NEWS SUMMARY JANUARY 12 – JANUARY 18

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ECONOMY & FINANCE

CNB[1] VICE-GOVERNOR: CROWN MAY GO BOTH WAYS AFTER CAP LIFT – 14.1.

The Czech crown will not necessarily strengthen after the CNB lifts its cap on the currency, and may well move in both directions, CNB Vice-Governor Mojmír Hampl said in an interview published on Saturday. The CNB launched the intervention regime in 2013.

"If I were a market player, I would definitely not bet all my money that the only direction for the crown, after the exit from the exchange commitment, would be to strengthen," Hampl told Lidove Noviny.

The bank has been facing increasing pressure to defend its crown cap - it bought around EUR[2] 9bn[3] of foreign currency in the first 10 days of January to hold the crown back as investors poured in expecting the bank to scrap the commitment. Hampl said the bank's position remained that it would not stop the interventions before the second quarter and the board saw the most likely date as mid-2017.

An overwhelming majority of analysts polled by Reuters on Friday expected the CNB to end its crown cap as soon as the second quarter, swayed by an acceleration in the inflation rate and an influx of investor funds.

Czech inflation reached the CNB's 2% target in December for the first time in 4 years, but Hampl said the board was more interested in the broader trend than in one set of data."It is not about one moment, but also the right assessment of future development," he said. "For example, that we will be quite sure that we won't have to return to the exchange commitment in one year and a half or two years."

ANALYSTS: INFLATION PRESSURES ON INDUSTRIAL PRODUCTION TO GROW – 17.1.

Inflation pressures on industrial producers will intensify in 2017. Raiffeisenbank's analyst Daniela Milučká has commented on data from the CSO[4] that she estimates that industrial producers' prices will on the average grow by 2.2%. Komerční Banka's economist Viktor Zeisel says that industrial producers' prices are strongly affected by oil prices on global markets. Oil soared to USD[5] 55 per barrel in early December 2016. ING Bank's chief economist for the CR,[6] Jakub Seidler, believes that the decline of producers' prices has subsided and will help keep inflation close to the CNB's 2% target. Interventions may thus be terminated in Q2[7] 2017.

EMPLOYERS CONFIDENT ABOUT ECONOMIC GROWTH IN 2017 – 15.1.

Representatives of leading Czech firms have put economic growth in 2017 at between 2.5 and 3.1%, according to the ctk news agency which conducted a poll among employers. According to employers, growth should be fueled by the drawing of EU structural funds, but could be undermined by a lack of qualified workers. The CNB predicts a growth of 2.9% this year and 2.8% in 2018.

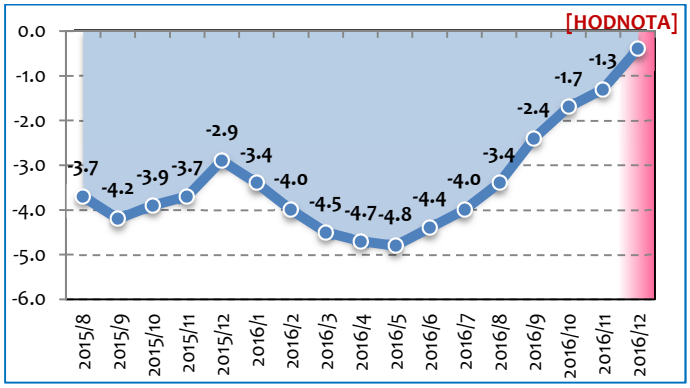
PRODUCER PRICE INDICES – 16. 12.

In December 2016 compared with the previous month, industrial producer prices went up by 0.5%. In comparison with the year 2015, on average for the whole year 2016 prices of industrial producers were both lower by 3.3%.

M-o-m,[8] prices of **industrial producers** went up by 0.5%. Prices were higher particularly in 'coke, refined petroleum products'. Prices increased in 'electrical equipment' (+0.9%) and 'chemicals and chemical products' (+0.6%). Prices decreased only in 'mining and quarrying' (-0.1%). Prices remained stable in 'food products, beverages, tobacco', thereof 'dairy products' (+2.0%).

Y-o-y,[9] prices of **industrial producers** went down by 3.3% in 2016 y-o-y (-3.2% in 2015). Prices decreased primarily in 'coke, refined petroleum products'. Prices were lower in 'chemicals and chemical products' and 'mining and quarrying' (-6.1% both). Prices fell in 'electricity, gas, steam and air conditioning' (-4.1%) and 'food products, beverages, tobacco' (-2.0%). Prices rose in 'water supply, sewerage, waste management and remediation services' (+1.3%).

Graph 1: Industrial producer prices, 2015-2016, Y-o-y (in %)



In December 2016 compared with the previous month, agricultural producer prices were lower by 0.4%. In

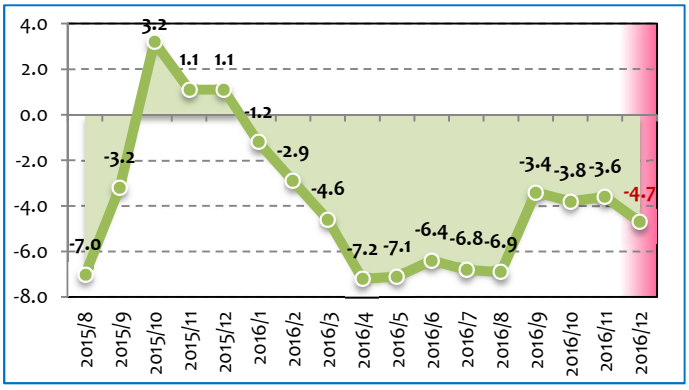
[1] CNB: Czech National Bank, is the central bank and financial market supervisor in the CR with its headquarters in Prague and a member of the European System of Central Banks. In accordance with its primary objective, the CNB sets monetary policy, issues banknotes and coins and manages the circulation of currency, the payment system and settlement between banks. It also performs supervision of the banking sector, the capital market, the insurance industry, pension funds, credit unions and electronic money institutions, as well as foreign exchange supervision.
[2] Euro: €, EUR, is the official currency of the Eurozone, which consists of 19 of the 28 member states of the European Union
[3] Bn: billion
[4] CSO: Czech Statistical Office, is the main organization which collects, analyses and disseminates statistical information for the benefit of the various parts of the local and national Govts of the CR. It accomplishes this goal through the management of the Czech Statistical Service.
[5] USD: $, USD, the United States dollar is the official currency of the United States and its overseas territories. It is the currency most used in international transactions and is the world's most dominant reserve currency.
[6] CR: the Czech Republic
[7] Q2: 2nd quarter of the year
[8] M-o-m: month on month
[9] Y-o-y: year on year

comparison with the year 2015, on average for the whole year 2016 prices of agricultural producers were lower by 4.9%.

M-o-m, **agricultural producer** prices fell by 0.4%. Prices of fresh vegetables (-8.7%), pigs for slaughter (-2.4%) and poultry (-1.8%) went down. Prices of eggs (+6.9%), milk (+6.4%), fruit (+4.3%), oil plants (+1.9%), cereals (+0.9%) and cattle for slaughter (+0.8%) went up.

Y-o-y, **agricultural producer** prices were lower by 4.7% (-3.6% in November). Prices of crop products went down by 8.6%. Prices of fresh vegetables (-35.3%), potatoes (-20.5%), cereals (-13.3%) and oil plants (-1.7%) decreased. Prices of fruit increased (+2.6%). For the first time after 25 months of decrease, prices of animal products grew by 0.6% due to increasing prices of pigs for slaughter (+13.5%). Prices of milk (-2.8%), eggs (-3.1%) and poultry (-7.7%) decreased.

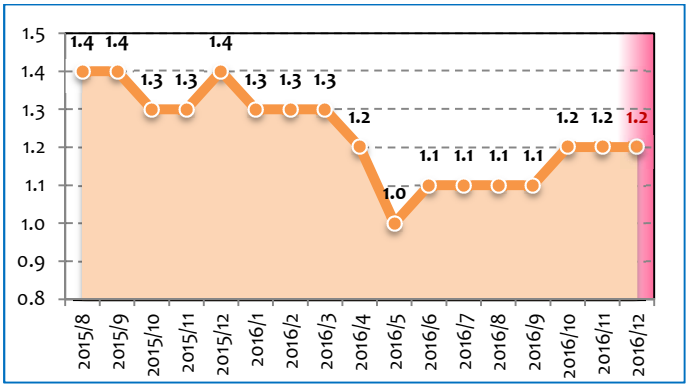
Graph 2: Agricultural producer prices, 2015-2016, Y-o-y (in %)



In December 2016 compared with the previous month, Construction work prices grew by 0.1%. In comparison to December 2015, Construction work prices increased by 1.2%.

According to an estimate, **m-o-m construction work** prices rose by 0.1% and construction material input prices stayed unchanged, and y-o-y **construction work** prices rose by 1.2% (like in November) and construction material input prices grew by 0.3% (-0.1% in November).

Graph 3: Construction work prices, 2015-2016, Y-o-y (in %)

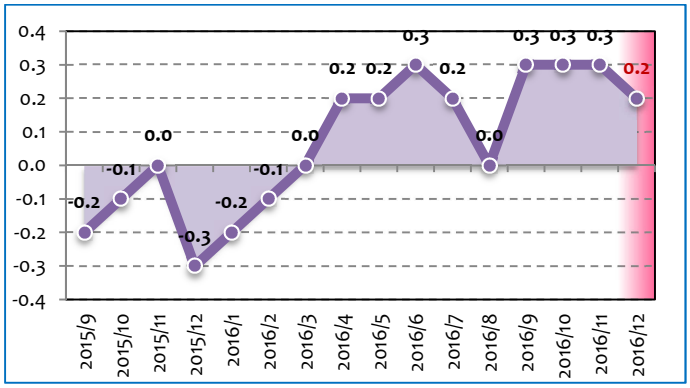


In December 2016 compared with the previous month, prices of market services fell by 0.9%. In comparison with the year 2015, prices of market services rose by 0.1%.

M-o-m, **market services** prices **in the business sphere** were lower by 0.9% due to the price decreasing of 'advertising and market research services' (-11.5%) and 'employment services' (-2.1%). On the increase were prices of 'insurance, reinsurance and pension funding services, except compulsory social security' (+1.5%) and 'land transport services and transport services via pipelines' (+0.4%). Market services prices excluding advertising services rose by 0.1%.

Y-o-y, prices of **market services in the business sphere** grew by 0.2% (+0.3% in November). Increasing were prices in 'employment services' (+2.7%) and 'insurance, reinsurance and pension funding services, except compulsory social security' (+1.0%). After ten months of growth, prices of 'advertising and market research services' fell by 0.2%. Market services prices excluding advertising services increased by 0.2% (+0.1% in November).

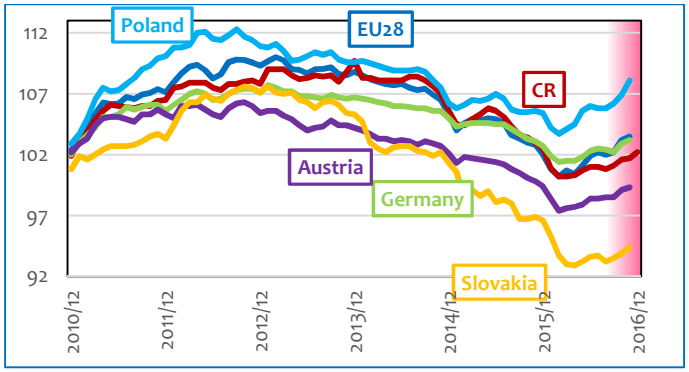
Graph 4: Market services prices, 2015-2016, Y-o-y (in %)



According to the Eurostat News Releases, industrial producer prices increased in November by 0.3% (+1.0% in October) in EU28, **month-on-month.** The highest increases were observed in Belgium and Ireland (both +1.4%). Prices rose in Poland (+1.1%), Slovakia (+0.5%), Germany (+0.3%), Austria (+0.2%) and the CR (+0.1%). Prices decreased the most in Croatia (-1.3%).

Industrial producer prices were higher in November by 0.7% (+0.2% in October) in EU28, **y-o-y.** Prices increased the most in the United Kingdom (+4.4%). Prices went up in Poland (+2.4%) and Germany (+0.1%) and went down in Slovakia (-2.6%), the CR (-1.3%) and Austria (-0.5%). Prices decreased the most in Luxembourg (-6.5%).

Graph 5: Industrial producer price index, International comparison, 2010-2016, monthly data (2010 average = 100)



DEPUTIES OUTVOTE SENATE ON BILL ON BUDGETARY RESPONSIBILITY – 18.1.

The Czech Chamber of Deputies outvoted on Tuesday a Senate veto and again passed a bill on budgetary responsibility rules, which introduces instruments against public budgets falling into debt and which the Senate says is unconstitutional in relation to municipalities. Senators said

previously they will turn to the CC[10] if the deputies outvote the upper house.
They claimed that it is a regular, not constitutional bill, which interferes in the municipalities' constitutional right concerning their financial management.
The Govt[11] coalition is likely to draw an amendment that will react to the municipalities' objections.
Last year, 63 out of 67 senators present, voted against the bill. On Tuesday, the bill was supported by 105 deputies, while at least 101 votes were needed to pass it.
According to the bill, the Govt and other offices will have to take remedial measures if the debt of public budgets crosses 55% of GDP.[12]
The Govt would be obliged to present such draft state budgets that would lead to the long-term sustainable state of public finances, while municipalities and other institutions would have to have at least balanced budgets.

MORTGAGE RATES STAY AT RECORD LOWS IN DECEMBER – 18.1.

Mortgage rates in December stayed at their record low levels of a month earlier averaging 1.77 percent according to the Hypoindex monitor. But the volume and number of loans dropped sharply on November, down by around 12 billion crowns at 17.7 billion crowns. Some lenders altered their conditions followed a new law giving existing borrowers greater freedom to pay back loans without penalty.

SOCIAL & EMPLOYMENT

NUMBER OF FOREIGNERS IN CR RISES TO RECORD LEVELS – 13. 1.

The number of foreigners in the CR in 2015 was the highest in the country's history – a little under half a million according to new numbers released by the CSO. The number is almost double what it was in 2004 when the country joined the EU.[13]
For many foreigners, the CR is the country they chose to begin again, and the latest numbers indicate more and more are hoping to gain long term residency. In 2015, the number of registered foreign nationals rose to 464,700 according to the CSO. Broken down, the largest group of foreign nationals in the country are Ukrainians (23%), followed by Slovaks (22%), and Vietnamese (12%). 8% come from Russia, five% from Germany, and four% from Poland, while the number of Bulgarians and Romanians seeking to stay and work in the country has also increased.
The draw for many foreigners is jobs with many Czech firms hiring to fill gaps at home. The shortage of qualified workers on the labour market is a problem that many companies have been grappling with, not altogether successfully, for some time, despite the fact that some 380,000 Czechs remain jobless. Many jobs on offer aren't being snapped up, and that's one reason the Govt introduced a fast-track programme aimed at increasing the influx of skilled workers from Ukraine. MLSA[14] Minister Michaela Marksová:
If we look at neighbouring Germany we see that they also have a problem [filling some jobs]. I think that if we really focus on inviting people from abroad who have the proper skillset, that's absolutely in order."
Until now, the Govt programme, aimed at bringing in thousands from Ukraine, has largely stalled for logistical reasons; changes should be implemented now to speed up the process again. Czech TV spoke to a number of firms including one which had employed 18 Ukrainians but was still waiting for months for an additional 70. Meanwhile, others remain critical of such plans, arguing that foreign workers should not take so-called Czech jobs.
Communist Party deputy leader Jiří Dolejš told the broadcaster that bringing outside workers was not a good idea while Czechs were out of work, while the head of the CCC[15] Vladimír Dlouhý argued the opposite, that unless the country bet on foreign nationals, overall economic growth could suffer.
Others, such as the head of the ČMKOS,[16] Josef Středula, told Radio Prague this week that there was nothing wrong with recruiting Ukrainians but suggested that there was another underlying problem which was that many firms were actually looking to fill jobs which were low-skilled and poorly paid. He made clear that Czech firms should not abuse the system to their own benefit.
"It's not possible that just anyone from abroad works for rates which are below those offered for Czech workers. That's the biggest cause for this difference over Ukraine. Our experience has unfortunately been that employers are offering pay and conditions that are so low that Czechs simply would not work at such rates."

UKRAINIANS AGAIN MAKE MOST ASYLUM REQUESTS IN CR – 17.1.

A total of 1,475 foreigners applied for asylum in the CR last year, according to figures released by the country's MI[17] on Tuesday. The number was 50 lower than for 2015. Continuing a long-term trend, Ukrainian citizens made the most asylum requests, with just over 500. The Iraqis placed second on the list with 158 asylum requests, a jump of 120 on the figure for 2015. However, the Govt has since abolished a system of programme bringing Christian Iraqi refugees to the CR after a number moved on to Germany and others returned home.

[10] **CC**: Constitutional Court of the Czech Republic
[11] **Govt**: Government of the Czech Republic
[12] **GDP**: Gross domestic product
[13] **EU**: European Union, is a politico-economic union of 28 member states that are located primarily in Europe. It has an area of 4,324,782 km^2, and an estimated population of over 510mn. The EU has developed an internal single market through a standardised system of laws that apply in all member states. EU policies aim to ensure the free movement of people, goods, services, and capital within the internal market, enact legislation in justice and home affairs, and maintain common policies on trade, agriculture, fisheries, and regional development. Within the Schengen Area, passport controls have been abolished. A monetary union was established in 1999 and came into full force in 2002, and is composed of 19 EU member states which use the euro currency.
[14] **MLSA**: Ministry of Labour and Social Affairs
[15] **CCC**: Czech Chamber of Commerce
[16] **ČMKOS**: a dominant union confederation in the CR, which had almost 400,000 members in 2011. ČMKOS is the Czech successor of the Czech and Slovak union confederation. It has separate affiliated member unions divided broadly on an industry basis, of which the largest are the metalworkers union, OS KOVO, with some 140,000 and the teachers' union, ČMOS PŠ, with around 50,000 members
[17] **MI**: Ministry of the Interior

More foreigners than Czechs caught working illegally for first time – 18.1.

The Czech labour authorities caught more foreigners than Czechs working illegally for the first time ever last year, iDnes.cz reported on Wednesday. While 1,338 non-nationals were uncovered working off the books in 2016, the number of Czechs was 758. The previous year the figures were the other way around, iDnes said. The highest number of undocumented foreign employees came from Ukraine, Vietnam, Slovakia and Moldova. Fines totalling CZK 71mn were imposed on employers using illegal workers last year.

Increased tax relief for parents with children backed in lower house – 13.1.

Lower house lawmakers have passed a raft of proposed Govt tax changes which mainly focus on offering more tax relief for parents for second, third, and fourth children. The move, for example, boosts tax relief for a second child by 2,400 crowns to reach 19,404 crowns. The measure, if backed by the Senate and president, should come into effect by April 1. But a series of amendments to the rules over electronic cash registers and sales declarations proposed by both Govt and opposition parties failed to win sufficient support.

ENERGY

New law brings tightened security at NPP[18] – 15.1.

A new nuclear power law which took effect in 2017 has tightened security at the country's two nuclear power stations, Czech Television reported on Sunday. The legislation has significantly increased the number of employees who need to have security clearance to work at a nuclear power facility. While in the past this concerned the station's management and those who worked directly with nuclear fuel, which was around 200 people, now anyone who has access to sensitive areas such as the vicinity of reactors or nuclear fuel storage facilities much have clearance. This has increased the number of people with security clearance five-fold.

Cabinet agrees to wider consultations over nuclear waste site – 16.1.

The Czech Govt agreed in principle Monday that wider consultations with local councils take place before choosing a site to store high level nuclear waste. But the Govt rejected a specific proposal put forward by the MIT,[19] which also suggested that the upper house, the Senate, be involved. That idea in particular sparked opposition from other ministries and the Govt's own legislative council which warned that dangerous precedents might be set. The MIT has now been tasked to create a working group to come up with new ideas by June 2018, after elections to the lower house of parliament scheduled to take place in October this year. The repository site should be selected by 2025 with seven sites now in the shortlist as possible locations.

[18] NPP: Nuclear Power Plant
[19] MIT: Ministry of Industry and Trade

INDUSTRY & TRADE & TRANSPORT

Czech companies start getting to grips with Industry 4.0 revolution– 12.1.

The MLSA has warned in its study of the possible effects that around 140,000 jobs could disappear within the eight years to 2025. And the Govt initiative passed last year dealing with the so-called Industry 4.0 scenario goes even further by warning that 54% of all Czech jobs could be at risk from the process.

Clearly most of the jobs at risk are those which are repetitive, such as cashiers in shops and supermarkets. But even jobs which might now be regarded as semi-skilled, such as long distance truck drivers, could be at risk as well with the possibility of automatically driven cars, trucks, buses, and other forms of transport.

The CR has so far not been in the forefront of preparations for the new industrial revolution – a conference in 2015 year highlighting the issue was masterminded by the Czech-German Chamber of Commerce and Industry. Part of the reasons were clearly somewhat selfish, German companies have re-sited a lot of their manufacturing and sub-contracting in the CR and are keen that the local companies are able to keep up with their demands and needs.

According to the Czech business daily, Hospodářské Noviny, a trio of German companies in the CR are leading the way with the 4.0 revolution. They are Volkswagen-owned Škoda Auto, Continental, and Siemens.

Siemens last year launched an investment programme which aims to introduce the new technology in all its seven Czech factories. Bosses say the investment should improve quality and production by cutting current manufacturing times by around a tenth. But Siemens says that while some Czech positions will be lost in the short term at the moment the trend is still towards recruitment.

Czech unions' fears about mass lay-offs have also been assuaged for the moment, according to the paper. The head of the biggest grouping of Czech unions, the ČMKOS Josef Středula says that automatization can get rid of repetitive jobs. But he argues as well for broader preparations for the new industrial revolution which look at the wider implications. *"That's why we are saying that together with Industry 4.0 we should also have a Work 4.0 and Society 4.0,"* Středula told the paper.

Record 1.35mn[20] cars produced in CR last year – 17. 1.

A record 1,344,000 cars were produced in the CR in 2016, according to figures presented on Tuesday by the president of the country's AIA,[21] Bohdan Wojnar. The industry's output was 8% higher than in 2015 while the biggest local carmaker, Škoda Auto, recorded a 12.5% increase in production. The sector is expected to see further, if slower, growth this year.

Metro service to see some improvements – 17.1.

This year will some changes to metro operation to make the lines more useful for the public. This follows on improvements to bus and tram operation last year. The

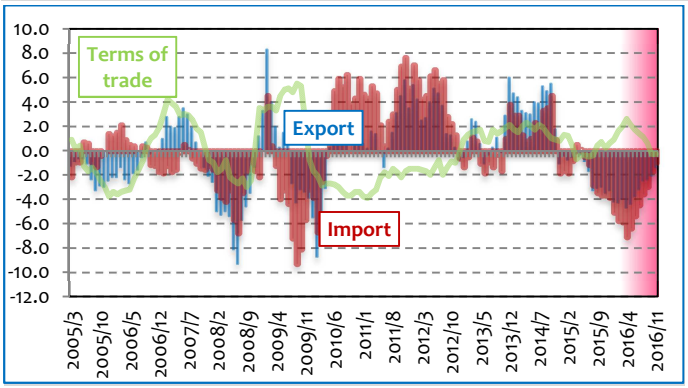
[20] Mn: Million
[21] AIA: Automotive Industry Association, AutoSAP, AIA represents companies making up nearly 90% of the Czech automotive industry. Their share in total industrial production posted an annual rise of 1% to 22%.

changes will be in response to surveys conducted by transit operator Ropid. Service will be increased to some stations, and more will become wheelchair accessible. People will see strengthening of evening operation and improvement of services at the end sections of line A. As of April 1, all trains running on the A line will go to Nemocnice Motol, which is the last stop in the western end of that route. Currently some trains end their runs before the terminal station. ¨
On line B, the service during the afternoon peak will be increased. On all routes in the evening, the wait between trains will be reduce to 7.5 minutes from the current 10 minutes between 9 pm and 10:30 pm. Ropid would also like to further increase service on peak times on the B line, but there is a lack of vehicles. Intermittent service on the C line between Ládví-Letňany would also be reduced once there were sufficient vehicles, and peak service could be increased. Currently 44 out of 61 stations are barrier-free. This year, the stations at Opatov and Palmovka should also be converted. Plans are being made to convert the station at Karlovo náměstí, but a building permit still has to be obtained. The barrier-free entrance should be in Václavská pasáž, which Prague 2 authorities say would be most convenient for passengers.
Bus service connecting to the metro will also be increased this year to improve service to the outlying areas of the city where there has been significant construction of housing and office parks.
Increasing weekend service, though, isn't in the current budget. Ropid is looking at several options, but each would require more money from the municipal Govt. The changes might come in the next year if the city allocates more money.

EXPORT AND IMPORT PRICE INDICES – 16. 1.

In November 2016, export prices increased by 0.5%, import prices by 0.8%, the terms of trade figures reached 99.7%, month-on-month. Export prices decreased by 1.4%, import prices by 1.0%, the terms of trade reached 99.6%, y-o-y.

Graph 6: Prices of exports and imports, 2005-2016, Y-o-y (in %)



BÍLINA MINE PREPARES FOR EXPANSION OF COALMINING AREA IN NORTHERN BOHEMIA – 16.1.

Following the unique lifting of limits on brown coal mining by the Govt in Bílina, North Bohemia, the Bílina Mine has formally set the ball rolling to be allowed to mine more than 150mn tons of coal still in the ground. Once approved, heavy machinery will move within half a kilometre of nearby villages. Before miners can remove a single lump of coal, however, further steps will have to be taken.

ENVIRONMENT & AGRICULTURE & FOOD & BEVERAGES

BERNARD BREAKS BREWING RECORD IN 2016 – 16.1.

Mid-sized Czech brewer, Bernard, has reported record production figures for 2016. The brewer produced just over 315,000 hectolitres of beer last year with around a fifth of it destined for export. The biggest export destinations are Slovakia, Slovenia, Sweden and Russia. Exports were renewed to the United States in December.

CR SUING EC[22] OVER DENATURATED ALCOHOL GUIDELINES – 14.1.

The CR is suing the EC over the new denaturated alcohol guidelines that are to come into effect as of August 2017. The Govt is thus hoping to prevent the new guidelines coming into force. The EC regulation was approved in order to reduce fraud and administrative burdens caused by too many national denaturing processes, of which there are currently over 150. The EC claims the new unified formula introduced is irreversible. However according to Czech experts the new "Euro" formula is not only easily reversible, creating space for fraud, but is three to four times as expensive as the current denaturing compositions used.

FIRST CASE OF BIRD FLU CONFIRMED IN PRAGUE – 14.1.

The Czech Veterinary authorities have confirmed the first case of bird flu in Prague. The deadly H5N8 virus was confirmed in a dead swan found on the banks of the Vltava River in Prague 7. No special measures will be taken for the time being in the Czech capital. The bird flu has been confirmed in 6 other locations in the CR. 13,000 birds have been slaughtered since the first case was confirmed just over a week ago to try and prevent the spread of the disease.

HPAI[23] SITUATION IN THE CR – 17.1.

The nine cases of the H5N8 version of avian influenza in the CR have been declared after a gap of around 10 years. Three cases have been confirmed in swans in Olomouc and Prague, than in the Znojmo area in South Moravia, and also at three poultry farms in the region. Another cases were confirmed in the Central Bohemia and South Bohemia Region. Also, one case was confirmed in Poland, near borders with the CR, zone of protection interferes with borders of the CR.
The MA[24] announced the payment of cash compensation to the farmers for destroying the poultry infected by avian influenza, allocated were CZK 31.3mn for these purposes.

[22] EC: European Commission, is the executive body of the EU responsible for proposing legislation, implementing decisions, upholding the EU treaties and managing the day-to-day business of the EU.
[23] HPAI: Highly Pathogenic Avian Influenza
[24] MA: Ministry of Agriculture

Map 5: HPAI in the CR, January 17, 2017

ŠUMAVA WILD BOAR SHOW EXCESSIVE LEVELS OF RADIATION– 17. 1.

Almost half of the wild boar in Bohemia's Šumava mountains demonstrate excessive levels of radioactivity, according to the head of food safety section at the SVA,[25] Jiří Drápal. The problem is caused by a type of underground mushroom eaten by the boar that is capable of retaining radiation from the time of the Chernobyl nuclear disaster in 1986. Humans would need to eat around 40 kilogrammes of contaminated meat a year to risk being affected, experts say.

OTHER

CZECH COMPANIES AMONGST BIGGEST INTERNET USERS IN EU – 18.1.

Companies in the Czech Republic are among the highest European users of the Internet to sell their goods and services, according to the industry association SPIR. Figures released Wednesday showed around 56% of companies relied on the Internet for sales and purchases in 2015. That's the third highest figure out of the 28 EU countries and trailing just Denmark and Austria. The association though slammed government efforts to boost Internet interaction between the state and citizens.

DISPATCH SYSTEM FOR CZK 61MN BECAME OPERATIONAL AT PRAGUE AIRPORT – 18.1.

17 new automated gates that control the passengers started to operate At Prague airport Vaclav Havel. Checks on passengers who depart from an airport outside the EU or from other countries traveling to the EU, are to be faster and safer. Police President Tomáš Tuhý told the reporters that its cost was nearly CZK 61mn. The system works like this: the passenger arrives at the automatic gate, where s/he must show his/her passport. The system evaluates the passport and determines if it is not a fake. The system is able to evaluate 2,897 types of documents from 206 countries. If everything is in order, the gate allows the passenger in, where his/her face will be checked by a camera system. When this check is also ok, the passenger is admitted to the interior of the airport for further clearance. If a problem occurs on the contrary, passengers must undergo a police check.

[25] SVA: Czech State Veterinary Administration

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State Veterinary Administration