

Defense and Security Market Report

Czech Republic

June 2018



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1 DEFENSE & MILITARY

1.1 TRANSITION FROM WARSAW PACT TO NATO MEMBERSHIP

In the 1990s, i.e. after the fall of the communist regime in 1989 and prior to joining the NATO in 1999, the condition of the Czech Army was still one of a former Soviet vassal. The Army had about 1,000 tanks, which could be used to invade a neighboring territory, but was not fit for defense operations typical for the post-cold war world.

In early 1990s, the Czech Republic decided to aim for NATO membership, and began to join the Alliance's missions through the Partnership for Peace program in 1994.

Despite being in dislike during the communist-era, the Army gradually began enjoying public respect throughout the 1990s following its successful foreign missions (KFOR mission in Kosovo, Permanent Freedom operation in Kuwait, Iraq and Afghanistan, the ISAF operation in Afghanistan, and several other minor tasks) where the Czech Army achieved both international and national acclaim.

In 1997, the Czech Republic, first among all NATO accession candidates, successfully passed the first round of evaluation of its readiness. The NATO summit held in July 1997 in Madrid invited three new members to join the alliance, namely the Czech Republic, Hungary, and Poland. Accession protocols were signed in December 1997 by NATO member countries' foreign and on March 12, 1999, the three countries became regular members, as the first wave of NATO enlargement by post-communist countries.

The Army of the Czech Republic (ACR) is also engaged in the EU military structures, in line with the country's EU membership since May 1, 2004. It regularly participates in joint exercises and operations.

While twenty years ago, at the time of NATO accession, the legacy of a Warsaw Pact army was obvious, its forces are now comparable to those of other NATO armies of countries of similar size. This said, the Czech Republic is fully reliant on collective defense with other NATO members in the case of a potential war conflict in the current geopolitical environment.

Czech soldiers have gained high recognition with their anti-chemical warfare unit in Kuwait, as well as members of special forces that operated in hostile territories in Afghanistan. On the other hand, the Czech Army, like those of many other European countries, is permanently understaffed and does not have enough men on key foreign missions.

1.2 INTERNATIONAL SECURITY ASSESSMENT AND OUTLOOK

The Czech Republic is a landlocked country surrounded by other NATO members (except for Austria) and entirely by European Union members, i.e. not protecting the external EU border, with no imminent threats present or foreseen.

This situation shifted priorities of Czech governments in the past into other areas. Defense spending is currently well below the Czech Republic's commitment to the NATO. Between 2005 and 2015, spending fell from the required 2% of GDP to less than 1%. The share of the national budget allocated to defense has been insufficient in comparison to many other European countries that are NATO members.



The situation changed with the Ukraine crisis and the Crimea annexation by Russia. Suddenly a war was going on almost next door as only neighboring Slovakia separates the Czech Republic from Ukraine. It served as a wakeup call for all EU countries and created pressure on decision makers to start preparing better defense strategies, and on politicians to start treating national defense as a priority again.

Similarly, the migration crisis (i.e. migrants from Africa and the Middle East coming to the EU after the Arab Spring caused instabilities in many countries) had a similar effect on spending of the Ministry of Interior and the Police, even though the Czech Republic serves mostly as only a transit country for migrants trying to reach Germany or other West or North European countries as their destination.

The Ministry of Interior and especially the Ministry of Defense have begun to increase funding and spending in innovation and modernization of their forces. The MoD declared plans to spend over CZK 150 billion (~ USD 6.7 billion) on army modernization projects by 2026. This upward trend is expected to further continue in the years to come.

1.3 MAIN BODIES AND INSTITUTIONS

The supreme commander of the Armed Forces of the Czech Republic (ACR) is the President of the Republic, Mr. Milos Zeman (as of June 2018). The highest military commander is the Chief of the General Staff, Lieutenant General Ales Opata. While the president's role in governing the Army is rather formal, the actual leadership is split between the Minister of Defense and the Army General.

Ministry of Defense

The Ministry of Defense (MoD) is the central authority of state administration for ensuring national defense. The Ministry directly controls the Armed Forces of the Czech Republic (ACR), supervises readiness and capacity of the Active Reserve Force, and administers the Czech military regions.

As the authority for ensuring the nation's defense, it formulates the national military defense policy, develops operation plans for the territory, and proposes defense arrangements to the government, to the Defense Council, and to the President.



Governing body: Government of the Czech Republic

Minister (Secretary): Mr. Lubomir Metnar (as of late June 2018)

Headquarters:
Ministerstvo obrany ČR
Tychonova 221/1
160 00 Prague 6
Czech Republic

Army of the Czech Republic

The primary mission of the Army of the Czech Republic (ACR) is to ensure military defense of the country against possible aggression and to meet commitments derived from international obligations and treaties of the Czech Republic on collective defense. The army also engages in peacekeeping operations in regions of instability or conflicts, and implements rescue and humanitarian missions both on the national territory and abroad.

The army is fully engaged in the integrated NATO military structure, contributing to defense operations and civil crisis management planning. It participates in joint exercises, in security consultations, and actively commits troops for NATO-led multinational operations.



Governing body: Ministry of Defense

General Staff of the Army

The General Staff acts as the body in direct control and command of the Czech Army. Following accession to NATO in 1999, the General Staff fulfilled tasks related to integration of the Czech military into NATO structures. NATO standards for training were introduced to the army. Since April 1, 2004, the General has been integrated into the structure of the Ministry of Defense. It is headed by Chief of Staff of the Army, appointed by the President of the Czech Republic based on nomination from the government. The Chief of Staff is subordinated to the Minister of Defense.



Chief of Staff: Army General Mr. Aleš Opatá

Headquarters:
Generální štáb AČR
Vítězné nám. 1500/5
160 01 Prague 6
Czech Republic

Military Police

One of the most important bodies falling under the governance of MoD, with many competences, the Military Police is a special police corps, which operates within the army structures. Its scope includes overseeing compliance with legislation, ensuring discipline and order at military premises and facilities and among soldiers, including any involvement in criminal proceedings. Further duties include guarding military facilities, ensuring personal security for senior officers and other protected persons, and securing the handling of prisoners of war.



The Military Police also provides protection to the armed forces, military facilities, military material and state property under administration of the Ministry of Defense. They also search for wanted and missing soldiers and lost or stolen military material. Only a career soldier can become a military policeman.

Governing body: Ministry of Defense

Director: Brigade General Mr. Pavel Kříž

HQ / Main Command:
Vojenská policie
Rooseveltova 620/23
161 05 Prague 6
Czech Republic

1.4 CZECH ARMED FORCES

According to the Global Firepower portal, the Czech army is the 30th strongest in the world and 9th in Europe. Particularly special regiments such as the anti-chemical warfare unit are well respected among NATO allies.

As the Czech Republic has no access to the sea, its major military forces are air and land forces.

The personnel of the Czech Army and Ministry of Defense has grown in the past three years, as shown in the below table. The next table below provides an overview of combat technology and armaments.

Personnel of Defense Department (Czech Army + MoD), 2015 to 2017

Year	Generals	Senior Officers	Junior Officers	Warrant Officers	Active reserves	Career Soldiers	Civilian Employees	State Employees	Total
2015	19	2,027	3,418	6,224	1,464	21,970	6,411	1,131	29,512
2016	25	2,094	3,596	6,654	1,485	23,184	6,515	1,148	30,847
2017	28	2,079	3,739	6,923	1,422	24,251	6,691	1,178	32,120

Main combat technology and armaments of the Czech Army, as of 2018:

Armored equipment	Battle tanks (all versions of T-72)	119
	Armored combat vehicles*	439
Artillery equipment	Artillery systems of 100 mm caliber and above	179
Air force equipment	Combat aircraft (all versions of JAS-39 Gripen and L-159 ALCA)	35
	Combat helicopters (all versions of MI-24 and MI-35)	17

* Armored combat vehicles include all versions of infantry combat vehicles of types BVP-1, BVP-2, BPzV, PANDUR II 8x8 CZ and armored transporters PANDUR II 8x8, OT-90 a OT-64.

1.4.1 AIR FORCE



The Air Force of the Czech Armed Forces ensures the sovereignty, defense and territorial integrity of the Czech Republic and its airspace. Units of the Air Force operate within NATO's Integrated Air and Missile Defense System (NATINAMDS), and in case of threat, the system is supported by activation of the National Air Defense System.

Key players in Czech aerospace industry

The Czech aerospace industry was substantially downsized after the fall of the communist regime in 1989. Manufacture of combat aircraft was reduced only to Aero Vodochody, while the state-owned company LOM PRAHA serves as the main repair center for helicopters.

Aero Vodochody - www.aero.cz - Leader of the Czech aviation industry specialized in development, assembly, production and servicing of military and civil aviation technology, with tradition since 1919.

LOM PRAHA - www.lompraha.cz - The only fully certified company providing repair & maintenance for Mi helicopters (Mi-2, Mi-8/17, Mi-24/35) in the NATO and the EU. Provider of comprehensive military aviation training. Production of ground, flight and tactical simulators.

The following two companies operate mainly in the civilian sector, but also serve as manufacturing contractors for the national military aircraft program:

AIRCRAFT INDUSTRIES - www.let.cz - Development, manufacture and sale of L410 UVP-E20 aircraft; maintenance, modification, modernization, sale of spare parts, subcontracting, R&D.

Evektor - www.evektor.cz - Design & development of aircraft, parts and components.

Aircraft operated by Czech armed forces

The Czech Air Force relies on **JAS-39 Gripen** to protect the country's airspace. This is the only supersonic aircraft of the Czech army. Fourteen fighters were leased from Sweden for a period of ten years from 2004. The contract was worth CZK 20 billion (USD 900 million). In 2014, it was extended until 2027 at additional CZK 21.4 billion (USD 970 million).

Spanish **CASA airplanes** (procured in 2009) represent the primary transport aircraft, replacing obsolete Antonovs AN-26.

Combat aircraft

- 30 combat aircraft
 - 14x SAAB 9 Gripen (12x JAS-39C fighter, 2x 2-seat JAS-39D training craft):

Gripens have replaced the legendary MiG-21s. All of them are part of the 211th Tactical Wing at the Čáslav airbase. The air fighters provide air security over the Czech Republic as part of NATO's Integrated Air and Missile Defense System (NATINAMDS). They are equipped with a single 27 mm Mauser BK-27 cannon, AIM-9M Sidewinder air-to-air missiles and beyond visual AIM-120C-5 AMRAAM air-to-air missiles.



- 16x Aero L-159 ALCA:

The single-seat L-159 is a light multi-role combat aircraft designed for a variety of air-to-air, air-to-ground and reconnaissance missions. The aircraft is equipped with a state-of-the-art multi-mode radar for all-weather, day and night operations and can carry a wide range of NATO standard stores including air-to-air and air-to-ground missiles and laser guided bombs.



- 17 combat helicopters
 - 17x Mil MI-24 and MI-35 (only 10 are operational and their lifecycle ends by 2018)

Combat training aircraft

- 9 training aircraft
 - 4x L-39 Albatros (+ 5 non-operational)
 - 5x Aero L-159T1

Non-combat aircraft

- 15 transport and surveillance aircraft
 - 6x Let L-410 Turbolet
 - 1x An-26 (not fully operational)
 - 1x Jakovlev Jak-40
 - 1x Bombardier CL-601 Challenger
 - 2x Airbus A-319 CJ
 - 4x CASA C-295M;
- 34 unarmed transport helicopters
 - 4x Mil MI-8
 - 5x Mil MI-17
 - 15x Mil MI-171S
 - 10x PZL W-3A Sokol



CASA C-295M

While the JAS Gripen jet fighters will remain the core of the national air defense until 2027 according to the Army's defense strategy, the situation is completely different in terms of combat helicopters.

The **MoD is now in the process of selecting and purchasing new multi-purpose helicopters**, which are to replace existing Mi-24V combat helicopters. Although the new ones are not supposed to be combat helicopters, the machines should have the ability to detect ground targets through modern sensors and to destroy them with modern, precisely-guided ammunition. Detailed information on this planned procurement is discussed in the section MODERNIZATION AND ARMAMENT STRATEGY on page 18.

FLIGHT TRAINING CENTER

(operated by state-owned company LOM PRAHA)

- 18 training aircraft
 - 7x L-39C Albatros
 - 9x Zlin Z-142
 - 1x Zlin Z-43
 - 1x Evektor-Aerotechnik EV-97
- 2 transportation aircraft
 - 2x Let L-410 Turbolet
- 12 training helicopters
 - 6x Mil Mi-17 Hip-H
 - 6x Mil Mi-2



L-39C Albatros

UAVs

The Czech Army plans upgrades in the field of robotics and autonomous systems. As of 2018, the Army operates UAVs of the following three categories: SMALL, MINI, and MICRO. They all belong to the smallest class defined by NATO – Class I.

The Czech Army currently owns the following UAVs / drones:

Micro / Mini:

- Wasp AE
- RQ-11B Raven
- SkyLark

Small:

- ScanEagle



ScanEagle

The ScanEagles as well as the Raven drones were used by the Czech Army unit deployed in Afghanistan.

By 2023-25 the Czech Army also plans to obtain Class II UAVs and new surveillance and combat drones for up to CZK 1 billion (U.S. \$46.5 million) in total.

NATO Airbase in Čáslav

Čáslav Airport serves as the 21st Tactical Air Force Base. The airport was built in the 1950's. Since it was designated as base for the country's combat aircraft, it underwent extensive modernization in line with NATO standards within the NATINAMDS (NATO Integrated Air and Missile Defense System). The base infrastructure is designed to operate Gripen jets, including simulation technologies and repair facilities.

The base is divided into headquarters, crew, 21st wing, including its 211th and 212th tactical squadrons, 213th training squadrons and 214th airplane repairs. Supporting units include the 215th Squadron and the 216th Squadron of Logistic Support.





In 2017, inspectors from the NATO Air Force Headquarters in Ramstein, Germany, tested the condition of various NATO bases for compatibility and interoperability with other allies by NATO standards. The overall condition of the Caslav Airport base and its infrastructure was ranked as “excellent”.

Radar Defense

The Czech Army's air defense relies on aging technology from the communist era, as its pillars are the then-famous Czech Radar VERA (S/M Passive Surveillance System) and Russian air defense missile system K12 M2 KUB (NATO code: SA-6 GAINFUL). Nevertheless, significant upgrades are to be made in the coming years. The MoD has planned to purchase 8 new MADR 3D radars - ELM 2084 MMR from the Israeli state company Elta System (known as part of the Israeli Iron Dome defense). The first delivery was to be deployed in 2019/2020, with others to follow by 2022, and the contract was to be over USD 170 million. However, in June 2018, the NATO alerted the Czech Republic to the fact that these radars could not be fully integrated with the NATO system and thus the plan is being revised. See MODERNIZATION AND ARMAMENT STRATEGY chapter on page 18.

The Czech Army also plans to complement these radars with new modern air defense missile system in the future.

1.4.2 GROUND FORCES AND SPECIAL FORCES



The Ground Forces are designed to form and train task force groups which can handle tactical and operational tasks on the Czech territory and beyond, including defense and attack combat activities, protection of communications, installations and areas outside of direct combat activity, surveillance operations, maintaining order and protection of civil population during peace operations in other countries, reinforcement of the state boundary, guarding of strategic infrastructure on the Czech territory and fulfilling tasks in favor of the Police of the Czech Republic.

The ground forces are underfinanced and underdeveloped in comparison to the air forces and still partially depend on technology from the Soviet-era, despite frequent upgrades/updates to meet the current needs and NATO compatibility.

Examples of equipment used by the ground forces are presented below:

ARTHUR mobile artillery and search radar

ARTHUR is ground radar that monitors the horizon for flying artillery projectiles and can determine the location from which they were fired and their target location. The radars also determine the position of mortars and artillery rocket launchers. However, this system is not able to monitor and evaluate low-flying targets, e.g. helicopters or aircraft. The operational range is between 2.7 to 40 kilometers.



RBS 70

The RBS-70 is a very short range portable anti-aircraft rocket set, developed and manufactured by Swedish Saab Bofors Dynamics A.B. It is a man-portable air-defense system designed for anti-aircraft warfare in all climate zones with little to no support from other forces. The rocket speed is Mach 2, with a range 5km high and 8km long.



Pandur II

The Czech version of Pandur II 8x8 differs from the original version in that a new breakwater controlled from inside the vehicle has been fitted, and the driver's hatch is fitted for CDND-1 night vision apparatus. Its armor is designed to protect against 14.5x114 ammunition (with RAFAEL add-on passive armor). SSAB ARMOX 500 armor steel is used on the bottom side of the hull which has an intermediate floor suspended from wall and ceiling mounts rather than floor mounted. The standard Pandur II has a flat bottom, but Pandur II CZ has its bottom shaped "A" which some sources claim to reduce the effect of mine blast on passengers. The Czech Pandurs also include a navigation, information, communication and identification system. The Czech Army has its Pandurs either unarmed or equipped with Rafael RCWS-30 and Mini-Samson RCWS units that carry 12.7mm machine gun.



Special Forces

The 601st Special Forces unit is the most respected task force of the Czech armed forces. It was officially established in 2003; however, its roots go back as far as 1952, when it was a paratroop brigade.

Members of the 601st unit participated in many foreign missions. The first deployment of the unit abroad was in Saudi Arabia during the Desert Storm operation in 1990. In the following years, members of the unit also participated in foreign operations on the territory of former Yugoslavia in the IFOR, SFOR and KFOR missions. It was also the first Czech army unit in the territory of Kosovo in 1999.

In 2004, the 601st unit was deployed in Afghanistan within the Operation Enduring Freedom; it was the first battle operation for the Czech Army since the end of the WW2. The 601st unit was active in Afghanistan until 2012 and gained high recognition among Special Forces of other allied countries.

Electronic Warfare Battalion

The 532nd Electronic Warfare Battalion is a specialized unit whose main task is to track, target, analyze and evaluate activities of the enemy's electronic means. Objects of interest include communication and non-communication signals of ground, surface and air targets. The battalion also performs tasks of electronic support, safeguards and electronic countermeasures.

Its armament consists of mobile electronic combat sets, signal jammers and radio reconnaissance, such as:

- Mobile electronic combat set that acts as protection against remotely activated charges by disturbing the signal needed to activate the detonator. The kit is connected to a vehicle that collects and analyzes data and then interferes with the targeted signals.
- RUP-FM-M Radio Surveillance Set, which serves for exploration in the field of short, very short and ultra-short waves
- Mobile electronic survey set Vera-S / M
- Stationary electronic survey set Vera-S / M, Vera N / G, Vera-A3D.



CBRN Defense

Defense against CBRN agents is a top priority for NATO's Emerging Security Challenges Division. This work is supported primarily by the **Joint CBRN Defense Capability Development Group** and the **Center of Excellence (COE) in the Czech Republic**.

JSBRN COE (www.jcbrncoe.cz, the Joint Chemical, Biological, Radiological and Nuclear Defense Center of Excellence) has a primary role in serving as an advisory body to NATO. It is responsible for CBRN Reachback (RB) support to operations and for operational planning support. It develops defense doctrines, standards and knowledge with the goal of improving interoperability and capabilities. It also provides education and training opportunities, assists and advises NATO, Supporting Nations and other international organizations and institutions in the area of CBRN defense. The Center also trains and certifies the CBRN Defense Task Force of the NATO Response Force. Established in 2006, the Center is based in Vyškov, Czech Republic, and is sponsored by 11 nations - the Czech Republic, Germany, Greece, Hungary, Ireland, Poland, Romania, Slovakia, Slovenia, the UK and the US.

The 31st NBC protection brigade based in Liberec is the main CBRN task force of the Czech Army. There are several other institutes dedicated to CBRN protection, such as the National Institute for Nuclear, Chemical and Biological Protection (SUJCHBO, v.v.i.) and the NBC Defense Institute of the University of Defense.

1.4.3 NATO COOPERATION AND INTERNATIONAL MISSIONS

Following accession to NATO on March 12, 1999, the Czech Republic also assumed a commitment to take part in foreign military operations under the flag of the Alliance.

Thanks to experience gained in UN multinational missions since 1993, followed by operations where the Czech Republic participated under the NATO Partnership for Peace Program, Czech military contingents and units have successfully fulfilled tasks in many parts of the world. As of now, Czech soldiers served in NATO-led ISAF operation in Afghanistan, renamed to Resolute Support Mission (RSM) as of January 1, 2015, in Kosovo KFOR, Somalia in the U.K., MFO in Sinai, in EU and UN missions in the Republic of Mali, and Althea in Bosnia and Herzegovina. A group of Czech signal troops officers contributed to NATO Active Fence operation in Turkey from September 2014 to January 2015, and Czech Air Force served on Air Policing operation in the Baltics and Iceland.

The Czech Republic also participated in multiple European Union operations and missions since the country's accession to the EU in 2004.

International missions with Czech Army participation	
<u>Afghanistan (Resolute Support)</u>	
<u>Task Force Kabul</u>	
<u>Guard Company Bagram</u>	
<u>Military Police</u>	
<u>Kosovo (KFOR)</u>	
<u>BiH (ALTHEA - EUFOR)</u>	
<u>Somalia (EUNAVFOR)</u>	
<u>EUNAVFOR-MED (Sophia)</u>	
<u>Mali</u>	
<u>Mali (EUTM)</u>	
<u>Mali (MINUSMA)</u>	
<u>Iraq</u>	
<u>Iraq (AAT)</u>	
<u>Iraq (CBRN)</u>	
<u>Iraq (MP)</u>	
<u>Sinai (MFO)</u>	
<u>Israel (UNDOF)</u>	
<u>Observers</u>	
<i>Source: MoD, with hyperlinks to more information</i>	

1.5 DEFENSE & MILITARY MARKET

1.5.1 DEFENSE BUDGET AND SPENDING

The Czech Army has been struggling with a lack of funds, which was further augmented by cuts in the public budget after 2009, witnessed by many other developed countries in the wake of the global economic crisis.

The Czech Republic, along with other NATO countries, has been criticized by NATO officials for low and further diminishing defense expenditures. The Czech government set a goal to raise the budget to 1.4% of GDP by 2020 (currently about 1%). There was a general skepticism even towards this goal; however, due to latest geopolitical developments such as new terrorism threats and Russia's aggressive policies, the current MoD officials expressed belief that the goal can be fulfilled.

		2013	2014	2015	2016	2017
MoD expenditures	CZK mil.	40,765	39,057	43,374	47,783	48,980
	USD mil.	2,084	1,585	*1,735	*1,958	2,157

* CZK was significantly weaker against USD from 2015 to mid-2017

One of positive tendencies has been an actual rise of real spending in the defense sector since 2014. In **2017, the total MoD budget reached CZK 48.9 billion** (USD 2.15 billion), which equaled only about 1% of the total GDP of the Czech Republic, far below the NATO agreed requirement of 2%. The Czech Republic belongs to NATO countries with the lowest defense spending as a share of GDP, as shown in the graphics below.

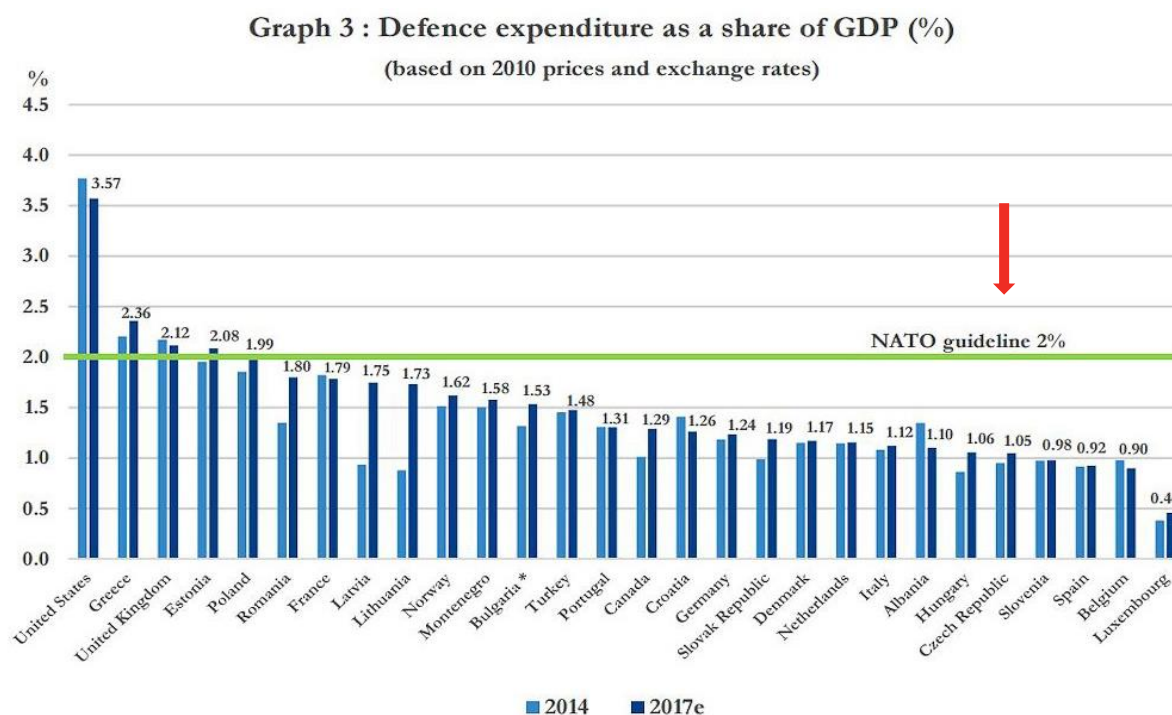
A major part of the MoD budget is mandatory expenditures. Consequently, spending on technology modernization, development and acquisitions amounted to only CZK 6 billion (USD 245.5 million) in 2016, which represents mere 12% of the MoD budget, again far below the NATO guideline of 20%. Please refer to the figure on the next page.

Nevertheless, in line with the MoD's action plan for 2016-2025, but also due to pressure from NATO and the United States, MoD spending should constantly rise up to 1.4% of total GDP in 2020, further up to the NATO desired 2% in 2025, and the percentage of funds going towards investments should rise, too. The already approved budget for 2018 already targets 1.1% of the total GDP, which itself grows significantly (approx. 5% in 2017), thus the nominal size of the MoD budget grows even more.

The following table shows planned the MoD budget increases, including on investments:

	2018	2019	2020
Expected MoD budget	51.2	53.8	56.3
Current expenditure	15.3	15.7	16.3
Personal mandatory expenses	27.1	27.7	28.4
Investment expenditures	8.8	10.3	11.5
Investments as % of MoD budget	17.1%	19.1%	20.4%

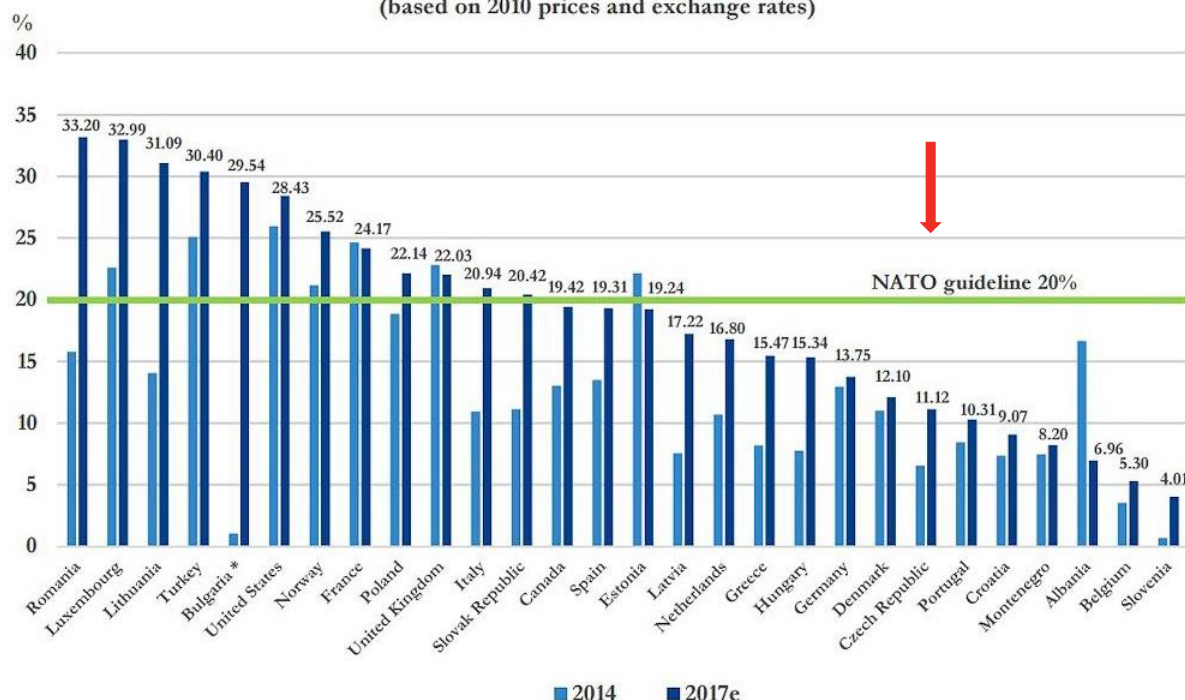
(in CZK billion)



Source: NATO

Graph 4 : Equipment expenditure as a share of defence expenditure (%)

(based on 2010 prices and exchange rates)



Source: NATO

Alternative Funding of Military Procurement

Besides funding directly from the national budget, the MoD can also finance its purchases through NATO, EU, and the US Foreign Military Financing (FMF).

As an example, NATO funding was used to invest into the construction of two backbone radars for the needs of the NATO Integrated Air Defense System (NATINADS).

The Czech Army is about to receive equipment worth CZK 65 million (USD 2.6 million) over the next 3-4 years through the FMF program. This is to include new radio stations, SRS 308/338 Sniper Rifles, special personal computers, or Rover 5i data receivers.

In a number of NATO countries, special agencies have been set up to coordinate and carry-out government-to-government (G2G) contracts, whether in the defense sector, industry or trade. The Czech Republic does not have such a dedicated agency, but uses its strategic and MoD-controlled state-owned enterprise VOP CZ in negotiating G2G contracts.

Major foreign suppliers to Czech Army

- **Saab AB (Sweden)** - www.saabgroup.com
- **Airbus Group SE (former EADS)** - www.airbus.com/defence/
- **General Dynamics European Land Systems (EU multinational, HQ in Spain)** - www.gdels.com
- **IVECO DEFENCE VEHICLES S.P.A. (Italy)** - www.ivecodefencevehicles.com
- **FN Herstal / Fabrique Nationale (Belgium)** - www.fnherstal.com

1.5.2 Czech defense industry

Largest private military and armaments companies

CZECHOSLOVAK GROUP (CSG)

www.czechoslovakgroup.cz/en/

A holding building upon Czechoslovak industrial tradition which is supported and further developed by Czech and Slovak companies in military and civilian industrial production. Its portfolio includes production and sales of military and special vehicles, all-terrain cargo trucks, weapons and weapon systems, ammunition, engineering products for automobile, railway and aerospace industries or transport and logistical services. CSG companies employ around 4,000 people and generated a revenue of CZK 12 billion (USD 487.8 million) in 2015.

CSG manages the following defense-related companies:

EXCALIBUR ARMY

www.excaliburarmy.com/en

Development, overhauls and upgrade of military hardware, e.g. BMP, T-72, DANA self-propelled howitzer, rocket launchers, combat engineering vehicles and others. The main production facility of the company is a former military maintenance plant acquired by EXCALIBUR ARMY in 2013, which is being further developed ever since. In 2015, the company secured a strategic partnership contract with General Dynamics which enabled them to offer, sell and deliver PANDUR II 8x8 CZ vehicles in different other markets.

TATRA DEFENCE VEHICLE

<http://tatradv.cz/en>

Specialized in production, overhauls and upgrade of armored and special vehicles for domestic as well as foreign customers, e.g. PANDUR II 8x8 vehicles, tanks, Land Rover vehicles and others.

KARBOX

www.karbox.cz/en/

Production of integrated containers and container facilities for utility and cargo vehicles, e.g. complete field hospital delivery to NATO NSPA.

Aero Vodochody

www.aero.cz

This traditional leading producer of military trainer jets has gained reputation with its subsonic trainer jets, including L-29 Delfin, L-39 Albatros, and L-59 Super Albatros, manufactured in high numbers in the 1950-1990s (approx.. 6,300 were produced). They are still widely used around the globe by air forces, acrobatic show teams such as the French Breitling Jet Team as well as by individuals (especially in the US).

In the 1990s, the company developed a light subsonic combat jet and advanced trainer L-159, primarily for the Czech Air Force who ordered 72 planes, but planned worldwide sales of this aircraft did not meet expectations. AERO introduced a new version of L-159 in 2017, negotiating with three potential buyers, one of which is (again) the Iraqi army.



In early 2000's, the company shifted its strategy towards contract manufacturing for foreign partners. AERO has been supplying complete civil helicopters S-76 (over 300 helicopters delivered since 2000) and fully assembled military cockpits for UH-60M and S70i Black Hawks to Sikorsky Aircraft Corporation. AERO also delivers components to Embraer (fixed leading wing edges), Saab (pylons for JAS-39 jet fighter), Alenia Aeronautica (center wing box for the transport plane C-27J Spartan), Latecoere (door subassemblies for Embraer 170/190), Boeing (gun bay doors for F/A18), Spirit AeroSystems (fixed leading edge kits for Boeing 767), and EADS (assemblies for Airbus 320/340). In 2012, AERO opened a new composite center, the largest of its kind in the Czech Republic.

The very latest news (June'18) say that AERO and Israel Aerospace Industries (IAI) will jointly bid in US Air Force tender for the OA-X program (experimental program to enlarge US Air Force with lower costing light combat aircrafts). The USAF demands 300 aircraft and AERO intends to offer their L-159 and L-39N. **AERO has been looking for a US partner with whom to form a consortium for the tender.**

Česká zbrojovka Uherský Brod (CZUB)

www.czub.cz

The largest Czech manufacturer of hand-held firearms, established more than 80 years ago, currently with over 2,000 employees. Some of its products became global bestsellers – eg. CZ 75, Dan Wesson and Škorpion sub-machine guns (types 58 and 61). Nowadays, over 90% of production is exported to 100+ countries. In 2017, the company sold over 300,000 firearms and thus belongs to the top 10 hand-held firearm producers and top 5 small automatic weapon producers in the world. Its largest export markets are the EU, Thailand, Canada, and most importantly the USA, where a production plant was established. Its current flagship products include: CZ SCORPION EVO 3 A1 submachine gun, CZ BREN 2 assault rifle, CZ P-07/09 and CZ P-10 pistols and the brand new CZ TSR sniper rifle.

Omnipol

www.omnipol.cz

A long-time synonym of trade in defense products in the Czech Republic (and former Czechoslovakia), with tradition since 1934, Omnipol is a supplier and system integrator of defense and security technologies, with a unique track record of work with the Ministry of Defense and Ministry of Interior. Among other, Omnipol supplied the SAAB Dynamics anti-aircraft missile system, CASA transport aircraft and Kongsberg-Protector remote weapon station to the Czech army, and Airbus helicopters to the Police. Omnipol currently offers fighter pilot training systems, parts and components for aircraft, armored vehicles, tanks, arms and ammunition as well as defense electronics for communication and navigation, surveillance and reconnaissance, C2 systems, radars and other. The company is heavily involved also in exports of defense and security technologies from various Czech producers, with a business record in over 60 countries worldwide. It owns stakes in two leading military producers, ERA and MESIT. Current projects also include cooperation with Aero in development (and future exports) of its new L-39 training aircraft. Besides defense and security, Omnipol supplies systems to the food and machinery industries.

Key state-owned companies in the R&D Sector

VOP CZ

www.vop.cz

A state-owned enterprise with 800+ employees, controlled by the Ministry of Defense, VOP CZ is active in the area of R&D in developing sensors for various purposes. Its main activities also include servicing and



repairs of defense technology, while its Security division (www.vop-security.cz) focuses on technology protecting people and critical infrastructure.

Importantly, the MoD uses VOP CZ for negotiating G2G procurement and export contracts. For export, the MoD consults with the Ministry of Foreign Affairs, Ministry of Industry and Trade, Czech Export Bank and the Export Guarantee and Insurance Company (EGAP), in order to realize the given deal.

Military Research Institute

www.vvubrno.cz/en/

As the only state-owned enterprise under the governance of the MoD operating as a specialized research institute, it ensures compliance with strategic interests in defense and security, working with the armed forces and the integrated rescue system of the Czech Republic. The R&D scope includes chemical protection of the army, electronic and cybernetic warfare, camouflage and deception, special metal and non-metal materials, sensors, technology of surface protection, quality system and logistics technology.

Military Technical Institute

www.vtusp.cz/en/

A state enterprise established by the Ministry of Defense to provide strategic deliveries and services to guarantee the Czech Republic's defense and security, and to fulfil its NATO and EU obligations. MTI provides development and testing of armament, ammunition, ground vehicles, unmanned aerial vehicles, aircraft on-board equipment, radio-technical equipment and aerodrome support equipment, simulators, communication systems and associated testing, verification and certification procedures. It is one of the largest institutions of its kind in the EU.

In line with the 2025 strategy plan of the Czech Army, joint R&D projects with other NATO countries should be one of the top priorities, as they allow access to state-of-the-art technology otherwise available only through expensive procurement.

Exports

Czech exports of arms and military material are rapidly growing. In 2016, they reached a record high at CZK 18.2 billion (USD 744.9 million), which represented a 20%+ increase in comparison to 2015 and a huge 250% increase in four years, i.e. from 2012.

The Czech Republic's largest export customer in 2016 was Iraq, with a total value of procurement at CZK 1.7 billion (USD 69.6 million). Other large buyers were the United Arab Emirates (CZK 1.4 billion), Slovakia (CZK 1.15 billion), and Egypt (CZK 1.1 billion).

Final 2017 export data are not yet available, but estimates suggest the total value exceeded CZK 20 billion (USD 909.1 million).

1.6 MODERNIZATION AND ARMAMENT STRATEGY

Key procurement plans by the MoD have been subject to political discussions and attention from media. Below is an overview of the biggest present and past army purchases as well as those planned in near or mid-term future. All investments into further development and improvement of the army must be in coherence with its official strategy on military development.



Largest procurement projects over the past 10 years (in descending order by value):

- CZK 14.4 billion (**USD 655 million**) - 107 Pandur II 8x8 APC wheeled armored vehicles from Austrian company Steyr in 2009
- CZK 4.8 billion (**USD 220 million**) - 62 Titus 6x6 armored transporters on Tatra chassis (local producer) in 2017
- CZK 3.6 billion (**USD 165 million**) - light armored Iveco vehicles in 2009
- CZK 3.5 billion (**USD 160 million**) - CASA C-295M transport planes in 2009 (from Spain)
- CZK 3 billion (**USD 120 million**) - small-caliber ammunition from Sellier & Bellot in 2017
- CZK 2.5 billion (**USD 114 million**) - servicing and maintenance contract with AERO Vodochody regarding the L-159 and L-39 aircrafts in use by the Czech Army in 2016
- CZK 2 billion (~ **USD 90 million**) - additional 20 Pandur armored vehicles, this time from Czech company Tatra Defence Vehicle, which obtained a license from the international group GDELS to produce Pandurs locally (with Tatra's own chassis). Contract signed in 2016.

Largest procurements expected in 2018 (in descending order by value):

- Rescue vehicles - CZK 237 million (**USD 11 million**)
- 4 new airport radars from Czech company ELDIS Pardubice to protect Czech military airports - CZK 162 million (**USD 7.5 million**)
- Monocular night vision devices - CZK 142 million (**USD 6.5 million**)
- Modernization of Mi-17 1Š helicopters - CZK 22 million (**USD 1 million**)
- Individual ballistic protection - CZK 24 million (**USD 1.1 million**)

The MoD is well aware of its default in structural upgrades of the Army in the past years. Consequently, there is a common consensus that this trend needs to change and the **MoD declared to spend over CZK 150 billion (~ USD 6.7 billion) by 2026 on army modernization projects.**

Several key projects have already been announced, among which the following are the largest (in descending order by contract value):

- **Heavy armored infantry combat vehicles;** expected value **CZK 53 billion (USD 2.5 billion)**
Expected to be the largest army contract ever; the Czech Army wants to change its 400 BVP-2 infantry combat vehicles of Soviet production. The MoD requested a detailed purchase specification from the army. Only one supplier will be approached once there is consensus on selection of the best technology meeting the Army's needs. In the summer, the army explored and tested several vehicles: PUMA from the PSM consortium (venture between Krauss-Maffei Wegmann and Rheinmetall Landsysteme), CV90 from BAE Systems, ASCOD from GDELS (General Dynamics European Land Systems), and Lynx KF31 from Rheinmetall Landsysteme. According to media reports, the German Puma gained the greatest attention of the Czech army. According to the MoD, at least 210 vehicles are to be purchased and the final number will depend on the price offered by the supplier.
- **12 multirole helicopters;** expected contract value **CZK 10 to 15 billion (USD 0.5 – 0.7 billion)**
A purchase of 12 new multipurpose helicopters is prepared by the MoD. The plan is to approach at least 3 suppliers. The Czech government has already addressed the US and Italian governments. The US government offered UH-1Y helicopters from Bell, the Italians offered AgustaWestland AW139M from Leonardo. None of these two offers were satisfactory to the Czech MoD. New helicopters have to be capable of troops transportation, direct ground support, reconnaissance, medical retreat, or tasks



in favor of the Czech integrated rescue system. The ministry wants to buy the aircraft together with equipment including armaments and ammunition. A part of the contract will be logistical and maintenance support throughout the lifecycle and training of aviation personnel. According to the MoD's plan, the delivery of the helicopters is planned over multiple phases until 2023.

- **52 new howitzers; expected contract value up to CZK 5 billion (USD 240 million)**
The army is in need of upgrading its artillery - replacement of the aging Dana howitzers is a priority. The Dana howitzers were produced in former Czechoslovakia and most armies of the Warsaw pact had or still have them in their arsenal.
- **80 light armored Iveco-based vehicles for anti-chemical units; expected contract value CZK 4.4 billion (USD 200 million)**
The vehicles will have advanced automatic sensors for combat substances but will also be able to measure industrial pollutants and other. The vehicles will offer better crew protection through armors and have the possibility to hermetically seal the cabin. The gun station can be controlled remotely from the cabin. The Military Research Institute (authorized to handle chemical weapons necessary to test vehicles) co-developed the cabin and the chemical systems, while the chassis will be supplied by the Italian Iveco. The CBRN response unit will receive 40 vehicles, while the other 40 will be distributed among other units.
- **8 new MADR 3D radars from Israeli Elta System, expected contract value over CZK 3.6 billion (USD 170 million)**
According to local media as of mid-June 2018, the NATO council (in particular: ASAB - Air and Missile Defense Command and Control Security Accreditation Board, responsible for security regulations for NATO systems) informed Czech authorities that it is not permissible to implement into the NATO system a radar system produced outside of NATO member countries, due to potential security risks associated with uncertified software. This cast negative light on Czech MoD and Army officials, who have been preparing the deal for the past couple of years. They have argued that they had been assured multiple times by the Israeli side that the radar system was fully NATO compatible.
- **Additional 16 pieces of RBS-70 very short range portable anti-aircraft rocket set, expected contract value approx. CZK 1 billion (USD 45 million)**
The weapon will be in the modernized NG version (RBS-70NG), supplied again by Swedish company Saab Dynamics AB
- **40,000 coats and 150,000 field uniforms (design type 95); CZK 463 million (USD 22 million)**
- **Additional Insitu ScanEagle drones; CZK 200 million (USD 9.5 million)**
The Czech Republic's General Staff informed that the Army plans to acquire new ScanEagle drones from Boeing's subsidiary Insitu. The drones, to be purchased in 2019, will supplement those used by the Czech Army already in Afghanistan.
- **350 assault rifles for the 601st Special Forces unit; worth approx. CZK 64 million (USD 3 million)**

The MoD plans to buy new AR-15 type assault rifles for the troops of the 601st Special Forces unit.

2 HOMELAND SECURITY

2.1 INTERNAL SECURITY SYSTEM

2.1.1 MINISTRY OF INTERIOR

The Ministry of Interior (Mol) is the supreme office for the realms of public administration, internal security, border protection and e-Government in the Czech Republic.

The Mol is the central government authority for home affairs, in particular responsible for:

- Public order and other matters relating to internal order and security within its defined scope of competence, including supervision of road traffic safety
- Fire protection
- The right of association and the right of assembly
- Registering organizations with international links
- State, economic and service secrets
- Maintaining archives and the territorial structure of the state
- Granting residence to foreign nationals and granting refugee status
- National border, surveying of the national border, maintenance and documentation;
- National symbols
- Registers of Vital Records; nationality, identity documents, reporting residence, the register of inhabitants, and birth (personal) identification numbers
- Maintenance of the telecommunication network of the Police of the Czech Republic and guidance relating to encoding services
- Cooperation with Interpol

Governing body: Government of the Czech Republic
Minister (Secretary): Mr. Jan Hamáček (as of end of June 2018)

Website: www.mvcr.cz
Headquarters address: Ministerstvo vnitra ČR
 Nad Štolou 936/3, Prague 7
 Czech Republic

National security within the Mol budget

National security expenditures accounted for approximately 75-80% of the Mol's budget over the past years. In 2017, spending increased due to expenses related to the migration crisis and to improve terrorism prevention. The largest part of the national security spending of the Mol goes to the Police of the Czech Republic, with a budget of CZK 31.4 billion (USD 1.4 billion) in 2017.

		2013	2014	2015	2016	2017
National security expenditures	CZK	42.0	43.1	50.1	46.9	52.5
within Mol budget	USD	2.1	2.15	*2.0	*1.9	*2.4

(in CZK & USD bil., calculated at average annual exchange rates)

2.1.2 SECURITY INFORMATION SERVICE (BIS)

The most important national intelligence agency of the Czech Republic is the Security Information Service (BIS). BIS is apolitical and has no police powers - it cannot detain, arrest or interrogate suspects. BIS reports to the Government, Prime Minister and President of the Czech Republic and its activities are regulated and controlled by the Government, the Parliamentary Committee and by its own internal audit.

BIS is responsible for acquiring, collecting and evaluating information concerning:

- Terrorist threats - BIS has been appointed the central intelligence service responsible for processing analytical and field intelligence related to national security and for fighting terrorism.
- Protection of major economic interests – the goal of BIS is to monitor and provide information on activities jeopardizing the security or major economic interests of the state
- Counterintelligence - BIS as a counterintelligence service identifies activities of foreign powers and natural or legal persons acting in the interest of foreign powers in the Czech Republic.
- Protection of constitutionality and democratic principles – BIS monitors activities of entities that openly or covertly perform acts aimed at undermining democratic foundations, sovereignty or territorial integrity of the Czech Republic
- Organized crime - BIS focuses mainly on informal non-institutionalized structures taking the form of lobbyist networks.
- Cyber security - BIS deals with cyber-attacks affecting protected interests of the Czech Republic.
- Protection of classified information - BIS's task is to protect people and entities who work with classified information and to identify critical vulnerable points with a danger of disclosure.

BIS employs about 300-500 persons and operates on a budget of CZK 1.2 billion (USD 48.5 mil).

Governing body: National Security Council of the Government
Minister (Secretary): Mr. Michal Koudelka

Website: www.bis.cz/defaultEN.html
Headquarters address: Bezpečnostní informační služba
Nárožní 13, Prague 13
Czech Republic

2.1.3 POLICE FORCES OF THE CZECH REPUBLIC

While external security of the state is provided (in cooperation with NATO) by the Czech Army, the Police forces of the Czech Republic are responsible for maintaining order within the country and ensuring internal security of the state. The Police forces of the Czech Republic consist of the national Police of the Czech Republic and of police units established, funded and controlled by municipalities, in accordance with legislation and as integral parts of the national Integrated Rescue System (IZS).

Police of the Czech Republic

The Police of the Czech Republic (PCR) is an armed security and law enforcement agency of the Czech Republic, with competences across the whole territory of the country. The main responsibilities are internal security and public order. PCR consists of the Police Presidium, units with a nationwide competence, Regional Police Directorates and units managed within Regional Directorates.

The territories under competence of the Regional Directorates are identical with geographical areas of the fourteen administrative regions of the Czech Republic. Typical units of the regional directorates are: Public Order Police, Road & Traffic Police, Intervention Units, Criminal Police and Investigation Service, Forensic Laboratories and Expertise Service, etc.

Centralized police units with nationwide jurisdiction include:

- Institute of Criminology in Prague
- Aviation Service
- National Antidrug Office
- National Office for Organized Crime
- Pyrotechnical Service
- Agency for Documentation and Investigation of Communist Crimes
- Agency for Protection of the President of the Czech Republic
- Agency for Protection of State Officials
- Agency for Special Activities of Criminal Police
- Agency for Combating Organized Crime
- Rapid Response Unit
- Alien Police - a highly specialized unit of the Police of the Czech Republic which performs tasks related to detection of illegal migration. The unit runs residence validity controls, operates detention facilities for immigrants, handles escorting activities in connection with deportation of foreigners or passing of foreigners through the Czech territory, has decision-making authority with regard to legal status assessment and in visa/entry permissions on the Czech territory. The Alien Police is directly subordinated to the Police Presidium of the Czech Republic.

		2014	2015	2016	2017
Expenditures of Police of the Czech Rep.	CZK billion	28.1	29.2	31.4	(exp.) 34.2
	USD billion	1.141	1.168	1.26	1.55

Most of the budget is spent on salaries – CZK 20 billion (USD 909 million), as the Police employs approximately 50,000 people (40,000 officers and 9,500 workers), while only about CZK 1.7 billion (USD 77.2 million) is available for investment in modernization and new technologies.

The Police currently operates 14 helicopters (8x Eurocopter and 6x Bell), an extensive fleet of police cars, some advanced surveillance vehicles, drones and other.

There are very few official or media reports on planned purchases for the police forces, other than on plans to buy new cars for the Police and for the presidential escort (with special anti-explosion and bullet proof armor). The police also has plans to purchase additional 16-20 advanced drones.

Governing body: Ministry of Interior
President: General Major Mr. Tomáš Tuhý

Website: www.policie.cz
Headquarters address: Presidium Policie České republiky
 Strojnická 27, Prague 7
 Czech Republic

Rapid Deployment Unit

The Rapid Deployment Unit, locally recognized under the name **URNA** (**ÚTVAR RYCHLÉHO NÁSAZENÍ** – meaning Rapid Deployment Unit), is the local number one SWAT team. The unit is subordinated to the designated police president deputy, who, with the consent of the Ministry of Interior, decides on the unit's deployment. The unit commander is authorized to give commands for particular engagements. The main purpose of URNA is to fight against terrorists, hijackers, dangerous perpetrators of organized crime. The officers are selected from the ranks of the Police in a multi-stage recruitment where candidates are subject to special physical and special training.

URNA armament:

- Weapons of caliber 9mm Luger
 - Glock 17
 - Glock 26
 - Heckler & Koch MP5
 - MP5K PDW - short version with shoulder rest and front grip
 - MP5 SD - equipped with integrated silencer
- Weapons of caliber 5.56 x 45 NATO
 - HK G36C
 - G36K
 - FN MINIMI
- Weapons of caliber 5.7 × 28 mm
 - FN 90
- Grenade launchers of caliber 40x46mm
 - HK 69
 - HK AG36
- Weapons of caliber 7.62 × 39 vz .43
 - SA-58
- Machine guns
 - AK 47, AR 15, etc. - typically fitted with a tactical light Sure-Fire M3, a laser sight and an OKO collimator
- Sniper rifles
 - URNA uses three basic calibers: .308 Winchester, .338 Lapua Magnum and .50 BMG.
 - Heckler & Koch HK417 support sniper weapon (7.62x51mm / .308 Win.) is also used for shooting from helicopter
 - SIG SSG 3000 Sniper (.308 Winchester caliber) with Hensoldt optical sight
 - Accuracy International (optionally with silencer)
 - SAKO TRG-42 .338 Lapua Magnum against obstructions and long distances
 - Accuracy International AW50 .50 BMG
- Other URNA sniper equipment: laser rangefinder, night vision, Stoney Point tripod for weapon support during shooting, shooting gloves, periscope, Weather station Kestrel 4500 NV
- Shotgun
 - Benelli M-3T
- Grenade launcher
 - caliber 26.5mm
 - RV85 - fires projectiles with irritating or smoky cloth with force sufficient to break thinner walls.



Basic equipment

- Kevlar helmet with black cover
- Bolle X800T Tactical Glasses
- Tactical vest
- UTON or Ka-Bar TDI attack knife
- Tactical gloves



- Black single-lock hood
- Knee protectors
- Peltor ear protectors
- Transmitter
- Throat holster

2.1.4 MUNICIPAL POLICE

Municipal police units are administered by cities and municipalities. They closely cooperate with the national Police of the Czech Republic. Each unit is controlled by the mayor or another authorized member of the municipal council. Municipal police has jurisdiction over misdemeanors, supervises and protects the safety of citizens and properties, public order, collaborates within its competences with the Police of the CR in terms of safety on roads, deals with offences and other wrongdoings.

By far the largest municipal police unit in the Czech Republic, the Prague City Police operates with a budget of CZK 1.75 billion (USD 75 million).

Governing body: Prague City Council
Director: Mr. Eduard Šuster

Website: www.mppraha.cz
Headquarters address: Městská policie Praha
 Korunní 98, Prague 1
 Czech Republic

2.2 DOMESTIC, REGIONAL AND INTERNATIONAL THREATS

According to the MoI's Security Strategy, the following are the main categories of potential threats to the Czech Republic:

Organized crime

Organized crime is currently the most serious non-military threat to Czech society and national security. Criminal groups can undermine social order, disrupt economic stability, and hurt democratic structures.

Organized crime of the 21st century is characterized by a high degree of fluidity. Organized crime groups are mostly based on international contact networks, where the border between legal and illegal environments is almost permeable. These groups indirectly influence politics, justice, production and trade, media and entertainment industry, and civil society as a whole in a way that makes it often difficult for security forces to distinguish between legitimate and illegitimate activities.

The most dangerous organized criminal groups in the Czech Republic reached an advanced stage where they use frauds instead of violence to gain power and benefits.

The operational level of the fight against organized crime is primarily ensured by specialized units of the Police of the Czech Republic (Organized Crime Detection Unit).



Terrorism

Although Central & Eastern European countries have not been target of radical Islamism-related terrorist attacks, the Mol as the main national coordinating unit in fight against terrorism dedicates maximum priority to its readiness and prevention of potential terrorist threats.

Civil aviation safety

Protection of civil aviation is a priority area for monitoring, primarily because it is a permanent target area for terrorists in the long run. The Mol, in cooperation with the Police and other bodies, regularly organizes exercises aimed at increasing civil aviation safety.

Cyber threats

As a developed European country, the Czech Republic has been increasingly dependent on information technology. Cyber threats and IT crimes occur in a wide range and various degrees of severity - from cyber espionage, hacking and DDoS attacks to increasingly frequent internet fraud. For more information on cyber security see CYBER DEFENSE & SECURITY on page 33.

Extremism

Radicalization, professionalization and internationalization of extremists have been imposing an immediate everyday security threat. Due to violence and fears spread by extremists, the Ministry assigned extremism with the highest security priority.

Specific attention is being paid to extremism on the Internet, where the most frequent extremist activities include support and promotion of movements aimed at suppressing human rights and freedoms, violence against a group of people or an individual, defamation of a nation, race, ethnic or other group of persons, incitement to hatred against a group of people or to limitation of their rights and freedoms.

The US “issue” - Many "defective sites" are located in the United States because the American concept of freedom of speech is different from the European perspective. The content of websites that might fulfill the facts of an "extremist" crime in the Czech Republic will not be illegal in the United States. This problem concerns not only the Czech Republic but also other EU states. The Police of the Czech Republic and the Ministry of Interior are in pursue of finding more effective ways to fight this phenomenon.

Corruption

Whilst the Czech criminal law does not define corruption as such, there are punishments of various forms of corruptive conduct, such as bribery, offenses in which corruption is included in the facts (public contracts and tenders related corruption), and crimes where corruption may be a motive (e.g. fraud).

2.3 CRITICAL INFRASTRUCTURE

“Critical Infrastructure” is a critical infrastructure component (pursuant to Act No. 240/2000 Coll. on Crisis Management and Amendment to Certain Acts) whose disruption would have a significant impact on national security, needs of the population, health of people or the national economy.

Soft targets protection

Like other countries in the world, the Czech Republic pays increased attention to prevention of terrorist attacks in places with high concentration of people, so called “soft targets” such as historical sites and public spaces in Prague, shopping centers, sports venues, major traffic hubs, etc.

The Czech Police uses a Geographic Information Systems (GIS) paired with data from video surveillance, as well as other systems in order to monitor and evaluate potential threats. The Police also closely cooperates with other forces of the security system (Army of the Czech Republic, Fire Brigade, Municipal Police) to work on constant improvement of public safety.

The following are the key facilities considered as critical national infrastructure.

Airports

There are 8 international airports in the Czech Republic, but only 5 of them have regular flight routes, and only 3 have over 250 thousand passenger movements annually, with one truly busy international airport.

Letiště Praha-Ruzyně (Václav Havel International Airport Prague)

www.prg.aero



Prague has by far **the largest and most important international airport in the Czech Republic** and the largest airport among the new EU member states. It annually handles over 13 million passengers. Prague Airport works closely with the Prague city council, Ministry of Transport, Civil Aviation Authority, Air Navigation Services of the Czech Republic, air carriers, and public authorities within the aviation sector.

Letiště Brno-Tuřany (Brno Airport)

www.brno-airport.cz

In proximity of the second largest city of the Czech Republic – Brno, this airport suffers from the short distance of the city (125km) to the major hub of the Vienna International airport, the largest airport not only in Austria but in all of central Europe. Brno Airport handled 470,000 passengers in 2017.

Leoš Janáček Ostrava Airport

www.airport-ostrava.cz

Located 20 km south of the 3rd largest city of the Czech Republic – Ostrava. The Irish airline Ryanair is the major airline operating flights to and from this airport. The airport handled 325,000 passengers in 2017.

Nuclear Plants

Temelín Nuclear Power Plant

Electricity is generated in two production units with VVER 1000 Type V 320 pressurized water reactors. In spring 2003, the Temelín Nuclear Power Plant, with its 2,133 MW of installed capacity, became the largest power resource in the Czech Republic. Fuel for the plant is supplied by Westinghouse (USA), which has also supplied a new instrumentation and control system.



Temelín Nuclear Power Plant

Installed capacity	1 x 1,078 MW + 1 x 1,055 MW
Commissioned	in 2002
Type of reactor	VVER 1000

Dukovany Nuclear Power Plant

The plant consists of four pressurized water reactors, with heat capacity of 1,375 MW and electric capacity of 510 MW. The first reactor unit was put into operation in 1985 and the last (fourth) unit in 1987. It annually supplies approximately 13 TWh of electric energy to the national power network.



Dukovany Nuclear Power Plant

Installed capacity	4 x 510 MW
Year of commissioning	1985 – 1988
Type of reactor	VVER 440

Dams

There are numerous dams on Czech rivers, 8 of them have the maximum water capacity of over 100 million cubic meters. One of them clearly stands out in terms of size.

The largest dam, **Orlík**, is bigger than the second and third dams combined in terms of total water capacity, thus the most important in the country. Any major damage to the dam would create a serious threat to the capital city of Prague, which lies down on the same river (60 km by air).



Orlík dam

Maximum water capacity	716 million cubic meters
In operation since	1961
Concrete dike – dimensions:	91m high and 450m long

Crude Oil Pipeline and Depot

Pipelines

There are two crude oil pipelines. IKL is the newer of the two, connecting the German city Ingolstadt with local refineries, delivering oil from the West (Germany). The first one installed, Druzhba, brings Russian crude oil from the East (via Ukraine and Slovakia). They meet in the central part of the country.

IKL Pipeline

Length in CZ	347 km
In operation since	1995
Annual crude oil capacity	10 million tons

Druzhba pipeline

Length in CZ	357 km
In operation since	1965
Annual crude oil capacity	9 million tons



Source: Mero ČR

Central crude oil tank farm in Nelahozeves

The Czech Republic's central large-capacity strategic oil reserve tank farm is located 20 km north of Prague, near the town of Nelahozeves.

The total storage capacity is 1,550,000 cubic meters (four tanks of 50k m³, six with 100k m³, and six with 125k m³).

The owner of both pipelines as well as of the tank farm in Nelahozeves is the state company **MERO ČR, a. s**



Currently only **2 refineries process crude oil**, both owned by **PKN Orlen**, a Polish multinational petrochemical group, through the local group **Unipetrol**.

1. Česká rafinérská refinery in **Litvínov** refines 5.64 million tons of crude oil per year (heavy Sulphur crude oil coming from the Russian pipeline Druzhba)
2. The second refinery in **Kralupy** processes 3.3 million tons of low-Sulphur crude oil transported via the IKL (usually from Saudi Arabia or Azerbaijan as the countries of origin).

Critical Infrastructure facilities in the Czech Republic



Nuclear power plants

Water dams

International airports

Crude oil depots

2.4 PHYSICAL SECURITY MARKET

2.4.1 OVERVIEW

According to various rankings, the Czech Republic is one of the world's safest and most peaceful countries.

As in most developed countries, the security market is shifting from mechanical and simple technologies towards smart solutions. While the commercial market often requires state-of-the-art solutions and local distributors and security system integrators respond by putting newest products into their portfolios, the home security segment lags behind and the shift towards new solutions in residential property protection is significantly slower. Nevertheless, smart security technologies are gradually found not only in specialized stores and e-shops, but also of regular electronics and DIY stores.

2.4.2 VIDEO SURVEILLANCE

The video surveillance market (including intelligent, machine learning, advanced recognition systems) has become increasingly competitive, with product suppliers and system integrators fighting for a share in a fast growing market.

Public institutions, businesses, and critical infrastructure and industrial facilities develop a security system with video monitoring as the core technology. Also most Czech towns and cities have made or plan to make significant investments in upgrading and extending their video surveillance systems, in line with the Ministry of Interior's strategy and recommendations to strengthen protection of so-called soft targets.

In May 2018, the capital city of Prague (population 1.3 million) signed a contract to replace its current street cameras with a new system capable of facial recognition and behavior analysis, with HD+ resolution, and with many other advantages against the current (in many cases still analog) one.

The company that won the tender to supply and operate the system is a subsidiary of ELTODO GROUP (www.eltodo.cz) - a video-surveillance system integrator **KH servis a.s.**. The contract value is approximately USD 35-40 million. ELTODO is the Czech leader in transportation & traffic systems (including public lighting), as well as communication, power engineering, and smart city applications. ELTODO cars cruise the streets of Prague with cameras installed on the top, which scan registration plates of parked cars and the system identifies cars without parking permission or unpaid/expired ticket.



Also regional capitals such as Liberec, České Budějovice, and Pilsen are planning or already in the process to significantly upgrade their number of surveillance cameras and their control systems.

As a result, there are numerous public calls for tenders on video surveillance systems every year. However, since this trend started several years ago, the market is already penetrated by many international producers and suppliers of camera systems. Security system distributors / integrators have exclusive partnerships with international brands or represent multiple brands. The Chinese company Hikvision, one of the world's leading camera surveillance producers, likely holds the largest share in the local market, private and public alike. Still there are many other brands in the market and new ones have been trying to enter the local market.

2.4.3 LEADING SECURITY INTEGRATORS AND CONTRACTORS

Profiles of five of the most important security system integrators are presented below.

Trade FIDES, a.s.

www.fides.cz

Founded in 1995, Trade Fides is one of the leading security systems integrators in the Czech Republic. It has supplied many important private, commercial, public and state facilities, such as the Czech Savings Bank or the Cesky Krumlov Castle, as well as securing important police and army premises. With 240 employees, Trade FIDES recorded USD 34.3 million in turnover in 2016.

MAXPROGRES, s.r.o.

www.maxprogres.cz

Est. in 1996, MAXPROGRES Inc. focuses on security technologies but also sells other electronic technologies. The company acts as a system integrator, providing complete deliveries from design through to project implementation, including 24/7 warranty and post-warranty servicing. MAXPROGRES is an exclusive distributor of security systems from French HYMATOM SA for the Czech Republic. With 36 employees, its revenues reached USD 7.2 million in 2016.

EVPU Defence a.s.

www.evpudefence.com/en/

EVPU Defence's main activities are development, design, production and maintenance of special monitoring and surveillance fixed and mobile systems, including vehicles with infrared and optical sensors and laser rangefinders, two-axis intelligent pan/tilts, and multi-sensor heads. The company also supplies software applications for various monitoring and surveillance systems. They specialize systems for public use (eg. monitoring of air quality), for police or army services for border protection and surveillance, airport protection, coastal protection, army bases and other places and objects of interest. The company had 65 employees and USD 8.8 million in turnover in 2016.

TELMO a.s.

www.telmo.cz

Based in Prague, TELMO offers complete turnkey security solutions. Telmo is active in large projects either as a subcontractor for construction companies or manages such projects independently. Their biggest clients include Skoda Auto, ABB Elektro, Monroe Czechia, T-Systems Czech Republic, T-Mobile Czech Republic, GTS, TRW, CEZ, and the Institute of Organic Chemistry and Biochemistry in Prague. With 75 employees, its latest financial data show USD 14.4 million in revenues last year (2017).

ATS – TELCOM PRAHA, a. s.

www.atstelcom.cz

A Prague-based telecommunication corporation specialized in design, installation and maintenance of large telecommunication networks and integrated services based on ALCATEL-LUCENT technologies. The company had 55 employees and approximately USD 8.8 million in turnover in 2015.

A very strong position in the market of electronic security is held by the Czech company Jablotron:

JABLOTRON

www.jablotron.cz

A great success story among privately owned Czech companies established in the 1990s, Jablotron Alarms a.s. (part of Jablotron Group, www.jablotrongroup.com) has grown into a leading regional, if not global producer of security technologies, employing over 660 people, with sales of CZK 2.9 billion (USD 130 million) in 2017, and exports to 70+ countries worldwide.

2.5 CYBER DEFENSE & SECURITY

2.5.1 BUSINESS AND HOME SECURITY

Cyber security is where the Czech Republic is a frontrunner among Central and Eastern European (CEE) countries, possibly thanks to the two IT security pioneers AVAST and AVG Technologies, who have set the benchmark for this market in the country.

The highly skilled Czech workforce helps Czech companies operating in the cyber security market to be internationally competitive. Some are closely cooperating with leading US and Israeli players in the field.

Still, according to a 2016 survey by Ipsos, only some 8% of Czech companies had capabilities to locate and evaluate cyber security threats, which is actually a competence required by the new Cyber Security Act that came into force in January 2015. According to the survey, 50% of Czech companies with 100+ employees planned to significantly raise their IT security spending over the next couple of years.

A major push towards increased IT security investments came from the newly introduced EU-wide GDPR legislation (General Data Protection Regulation), effective from May 2018, requiring companies to secure systems where they store personal data of EU citizens, including their clients, partners and employees.

2.5.2 CYBER SECURITY ON NATIONAL LEVEL

Cyber-defense has become one of key areas where government funds will be directed in the coming years in order to improve protection of national security, including protection of information, intelligence and C2 (Command and Control) systems.

National Cyber Security Center

The key public body in matters of national cyber security is the National Security Authority (NBU). Within the NBU, the **National Cyber and Information Security Agency** (www.govcert.cz/en/), is part of the national and international early warning system (CSIRTs) and has responsibility for coordination of cooperation in preventing and addressing cyber-attacks, and for the introduction of necessary measures in this area. Team members of the National Cyber and Information Security Agency include top cyber-defense experts from the private sector, and their responsibility is to ensure defense of state institutions, power plants, banks and other key institutions against hacking attacks.

In 2016, the NBU scrutinized 15 major governmental bodies to investigate their readiness and capabilities against hacking. 12 did not pass the test, thus violating the cyber security law. The most recent major cyber-attack against a state institution occurred in February 2017, when a group of **Russian hackers penetrated email accounts of the Ministry of Foreign Affairs**, including that of the Minister himself.

Based on an Amendment to the national Cyber Security Act, **Military Intelligence** (MoD is the governing body) will also play an important role in the state's cyber defense; in particular the newly established **National Center of Cyber Forces**. Military experts will try to avert attacks on important targets in the Czech Republic, such as hospitals, power plants or critical infrastructure. The Military Intelligence will also monitor digital networks of telecommunication operators, which has led to discussions over the effect on privacy rights. The National Center of Cyber Forces will be performing active cyber defense, meaning they will go after the sources of threats and will make use of the Military Intelligence's activities and capabilities. The budget of the National Center of Cyber Forces is around USD 15 million.

3 PUBLIC PROCUREMENT SYSTEM

Significant changes have lately been made to the public procurement system through the new **Act No. 134/2016 Coll., on public procurement**. Before this new act, public procurement procedures were based on legislation from 2006 which introduced several vaguely defined exceptions related to procurement of “strategic importance” and “in the interest of national security”, which were frequently availed of by various ministries to conclude contracts directly with pre-selected candidates, thus creating an environment of low transparency and risk of corruption.

The **Ministry of Defense** had a statutory obligation to use local intermediaries for all purchases from foreign entities. This too led to cases of fraud and inefficiencies, and was rightly abolished in 2011.

The act was first amended in 2012 in order to reduce those exceptions allowing authorities to avoid open tenders. The new **Act No. 134/2016 Coll., on public procurement** became effective on October 1, 2016. Its main objective was to transfer easier, more effective, and less bureaucratic European regulations for all parties into the national legislation. Another important milestone will occur in October 2018, after which all communication between authorities and tender participants will be only in electronic form.

Procurement procedures according to Act No. 134/2016 Coll. on Public Procurement

According to its preamble, the general aim of the new legislation is to:

1. provide conformity with the law of the European Union;
2. set clear rules, which are capable to prevent corruption, guarantee effective use of public funds, prompt realization of needed public projects and fair competition of bidders;
3. reduce administrative burdens of public procurement and at the same time ensure a sufficient level of transparency.

In particular, the new law aims at reducing the length of the procurement procedure, the number of cancelled procedures, the number of objections and complaints, and differences between the expected and the realized price of the tenders.

All public procurement must meet the following key principles:

1. principle of transparency,
2. principle of proportionate manner,
3. principle of equal treatment,
4. principle of non-discrimination.

Based on the equal treatment and non-discrimination principles, foreign companies have equal rights to participate in pre-tender consultations, as well as in the actual tenders. This applies to all EU states and all countries that have an international agreement with the Czech Republic allowing each other's suppliers to participate in public tenders. The USA belongs to this latter category.

While for small scale contracts, public authorities are not obliged to select bidders and award contracts through public procurement procedures, for under and over-threshold contracts the requirement applies and eight types of procurement procedures exist. The following table specifies the limits for small contracts, under-threshold and above-threshold contracts.

Public procurement based on expected size of contract:

Small-scale public contracts
▪ under CZK 2,000,000 (approx. USD 95,000) / under CZK 6,000,000 (approx. USD 285,000) in case of construction works
Under-threshold contracts
▪ over CZK 2,000,000 (approx. USD 95,000) / over CZK 6,000,000 (approx. USD 285,000) in case of construction works
Above-threshold contracts
▪ over CZK 3,686,000 (approx. USD 175,000) for Czech government bodies and ministries, state-funded organizations (hospitals, orphanages, libraries, museums, etc.)
▪ over CZK 5,706,000 (approx. USD 270,000) regional offices and its bodies and for non-profit organizations
▪ over CZK 11,413,000 (approx. USD 545,000) for state-owned sectoral suppliers (utilities, public transport, postal service)
▪ over CZK 142,688,000 (approx. USD 6.8 million) in case of construction works for any contracting authority

However, **defense and security related tenders** (*not just those published by MoD or Mol*) can be processed only in the following five regimes:

- Simplified under-threshold procedure (under-threshold tenders only)**
The procedure starts with the authority publishing its call for submission of bids on its website, and any bidder may submit a bid in response to this call.
- Restricted procedure**
This is a two-phase procedure where initially any bidder may submit a request to participate in response to a call. After assessment of compliance with required qualifications, only selected bidders are invited by the contracting authority to submit their (non-negotiable) bids.
- Negotiated procedure with publishing**
In this two-phase procedure, the contracting authority can negotiates with bidders to achieve the most convenient conditions of the bid. This type of procedure may be used only in specific cases, for example when the contract cannot be awarded without prior negotiations because of specific circumstances related to the nature, complexity or legal and financial make-up.
- Negotiated procedure without publishing**
This procedure may only be used under strict conditions. The contracting authority is obliged to provide justification for using this procedure. The contracting authority calls on one or several bidders to negotiate. After the negotiations, the invited bidders submit their bids. Large defense and security, as well as IT tenders, are often executed in this regime.
- Competitive dialogue**
This is a three-phase procedure which may be used under specific conditions. During its first phase, any party may submit a request to participate in response to a contract notice by providing

proof of capabilities requested by the contracting authority. In the second phase, the contracting authority negotiates the most suitable solution with selected participants. After finding the most convenient solution, the contracting authority calls for the submission of bids. This type of procedure is used when the contracting authority knows its needs and aims, but is not able to find the most suitable solution by itself (e.g. in cases of very large investment projects).

Since 2017 / 2018, **all ministries of the Czech government, including their bodies and institutions**, are required to use a single bidding portal: the National Electronic Tool (Národní elektronický nástroj - NEN), accessible at <https://nen.nipez.cz>.

Active tenders issued by the **Ministry of Defense** are listed [here](#)¹, while active tenders of the **Ministry of Interior** (including bodies and institutions falling under the rule of the MoI) are listed [here](#)².

Ministry of Defense - Section of Armaments and Acquisitions

The Armaments and Acquisitions Section is the MoD's organizational unit responsible for procurement, including via the NATO Security Investment Program (NSIP) and foreign assistance programs (FMF / FMS). The Section also develops future procurement strategies.

Head of Section: Deputy Minister Mr. Daniel Koštoval
Address: Ministerstvo obrany
 Sekce vyzbrojování a akvizic
 Náměstí Svobody 471/4, 160 01 Prague 6
 Czech Republic
 tel.: +420 973 216 374
 email: svamo@army.cz

Ministry of Interior - Public Procurement and Central Purchasing Department

This department of the MoI issues and coordinates tenders for all nationwide jurisdiction departments; regional headquarters may issue tenders on their own.

Head of Department: Mr. Stanislav Loskot, Director
Address: Ministerstvo vnitra, odbor veřejných zakázek a centrálních nákupů
 P.O.BOX 155/VZ, náměstí Hrdinů 1634/3, 140 21 Prague 4
 Czech Republic
 tel.: +420 974 816 722
 email: vezak@mvcz.cz

¹<https://nen.nipez.cz/SeznamPlatnychProfiluZadavatelu/MultiprofilZakladniUdajeOZadavatelim-310920816/SeznamZahajenychZadavacichPostupu-310920816/>

²<https://nen.nipez.cz/SeznamPlatnychProfiluZadavatelu/MultiprofilZakladniUdajeOZadavatelim-18361113/SeznamZahajenychZadavacichPostupu-18361113/>



Police - Public Procurement Department of the Police Presidium

The Public Procurement Department prepares and updates plans for procurement of centrally sourced assets and a timetable for awarding public contracts and small orders.

Head of the Section: Mr. Martin Šlemer
Address: Policejní prezidium České republiky
Pelléova 21, 160 41 Prague 6
Czech Republic
tel.: +420 974 835 653
email: pp.ovz@pcr.cz

4 ROUTE TO MARKET

4.1 ENTERING THE CZECH MARKET

Good opportunities exist particularly for U.S. companies supplying high-end, advanced products, as their technologies can surely attract local authorities and meet the current needs of the Army, Police, or the private sector.

The Czech Republic is a member of the EU, Organization for Economic Cooperation and Development (OECD), and World Trade Organization (WTO), and applies all international regulations from those bodies. Most provisions governing Czech imports have been EU-harmonized, while others are national. Companies from the USA can apply the same business principles when entering any other EU market.

U.S. companies can gain access to the Czech defense and security market via the following channels:

- Direct exports
- Contracting a local distributor – for small and medium size companies this is generally the most effective route to market
- Establishment of a local subsidiary / trading company in the Czech Republic
- Acquisition of a local company – this strategy would provide an immediate access to local production or market know-how as well as existing distribution channels and certifications
- Appointing a sales agent (although this is not a very common concept in the Czech market).

Having someone local who speaks the Czech language on the ground is a major advantage. The Czech Republic is a rather small country where local contractors and suppliers to MoD and MoI have developed well-established contacts with key decision makers. These companies are able to react quickly and flexibly towards actual needs, as they often have “inside” information about planned procurement.

Under the new European General Data Protection Regulation (GDPR) that came into force on May 25, 2018 sending unsolicited emails is no longer allowed without the prior permission of the recipient.

Upon request, EasyLink Business Services, the VEDP consultant in Central and Eastern Europe, can provide further assistance with identifying and contacting potential partners.

4.2 ASSOCIATIONS, PUBLICATIONS AND FAIRS

TRADE SHOWS

Name: **IDET - International Fair of Defense and Security Technology**
 Website: www.bvv.cz/en/idet/
 Date: May 29 – 31, 2019
 Venue: Brno
 Profile: One of the biggest shows of defense and security technology in Central and Eastern Europe.



Name: **FUTURE FORCES**
 Website: www.natoexhibition.com
 Date: October 17 – 19, 2018
 Venue: Prague
 Profile: FUTURE FORCES is an international exhibition event in defense & security field organized biennially in Prague and officially supported by the Czech Ministry of Defense, Chief of the General Staff, Ministry of Interior, Ministry of Foreign Affairs, civil and military parts of the NATO HQ, European Defense Agency (EDA) and other institutions, organizations and agencies.



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ASSOCIATIONS & ORGANIZATIONS

Name: **Defense and Security Industry Association of the Czech Republic (DSIA)**
 Website: www.aobp.cz/en
 Description: Association of Czech companies engaged in research, development, production, trade and marketing of military and security equipment, material and services.



Name: **Association of Aviation Manufacturers in the Czech Republic (ALV)**
 Website: www.alv-cr.cz
 Description: The association has 35 members, from major prime contractors and systems suppliers, through aircraft aggregates and components manufacturers to small specialist companies.



PUBLICATIONS

Name: **REVIEW FOR DEFENSE AND SECURITY INDUSTRY**
 Circulation: n/a
 Frequency: Quarterly
 Website: www.msline.cz
 Publisher: MS LINE s.r.o.
 Description: A printed and online magazine representing the Czech defense and security industry. Its principal mission is to contribute to better cooperation between the government and its agencies and the Czech defense and security industry.



SECURITY MAGAZÍN

Name: **SECURITY MAGAZÍN**
Circulation: n/a
Frequency: Bi-monthly
Website: www.securitymagazin.cz
Publisher: Security Media, s.r.o.
Description: A magazine focused on all aspects of security. The printed version is published since 1994.

Name: **ATM**
Circulation: 16,000
Frequency: Monthly
Website: www.atmonline.cz
Publisher: MAGNET PRESS, SLOVAKIA s.r.o.
Description: Magazine focused on military technology and equipment. Published in both the Czech Republic and Slovakia



Name: **Letectví a kosmonautika**
(Aviation and Astronautics)
Circulation: 16,000
Frequency: Monthly
Website: <http://work.letectvi.cz/avizo/avizo.htm>
Publisher: MAGNET PRESS, SLOVAKIA s. r. o.
Description: Aerospace magazine with the longest tradition in the Czech Republic and Slovakia.



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