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ANALYSIS

6 September 2013

COMMENTARY: DEVELOPMENT OF AVERAGE WAGES OF EMPLOYEES IN Q2 2013

The results for Q2 2013, on the contrary to those for the previous two quarters, are probably not affected by any changes to legislation, or movements of wage resources in the business sphere following from such changes, respectively. The current growth in wages is thus a logical follow-up of the results for Q3 2012, or it is comparable to the moving average from the previous two quarters (1.7% nominally, as presented in the previous commentary). The wage development has shown further decline in its pace: after nominal increments fluctuating around 2.5%, its values in the last year have been ever deeper below 2%, and the current one is mere 1.2%.

Rather positive news is the consumer price development, which in previous periods "bit off" larger bits from the wage increments so in real terms purchasing power of earnings suffered significant drops. This way a decrease in the inflation rate down to 1.5% partially compensates a slower pace of the wage nominal growth. Nevertheless, the real wages decreased by 0.3% in Q2 2013.

In the non-business sphere, which depends on the state budget, the average salary increased nominally by 1.9% and by 0.4% in real terms. In the business sphere, in which the wage development fluctuate most traditionally because of effects of current conditions on the market, the nominal growth of the average wage reached mere 1.1%, which means a decline by 0.4% in real terms. The share of extraordinary bonuses in the average wage in the business sphere (except for manufacturing and transportation segments) increased year-on-year, conversely the influence of overtime work has been further reduced.

The registered number of employees (FTE persons) in Q2 2013 decreased again, this time by 1.2% compared to the same period of the previous year, which means a decrement by 44.3 thousand persons.

The decrease in the number of employees in manufacturing, which is the largest economic activity of the Czech economy, got deeper (-1.4%), as well the number of employees in construction (-6.9%), which suffers of a long-term recession. The drop in accommodation and food service activities was the relatively deepest one (-7.6%). This way the business sphere in total has lost almost fifty five thousand jobs, which is a drop by 1.8%. The situation is partly saved by the non-business sphere, in which the number of employees has grown by 10.4 thousand persons (1.6%) following the drops in the last year. This increase happened mostly in public administration (7 thousand persons), which covers also public works.

Data for the entire first half of 2013 cannot be analytically compared to previous data for reasons described in previous commentaries on Q4 2012 and Q1 2013.

In a long-term view, it can be seen that certain activities diverge from the development of the overall average wage. While over the four-year period since Q2 2009 the overall average wage has grown by 9.5%, the average wage in agriculture, forestry and fishing increased by 15.8%

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ANALYSIS

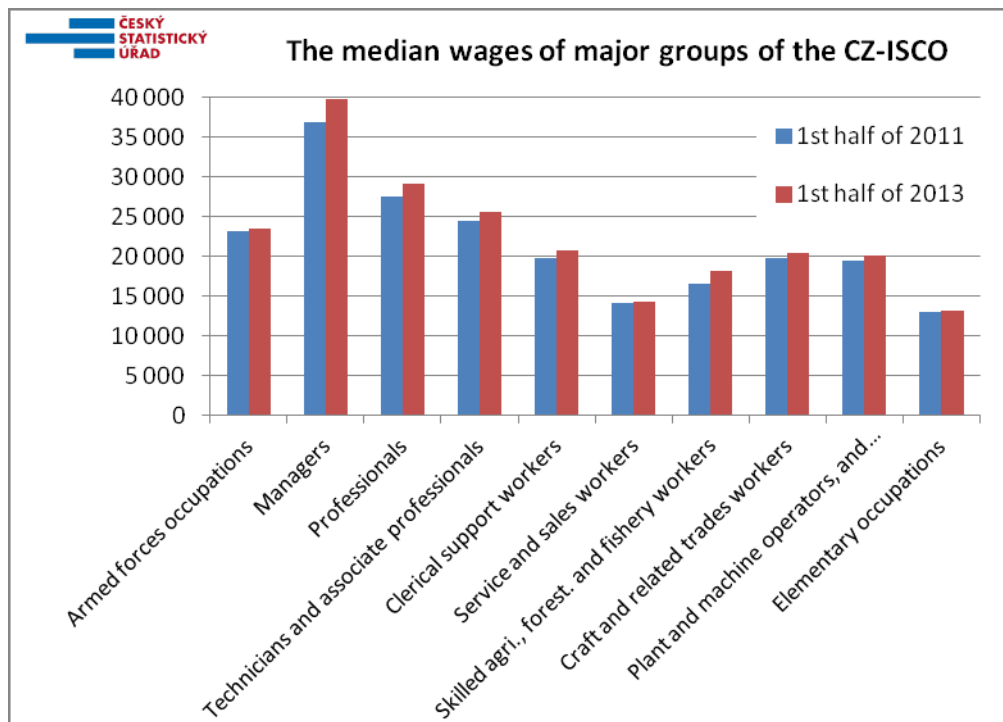
and in manufacturing by 15.2%. On the contrary, the average wage in transportation and storage increased by mere 1.0%, in public administration by 2.1%, and in construction, suffering from a long-term recession, by 2.5%.

This year the CZSO News Releases also include data on the median wage. These are calculated by means of a mathematic model of earnings distribution and show the wage of an employee right in the middle of the distribution. This way it demonstrates the middle level, that means the common level of wages. Because differences in earnings have been ever growing the median wage is already by approx. four thousand Czech crowns below the arithmetic average (the average wage) and in Q2 2013 the median wage was CZK 20 944.

The female wage level (median wage was CZK 18 836) was essentially lower than that of males (CZK 22 769). The male wages are more varied; 80% males earned wages in between CZK 10 761 and CZK 45 176 while 80% females received pay cheques from CZK 9 463 to CZK 33 747.

Preliminary results of the **Information System on Average Earnings (ISAE)** for the first half of 2013 offer a better structured view of earnings. The ISPV results, however, **cannot be directly compared** to data given in the latest News Release because of differences in the methodology of the earnings calculation (first of all, the absent employees and part-time employees are not included).

Graph 1



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ANALYSIS

Wages are strongly differentiated by **employee category**, as expressed by major groups of the CZ-ISCO classification and the differences have been getting even greater. Numbers of persons belonging to respective categories are, however, also different, qualified workers in agriculture and armed forces are hard to calculate with, because they account for solely a couple of tens of thousands persons in the Czech economy.

Over the recent two years earnings of the best paid managers have shown the fastest growth (their median wage increased by 7.9%), and simultaneously they have demonstrated a very high variability in salaries. One tenth of the best paid managers earned salaries higher than CZK 104 795 and the opposite tenth earned less than CZK 19 484. A faster growth was seen also in professionals (5.8%) among which the tenth of the best paid earned more than CZK 59 801; technicians and associate professionals recorded a slightly above average growth (4.6%). On the contrary, in this period the median wage almost stagnated in elementary occupations (0.8%), and grew a little in service and sales workers (1.7%). A roughly three per cent growth was recorded for wages of workers in blue collar occupations.

Educational attainment has had a very substantial effect on the wage level of employees as well. In the first half of 2013 higher education graduates earned more than twice as high wage (CZK 32 240) than employees working in elementary occupations (CZK 15 504) according to the median wage. Employees with A-level examination earned the median wage of CZK 22 910 and workers with apprenticeship without A-level examination had the median wage of CZK 18 482. The highest wage variability was found in the university graduates of which 80% employees earned the gross wages in between CZK 19 939 and CZK 72 344. Conversely, the least qualified employees demonstrated the lowest variability of wages.

The overall **distribution of earnings** has been broadened over the recent two years. Earnings of the best paid persons grew most. One tenth of employees having the lowest earnings had wages below CZK 11 763 (1st decile) according to preliminary results of the ISAE in the first half of 2013, on the contrary, the tenth of the best remunerated persons earned wages above CZK 40 379 (9th decile). The decile ratio has increased from 3.30 to 3.43 over the two years.

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