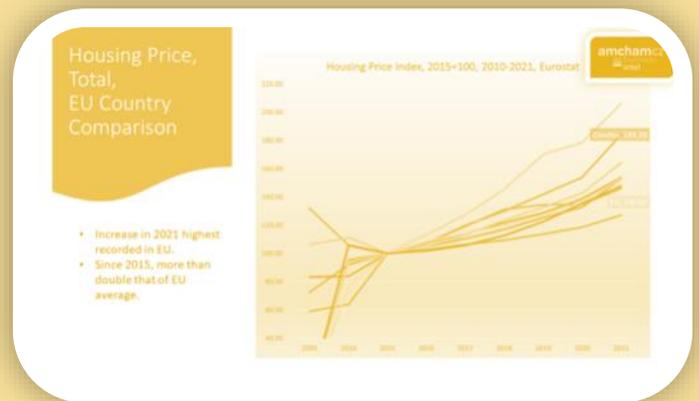
Our Digital Economy Council held several sessions on how companies were preparing for increased cyberattacks from national actors.

Our market intel work.

We focus on two types of intel: macro information that applies across sectors and sector specific information that influences wide parts of the economy. An example of the first are our regular sessions on the macroeconomy with the Czech National Bank. Events that illustrates the second were an overview of industrial real estate development or a discussion on how downtown retail and hospitality has been impacted by new working from home policies. We supplement our sessions with reports containing key indicators prepared by our staff.

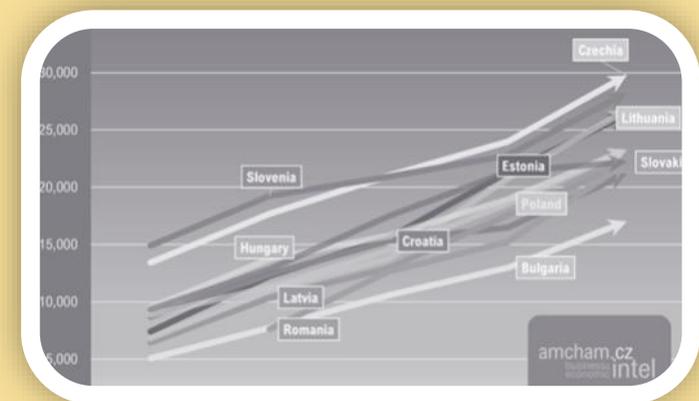
A majority of our market intel activities occur regularly. We assess the macroeconomic situation and the labor market twice annually. We hold a consumer trends as well as a manufacturing trends session once annually. Our Real Estate Council reports on residential and commercial development once annually. Until the recent crisis required more frequent updates, we analyzed the energy market once a year.

We also monitor developments in Czech and US politics that will impact economic policy.



Will conflict before the end of May?

<p>Does Russia have other targets than those stated publicly?</p> <p>Russia's stated goals are the "demilitarization" and "denazification" of Ukraine. The first goal likely refers to their membership, but could also require a total withdrawal of Russian troops, which may be an option for the regime. Ukraine's economy is expected to require 10%. The second goal, "denazification", does not have a clear definition or mission. Ukraine's leadership of the Russian occupation of the peninsula of Crimea and the partition of Ukraine with the annexation of Crimea.</p>	<p>Should Ukraine accept a ceasefire with partial occupation of its territory by Russian troops?</p> <p>Ukraine faces a fundamental trade-off: a pending ceasefire, even if temporary, would allow the Russian occupation of its territory. The increased use of heavy weapons will wear the Ukrainian air defense capabilities and make the country's ability to provide military aid. Ukraine's leadership has not ruled out negotiations between the two countries' leaders.</p>	<p>Should Russia accept a negotiated end to the conflict that does not include annexation of part or all of Ukraine?</p> <p>Russia has declared Crimea to be a high part of Russia, the world's largest landmass in terms of territory. Russia has not declared the Crimean region of Ukraine.</p>	<p>Should Russian public opposition to the war force Russian regime to negotiate settlements?</p> <p>Ukraine's public opinion support for the war, while not influenced by government-backed polls and the effect of economic hardship in all regions. If the regime cannot bear the public's anger, it may be forced to negotiate settlements and withdraw of Russian troops from Ukraine. The regime's public opinion support is a result of increased tension and war efforts in Ukraine.</p>
<p>Will China pressure Russia to end conflict and withdraw from it?</p> <p>China and Russia signed a partnership pact in 2022. If of China's top 10 export markets. In 2022, Russia's exports to China, India, South Korea, Germany, Mexico, Saudi, UK, Taiwan, and Australia comprising 40.3% of total exports have increased significantly in Russia and support Ukraine.</p>	<p>Should Ukraine accept a ceasefire which requires Russia to acknowledge the annexation of Crimea and withdraw troops from other regions?</p> <p>The Ukrainian government has consistently stated it will not accept any changes to its territory.</p>	<p>Should Ukraine accept any forced reduction in its military presence?</p> <p>Ukraine needs the defense to recover the area of its armed forces. Without withdrawing from Ukraine, it will be forced to withdraw from Russia without a large amount. The war has shown that Ukraine can sustain a military resistance from the outside without being a member of NATO.</p>	<p>Should Ukraine accept any forced prohibition to join NATO and EU?</p> <p>The war has shown that Ukraine can sustain military resistance from NATO. Ukraine's military resistance is a result of the war. The war has shown that Ukraine can sustain military resistance from NATO.</p>



Our Councils and Committees.

AmCham operates through Councils and Committees.

Councils represent sectors and major economic regions. The role of the Council is to identify advocacy issues and to share market trends. Our active Councils are Manufacturing, Digital Economy, Real Estate, Health Care, Tourism, Prague, and Brno.

Committees focus on business functions. The activities of Committees primarily focus on best practices sharing, market intelligence and also issue advocacy. Our active committees are Human Resources, Finance/Macro, and Marketing.





our 2022-23 aims.

Advocacy. Our advocacy will concentrate on developing the country's three main assets: its people, its technology and its cities. Integral to each of those three are sustainability and diversity, and they will be a key factor in all.

To develop **an innovative workforce**, we will pursue policies to increase the digital skills of people, an immigration process quickened by digitization and targeting STEM students and workers, and a longterm program to develop a larger pool of worldclass researchers. This will be supplemented by efforts to modernize the labor code to align it more closely with the reality that most people will not work mainly on the factory floor or office.

In technology, we will propose the continued development of a **research policy built around existing high tech companies**, which are our primary competitive advantage. We would like to see more "big bets": coordinated investments of government, universities and businesses to create the next generation of key technologies for important industries. We will also argue for public research policy that prioritizes technology over achieving bureaucratic targets.

Our cities need the infrastructure to attract the businesses and people that make economies grow. We propose that both Brno and Prague plan their future in closer cooperation, including building the technology parks needed to sustain creativity, and digitizing their land-use planning and processes to improve

the speed and outcomes of development. Finally, our major cities need a tourism scorecard to better understand the economic influence of foreign visitors, and to design tourism policies which maximize that impact.

We will continue to advocate incentives for our manufacturing base to convert to sustainable sources of energy and sustainable production.

In health care, we also will continue our effort to increase the number of healthy life years of the workforce by encouraging more innovation. This advocacy will start with arguing that setting ambitious, measurable targets in national disease plans will inspire providers, suppliers, and insurers to come up with great new ideas to deliver more value to the employers and employees who finance the system.

Best Practice. We will continue to examine how companies are reacting to the new situation in office work, including how inflation is distorting wage expectations; how manufacturers are incorporating new technologies to adjust to labor shortages and new green regulation; how social media is transforming company communication; and how inflation is changing how offices operate.

Market Intel. Our market intel will be focused on the outlook for energy, Ukraine, pricing/inflation, wage and employment, and technology development.