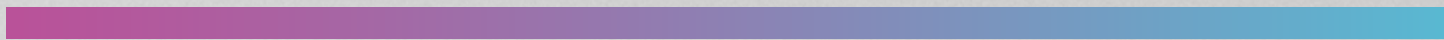




# TMT Highlights Czech Republic 2025



What's next for technology, media,  
and telecommunications?



# The Future Starts Here

**AI isn't coming—it's now.**

We don't think about using electricity or the internet—we just live in a world powered by them. **AI is following the same path.** Instead of being a tool we actively engage with, AI is blending into the background, making life **smarter, faster, and more intuitive.**

In 2025, we're not asking *if* AI will transform industries—we're asking *how far it will go*. From **autonomous agents** to **on-device** intelligence, technology is becoming an invisible force, woven into everything we do.

**Welcome to TMT Highlights 2025. Let's explore how AI, connectivity, and next-gen technologies are reshaping industries, businesses, and society. Stay ahead with us.**



**Jan Kudlák**  
CE TMT Advisory  
Leader



**Julie Šislerová**  
CE TMT Research  
& Innovation



# Key Highlights

## Digital Consumer Behaviour

### **Devices shape our daily lives:**

Smartphones dominate, but new wearables and smart devices are reshaping how we interact with technology.

### **AI goes mainstream:**

Adoption skyrockets, simplifying work, entertainment, and everyday tasks.

### **The AI gender gap is closing:**

AI is becoming more accessible, driving a more balanced adoption across demographics.

### **Personalization is key:**

Consumers expect smarter, more intuitive experiences tailored to their needs.

## What's next?

### **AI is getting proactive:**

Agentic AI isn't just responding—it's taking action, automating decisions, and streamlining workflows.

### **From cloud to pocket:**

AI is moving on-device, with smartphones and wearables getting their own AI brains.

### **Tech boundaries are blurring:**

Spatial computing, AI-powered chatbots, and multimodal models are redefining how we interact with technology.

### **AI regulation is here:**

The EU AI Act is shaping the future of responsible AI adoption—but also raising concerns about innovation constraints.

## The Business of Tomorrow

### **AI is transforming enterprises:**

From ERP systems to automation, AI is the new operational brain of businesses.

### **Powering the AI boom:**

AI's growth is fueling a debate on sustainability, pushing companies to adopt low-power models and alternative energy sources.

### **Telco is bundling and consolidating:**

Shifting towards content and service aggregation while merging to stay competitive.

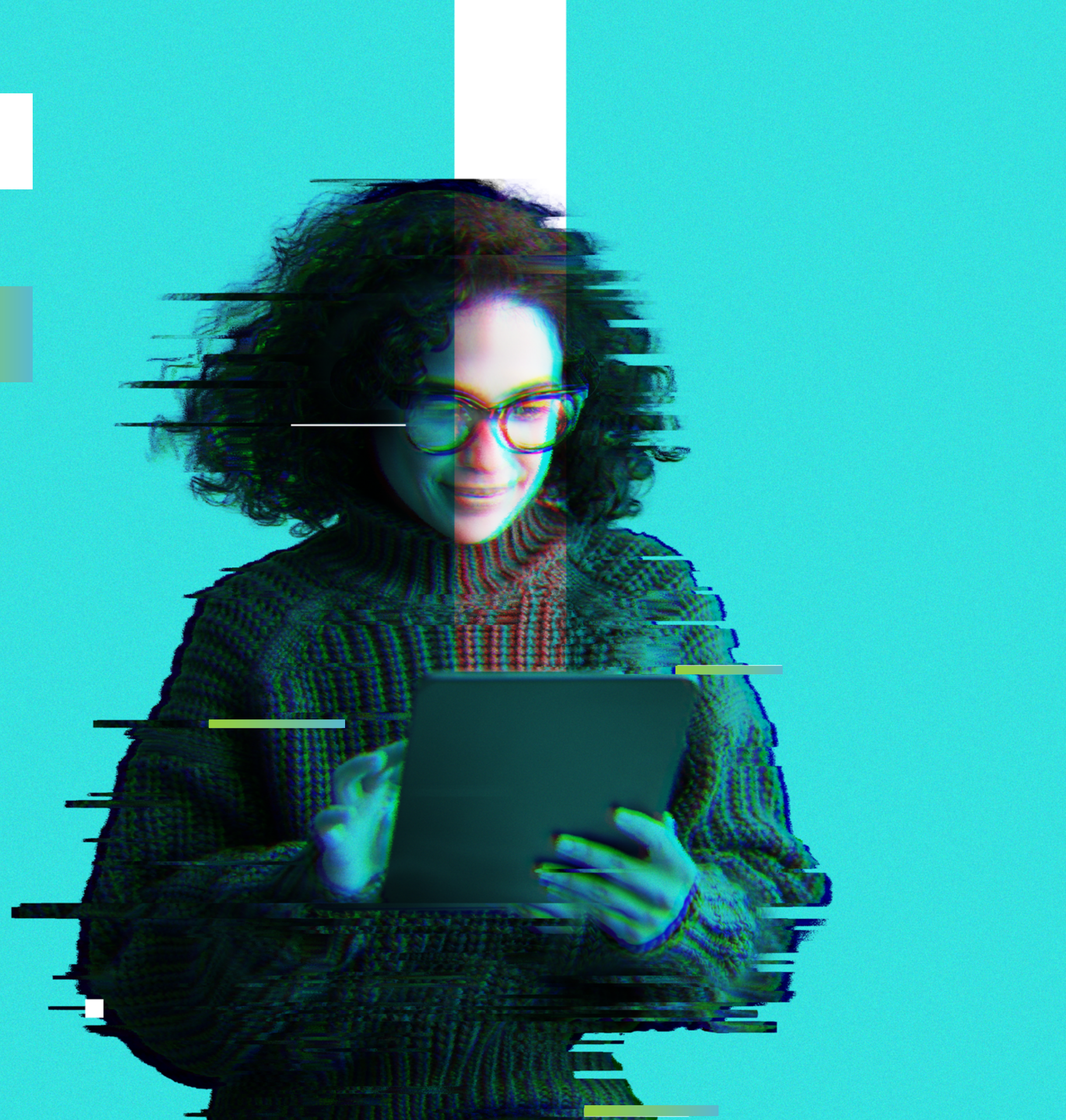
### **The stadium of the future is here:**

Next-gen sports venues are merging immersive entertainment, digital engagement, and community-driven infrastructure.

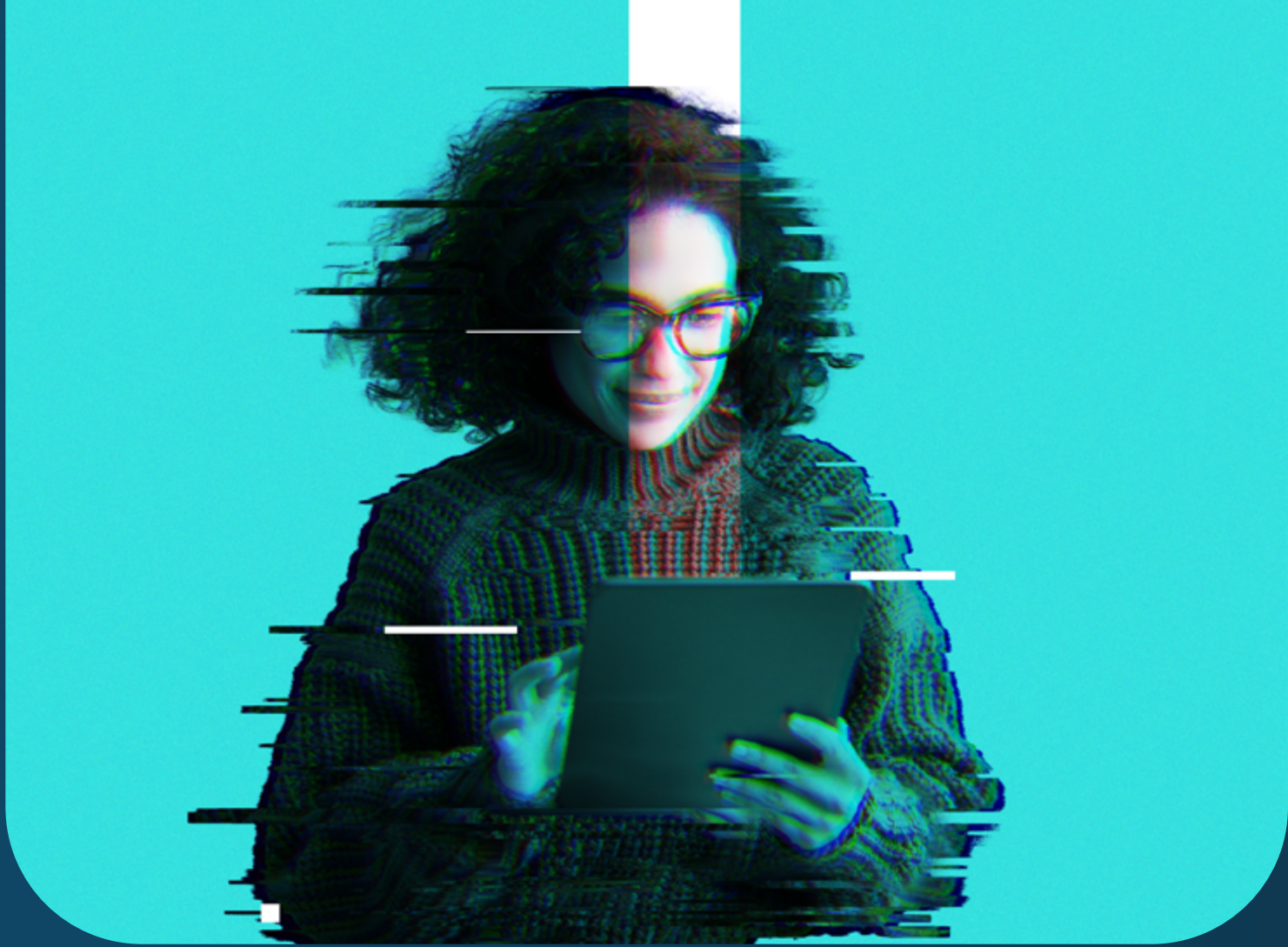


# Digital Consumer Behavior in the Czech Republic

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# The Digital Hierarchy: The Most Essential Devices

**Smartphones are unstoppable.** Unsurprisingly, they **continue to dominate daily digital usage in the Czech Republic**, holding their position as the most frequently used device in both 2023 and 2024. Following closely, **laptops** remain essential tools for work, education, and entertainment.

**Smart TVs and smartwatches are thriving.** With **90% of respondents** owning a TV, it's no longer just for watching—**VOD and social media** have become integral to the experience. **Smartwatches**, meanwhile, have gone mainstream. Whether extending a smartphone's functionality or tracking fitness, they've become **must-have accessories**.

**Tablets have found their place.** No longer at the center of tech trends, they are still a **go-to device for gaming, reading, and streaming on the go**.

**Smart homes are booming. 60% of Czechs own at least one smart appliance**—think vacuum cleaners, washing machines, or fridges. Some are also exploring niche devices like smart planters and automated lighting, expanding home automation.

These trends show that **Czech consumers value practical and multifunctional technology that seamlessly fits into daily life**.

## Did you know?

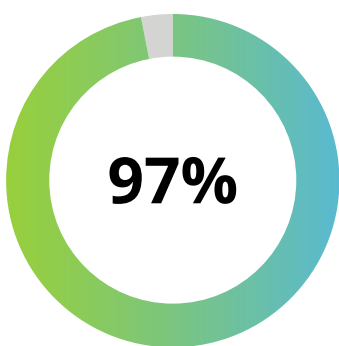
While **VR headsets** have yet to gain traction in Czech households, **smart rings** are quietly making waves.

With **features like sleep tracking and stress management**, these sleek devices are already winning over **2% of users**, proving big innovation can come in small packages.

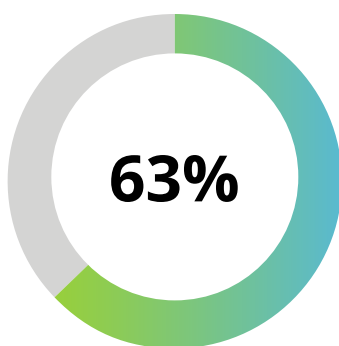
### Daily usage of digital devices

Choose the top 3 most-used devices

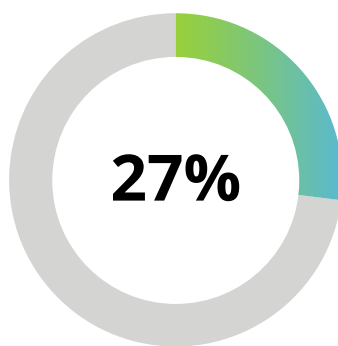
Smartphone



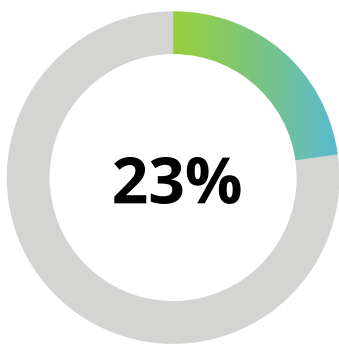
Laptop



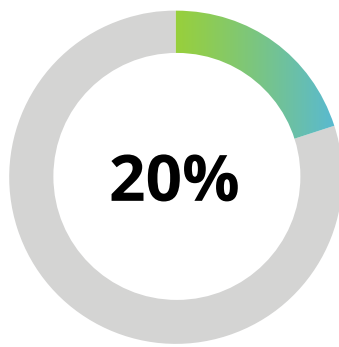
Smart TV



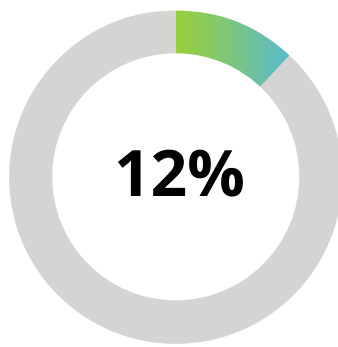
Tablet



Smart watch



Smart Home







# Long Live the King – The Smartphone

A striking **70% of respondents** say they **can’t imagine life without their smartphones**. More than just a device, it’s their **primary assistant** for communication, managing finances, and work. Smartphones have become the **ultimate all-in-one tool**, combining the functions of a PC, TV, and more into a single, always-on companion.

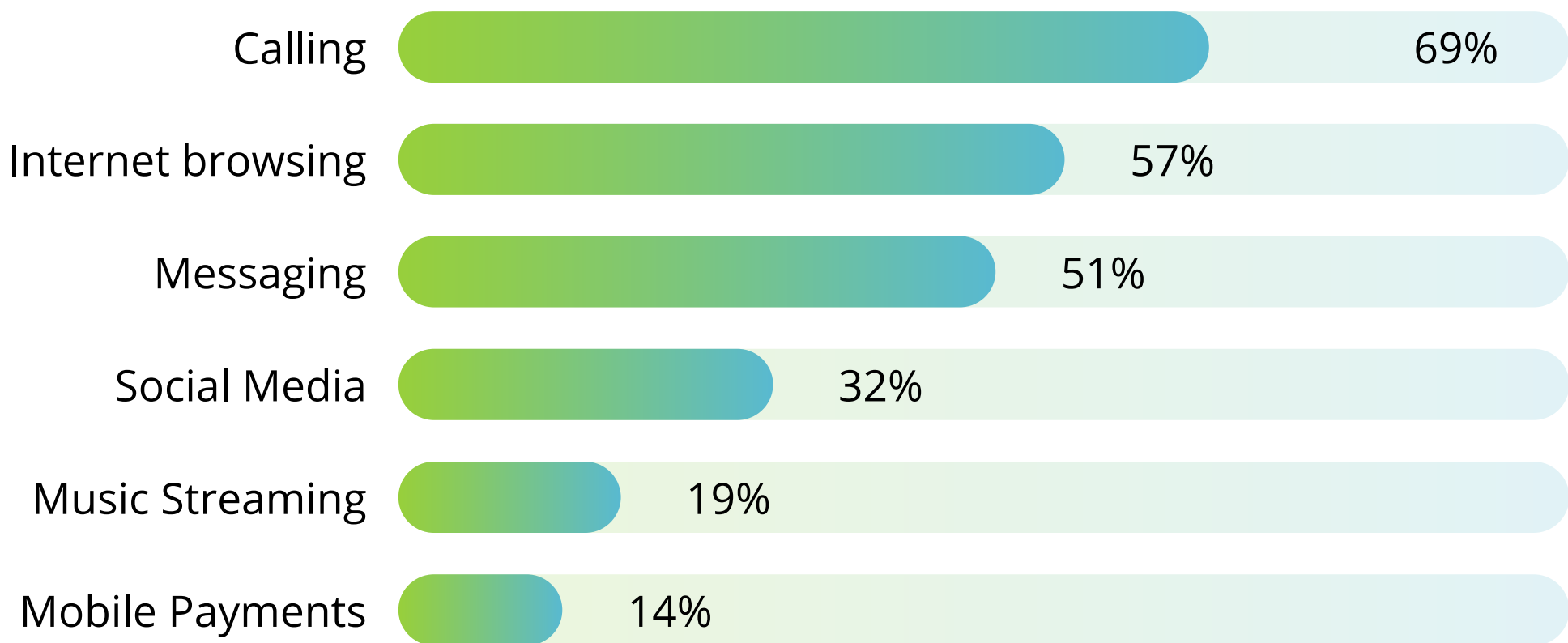
When it comes to **smartphone usage**, the top 3 activities are **calling, internet browsing, and messaging**. However, respondents also frequently mentioned **social media, music streaming, mobile payments** and **banking, navigation, shopping**, and video calls as key functions.

**Younger users (18-35)** prioritize **internet browsing** over calling. **For 36+, calling still takes the top spot.**

**Wireless headphones** have become an essential part of the smartphone experience. Whether for **calls on the go** or **immersive music and podcast listening**, they’ve become an essential everyday accessory. Among users, **60% own AirPods**, solidifying Apple’s dominance in this category.

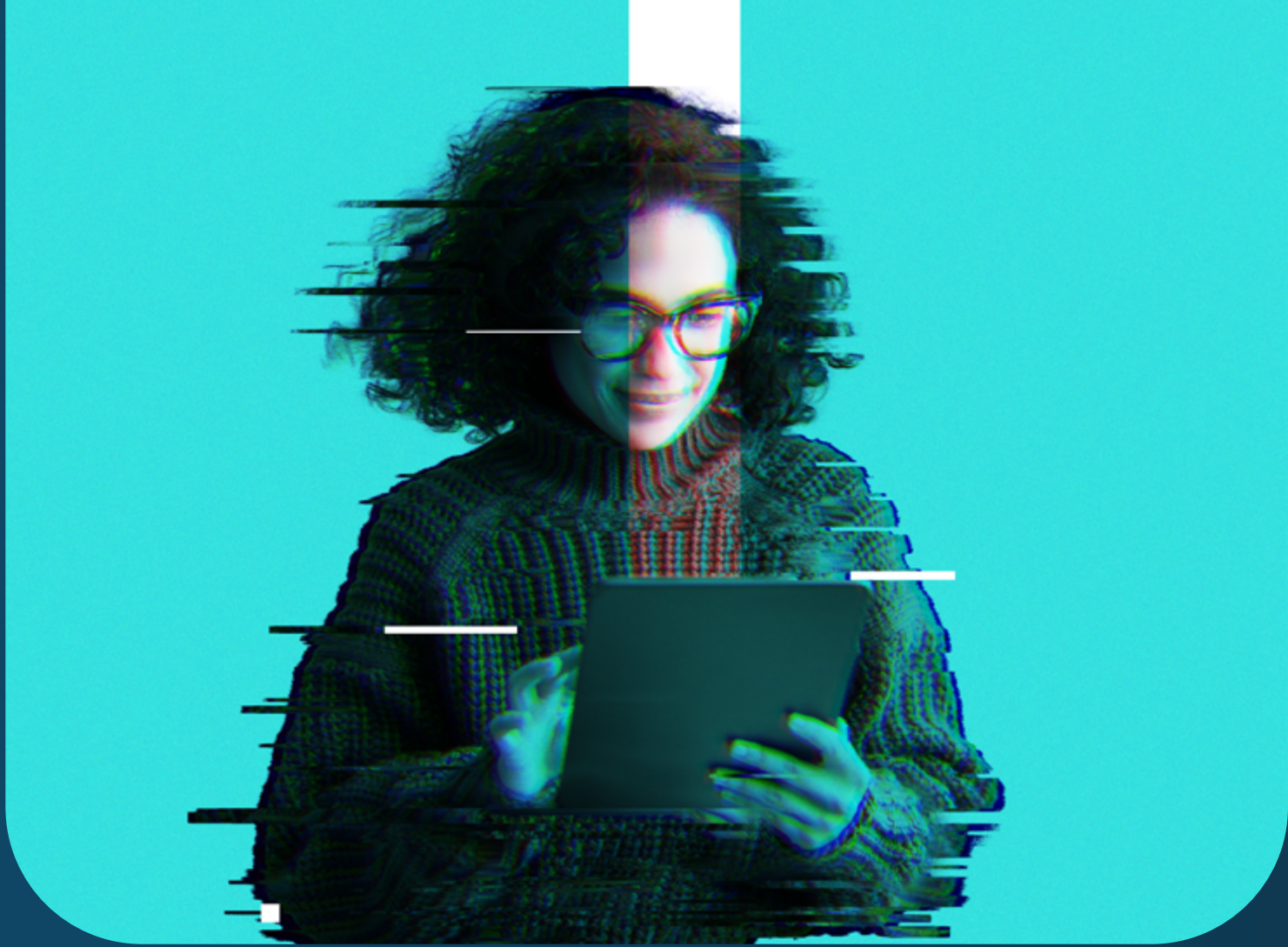
However, one thing is clear: **the smartphone industry has seen little innovation in recent years**. Czech consumers remain focused on core features like **performance, usability, and reliability** rather than chasing flashy upgrades.

## Top Primary Uses of Smartphones



Weighted base: All respondents aged 18-65 years, 2024 (347)  
Source: Deloitte survey, CZ, 2024





# Beyond the Hype: What Really Matters to Consumers

**Price is the leading factor when choosing a smart device.** However, beyond price, consumers focus primarily on **functionality and performance (63%)**, proving that Czechs prioritize **practicality over hype**. **Ease of use (36%)** and **brand loyalty (35%)** also play a key role, reflecting a preference for **reliable and intuitive devices**. **Security and privacy** remain concerns, but **only 10% of buyers prioritize innovation**, showing **low expectations for groundbreaking tech**.

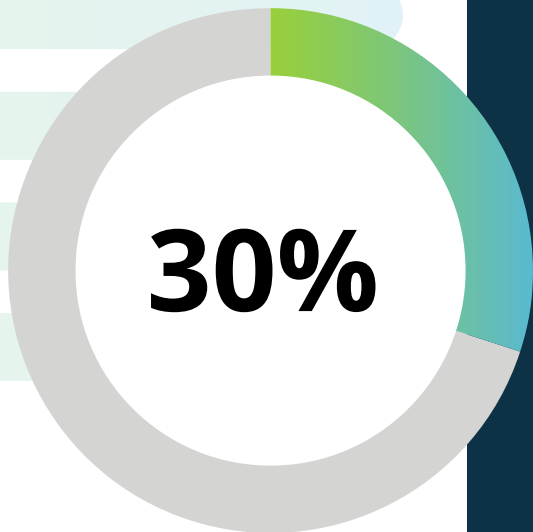
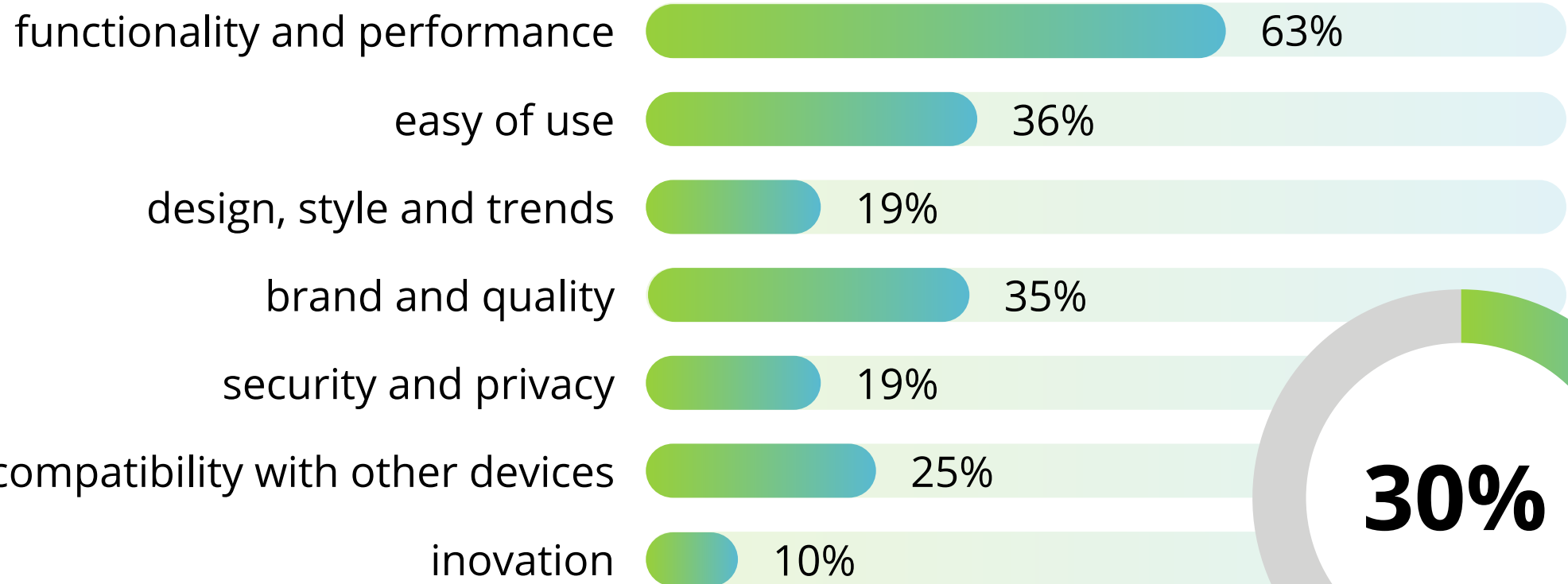
As age increases, so does the demand for **simplicity**. Older users **favor ease of use**, while **younger generations** are more focused on **performance and brand appeal**.

The relationship between consumers and smart devices is deeply integrated into daily life, but **opinions on their impact vary**. **50% of consumers say smart tech makes life easier and saves time**, making these devices essential for everyday tasks. Yet **30% worry about over-dependence**, believing technology is **diminishing essential life skills like navigation**.

While adoption is high, many users **aren't making the most of their smart devices**, revealing a clear gap between owning technology and actually using it to its full potential.

## Feature preferences for a smart device

Aside from price, what are the key parameters for you when making a choice?



of people think smart devices are  
**“a good servant but a bad master”**

Weighted base: All respondents aged 18-65 years, 2024 (347)  
Source: Deloitte survey, CZ, 2024



„Nowadays, smart devices are an inseparable part of life. They are helpful assistants, but for some, also a source of concern. In general, I have a positive opinion of them, as they genuinely make life easier. On the other hand, I'm worried about the dependencies that come with them.“



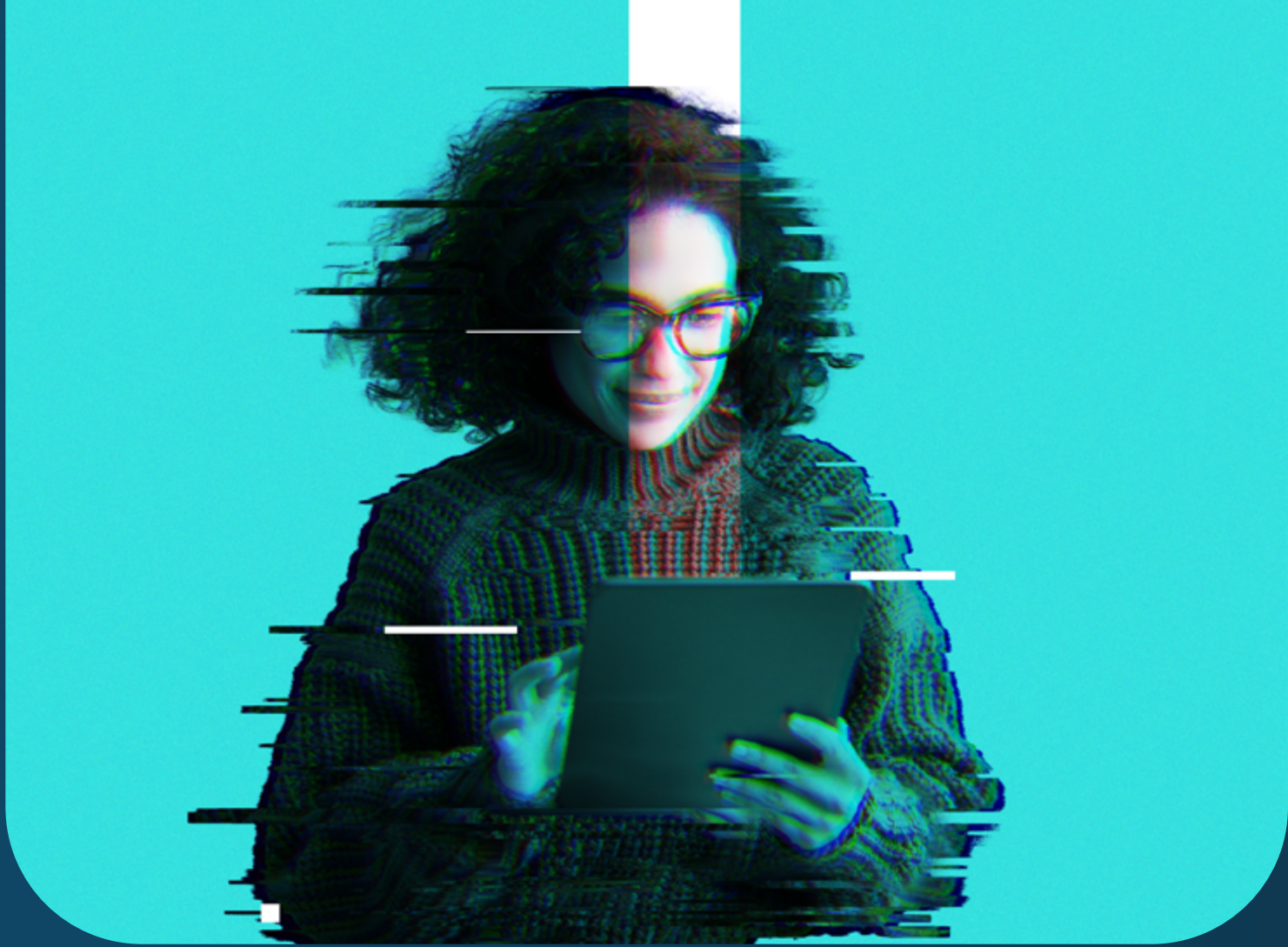


“The smartphone is simply a necessity nowadays and without it I would be lost in life, I would not be able to work and function normally. It’s sad on the one hand, but on the other hand I think it’s impossible to live without a phone these days.

Everyone needs it, because most services run over it. Doctor’s prescriptions, checking bills, banking, communication, etc.”







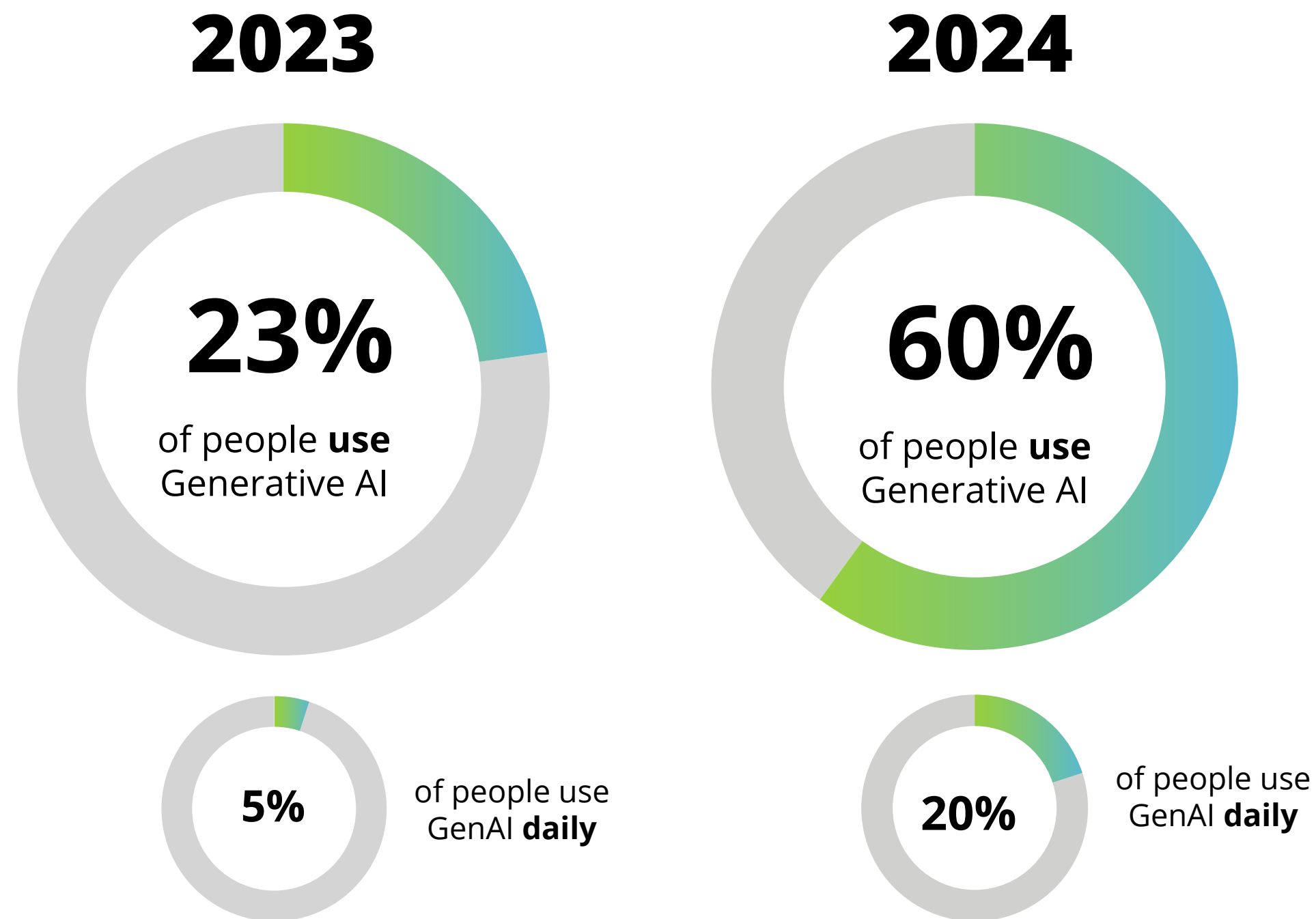
# Generative AI Adoption Skyrockets in the Czech Republic: 60% of Consumers Onboard

At the end of 2022, AI experienced a major boom, driven by the rise of **freely accessible AI models** like those from **OpenAI**. Since then, these technologies have steadily **integrated into daily life and work**.

In 2024, AI adoption surged, with **GenAI tools** like ChatGPT, Microsoft Copilot, and Gemini gaining traction in the Czech Republic. Their **accessibility—many free and available across devices—has lowered entry barriers**, driving widespread adoption.

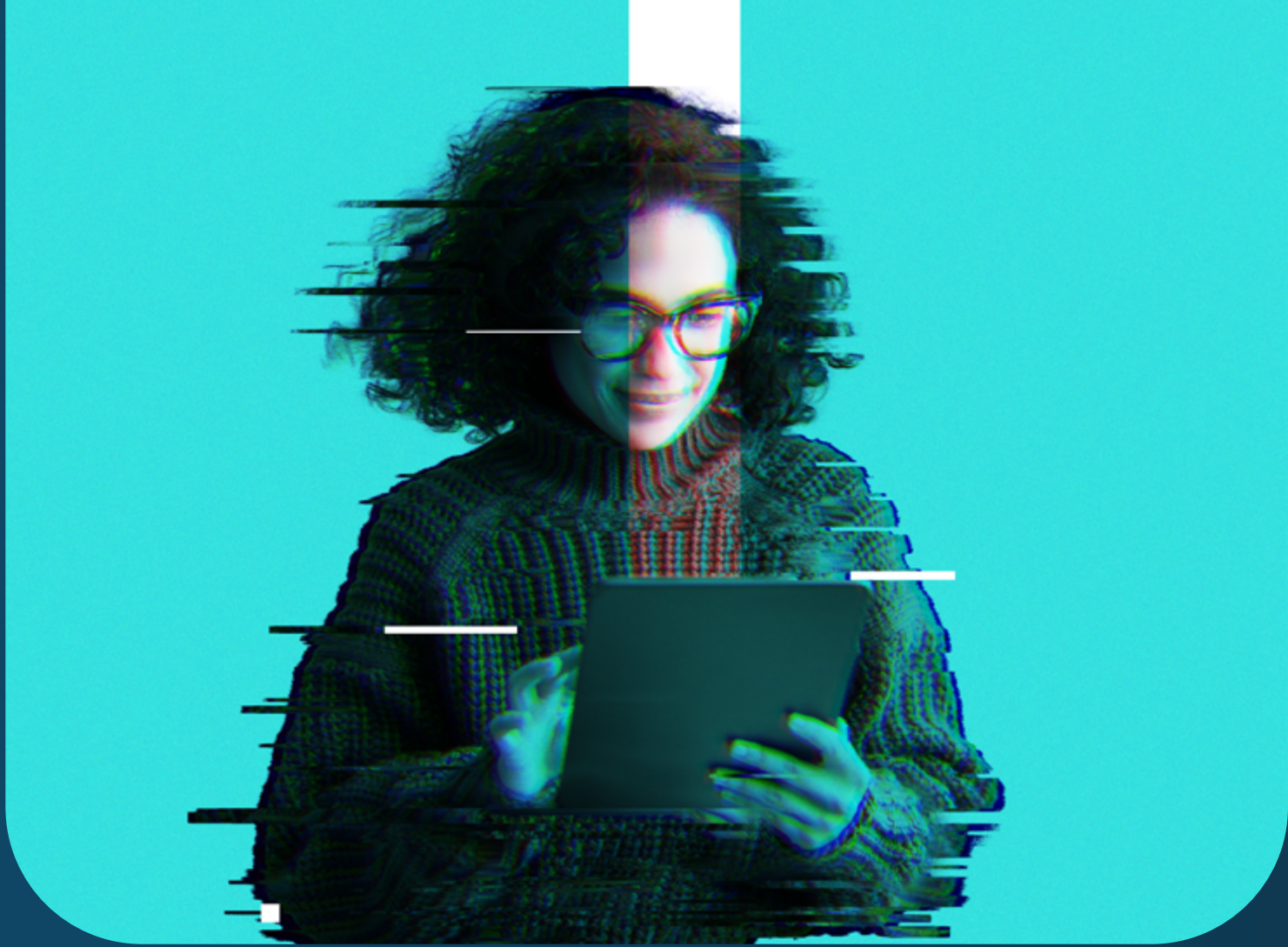
In 2023, only 23% of consumers had used GenAI tools. By 2024, that number surged to 60%, marking a **rapid increase in adoption and recognition**.

Not only are more people using AI, but they're using it **more frequently**. **Daily engagement** grew from 5% in 2023 to 27% in 2024, reflecting a **shift from occasional use to regular integration into daily routines**.



Weighted base: All respondents aged 18-65 years, 2024 (347)  
Source: Deloitte survey, CZ, 2024; Deloitte Digital Consumer Trends, CZ, 2023



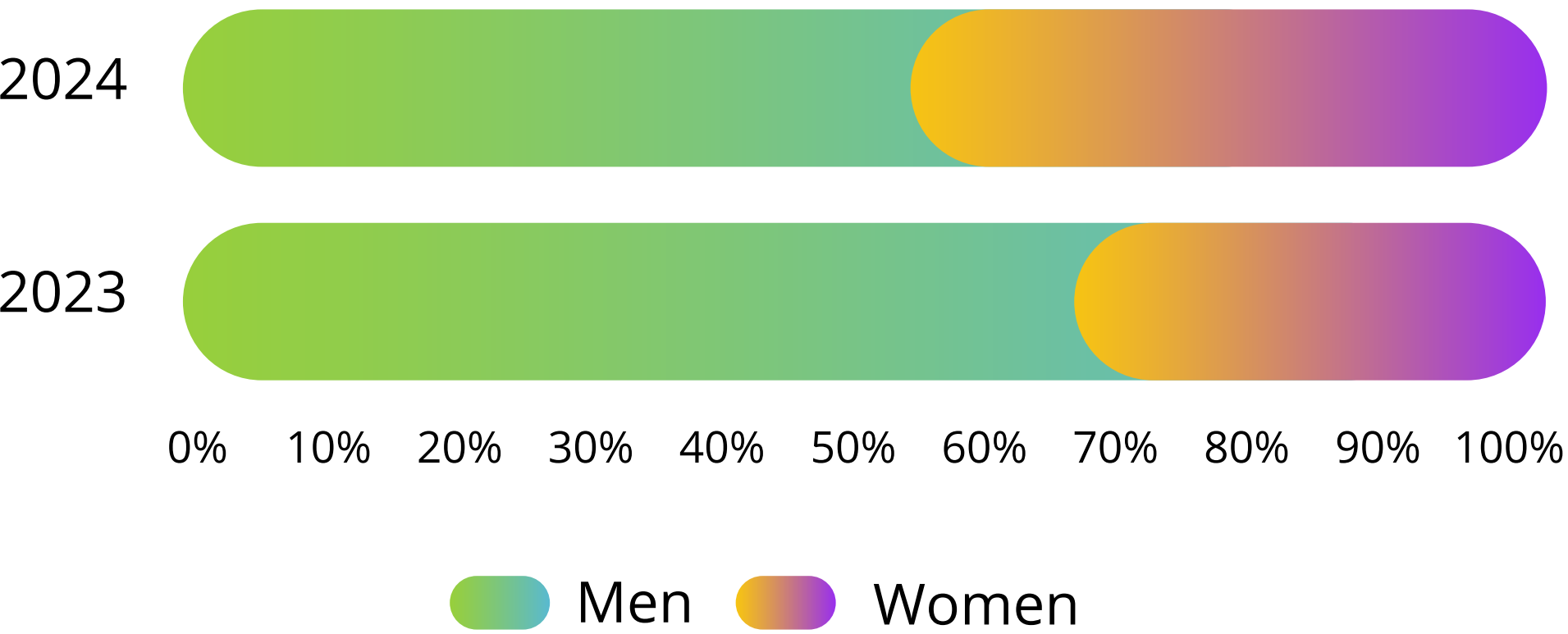


# AI Adoption: Trends Across Generations and Genders

AI usage in the Czech Republic varies across different age groups, with younger generations leading the way. The highest engagement comes from users aged 18-24, closely followed by those aged 25-34, showing that AI is most popular among digital-native generations in the country.

Adoption decreases among those over 45, indicating a generational gap in both familiarity with and use of AI. However, as AI tools become more user-friendly and integrated into everyday applications, older demographics are likely to gradually increase their adoption, following the same trajectory as past technological shifts.

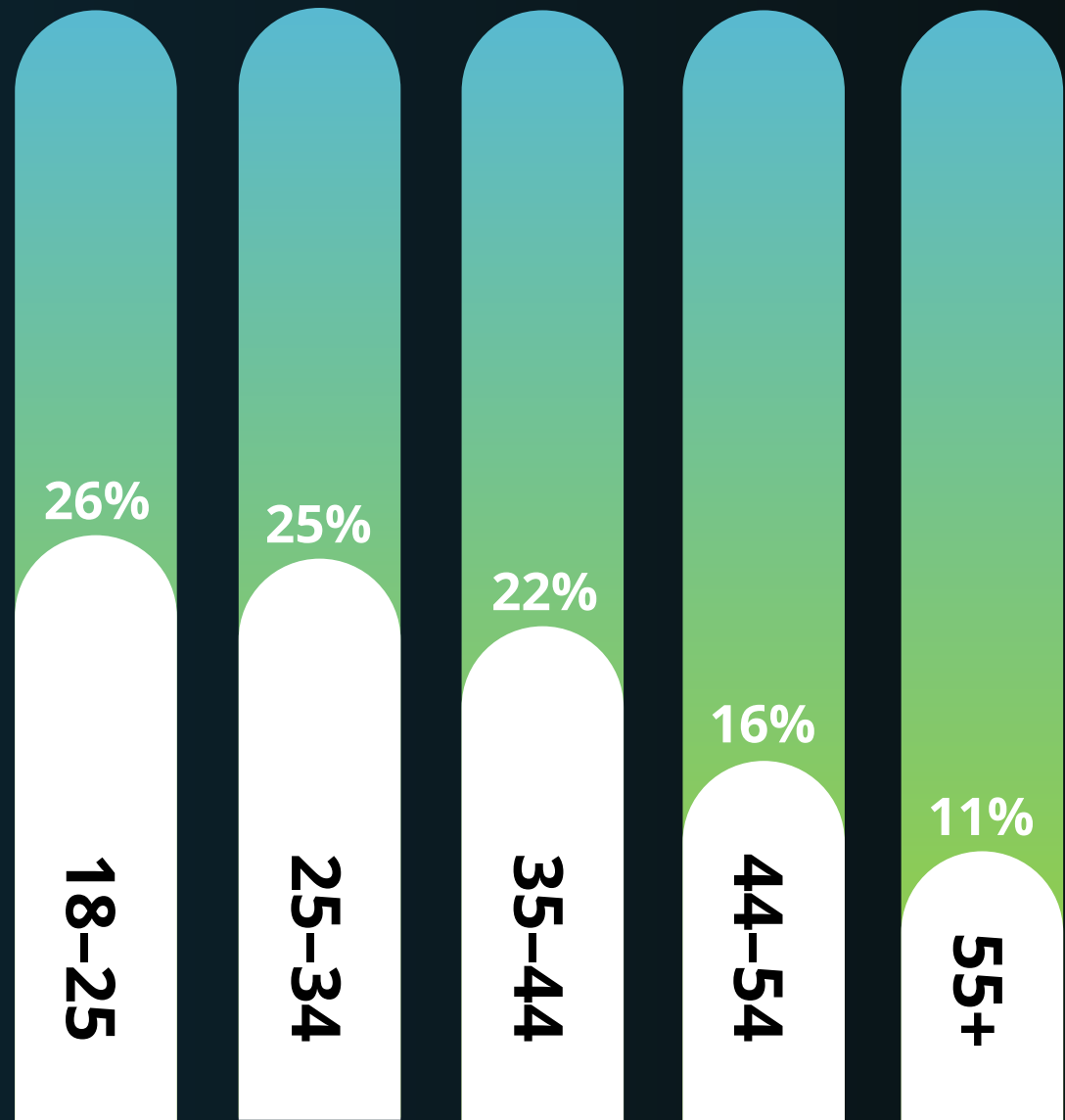
Closing the Gender Gap in AI Adoption



In 2023, men were the dominant group in AI adoption in the Czech Republic, comprising the majority of users, while women represented only 31%. By 2024, the gender gap has significantly narrowed, with men making up 54% of users and women 46%. This shift signals growing accessibility and interest in AI across different demographics. As AI tools continue to evolve and become more intuitive, we can expect the adoption gap to further narrow, leading to a more balanced usage across genders in the future.

Weighted base: All respondents aged 18-65 years, 2024 (347)  
Source: Deloitte survey, CZ, 2024; Deloitte Digital Consumer Trends, CZ, 2023

Generational Trends







# AI in Action: Simplifying Life and Work

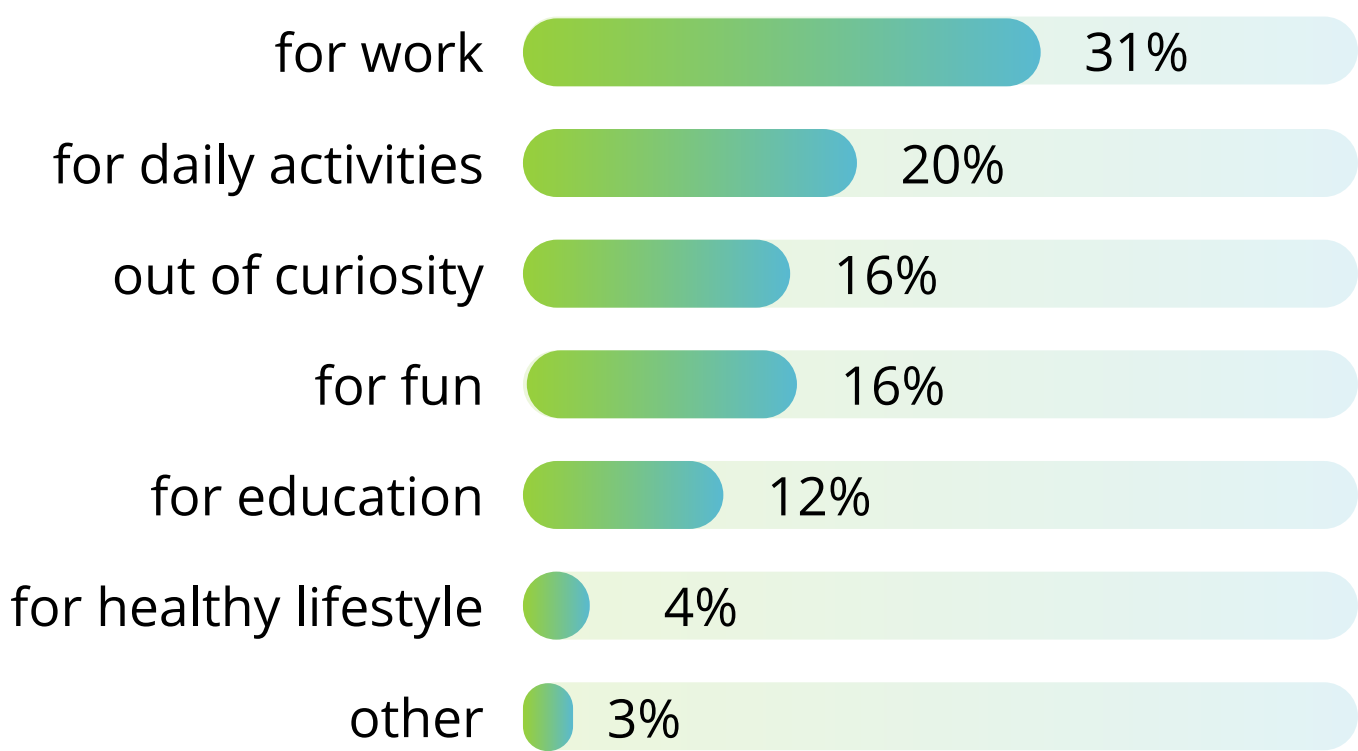
Based on Deloitte survey, 40% of respondents believe that artificial intelligence can **significantly simplify life and save time**. They view it as a **personal pocket assistant** capable of helping with almost anything.

45% of respondents **most frequently use ChatGPT**, with 30% of them combining it with other AI models, such as **DeepL, MS Copilot, or Gemini**. The **primary reasons** for using AI include **work-related tasks, assistance in daily life, curiosity, or entertainment**.

Respondents most commonly use AI for text creation, spell checking, itinerary planning, guideline or recipe suggestions, idea generation, and general inspiration. It is also frequently used for explaining concepts and comparing products.

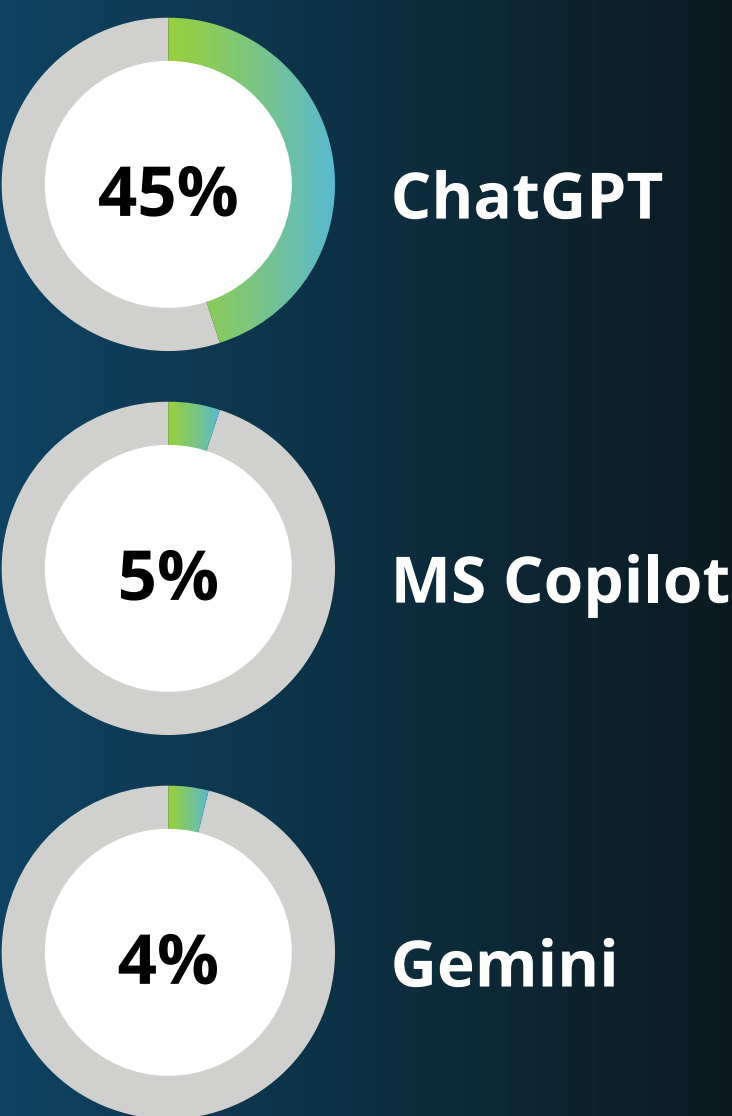
Despite the overall growth in AI adoption, some people remain **hesitant**. A **primary reason** for avoiding AI is a **lack of understanding** about how or what to use it for in everyday life. Some perceive AI as **too advanced** or feel **uncertain about its potential risks and negative impacts**. While adoption is on the rise, there are still groups of people who have **not yet interacted with AI**. This highlights the **ongoing need for education and awareness** to help more people **benefit from these technologies**.

## Primary Reasons for Using AI



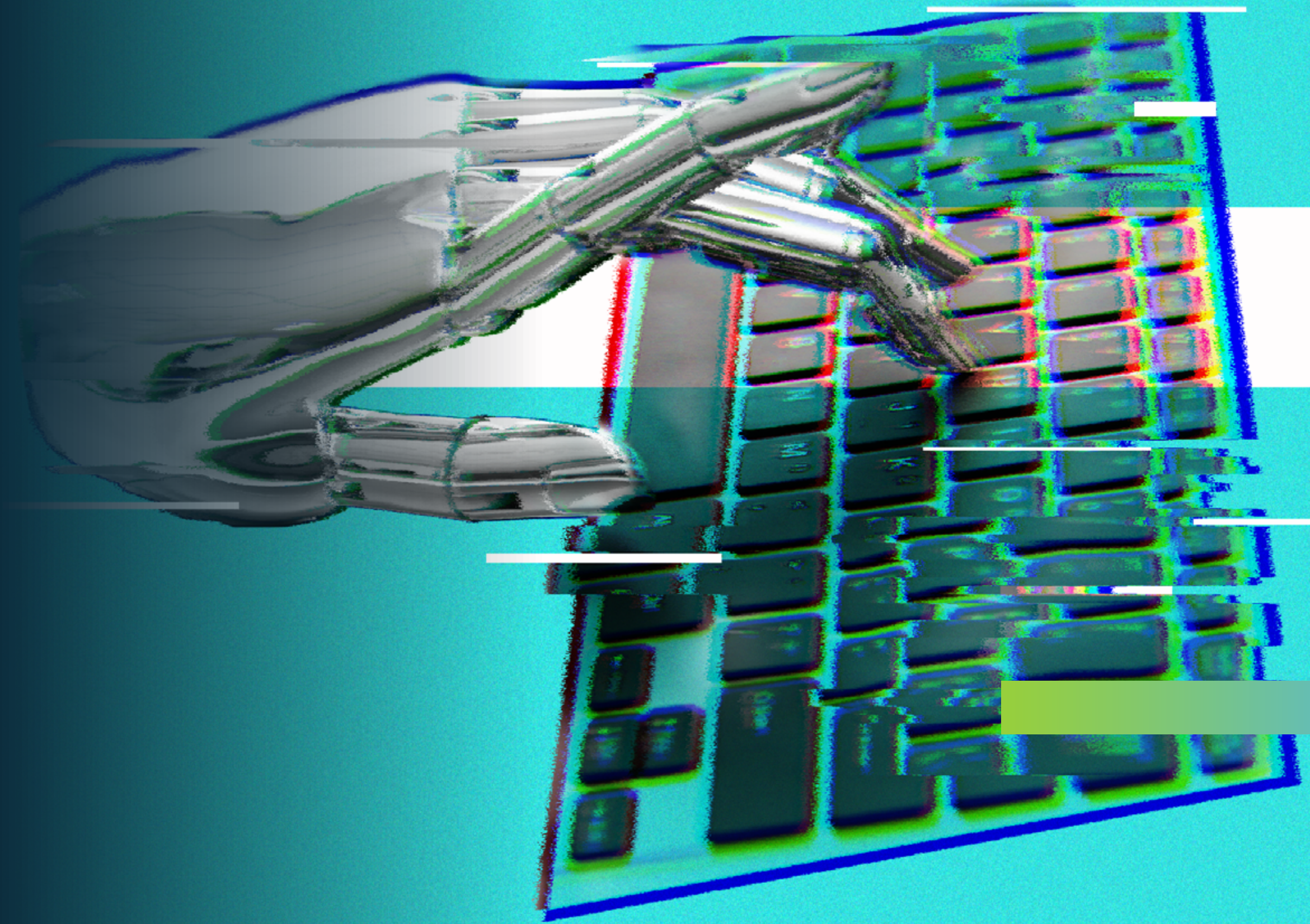
## Did you know?

The most widely used Gen AI models in the Czech Republic





„I personally use Chat GPT and I find it to be a great tool, such a helper. Maybe better google I would say, because I use it for example when I don't know what to cook in the evening and I want something healthy and light. So I type it into chat GPT instead of google and it just comes up with a lot of stuff. It's great, I praise it, it helps me in my daily life.“







**What's next?**



# From Words to Actions: The Rise of Agentic AI

AI adoption in the Czech Republic is accelerating, but the technology itself is evolving beyond traditional language models.

The next phase of AI development is **shifting from passive information retrieval to proactive execution**, enabling AI to **not just assist, but act**. This transformation is redefining how AI integrates into daily life—**handling tasks, making decisions, and automating processes** that once required human input.

A user can simply request:

*„Schedule the marketing post for the most opportune time, based on content and target audience.“*

*Or in everyday life: „Order groceries for delivery tomorrow based on my usual shopping list.“*

and AI agents then independently coordinate to execute the task and deliver results.

AI is transitioning from **passive assistance to active support**, revolutionizing the way we work the way we live.

As these tools become more capable, **agentic AI will move beyond insights to real-world execution**, evolving into a **true digital collaborator** in professional and everyday life.





# The AI Revolution is Coming to Your Pocket

Generative AI is no longer just a cloud-based tool—it's moving into consumer devices, making them smarter than ever. By 2025, over **30% of smartphones shipped** are expected to feature **on-device GenAI capabilities**.

After two years of declining smartphone sales, driven by market saturation and longer upgrade cycles, **AI could be the game-changer** the industry has been waiting for.

This means a phone could **draft emails, edit photos, and personalize content** in real-time—without an internet connection.

Tech giants are **embedding AI directly into chips**, ensuring faster performance and better security. Imagine a smartphone that **anticipates the user's needs**, suggests the perfect response, or enhances user's creativity instantly.

The future of mobile technology isn't just smart—it's becoming truly intelligent. 2025 will test how quickly users adopt AI-powered experiences—and whether on-device AI is truly revolutionary or just another trend.

## On-Device AI: Android vs. Apple

### Android brands are already integrating real-time AI features:

**Samsung Galaxy S25 Ultra** – Equipped with **Google Gemini** and Bixby, offering **real-time call translation, AI-enhanced photography, and voice-controlled automation**.

**Google Pixel 9 Series** – Powered by the **Tensor G4 chip**, enabling **AI-generated images, call summarization, and natural language interactions via Gemini AI**.

### Apple is stepping into on-device AI—but at a more measured pace:

Apple Intelligence is an **on-device GenAI suite** for iPhone, iPad, and Mac, designed with **privacy-first AI features**. Launched in 2024, its initial rollout includes **Writing Tools, Image Playground, and Genmoji**, all processed on-device for faster performance and enhanced security. However, the **more advanced capabilities**, such as **Siri's AI-powered upgrade and deeper ChatGPT integration**, have been **delayed until 2026**, as Apple continues to refine its AI assistant.

## Did you know?

Starting in April, the initial rollout of **Apple Intelligence** will be available for iPhone, iPad, and Mac **in Europe, including the Czech Republic**.





# AI-Powered Devices: More Than Just Chatbots

*„I want AI to do my laundry and dishes so that I can do art and writing, not for AI to do my art and writing so that I can do my laundry and dishes.“*

— Joanna Maciejewska

That vision is becoming reality as AI is no longer just about smartphones and chatbots— AI is stepping out of the digital world and into our daily lives—from practical tools to futuristic robots. What once seemed like science fiction is becoming part of our reality.



## Everyday AI Assistants

**Meta AI Glasses** offer **real-time translation and guidance.**

**Samsung's Ballie** – A rolling cute AI assistant that **controls smart home devices and responds to voice commands.**

## Practical AI Devices

**Samsung's AI fridge** tracks groceries and suggests meals.

**Roborock's smart vacuum** identifies obstacles and even clears socks.

**AI Suitcases** – Your luggage can now follow you around the airport like a loyal pet, making travel completely hands-free. **Isn't it funny?**

## Everyday AI Assistants

**The robot race is on.** Tesla's Optimus, Boston Dynamics' Atlas, Unitree's G1, and Neo Robotics' Neo **are moving from prototypes to real-world tasks in homes, factories, and healthcare.**

**Who will bring the first mass-market humanoid?**

## Did you know?

AI-powered robots are no longer confined to research labs—they are already working in stores, homes, and factories:

**Adam** – AI-powered service robots are already serving drinks in stores and venues.

**Jennie** – A robotic dog providing emotional support through realistic interactions.



# Spatial computing? It is not only VR headset

Imagine a world where digital and physical realities blend seamlessly. **Spatial computing is not just an evolution—it's a revolution.** From **immersive shopping** and **AI-powered assistants** to **hyper-realistic gaming**, this technology is reshaping how we interact with information, the environment, and each other.

**How Spatial Computing Works?** — it's built on **three key layers**:

**Physical Layer:** Devices like wearables, smart glasses and haptics capture real-world data.

**Bridging Layer:** Technologies such as LIDAR, AI-powered 3D mapping and computer vision process and translate physical data into digital environments.

**Digital Layer:** AR overlays, holograms, and AI avatars create an interactive, immersive experience.

## AI as the New Interface

Instead of tapping, clicking, or swiping, AI understands your **gestures, voice, and even context**—making interactions feel effortless. The next step? AI won't just respond to commands; **it will anticipate what you need before you even ask.**

## Data: The Fuel of Spatial Computing

For spatial computing to work, **data is everything.** Yet **most business are still struggling** with **data silos, interoperability issues, and messy pipelines.** Unlike traditional software, spatial applications need **real-time, high-fidelity data** to map, process, and visualize environments accurately.

## AI & XR: A Perfect Match

AI and spatial computing go hand in hand. To truly understand the physical world, AI relies on XR technologies like AR, VR, and mixed reality. Now, with 5G, IoT, and AI converging, we're entering the next computing revolution—just as the Internet and mobile phones reshaped the digital age.

Spatial computing is not just about **gaming or cool gadgets**—it's changing **how AI understands the world, how businesses operate, and how we interact with technology.** Those who **act now** will set new industry standards and define the next era of human-computer interaction.



## Did you know?

Apple played a **key role in popularizing the term “spatial computing”** with its **Apple Vision Pro** headset. How aware are Czech consumers of this shift?

**Familiarity with Apple Vision Pro**

**4.2** /10

Awareness **drops significantly with age**, with the youngest group scoring **5.8/10**, while older demographics lag behind at **2.1/10**.



# One Subscription to Rule Them All? The Streaming Shift

Are you tired of juggling multiple streaming subscriptions? You're not alone! **The world of Video on Demand (VOD) is changing, and it's all about convenience and value.** Here's what you can expect:

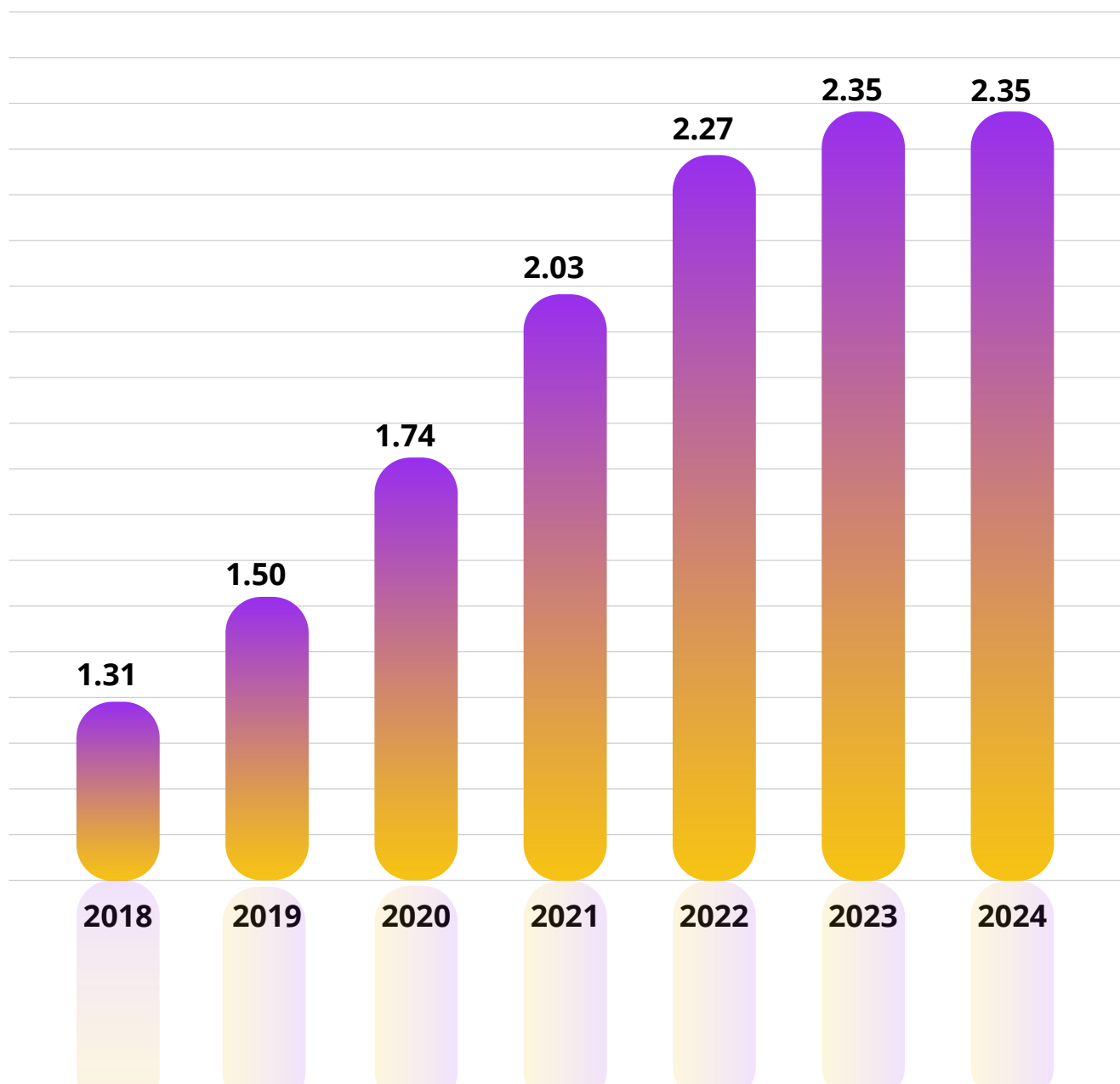
The streaming industry is **shifting back to content aggregation, moving away from fragmented standalone subscriptions.** In markets like the UK, **43% of SVOD subscribers already access at least one service through a third-party provider**, such as a telecom or pay TV company. This trend reflects a growing preference for **bundled SVOD offerings, where streaming services are integrated into telecom, pay TV, or financial service contracts.** These bundles often require a minimum commitment but **significantly reduce costs and simplify access.**

In the **Czech Republic**, this shift is evident in the **merger of O2 TV and Voyo into Oneplay**, a unified platform combining live television with on-demand content. Additionally, **O2 TV has also been bundled with O2 Internet**, enabling consumers to access both services through a single provider. **Vodafone has also embraced this model, bundling Vodafone TV with its internet services.** Similarly, **T-Mobile offers benefits like Magenta TV, Canals + and Max** to customers who combine multiple services, such as mobile and fixed-line, under one contract, enhancing **user convenience and providing cost-effective solutions.**

**These developments signal a broader move toward consolidation, making streaming more accessible, affordable, and user-friendly.**



**Average number of video on demand substriptions, multiple EU markets**





# Big opportunities in AI, but also big risks

AI-generated content is expanding rapidly, making it harder to distinguish real from fake. While this technology enhances efficiency, it also fuels misinformation and lowers content quality. As deepfakes and AI-driven deception rise, trust in digital information is declining.



Globally, AI manipulation is increasing skepticism. Deloitte’s Connected Consumer study found that **50% of US consumers** are more doubtful of online information, with **68% fearing AI-driven deception** and **59% struggling to differentiate AI-generated content from human-made material**. The **deepfake detection market** is growing **42% annually**, expected to reach **\$15.7 billion by 2026**, as businesses and advertisers face rising fraud risks.

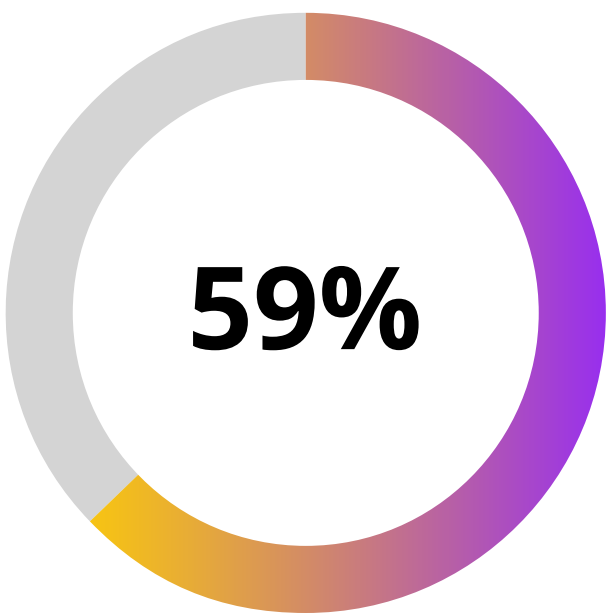


In the Czech Republic, we have also witnessed an increasing occurrence of AI deepfakes being used in fraudulent campaigns, such as **fake political statements** and **celebrity deepfakes**. Their prevalence is expected to rise, yet **research on deepfakes in the Czech Republic remains limited**, with no structured approach to addressing the issue, as highlighted by the Technological Center (TC) Prague.

To address these challenges, **the EU has introduced the AI Act**, setting stricter regulations for AI-generated **content and deepfake detection**. Additionally, **blockchain technology** is emerging as a potential solution, offering content authentication and traceability to verify the origin of digital media. As AI content creation advances, raising awareness and strengthening detection efforts will be key to preserving information integrity.



## AI vs. Human-Made Content



of people **struggle recognize difference** between AI-generated and human-made content

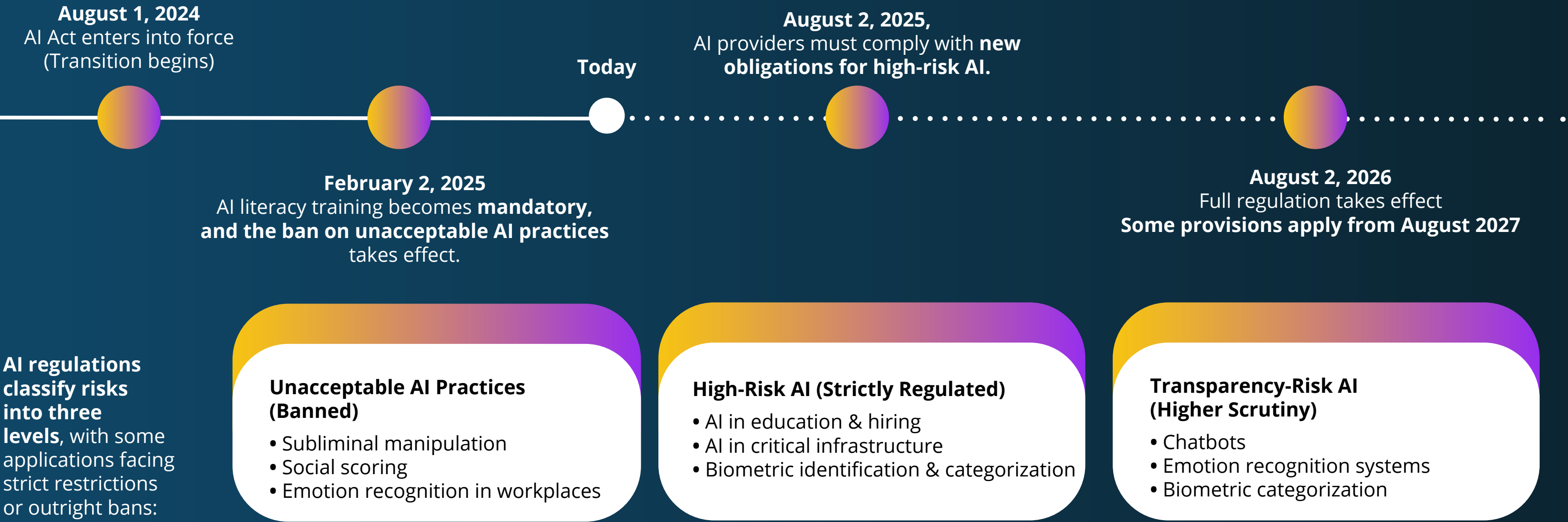


# Safeguard or Obstacle?

## Let's talk about EU AI Act

The **EU AI Act** introduces strict regulations to **ensure safe and transparent AI**, but it also raises concerns about **slowing innovation and global competitiveness**. While its goal is to **protect users and prevent AI misuse**, it imposes new obligations that businesses—including those in the Czech Republic—must adapt to in the coming years.

Here's a timeline of key milestones shaping AI regulation in Europe:



### Did you know?

The **Czech Republic** is actively shaping AI policy through its **National AI Strategy 2030**, a roadmap for **trustworthy and competitive AI development**. This strategy sets **clear government priorities** to balance AI **growth, regulation, and economic competitiveness**.

The **EU AI Act aims to ensure transparency, accountability, and safety**. However, strict regulations may **slow innovation**, making it harder for European companies to compete globally. The key challenge is finding the **right balance between oversight and progress**.



# The Business of Tomorrow

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# Beyond ERP: How AI is Reshaping Business

As AI reshapes consumer experiences, its impact on business operations is even more profound. Traditional ERP systems have long been the **backbone of enterprises**, centralizing business data and processes. But AI is **breaking these rigid models**, unlocking automation, adaptability and real-time decision-making—without requiring users to interact directly with ERP platforms.

**AI is Becoming a Business Agent!** AI is shifting from a **supporting tool to an active business agent**, learning enterprise operations, replicating processes, and autonomously making decisions. This **reduces dependency on monolithic ERP systems** while **enhancing efficiency, intelligence and flexibility across business functions**.

AI's ability to **process HR, finance, and supplier data** raises **privacy and compliance concerns**. Poor governance could expose enterprises to **data breaches, misinformation, and regulatory risks**, making **security policies and AI oversight** critical for sustainable business adoption. **AI is no longer just optimizing business processes—it's redefining them.**

## AI in Action: Real-World Use Cases

### Automated Employee Onboarding (ServiceNow)

AI-driven HR systems **automatically provision access** for new hires, reducing manual setup and delays.

### AI Customer Service Bots (Saks)

AI bots **manage order tracking, returns, and shipments**, seamlessly interacting with inventory systems to improve customer experience.





# The New Gold Rush: AI Chips & Infrastructure

For years, software dominated as the primary driver of innovation and investment, but the AI revolution is shifting the focus back to hardware. **Specialized AI chips, particularly GPUs, are in unprecedented demand**, with AI chip sales expected to reach up to **\$400 billion by 2027**. The financial services sector alone has seen an **88% surge in GPU usage** to power fraud detection and wealth management AI models.

This demand has outpaced supply, creating a modern-day **Gold Rush** where companies providing the essential tools—like NVIDIA's cutting-edge GPUs—are reaping the rewards. **Hyperscalers are investing nearly \$1 trillion in AI-driven infrastructure**, racing to secure the latest chips.

This shift is fueling **a major refresh in enterprise hardware**. Today, **30% of the 1.5 billion PCs in use are outdated**, lacking the AI-ready capabilities needed to leverage modern applications. Companies like Apple, Microsoft, and Dell are embedding AI into their devices, ensuring that AI is no longer confined to the cloud but at our fingertips.

Deloitte predicts that by 2025, over **50% of laptops shipped** are expected to feature **on-device GenAI capabilities**.



## Did you know?

The AI hardware race isn't just about GPUs. **Neural Processing Units (NPUs) are redefining AI efficiency**. These specialized chips are built to **accelerate machine learning** tasks while consuming significantly **less power**. Unlike traditional processors, **NPUs mimic how the human brain processes information, making on-device AI faster and more responsive**.

With **major tech companies embedding NPUs into next-gen devices**, the future of AI computing is shifting from **cloud dependence to local intelligence at our fingertips**.



# The Power Challenge: Can AI's Growth Stay Sustainable?

AI is transforming industries, but its **soaring energy consumption** is raising concerns. **By 2030, global data center electricity use could double**, reaching nearly **4% of the world's total energy consumption**. As AI adoption accelerates, businesses must **find ways to balance technological growth with sustainability**.

Companies are now taking action by developing **low-power AI models**, integrating **AI-driven sustainability efforts**, and investing in **next-gen nuclear power** to provide stable, long-term energy solutions.

## Low-power model

The industry is developing **energy-efficient AI systems** like DeepSeek's model, which uses significantly less computing power than Meta's Llama 3. 1. While this reduces energy demands, **widespread AI adoption could still drive overall consumption higher**.

## AI-Driven Sustainability Efforts

AI is not just using energy—it's also improving sustainability:

- **Renewable energy**  
AI optimizes energy costs in cloud computing.
- **Energy-saving applications**  
AI enhances emission tracking & efficiency.
- **Hardware improvements**  
New chips reduce power consumption.

## Next-Gen Nuclear Power

To meet AI's growing energy needs, **tech companies are investing in advanced nuclear reactors** as a clean energy source. These reactors could **provide stable, long-term power for AI-driven systems**, ensuring sustainability without reliance on fossil fuels.

AI's rapid expansion presents a **double-edged sword**—it increases energy demands while also creating solutions for **cleaner, smarter energy use**. Moving forward, balancing **AI innovation with sustainable practices** will be crucial to ensuring **long-term growth without compromising environmental responsibility**.





# Telco Does Not Sleep at All

The telecom industry is undergoing **massive consolidation**, with over **400 M & A deals expected in 2025 and beyond**. The focus is shifting from asset acquisitions to **full operator mergers** to strengthen market positions and improve competitiveness.

In the Czech market, **signs of consolidation have emerged**, with major players acquiring smaller infrastructure companies in recent years. **PPF Group partnered with e & in 2024**, selling a **50% + one share stake in its telecom operations in Bulgaria, Hungary, Serbia, and Slovakia** while retaining its Czech business. Additionally, **Vodafone and e & formed a partnership in 2022**, with e & acquiring a **15.01% stake in Vodafone** up today and collaborating on **managed voice solutions and IoT connectivity services**. These moves reflect the ongoing push for **stronger, more efficient networks** in the region.

European leaders like **Mario Draghi and Enrico Letta** support this trend, highlighting that the average European mobile operator has just **4.5M subscribers**, far behind the **95M in the U.S.** Scaling up is key to survival.



4.5M Customer



95M Customer

**Meanwhile, 6G remains a distant future, with no signs before 2030. For now, telcos must focus on making 5G financially sustainable for the next decade before the next leap in technology arrives**



## Did you know?

T-Mobile is the **first operator in Europe** to provide **5G signal from a drone**, operating at an altitude of **one kilometer**.

Technology ensures seamless connectivity in crisis zones and remote events—without the need for ground-based transmitters.



# Beyond the Game: The Next Generation of Stadiums

The way people experience entertainment is evolving—stadiums are no longer just venues for sports, but immersive hubs. In **2025, over 300 global stadiums** will undergo renovations or new builds, with nearly **50% of projects concentrated in North America and Europe**. These developments follow two major trends:

## Community-Centric infrastructure

The **Tampa Bay Rays' new stadium in Florida** reflects this shift, integrating **affordable housing and job creation** alongside sports facilities to support local communities.

## Fan-Centric Design

Modern stadiums are evolving with **interactive technology, gaming elements, and second-screen experiences** to engage younger audiences.

With **77% of fans multitasking during games** (Deloitte TMT Predictions 2025), venues are enhancing digital experiences. As innovation progresses, **stadiums may increasingly resemble The Sphere in Las Vegas**, delivering **immersive, tech-driven entertainment**.

## Did you know?

Women's sports are capturing the attention of fans, sponsors, and investors like never before. **With global revenues expected to surpass \$1 billion in 2024—a 300% increase since 2021—women's sports are reaching unprecedented levels of visibility and valuation.**

As interest grows, so do investments. The Kansas City Current made history by opening **CPKC Stadium**, the **first-ever stadium built exclusively for a women's professional team**—a \$117 million milestone in sports infrastructure.

## The ambitious projects in Czech Republic:



Brno recognized the trend and is building its **large and modern multifunctional arena**, designed to host **sports, cultural, and conference events**. The venue will be part of the **Veletrhy Brno (BVV) complex**, accommodating up to **13,000 spectators**. Construction starting in **September 2023**. The first visitors will step inside in **2026**.



Pardubice are planning to build **one of the most modern arenas in Europe**. While primarily designed for **ice hockey**, the arena will also host cultural events, entertainment, and conferences. The goal is to open the venue in **August 2027**. Alongside the arena, a **hotel, training hall, and parking facility** will create a vibrant district with **shops, services, and green relaxation areas**.





# Do you want to know more?

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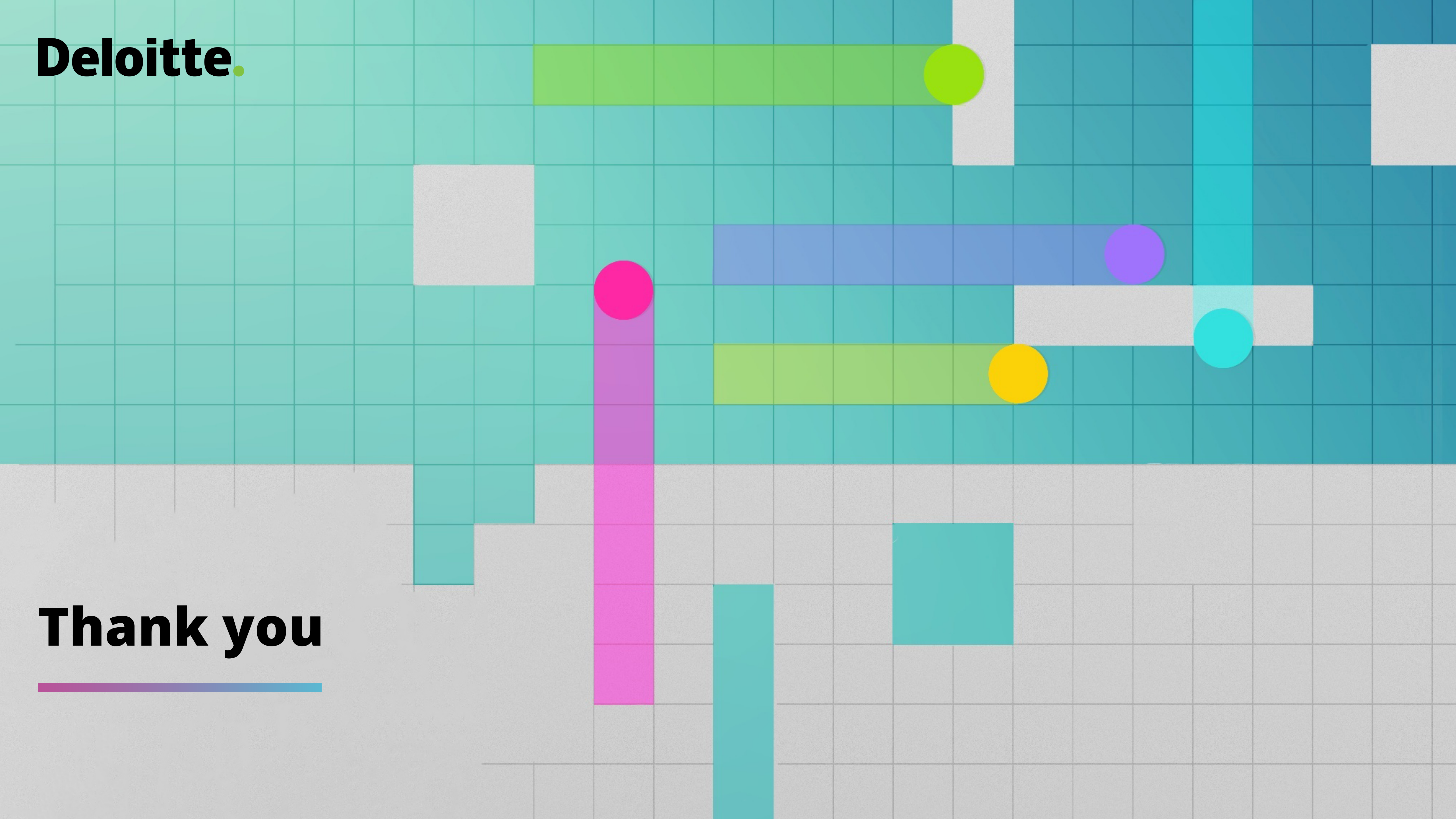
## TMT Highlights Czech Republic 2025

Knowing what new trends in technology, media and telecommunications (TMT) will affect us today is a critical competitive factor that can help your company gain a market advantage. That's why we prepare an annual forecast of key TMT trends that will affect how companies operate globally.



**Deloitte.**

**Thank you**







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