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ANALYSIS

5 June 2016

Trends in Employees' Wages in the First Quarter of 2017

Results of statistics demonstrate good conditions on the labour market in the Czech Republic, which, however, have brought troubles in searching for new labour force to employers. This also corresponds to a higher pace in income growth when the average wage increased by 5.3%, year-on-year (y-o-y). Results of business statistic performed by the Czech Statistical Office (CZSO) showed also an important increase in the registered number of employees by 1.7% in Q1 2017. Let us remember that the employment rate of the aged 15 – 64 years dropped to 3.5% and thus it was the lowest in the EU Member States.

The labour market in the Czech Republic is in good shape. Results of the Labour Force Sample Survey (LFSS) have been showing a permanent growth in total employment ever since 2012. The first quarter of 2017 has brought another record-breaking employment rate of 72.8% in persons of the age group of 15 – 64 years. The rise in business demand for labour force is strong. The number of vacant jobs reported to labour offices reached 159 thousand vacancies at the end of April 2017, which is more than the so far maximum value in 2008; that means the highest number in the whole history of this registration.

The total number of the unemployed in Q1 2017 declined to 184.6 thousand persons. The number of the long-term unemployed has been falling fast as well. A high unemployment rate lasts already solely in persons with educational attainment of primary education (16.2%), it was significantly reduced in the persons with apprenticeship certificates (a decline by 0.8 percentage point (p.b.), y-o-y, to reach 4.1%). The unemployment rate in graduates having secondary education with A-level examination is mere 2.5%, and higher education graduates show the unemployment rate of just 1.5%.

Yet in the Czech Republic there is a significant number of persons who do not work and do not seek work in an active manner, but being questioned in the LFSS, they state they wish to work. This labour force reserve in the number of 133.5 thousand persons is obviously the reason for the discrepancy in between the number of the unemployed measured by the LFSS and the number of job applicants registered at local offices of the Labour Office of the Czech Republic.

Preliminary data of the CZSO business statistics have confirmed the described trend in the **growing number of employees**. In Q1 2017, compared to the same period of the previous year, there were by 67.7 thousand full-time-equivalent (FTE) employees more, which is a relative increase by 1.7%. Let us remember that a decrease (by 1.0%) in the average registered number of employees occurred last time in 2013 and since 2014 the number has been growing monotonously.

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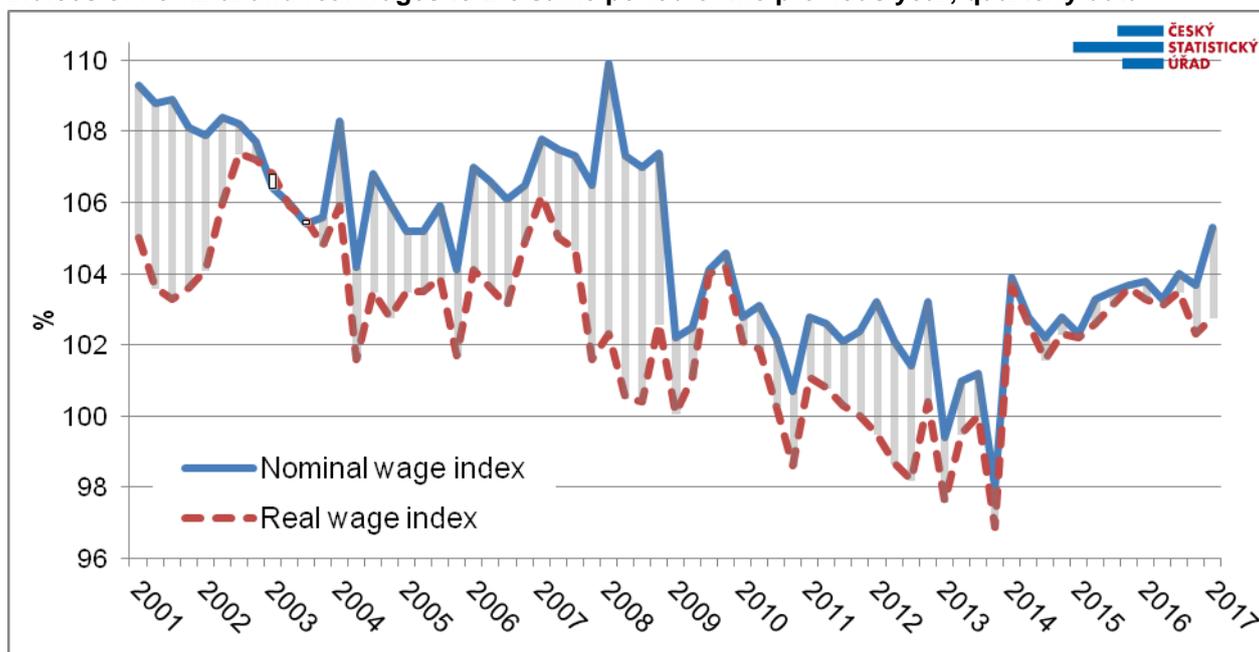
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Despite in general positive development there are certain sections of the economy, which do not contribute to it. First of all, mining and quarrying continue to experience hard times related to lay-offs. In Q1 2017 the number of employees of these economic activities dropped by 1.8 thousand persons, i.e. – 6.6%. A descend continued in activities of construction; agriculture, forestry and fishing; and in accommodation and food service activities, which got diminished by 2.2 thousand persons (- 1.1%), 0.4 thousand persons (- 0.4%), and by 0.3 thousand persons (- 0.3%), respectively. All other sections of economic activities of the CZ-NACE experienced a growth in the number of employees.

The increment of the absolute importance was that in manufacturing, which is, as an industry, the largest employer in the Czech Republic. It was 16.9 thousand persons, i.e. by 1.5% more, relatively. Wholesale and retail trade; repair of motor vehicles and motorcycles grew substantially by 12.5 thousand persons, i.e. by 2.6%, as well. The relatively highest increase was recorded in electricity, gas, steam and air conditioning supply by 1.6 thousand persons (+ 5.5%) and also in information and communication by 5.6 thousand persons (+ 5.4%). An important increase was recorded also in professional, scientific and technical activities (+ 4.6%). Concerning industries dominated by government ownership, public administration and defence; compulsory social security demonstrated an increase in the number of employees by 2.0 thousand persons, which is + 0.7%, relatively. In education the number of employees grew by 6.3 thousand persons, which is + 2.3%, relatively, and human health and social work activities saw increase by 4.0 thousand jobs (+ 1.4%).

Indices of nominal and real wages to the same period of the previous year, quarterly data



Concerning wages we can see the growth has been ever more dynamic. The average wage (CZK 27 889) grew nominally by 5.3% in Q1 2017, which is by most since 2008. The graph

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enclosed demonstrates several periods in history. In the period till 2009 the year-on-year increases in the nominal average wages were high yet often were offset by inflation (the difference in between the two curves) and the real wage was growing less then. Since the beginning of the recession the growth in nominal wages was descending, which resulted in stagnation in 2013. From the real wage point of view these were even decreasing in 2012 and 2013.

In between the end of 2012 and beginning of 2013 and the year after the curves are affected by a change to legislation. The year of 2014 was the turning point when nominal wages went upwards and they have been keeping the direction so far.

Till Q3 2016 real wages virtually copied the trend in nominal wages because inflation (consumer price index) has been still at the level of about 0.5%. This way the real purchasing power of wages has been increasing at a fast pace. As a higher inflation arrived at the end of the last year the trend is not valid anymore and the curve of nominal wages and that of real wages begun to differ. In Q1 2017 wage grew by 2.8% year-on-year, in real terms which is by a bit less than on the average for the last year.

In Q1 2017, similarly to developments in the number of employees, economic activities of respective sections of CZ-NACE also showed rather differentiated developments in the wage growth. None of the sections experienced a decline; year-on-year nominal increases in wages were from 0.7% to 11.8%. The average wages increased most in two CZ-NACE sections, which traditionally feature the lowest average wages, that is in accommodation and food service activities (+ 11.8%) and in administrative and support service activities (+ 7.2%). Yet even this relatively high pace has not changed the ranking of the poorest economic activities. The pace over 6% was recorded in human health and social work activities (+ 6.2%) as well.

Conversely, in mining and quarrying the increment in the average wage was the lowest (+ 0.7%). Let us mention these economic activities always had wages high above average. In 2008 they were by a quarter above the national average. Yet since 2012 the hard coal mining in the Ostrava Basin has been phased out and the wage increase has been slowing down. Thus in Q1 2017 the wages in mining and quarrying were by sole 8% higher than the national average.

The financial and insurance activities did not maintain to keep the first rank in the wage level of Q1 2016 and the average wage in these activities grew at relatively moderate pace by 3.4% and thus with CZK 53 579 of the average wage the activities was ranked second to the information and communication with the average wage of CZK 54 090, in which the year-on-year increase was 4.7%, that was + CZK 2 411 expressed in money.

Among industrial activities it was manufacturing what was doing the best and it is also the largest employer with 1 131 thousand employees. The average wage in manufacturing grew by 5.6% to reach CZK 27 833. Wholesale and retail trade; repair of motor vehicles and motorcycles as the activities with the second largest number of employees were doing well similarly with a wage growth by 5.5% to reach CZK 26 424.

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The wage growth in Q1 2017 was augmented by a higher number of hours worked because the quarter was by three working days longer year-on-year, there were lower incapacity for work due to disease and injury and other types of absence at work, which were observed in every section of economic activities.

The growth in average wages was most pronounced in the Plzeňský Region (6.8%), Ústecký Region (6.4%), and in the Karlovarský Region (6.2%). In other regions the wage growth was below 6%. In the Capital City of Prague the growth in average wages was the lowest, by 4.3%. On the other hand, Prague still boasts the fastest growth in the number of employees. In Q1 2017 there was an increment in the number of employees by 3.5% there. No region experienced a drop in the number of employees, the least increases were found in the Plzeňský Region (+ 0.2%) and in the Karlovarský Region (+ 0.4%). The highest growth in the number of employees, but that in Prague, was recorded in the Středočeský Region (+ 2.8%).

The News Release of the CZSO for Q1 2017 contains also data on the median wage, which is calculated from a mathematical model of the earnings distribution. The model shows the wage of a middle employee that means a common wage level. In Q1 2017 the median wage was CZK 23 704, by CZK 1 176 (+ 5.2%) higher than in the same period of the previous year. The wage interval remained wide - eighty per cent of employees earned wages within the interval of CZK 13 200 and CZK 43 107. From the standpoint of sexes, the wage increase was rather more pronounced in males (+ 5.5%) and less in females (+ 5.0%). The male wage level is significantly higher: in Q1 2017 the median wage in females was CZK 21 162 while in males it was CZK 25 905.

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