

# CIO Survey Report Czech Republic



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# Executive Summary

Let us present to you the results of the CIO survey in the Czech Republic.

This survey should help you understand CIOs' perceptions of the current situation and the future development in ICT management. The aim of the survey was to find out how the following areas are perceived:

- Development in ICT budgets and expectations for 2013;
- Organisational and strategic aspects of ICT management; and
- CIOs' priorities for the subsequent period and their current perception of technological trends.

## Key Trends

### IT Budget

For most organisations, the worst times in terms of pressure on the cost reduction in relation to the economic crisis are not over yet. The majority of CIOs are still forced to realise "more for less". This results in the fact that the next year will not be an ideal period for big investments in new technologies, since the CIOs' major priority is still to cope with the unexpected decrease in the ICT budget. Contrary to this trend, a slightly-positive finding is that 5% more organisations than in the prior period are expecting to increase their ICT budget next year.

### Strategic IT Management

The major challenge for the next period is to shift the perception of the IT division from a cost centre that runs applications to a perception of the IT division in the role of a strategic partner that brings high added value in the form of the services provided.

More than 80% of organisations evaluate the current status as not entirely ideal and see a great area for improvement predominantly in the interconnection of ICT strategy with the goals of the organisation.

### Technological Trends and CIOs' Priorities

CIOs perceive the value and the meaning of technological trends and understand the significance of their benefit for the organisation. However, the CIOs' task will be to make further effort and demonstrate these benefits that arise from the innovative solutions to the whole organisation and thus take up the position of technology innovator.

The current technological trend is with mobile applications, with 80% of organisations planning to implement them. The survey shows that technologies such as the private cloud or Infrastructure as a Service still do not belong among the major priorities of CIOs in organisations in the Czech territory, although more than a half of the organisations perceive the related benefits as relatively high. With regard to big data and platform as a service, it rather applies that companies will first need to familiarise themselves with these trends, and identify and prove their potential within partial pilot solutions.



**Zdeněk Krížek**  
Partner



# Major Findings

In 2013, the further reduction of ICT expenses is expected.

The highest year-on-year decrease of the ICT budget is expected in the public sector.

The major topic is the optimisation of ICT expenses.

The suspension of investments and the restriction of external services represent the most frequent reaction to the decrease of the ICT budget.

Investments account for 26% of the ICT budget on average.

Investments in new trends and technologies are not a current priority for CIOs.

37% of companies who participated in the survey are coping with a lack of qualified ICT specialists.

The current trend is the implementation of mobile technologies.

Despite their high perceived potential, the private cloud and infrastructure as a service trends are still not considered hot topics.

# About the Survey

The aim of the CIO survey was to identify the state of IT management in major companies in the Czech Republic in the context of the macroeconomic conditions and the changing information and communication technologies' environment with an emphasis on the development of budget possibilities, priorities and the strategic focus of IT divisions.

The survey was conducted in cooperation with CACIO in autumn 2012 and over 100 respondents in the positions of CIOs and senior IT managers from various sectors participated in it.

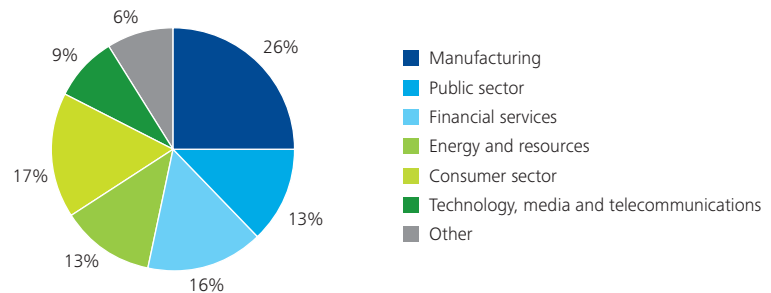
The survey includes the answers of senior IT managers from organisations of various sizes, from those with fewer than 100 employees to those with more than 5,000 employees. The total number of employees of the organisations surveyed exceeds 400,000 and the total sales exceeded CZK 850 billion. The average headcount of the organisations that participated in the survey is 4,065 and the average turnover is almost CZK 9 billion.

For a better interpretation of the survey results, the sample of the organisations surveyed was divided pursuant to the global taxonomy of Deloitte industries into the following major sectors:

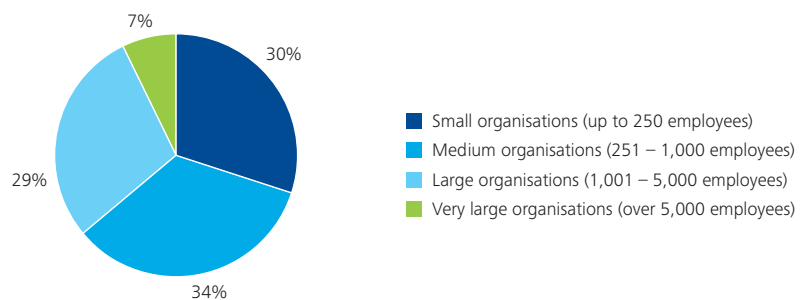
- Financial services;
- Public sector;
- Technology, media and telecommunications;
- Manufacturing;
- Consumer sector; and
- Energy and resources.

In addition to the segmentation of the organisations surveyed by industry, a division based on headcount was also made. Organisations with up to 250 employees were described as small, organisations with 251-1,000 employees as medium, organisations with 1,001-5,000 employees as large and those with more than 5,000 employees as very large.

**1. Representation of individual industries among the respondents**



**2. Representation of respondents pursuant to the size of the organisation**



# Survey Findings

## Organisational Aspects of ICT Management

A total of 70% organisations have a dedicated CIO position. Employees in other functions are entrusted with ICT management namely in smaller or medium organisations. In this case, the responsibilities related to ICT management fall within another position, namely that of a CFO. The position of a CIO is most commonly – in more than 50% of cases - subordinate to the CFO or the CEO. Only in 25% of the organisations surveyed is the CIO position directly subordinate to the Board of Directors, to the statutory executive or the owner.

### Changes in CIO positions in the Public and Manufacturing Sectors Are Not Very Frequent

Pursuant to the survey, the position of CIO is usually carried out by an expert with years of experience; currently, 47% of CIOs have been in their positions for five or more years.

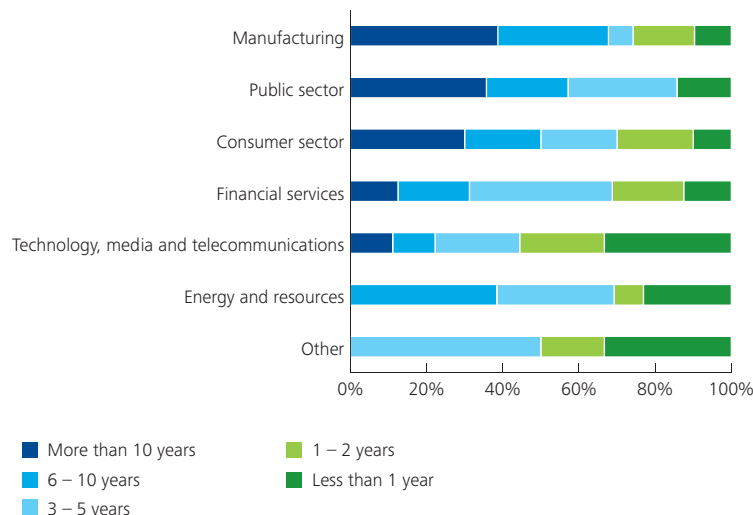
At the same time, the position of CIO is typically performed by experts aged 40 or more. This state fully complies with the needs of organisations and the high expectations of the management regarding the CIO's qualifications and professional experience.

### Compared to the Global Average, IT Divisions in the Public Sector and Energy Sectors Are Undersized

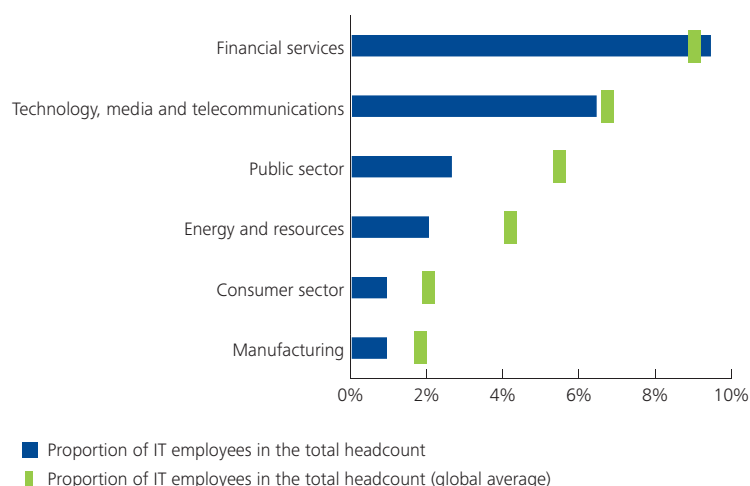
The proportion of the number of ICT employees compared to the total headcount in the organisations surveyed is usually lower than the global average. The cause of this state might also be the fact that eg the rate of ICT activities' outsourcing in the energy and resources and public sectors is greater compared to other sectors (more than 30% of activities are outsourced).

The different proportion between individual sectors is predominantly due to the different approach to the use of ICT. In the financial services sector, where information and communication technologies are the main driving force of the performance of the organisations' key activities, the proportion is significantly higher than in the manufacturing or consumer sectors.

### 3. Length of performing the position of a CIO



### 4. Proportion of IT employees in the total headcount

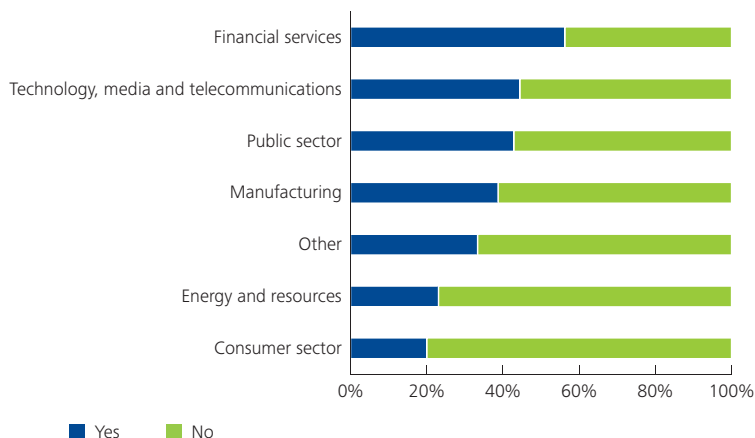


## More than One Third of the Organisations Surveyed Are Coping with a Lack of Qualified ICT Specialists

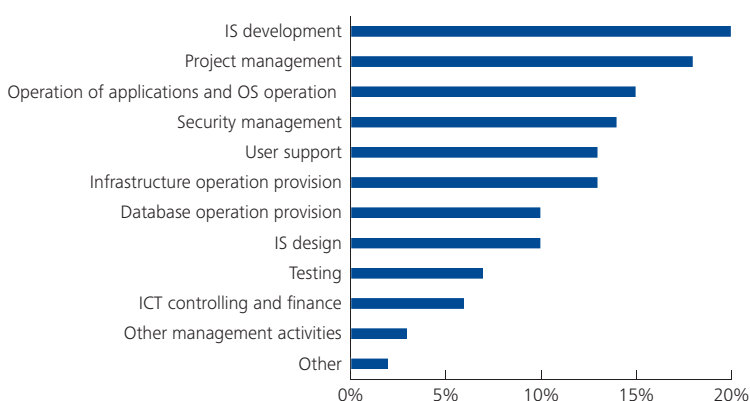
Almost 37% of all the organisations surveyed are facing a lack of qualified ICT specialists; the greatest lack is perceived predominantly by organisations in the financial services, technology, media and telecommunications and public sectors.

The results of the survey show that the greatest lack of experts is felt predominantly in information systems development (19.3%) and in ICT project management (17.4%).

### 5. Do you perceive a lack of qualified specialists?



### 6. Perceived lack of ICT specialists in individual areas



## ICT Budget Costs Development

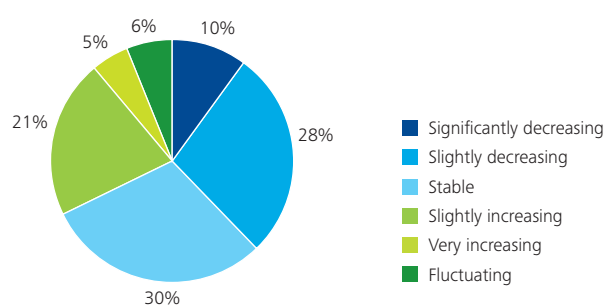
### Only 15% of Organisations Report Significant Changes to the Budget

From a long-term perspective of ICT budget development in the organisations surveyed, only 15% of organisations report a significant budget reduction or increase, another 6% of organisations report ICT budget fluctuations.

In the past years, a significant decrease in ICT expenses was predominantly identified in organisations in the public sector. None of the surveyed organisations in the public sector increased their ICT budget in 2012.

On the other hand, a significant increase in the ICT budget in the past years is predominantly reported by organisations in the financial services sector.

### 7. The past years' trend in ICT budget development



## Other ICT Cost Reductions Are Expected in 2013

The number of organisations that are expecting a budget increase in 2013 is five percentage points higher than last year. However, in most sectors, expectations of an ICT budget decrease in 2013 are still prevalent. In the public and energy sectors, these expectations prevail in the majority of the organisations surveyed.

A detailed analysis of the volume of funds of all the organisations surveyed shows that the proportion of ICT expenses within the budget has been slightly decreasing on average in recent years. The total ICT budget for 2012 in all the organisations surveyed was lower by 2.4% on average compared to 2011. For 2013, a year-on-year decrease of the budget proportion for ICT compared to the total budget of the organisation by 1.6% is expected.

This fact is interesting in the context of ICT expenses development in the entire EMEA region where, pursuant to a survey performed by Gartner<sup>1</sup>, ICT expenses will decrease by 3.6% in 2012, but a turn in the form of a 1.4% increase is expected for 2013 across the entire region.

## The Highest Year-on-year ICT Budget Decrease Is Expected in the Public Sector

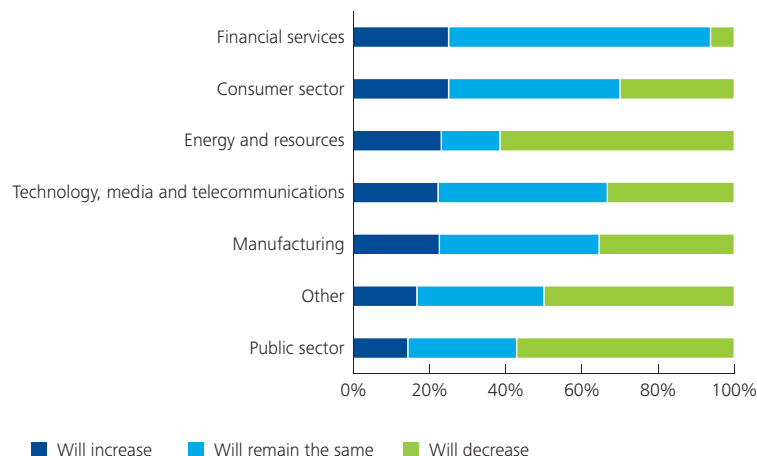
The highest year-on-year decrease of the ICT budget is expected in the public sector where the proportion of the ICT budget in the aggregate budget of the organisation is expected to decrease by 6%.

In the technologies and telecommunications sector, where the highest year-on-year decrease of the proportion of ICT expenses in the total budget was reported between 2011 and 2012 (by 8.1%), another, less significant decrease is expected in 2013 (by 3.3%).

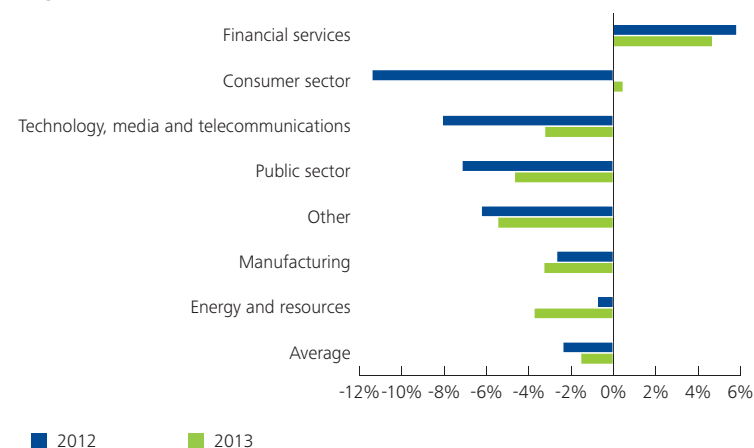
In the energy and resources sector, there are the biggest fluctuations in the expectations for budget development in 2013. Some of the organisations surveyed are expecting a significant increase in the ICT budget; however, more expect a slight decrease. The overall anticipations for 2013 include a slight (0.5%) year-on-year decrease in the proportion of ICT expenses from the organisation's budget.

An exception in the anticipated ICT budget development trend lies in the financial sector where the trend of implementing new technologies in the context of securing organisations' competitive strength has prevailed in the last few years.

## 8. Expected development of ICT budget for 2013



## 9. Year-on-year change in the proportion of ICT expenses in the organisation's total budget



This state is the cause of a higher proportion of ICT expenses from the budget of organisations compared to other sectors. The anticipated year-on-year increase in the proportion of ICT expenses from the organisations' budgets for 2013 in this sector is 4.7%.

1 Source: Gartner Symposium ITxpo 2012 (5th – 8th November 2012) - Gartner

### The Lowest Percentage of ICT Expenses Is Incurred by the Consumer and the Energy and Resources Sectors

The proportion of ICT expenses compared to the aggregate budget of the organisations is highest in the technology, media and telecommunications sector, where it amounts to 5.7% on average, followed by the financial services sector (5%). In both of these sectors, information and communication technologies play a key role.

Contrarily, the lowest ICT expenses are incurred in the energy and resources sector, amounting to 1.7% of the total budget on average, followed by the consumer sector.

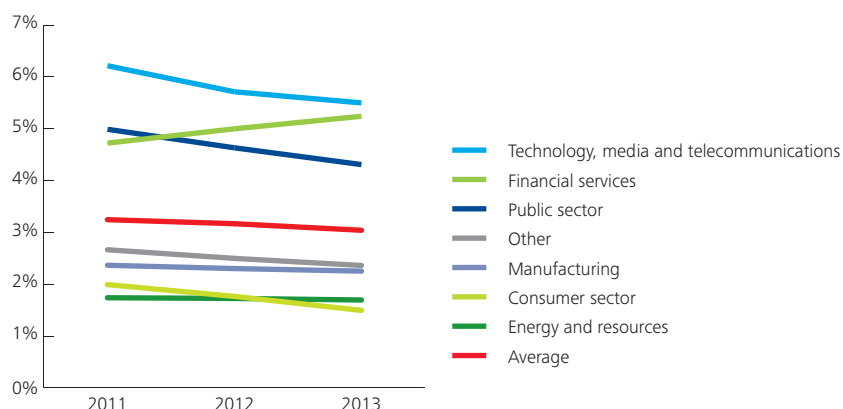
The proportion of aggregate ICT expenses to the organisation's total budget is the second lowest in the energy and resources sector, but is still approximately 50% above current practice. In the consumer sector, on the other hand, ICT expenses in the organisations surveyed in the Czech Republic are 40% below the usual.

### The Greatest Budget Proportion Is Invested in the Public Sector

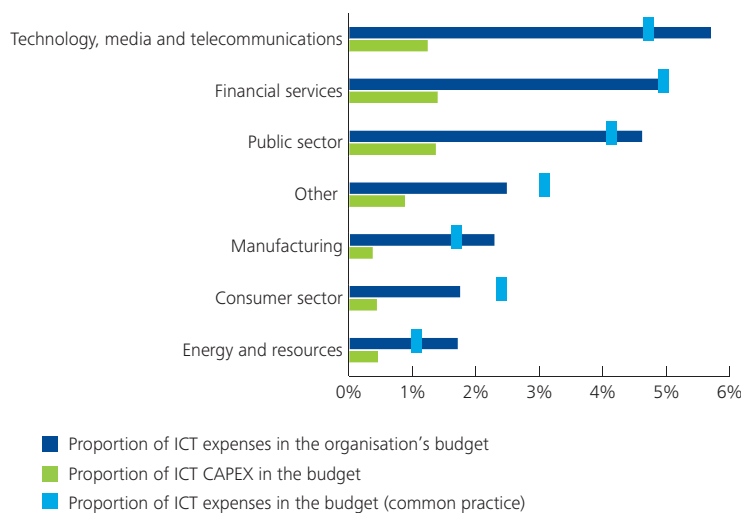
Furthermore, the results of the survey show that the average proportion of total ICT expenses in the aggregate budget of the organisations surveyed in the Czech Republic is comparable to the common practice.

Another important finding is that the investment expenses (CAPEX) are highest in the public sector, where extensive investments in the integration and centralisation of information systems, the creation of technology centres and the increase in the automation of internal processes of public administration organisations have been realised in recent years. However, the highest proportion of investment expenses in the aggregate budget of organisations in this sector is in significant contrast to the expected decrease of operating expenses (OPEX) for ICT.

#### 10. What percentage of the organisation's budget for 2012 constitutes the ICT budget in the each sector?



#### 11. What percentage of the budget is used for ICT?



## Investments Account for More than One Quarter of the ICT Budget

With regard to the proportion of operating and investment expenses, organisations in the manufacturing and energy sectors report a greater proportion of operating expenses. This fact can also be due to a lower need of these organisations to invest in new technologies.

In 2010 and 2011, a global downturn of investment expenses compared to prior years was notable (source: Gartner<sup>2</sup>). The source says that the proportion of CAPEX for ICT decreased from 30% to 25% compared to OPEX (in 2010), or to 26% (in 2011).

The proportion of investment and operating ICT expenses in the organisations surveyed is at the level of EMEA region's organisations' average and represents 26%, while small organisations invest less than 25% of their ICT budgets.

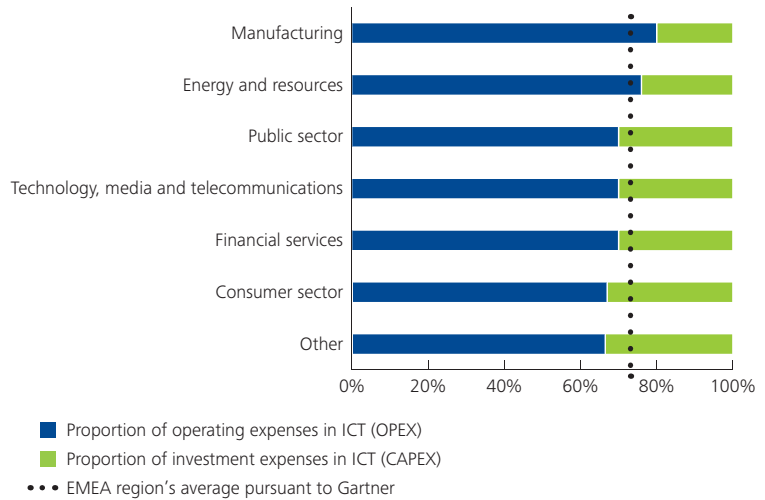
The methods and suitability of the selected measures as a reaction to the continuously-decreasing budgets are currently a frequent discussion topic. For CIOs it is often of key importance to decide how to adapt to the decreasing budgets, whether to prefer short-term measures to system changes which often require an initial investment in order to achieve future savings.

## A Restriction of Payroll Expenses Is the Least Preferred Measure by the CIOs

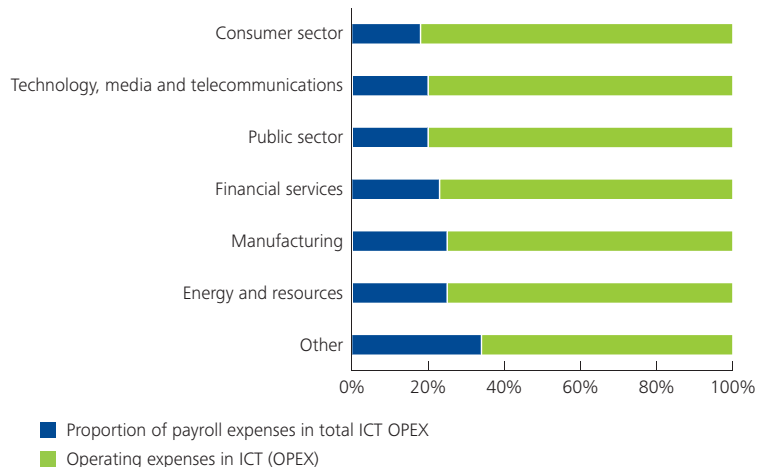
The survey involved questions regarding the preferences when performing operating interventions in ICT management in the case of an unexpected budget decrease of 10%.

The least preferred in this case was a measure regarding the restriction of payroll expenses. With regard to a low payroll expense rate (24% on average) compared to the aggregate operating expenses, and with regard to the undersized IT divisions, CIOs do not currently see any space for the decrease of operating ICT expenses in the area of staff costs.

### 12. OPEX to CAPEX ratio



### 13. What portion of OPEX represents payroll expenses?



<sup>2</sup> Source: IT Key Metrics Data 2012: Executive Summary (15th December 2011) - Gartner

### Suspension of Investments and Restriction of External Services Are the Most Frequent Reaction to the Decrease of ICT Budget.

In the case of cost reduction, most organisations would optimise the use of external services (eg consultations, training, etc) and review the ICT development projects with regard to their actual added value.

For almost 70% of the organisations surveyed that indicate a decrease of their ICT budget, the preferred reaction to another possible cost reduction is the suspension of development activities that do not have a clear transparent benefit for the organisation or for ICT maturity.

An exception lies in the technology, media and telecommunications sector, where ICT development represents a key factor of success in a competitive environment and where the optimisation of operating costs is preferred to the restriction of investments.

## Strategic Aspects of ICT Management

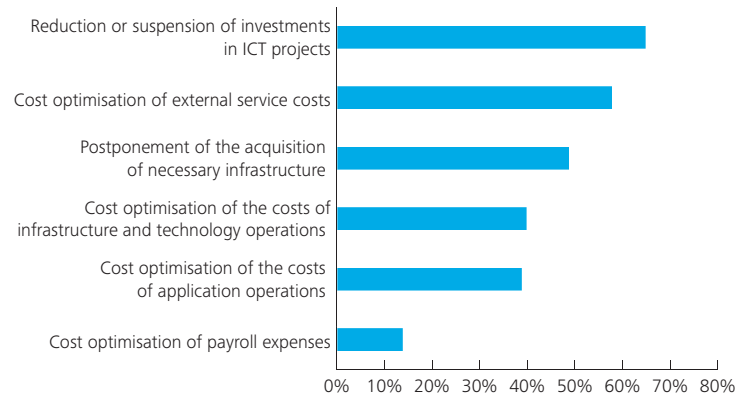
### Strategic ICT Management is Mostly Applied in Large Organisations, Namely in the Finance and the Energy and Resources Sectors.

In this area, the organisations surveyed assessed their approach to strategic and operating ICT management. In addition to other aspects, strategic ICT management usually defines the direction of information technologies and services development in line with the business goals. From the perspective of tactical and operating ICT management, the question was evaluated as to whether organisations approach ICT as a service provided to their internal and external customers and whether they have control over the price and quality of the provided ICT services.

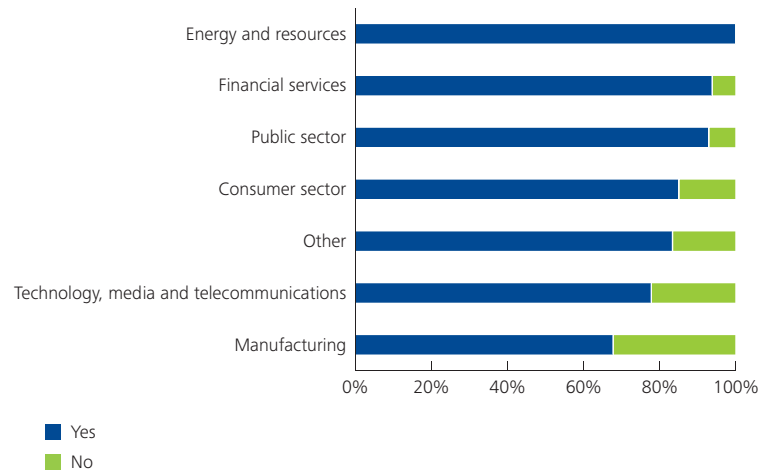
On average, 83% of companies have a defined ICT strategy, which respects the organisation's business strategy in 70% of cases; however, a detailed view shows that it is often the case that not all strategic aspects are solved comprehensively. Eg all the "very large" organisations requested have implemented strategic management; however, a quarter of them evaluate this management as unsuitable at the same time.

As a standard, ICT strategies solve several aspects for which the future state of ICT and the relevant objectives should be defined. The organisations surveyed consider the application architecture to be the most significant aspect, with 36% of organisations considering this aspect in their strategies. Security, data architecture and organisational aspects are dealt with in less than 15% of organisations.

#### 14. Prioritised measures in the event of a 10% decrease of the ICT budget



#### 15. Is the ICT strategy defined?



Information strategies are mostly created for a three-year period, while only 20% of them are defined with a longer than a four-year outlook. Most strategies (61%) are regularly reviewed or updated within a year's horizon.

Strategic ICT management is mostly used in the energy and resources, finance and public sectors.

### ICT Services Provided in the Public Sector Are Often Not Standardised

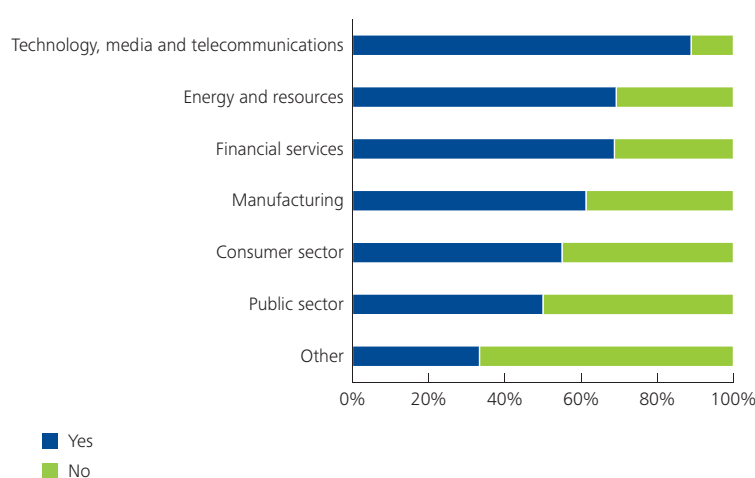
ICT services management is implemented in most of the organisations surveyed, but lags behind in the consumer and public sectors. In the technology, media and telecommunications sector, this situation is enhanced by the high maturity of ICT and the high intensity of the use of information and communication technologies.

For the management of relationships between the ICT service provider and ICT service customers, it is common practice to include the parameters of ICT service quality in their definition. Such practice is desirable namely in cases wherein ICT services are also provided to external customers (eg to citizens in the public sector).

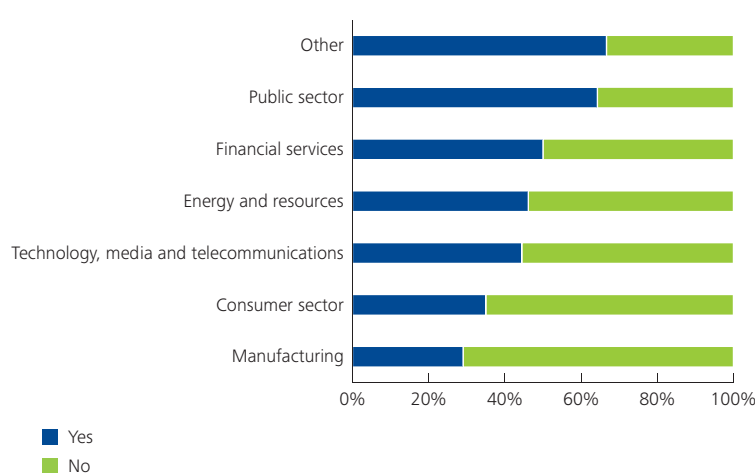
In the public sector, the high rate of services provided to external entities (the public) is due to the legislative conditions for the operation of ICT equipment and to the fact that the major objective of the public sector is the fulfilment of public interests.

A high percentage of ICT services provided to external customers and at the same time a low maturity of the management and assessment of ICT service quality results in the conclusion that these services are provided without deeper control over the quality of their supply and the costs related to their operation.

#### 16. Are the ICT services defined in the organisation?



#### 17. Does the organisation provide ICT services to external customers?



### Financial Management of ICT Services Has Not Been Implemented in Most Organisations

Despite the fact that ICT services are defined in the majority of sectors and that these services are assessed on the basis of defined quality parameters in 85% of cases, an allocation mechanism is not set up in 63% of them. 57% of ICT divisions are not evaluated on the basis of the quality of the ICT services provided.

The fact that IT divisions are not evaluated for the quality of ICT services and that a mechanism for cost allocation is not defined has an impact on the quality and the perception of relationships between the IT division and the business users. Organisations with defined ICT services evaluate the relationship with their customers better than organisations where ICT services are not defined. 70% of organisations with defined services evaluate their customer relationships between good and excellent. On the other hand, such perception has been recorded only by 45% of organisations surveyed where ICT services are not defined.

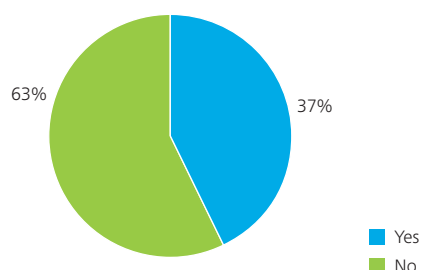
More than 80% of organisations agree that the level of mutual relationships between the IT division and its customers must be improved on an ongoing basis.

The highest maturity of ICT service management has been reported in the energy and resources sector, where a third of the respondents evaluate the service quality, and allocates and assesses the related costs of individual ICT services, and the relevant IT division is also assessed pursuant to the quality parameters.

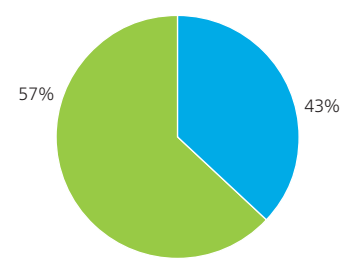
### The Lowest Outsourcing Rate Is Reported in the Technology, Media and Telecommunications Sector

More than 43% of the organisations surveyed do not outsource ICT activities at all or do it only minimally. Over 75% of organisations use outsourcing in up to 40% of the total volume of their activities. The lowest use of outsourcing is reported in the technology, media and telecommunications sector, where 55% of organisations outsource less than 20% of their activities. Outsourcing is mostly used in the public sector, where the same percentage of organisations (approximately 57%) use this form of securing ICT services for up to 40% of their activities.

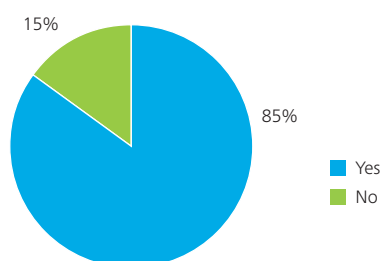
18. Has the cost allocation model been set up?



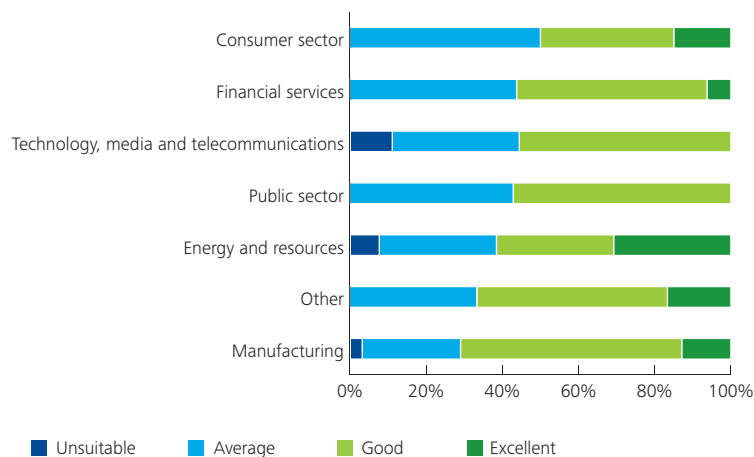
19. Is the IT division assessed for the quality of the provided services?



20. Are the parameters of ICT service quality assessed?



21. Business – IT division relationship



## Currently-perceived Problems and ICT Management Maturity

### CIOs in the Czech Republic perceive ICT services as an important area for further development

Based on the performed investigation, it is obvious that the areas in which organisations perceive the greatest potential for improvement – ie areas where the greatest lacks and problems are perceived – predominantly include ICT service development management (80%) and the related internal customer relationship management (81%).

It is predominantly the evaluation in the area of internal customer relationship management, which correlates with the evaluation of the relationship between the IT division and business users of ICT services that are evaluated as average or unsuitable by 40% of organisations.

Another identified area with a large potential for improvement is security and risk management. 80% of respondents also identified this area as the least developed.

A significant area for improvement is also the provision of compliance of the information strategy with the corporate goals. 79% of respondents consider this area significant from this perspective.

With regard to the assessment of the maturity of individual ICT management disciplines, ICT resource management and provision is assessed significantly better. An exception is found in the public sector, where organisations do not have the ability to fully control this area in many cases, even with regard to the necessary funds.

Innovation management, on the other hand, is an area that is not the centre of focus. The identified low maturity in the technology, media and telecommunications sector, where innovations represent a key role for business, can result in complications for the further development of the entire organisation in the future. In this respect, the survey also revealed the fact that in 13% of organisations on average, this area is not solved at all and in the energy and resources sector, even 27% of the organisations surveyed do not perform these activities.

Another area which is perceived as functioning insufficiently, but having potential for improvement, is the project portfolio management. In 11% of cases, this area is not performed at all, in the manufacturing sector it is even the case in 18% of cases.

### 22. ICT management areas maturity

ICT management maturity	Financial services	Public sector	Technology, media and telecommunications	Manufacturing	Other	Energy and resources	Consumer sector
Internal customer relationship management							
Creation of an information strategy in line with the corporate goals							
IT organisation and process management							
Project portfolio management							
Corporate architecture management							
ICT service development management							
Innovation management							
ICT service operation management							
Information security and risk management							
ICT resource management and provision							

■ Works with deficiencies  
■ Works partially  
■ Works perfectly  
 Width = maturity level

## ICT Priorities and Trends

In order to maintain the organisation's competitive strength in any sector, a continuous increase in the efficiency of the use of current technologies and the selection of new suitable technologies in line with the organisation's requirements and goals is of key importance. The implementation of innovative solutions and adaption to new technologies is mostly a significant change that can be caused on one side by the organisation itself, or the users of information systems, as well as the IT division on the other side.

### Changes Are Mostly Initiated by IT Divisions

A total of 72% of the organisations surveyed state that the changes are initiated directly by the individual IT divisions. The business predominantly initiates changes regarding the expansion and integration of the current information systems. On the other hand, IT divisions rather initiate the changes related to the aggregate exchange or renewal of the information systems, their components and the necessary infrastructure.

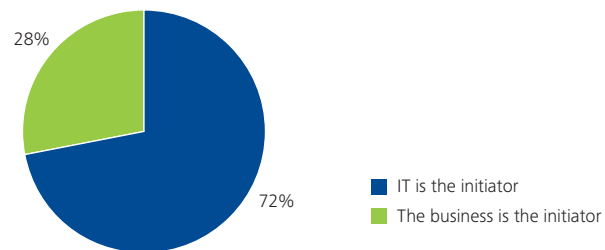
### The Major Topic Is the Optimisation of ICT expenses

The current situation in the area of ICT budgets clearly determines the major priority – for 2013 it is the optimisation of ICT expenses. In the technology, media and telecommunications sector, this initiative is perceived as the highest priority, and focus is also put on the increase in the efficiency of ICT resource management and the provision thereof as a whole. This priority is also the centre of focus in the public sector, which is restricted by binding budget rules in the ICT resource management and provision.

The second-highest priority is purposeful investment in the increase of information security, which represents a higher or high priority for almost 40% of organisations, despite the fact that ICT security is generally (with exceptions in the public and consumer sector) evaluated as an area with a relatively high maturity.

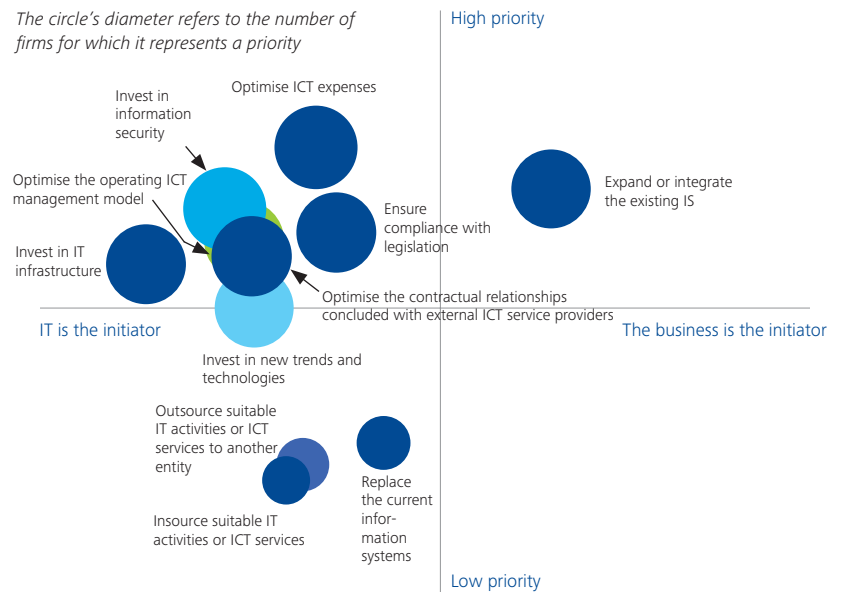
The third significant priority is the increase in the ICT infrastructure maturity and performance. A flexible infrastructure with sufficient capacity is of key importance for the successful implementation of new technology trends.

#### 23. Who is the initiator of changes in ICT?



#### 24. Matrix of priority areas

The circle's diameter refers to the number of firms for which it represents a priority

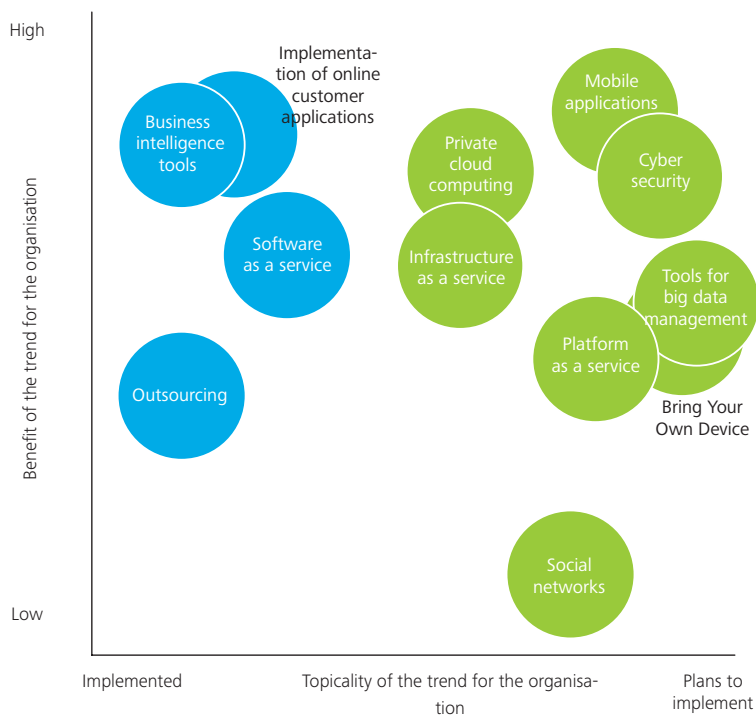


## Investments in New Trends and Technologies Are Not the CIOs' Current Priority.

In the context of the identified low level of maturity of the innovation management in all sectors, investments in new trends and technologies are the lowest 2013 priority for most CIOs in the Czech Republic. This situation can be caused by the fact that organisations do not have sufficient available funds in their tight budgets to enable these investments. The current situation is rather inclined towards increasing the efficiency of operating activities and the efficiency of the used ICT sources.

Based on the survey, the current technology trends were divided pursuant to their contribution for the organisation and pursuant to the topicality of their implementation.

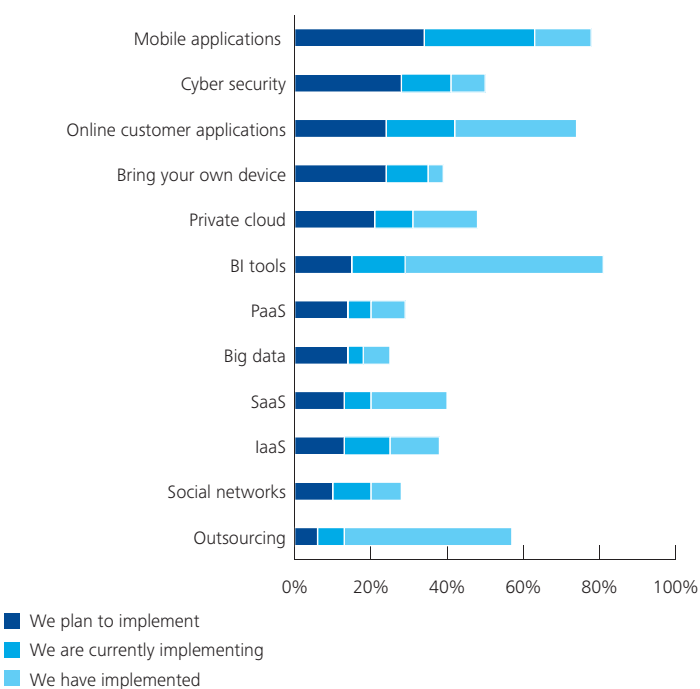
## 25. Overview of the significance and the potential benefits of the trend for organisations



## Mobile Technologies Are the Hottest Trend in ICT

The use of social networks was identified as the least hot trend from the perspective of the planned implementation and the perceived level of its benefit for the entire organisation. This trend has no or just a little benefit in the manufacturing and the energy and resources sectors.

## 26. Significance of ICT trends pursuant to the topicality of their implementation

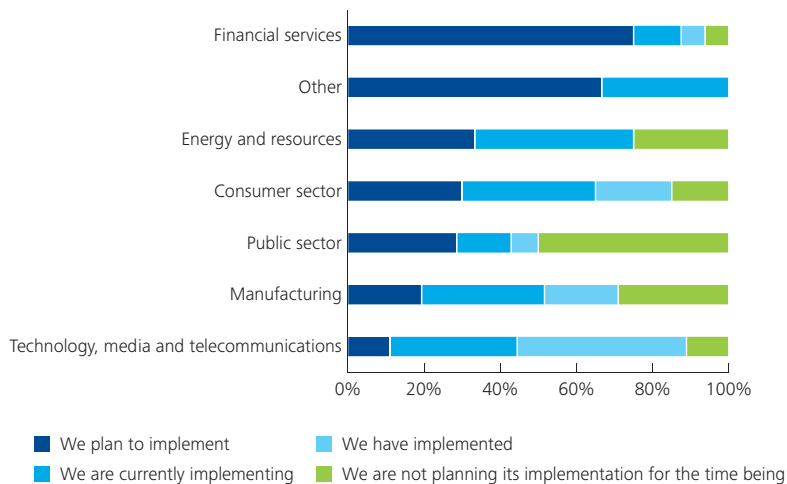


The respondents evaluated the development and implementation of mobile applications as the hottest and the most interesting trend with a high benefit. The implementation of this trend is planned by the greatest proportion of the CIOs surveyed (almost 34%) and at the same time, these technologies are currently being implemented in 28.4% of the organisations.

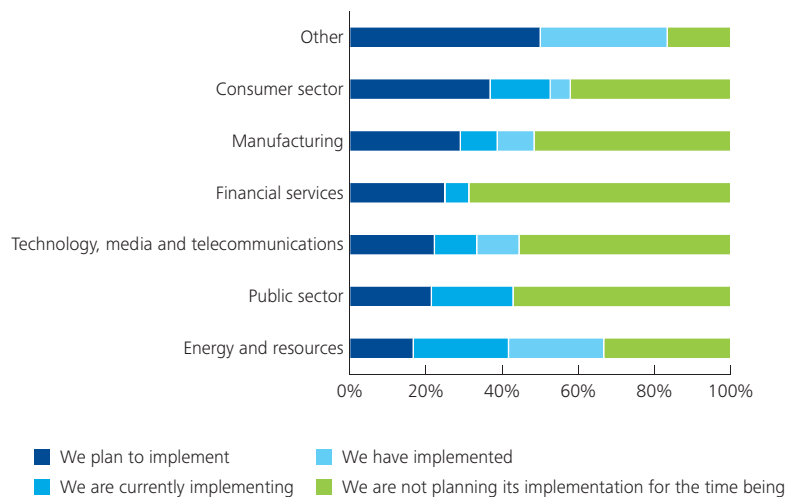
The greatest development of mobile applications is recorded namely in the financial services sector, where almost 80% of organisations are planning their implementation. Mobile applications are most frequently used in the technology, media and telecommunications sector (almost 50% of organisations) and their implementation is currently in progress in another 37.5% of organisations. 100% of the organisations surveyed in this sector stated that these technologies represent a significant benefit for them.

The second hottest topic is the implementation of Cyber security, where the second-highest level of interest was noted (27.5%) from the viewpoint of the planned implementation. The greatest potential for Cyber security is in the consumer sector.

## 27. Mobile applications trend

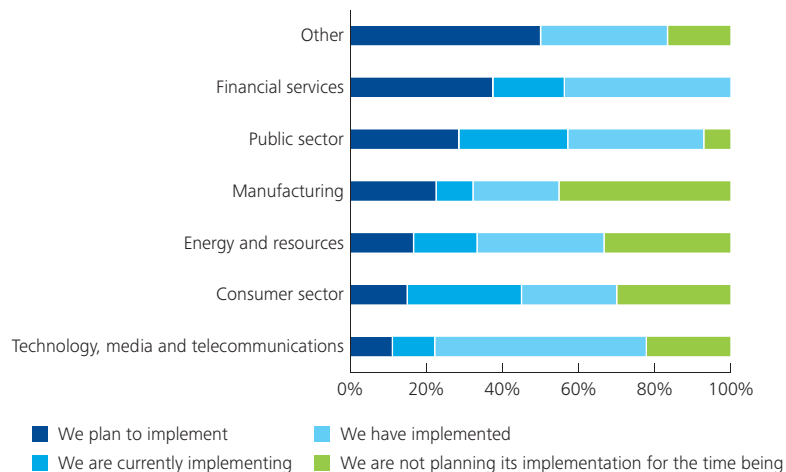


## 28. Cyber security trend



Almost 80% of organisations in the public and the financial services sectors perceive a significant benefit of the implementation of online customer applications. Almost 40% of organisations in these sectors are considering their further implementation.

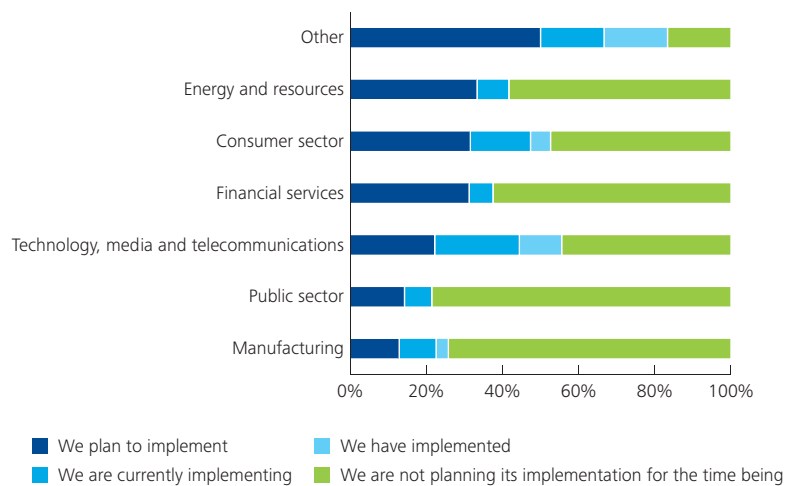
## 29. Online customer applications trend



Another important technological trend in the organisations is the use of end devices in line with the “bring your own device” principle. Almost 24% of organisations are considering the implementation of these principles and 11% of organisations are currently implementing them.

This principle will be developed most intensively in the energy and resources sector and in the consumer sector.

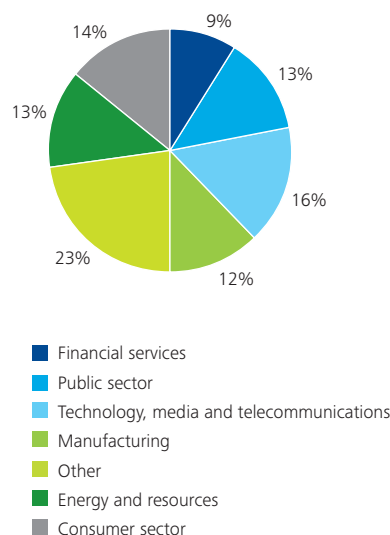
## 30. Trend of the “bring your own device” approach



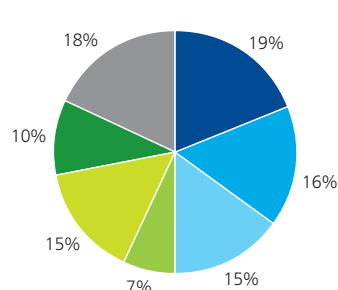
### The Topics of the “Private Cloud” and “Infrastructure as a Service” Trends are Still Not Hot Enough, despite the Great Benefit Perceived

With regard to the private cloud and IaaS trends, 50% of organisations are not planning their implementation yet, but still perceive their high benefits. Both trends attract namely organisations from the “large” and “very large” categories.

31. For which sectors is the implementation of the private cloud most beneficial?



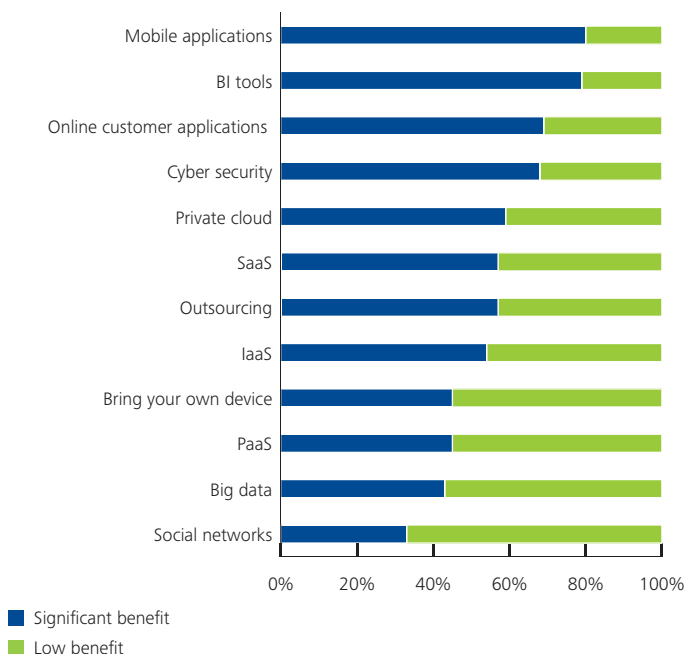
32. For which sectors is the implementation of IaaS most beneficial?



### “Big Data” and “Platform as a Service” Are Currently Perceived as the Least Tangible Technological Trends by the CIOs

The majority of the organisations surveyed were not able to assess the benefits of these two technology trends, or took a neutral stand. At the same time, these trends are currently also the least implemented ones and only a minimum of organisations are considering their implementation in the near future.

33. Expected benefit of the trend



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