

CZECH REPUBLIC



AUTOMOTIVE AND AEROSPACE SECTOR AT A GLANCE

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CZECH AUTOMOTIVE INDUSTRY



- 850 companies
- EUR 32 billion in sales
- 20% of Czech exports
- 260 000 employees
- 55 out of Global Top 100 automotive suppliers (Tier 1-3)

Note: 1 EUR = 24,45 CZK

Source: CzechInvest's Supplier Database and MagnusWeb database, ČEKIA, 2012



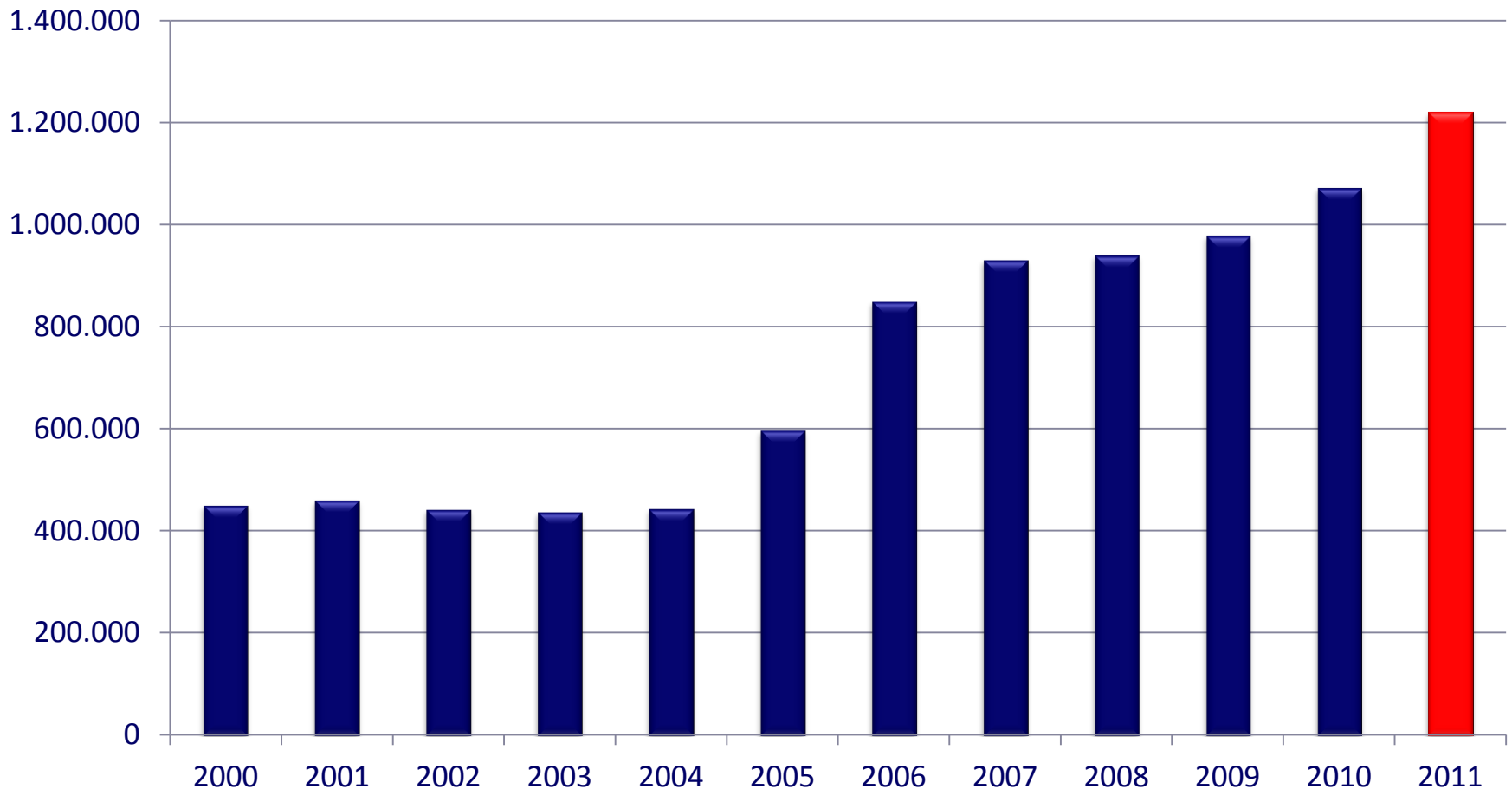
AUTOMOTIVE INDUSTRY IN CEE REGION (2012)



MAJOR AUTOMOTIVE INVESTMENTS

COMPANY	COUNTRY OF ORIGIN	TYPE OF ACTIVITIES	Investment (EUR mln)	Jobs	Year
Hyundai Motor Company	South Korea	MFG	1120	3500	2006
Toyota/PSA	Japan/ France	MFG	850	3000	2002
VOLKSWAGEN	Germany	MFG	562	600	1998
Nemak	Mexico	MFG	317	1361	2000
Denso	Japan	MFG	255	936	2001
Robert Bosch	Germany	MFG	237	1485	2000
Koito	Japan	MFG	70	340	2001
Automotive Lighting Reutlingen	Germany	MFG	106	632	2006
SUNG WOO HITECH	South Korea	MFG	111	1041	2005
Continental Teves	Germany	MFG	61	670	2000

CZECH PRODUCTION OF MOTOR VEHICLES



Source: Automotive Industry Association, 2012

SELECTED R&D COMPANIES AND TECHNOLOGY CENTRES



Selected Technology and R&D Centres

PRAGUE

Mercedes-Benz technology
Porsche Engineering Services
Ricardo Prague
VALEO
SYSTEMES THERMIQUES
TÜV-SÜD Czech

LIBEREC REGION

Denso
Idiada CZ
TRW Automotive
MSV Systems CZ

MORAVIAN-SILESIA REGION

Behr Czech
Continental Automotive Systems Czech Republic
Hayes Lemmerz International
Visteon-Autopal

HRADEC KRÁLOVÉ REGION

Continental Teves
Swell

OLOMOUC REGION

HELLA KG Hueck&Co.
HORIBA

CENTRAL BOHEMIA REGION

AUFEER DESIGN
Behr Czech
Faurecia
Idiada CZ
Ingersoll Rand
Kostal CR
Mercedes-Benz technology
Swell
Škoda Auto

PLZEŇ REGION

Mercedes-Benz technology
NARETEC
ZF Engineering

SOUTH BOHEMIA REGION

Robert Bosch
ČZ a.s.
MOSLED
TRW-DAS
Brisk

VYSOČINA REGION

Bosch Diesel
Mann+Hummel
Motorpal

SOUTH MORAVIA REGION

Blata
Honeywell Turbo Technologies
Mann+Hummel



MBtech
Mercedes-Benz technology



TECHNICAL UNIVERSITIES

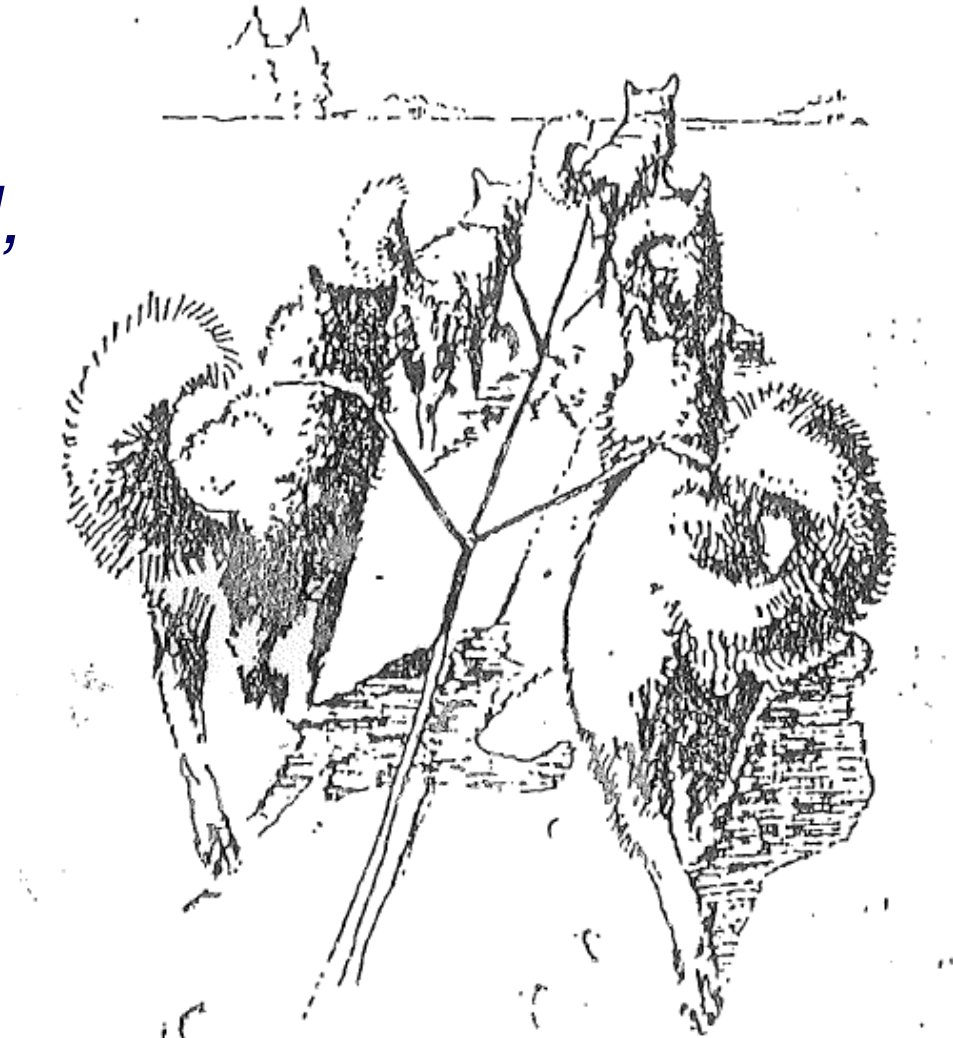
FOCUSED ON ADVANCED AUTOMOTIVE RESEARCH
WITH THEIR INDUSTRIAL PARTNERS



AEROSPACE INDUSTRY

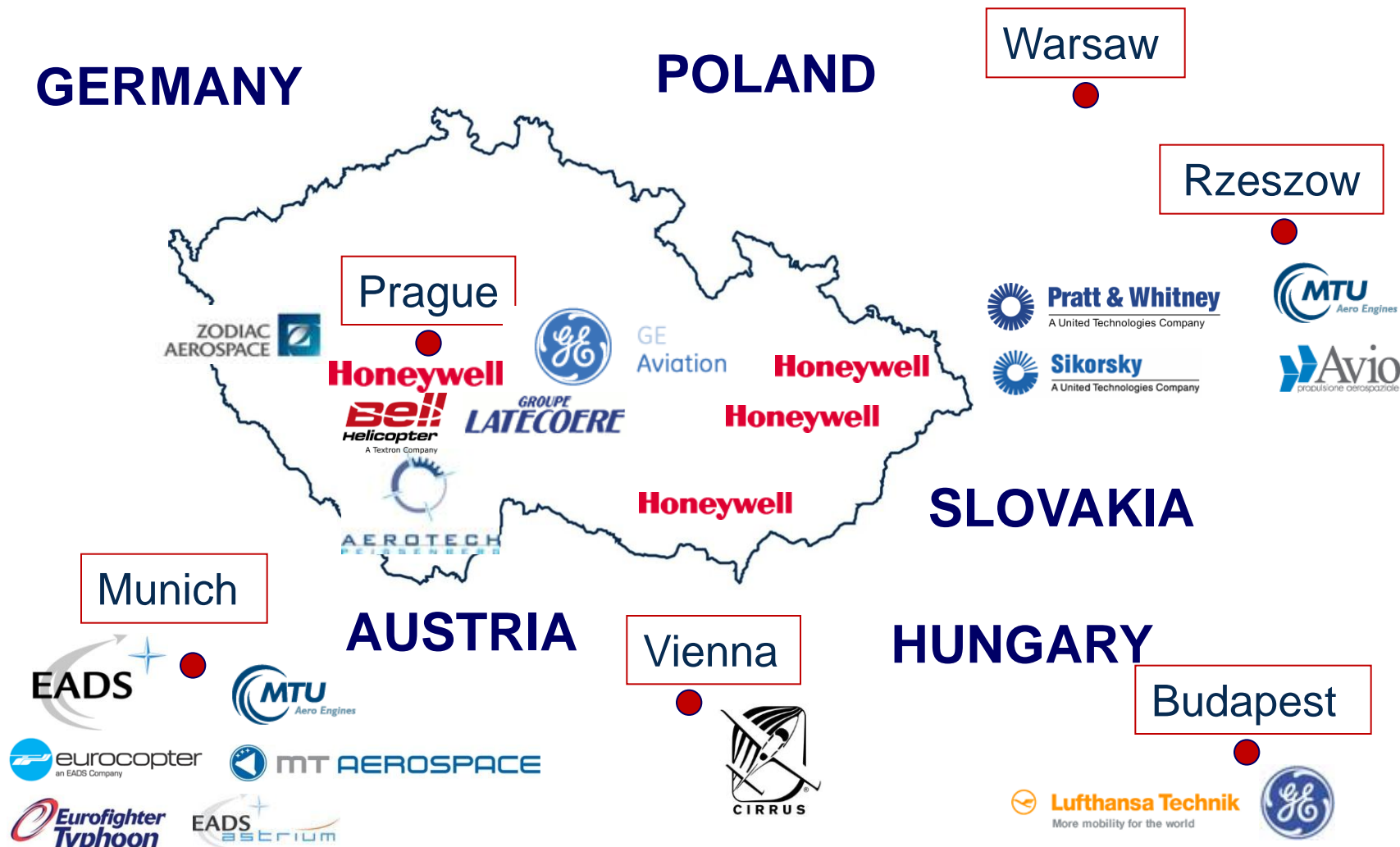
*“If you aren’t in the lead,
your view will always
be the same”.*

5M Company / Smart Technologies



STRATEGIC INVESTORS

Aerospace Industry CEE



AERO VODOCHODY PARTNERING WITH EMBRAER (KC-390)

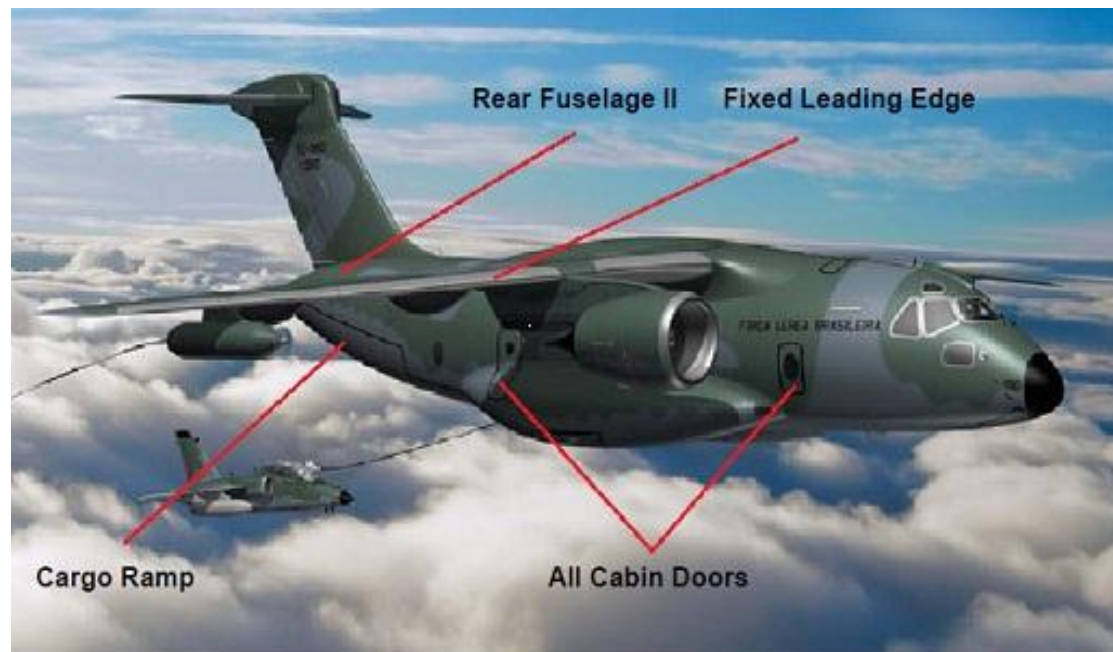


- AERO established in 1919
 - 1.200 employees, 180 mil.USD turnover in 2011

-- Embraer Program

- wing fixed leading edge
- all cabin doors (7)
- cargo ramp
- rear fuselage

www.aero.cz/en/



COMPLETE MODERNISATION OF L410 BY LET INDUSTRIES

-- LET L410

- 70s, 350 in service, 1.100 delivered
- Lowest operating and maintenance costs
- Proven reliability in extreme conditions
- STOL characteristics

-- Modernisation

- 2010-2014
- complete aircraft upgrade
- further decreasing DOC
- further improving performance



UTC SUPPLIER GOLD 2009, 2010 AWARDED TO AERO VODOCHODY



- Focus on perfect execution of Sikorsky programs
- Demonstrates continue cost improvements
- **Sikorsky S-76C/D Program**
- Fully assembled & equipped helicopter ready for dynamic parts installation, 300 helicopters delivered
- **Sikorsky UH-60 Black Hawk Cockpit**
- Fully assembled cockpit
- Control of the supply chain
- Provision of spare parts

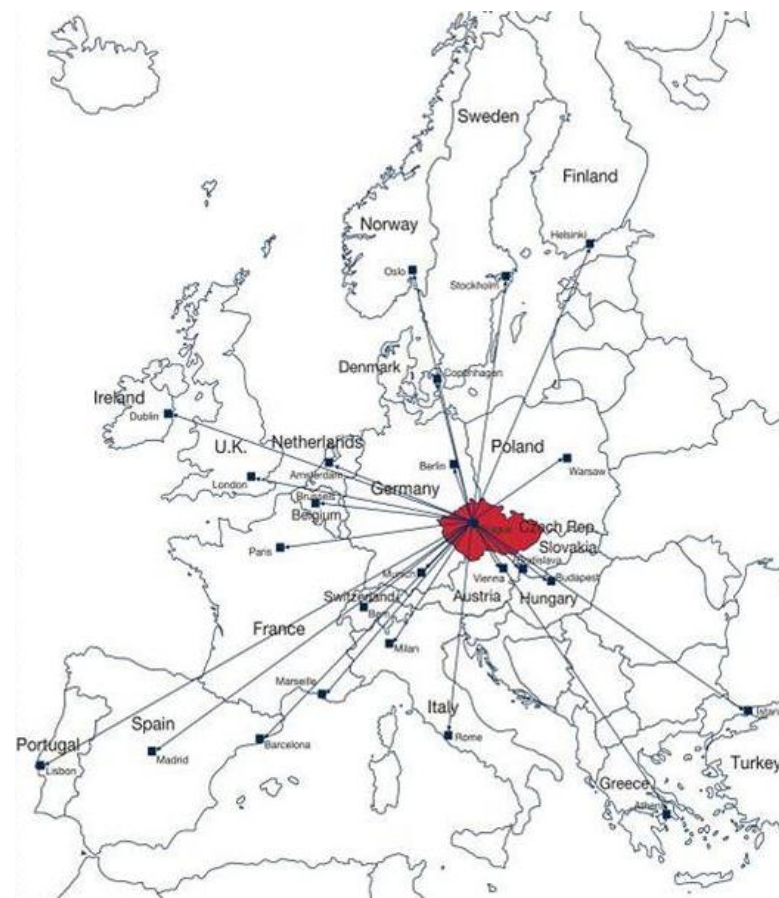


CZECHINVEST SERVICES (free of charge)



-- Set up by the Ministry of Industry and Trade to support foreign investors and local entrepreneurs in the Czech Republic.

- full information assistance
- handling of investment incentives
- business properties identification
- supplier identification
- aftercare services
- tailor-made visits
- access to EU structural funds
- networking



SEE YOU IN THE CZECH REPUBLIC

