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ANALYSIS

4 September 2015

Commentary: Labour Market Development in Q2 2015

Results of up-to-date statistics demonstrate continuous recovery on the labour market. Data from the Labour Force Sample Survey (LFSS) in households have brought further record-breaking values of the employment rate; the general unemployment rate further declined, year-on-year (y-o-y). Results of the Czech Statistical Office business statistics show a significant increase in the number of registered employees. The average wage increase has been failing behind the economy development; nevertheless, the purchasing power of earnings has been increasing anyway. The growths of employment as well as wages have been differentiated by sphere and by economic activity.

Results of the LFSS have been indicating a permanent growth of total employment. The employment rate value in Q2 2015 itself exceeded the limit of 70% for the first time of the Czech Republic history. There was an increase in employment in males, yet much higher one in females, and it also covered all sectors and activities of the economy.

As the number of working persons has been increasing the number of people searching for jobs, meaning jobless, has been declining. The general unemployment rate decreased down to the five percent level. This way the Czech Republic, along with Malta, is ranked second to the neighbouring country of Germany, in comparison to other Member States of the European Union. This, along with an increasing number of job vacancies have caused some economic activities have been experiencing a lack of labour force, especially the qualified one. On the other hand, some of the adverse structural indicators pertain, as: a high unemployment rate in persons with primary education only (21.9%), a substantial gap in between male unemployment and female unemployment, and, first of all, a significant proportion of long-term unemployed, for over one year, which accounted for 46.7% of the total number of persons searching for jobs.

Preliminary data from the CZSO business statistics confirm the prevailing positive trends in employment. It is namely a growth in the number of registered employees. The two-per-cent growth (FTE) year-on-year means a positive balance of almost 75 thousand newly occupied jobs in absolute figures. It was manufacturing that contributed the most to this pleasant result. Its sole contribution was 31.4 thousand jobs, followed by wholesale and retail trade; repair of motor vehicles and motorcycles with 8.5 thousand, and administrative and support service activities (including job and recruitment agencies) occupied the third place with 7.1 thousand. Slight year-on-year decreases of the number of registered employees were observed in construction, then in accommodation and food service activities, financial and insurance activities, and in two small industrial activities of mining and quarrying and electricity, gas, steam and air conditioning supply. In total, however, these five economic activity sections saw a decline of 5 thousand full-time jobs, that is less than the number that emerged, for instance, solely in professional, scientific and technical activities.

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Concerning wages moderation that was typical for the last period sustained in Q2 2015 as well. The nominal average wage increase by 3.4% can be referred to as the highest one since Q4 2009 yet entirely different periods are compared this way here. The period of deep recession, that brought massive layoffs, compared to the current period of significant economic growth and increasing demand for labour force. Moreover, this year increase in wages has been strongly driven by one-time raise of tariff salaries in the government sphere at the end of 2014 and the business sphere, in which wages are determined by market forces and collective negotiations, have been contributing less.

The real wages increased by 2.7%, year-on-year, while the consumer price index (inflation rate) reached 100.7%, the highest value since the end of 2013, in the corresponding period. Nevertheless, this result indicates a pleasant increase in real purchasing power of earnings and thus growing support to domestic consumption.

In respective economic activity aggregates (CZ-NACE sections) the wage development was substantially differentiated. Two CZ-NACE sections even experienced a decline in nominal average wages – mining and quarrying (-0.9%) and electricity, gas, steam and air conditioning supply (-1.6%). Other CZ-NACE sections year-on-year increases fell within 1.5% in water supply; sewerage, waste management and remediation activities) and 6.1% in accommodation and food service activities. This economic activities, featuring the lowest pays, undoubtedly reflected the positive effect of the increased minimum wage.

In the main motor of the Czech economy, manufacturing, which gives jobs to 1 093 thousand employees, the average wage increased by 3.7%, y-o-y. What is remarkable is the wage increase in construction, in which the average wage grew by 5.1%, while the number of employees simultaneously fell yet the number of overtime hours increased substantially. An increase in overtime hours affected average wages in all activities of the business sphere, except for agriculture, as well. On the contrary, the length of paid non-worked hours dramatically fell year-on-year.

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Data for the whole 1st half of 2015 have brought a nominal growth in wages by 2.9%, which, with inflation (0.4%) effect deduced, means the real increment is by 2.5%. The non-business sphere showed a growth by a whole percentage point faster than that of the business sphere yet the average wage in the non-business sphere (CZK 25 640) was absolutely lower than that in the business sphere (CZK 25 848). Such a simple comparison of the spheres is, however, tricky because sets of employees are almost incomparable due to different levels of qualifications of the employees and also due to substantially different distribution of earnings.

If viewed by CZ-NACE section of economic activities absolute levels of wages still indicate a noticeable margin of the leading three sections from other sections. In the first half of 2015 it was financial and insurance activities showing the highest average wage (CZK 50 541), followed by information and communication (CZK 47 649). Then, with a slight margin, it was the average wage in electricity, gas, steam and air conditioning supply (CZK 41 040). Other economic activities fell deep bellow the forty-thousand limit while average wage in professional, scientific and technical activities was the highest of them with CZK 32 385.

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The activities with the lowest pay were dominated by accommodation and food service activities with mere CZK 14 500 followed by administrative and support service activities, also traditionally, with CZK 17 004.

Concerning the regional structure the highest average wage growth was in Hlavní město Praha Region (CZK 33 397), as is used to be in recent years all the time, yet in the first half of 2015 the wage growth pace in Prague was the slowest (2.1%). The Středočeský Region had the second highest wage level (CZK 26 035), and, at the same time, an above average wage increment of 3.2%. Absolute values of average wages in other regions fell below the nation average while the Karlovarský Region demonstrated the lowest average wage (CZK 21 960) and this region, moreover, as the only one in the Czech Republic saw a decline in the number of registered number of employees (-0.2%). The highest year-on-year growth in wages was recorded in the Pardubický Region (3.7%) with a simultaneous increase in the number of employees by 2.5%.

The News Release 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 Q2 2015 the median wage was CZK 22 230, by CZK 920 (+4.3%) higher than in the same period of the previous year. This way the wage level of the middle employee grew at a faster pace than the arithmetic average of earnings. Changes in the earnings distribution indicate the earnings growth is of blanket character while the lowest wages were growing relatively more which relates to an increase in the minimum wage level. The wage interval remained very wide: 80% of employees earned from CZK 10 860 to CZK 42 698. Concerning sexes, increases in wages were more pronounced in males, whose wage level has been already significantly higher. In Q2 2015 the female median wage was CZK 19 837 while the male one was CZK 24 398.

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The **preliminary results of the Average Earnings Information System (ISPV)** for Q1 2015 bring a more detailed view of wage distributions. The ISPV, however, applies a different methodology for the calculation of personal earnings of employees, it especially excludes all absence at work and therefore the data may neither be compared to the aforementioned values of the average wages nor to figures given in tables attached to the News Release of the Czech Statistical Office.

The median wage, according to the ISPV methodology, reached the value of CZK 23 091 in the first half of 2015. Eighty per cent of employees earned wages within the interval of CZK 12 154 and CZK 42 946, and the decile ratio was 3.5. The wage level for women (median wage CZK 20 824) was substantially lower than that for men (median wage CZK 24 995); and earnings inequality in women was also lower than that in men: the decile ratio for women was 3.1 while the men decile ratio was 3.8.

According to the valid Classification of Occupations (CZ-ISCO) managers were the group with highest earnings having the median wage of CZK 42 726 and a very wide decile span from CZK 19 625 to CZK 115 772. The second highest wage level can be found in professionals

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lying in between deciles of CZK 21 462 and CZK 64 653, while their median wage is CZK 30 907. The third rank is occupied by technicians and associate professionals with the median wage of CZK 27 460 and the decile range from CZK 16 786 to CZK 46 160. Clerical support workers had already earnings below the total values with the median wage CZK 21 211 and the decile range from CZK 12 344 to CZK 34 547. A great number of service and sales workers belong to low earnings employees with the decile range from CZK 10 180 to CZK 27 314 and their median wage was CZK 15 242. Craft and related trades workers and plant and machine operators and assemblers have their median wages CZK 21 988 and CZK 21 083, respectively. The lowest wage level can be found in general at elementary occupations with the median wage CZK 14 033 and the decile range from CZK 9 502 to CZK 22 708.

Wages are markedly structured by educational attainment of employees when in the first half of 2015 employees with higher education earned the highest earnings, their median wage was CZK 33 563. Employees with primary and/or incomplete education had the lowest wages (median wage of CZK 16 268). Employees having secondary education with A-level examination earned more (CZK 24 113) than employees having secondary education without the A-level examination (CZK 19 236), yet less than employees with completed higher professional school or with bachelor degree (CZK 26 982).

The higher the wage level the higher the earnings differentiation: 80% of university graduates earned wages within a broad interval of CZK 20 074 and CZK 75 563 and their decile ratio was then 3.8. Conversely, 80% of employees with primary education earned wages within the span of CZK 10 117 and CZK 26 634. Over three quarters of employees with secondary education without A-level examination earned gross wages below CZK 25 000 as well.

When broken down by age group employees up to 20 years of age earned the lowest wages with the middle earning of CZK 15 493, while in the age group 20-29 years the median wage was already CZK 20 590, and in the age group 30-39 years the median wage was CZK 24 165.

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