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ANALYSIS

7 June 2012

COMMENTARY: DEVELOPMENT OF AVERAGE WAGES OF EMPLOYEES IN Q1 2012

Growth in wages was significantly affected by payments of extraordinary bonuses. Data on wages for the business sphere and the non-business one since 2010 have been substantially revised because of administrative transfers of reporting units.

Overall the average wage nominally increased by 3.6%, year-on-year, while the growth was significantly contributed to by an increasing share of extraordinary (irregular) bonuses and premiums. It can be assumed that these additional components were not paid to everybody and therefore the increase in wages was not the same in all groups of employees.

The second remarkable fact was the increasing share of paid hours out of work, which indicates that employees take their vacations in cases of a shorter illness. This trend affects the average wage level because the compensation for vacations is paid as an average of the previous period, while employees do not receive any compensation for the first three days of an illness and then receives sickness benefits.

Although the average wage growth was nominally higher than in the previous quarters it fell behind the accelerating increase in consumer prices (inflation), which grew by 3.7%. Therefore the real purchasing power of employees declined by 0.1% in Q1 2012.

In view of respective activities of CZ-NACE real wages increased solely in ten sections of CZ-NACE and in nine of them the average real wages declined, see Graph.

In Q1 2012 the full time equivalent of employees decreased by 0.4% compared to the same period of the previous year, that means by approx. sixteen thousand persons in total. The deepest decline was recorded in 'construction' (-4.0%), then in 'public administration and defence; compulsory social security' and in 'arts, entertainment and recreation' (identically by -2.8%). A significant growth was recorded in 'real estate activities' (+7.7%).

* * *

Non-business sphere and business one are defined by sectors of the national accounting in the official statistics. In history there were (administrative) transfers of reporting units from one sphere to the other one caused by, for instance, privatisation, after all two decades ago the business sphere was almost an empty term in the Czech Republic.

The latest improvement in accuracy of the classification of certain organisations according to the so-called 50% criterion based on the shares of finances to cover operating costs, as required by Eurostat, was carried out in 2011. This requirement implementation resulted in one-time done massive transfer of hundreds of reporting units. These were namely retirement homes for the elderly, school canteens, etc., which moved into the business sphere. The list of these entities was published on the CZSO webpages in the second half of 2011. They were re-coded in the Statistical Business Register as at 1 August 2011, yet the change was not shown

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in processing for results till the end of 2011. The change was incorporated within the revision of annual data, also retroactively since 2010, in order results to be consistent with data in the national accounts.

In time series the change affects the comparisons of all quarters of 2010 to those of 2009 by a distortion of the base compared. Starting Q1 2011 indices has been consistent because since the beginning of 2010 the time series of values of average wages have been comparable in terms of methodology.

The administrative transfer caused shifts in the average wage levels of both the spheres yet in opposite directions. The shift in the non-business sphere was higher, because this sphere is substantially smaller than the other. For the entire year 2011 the shift in the business sphere is CZK -42 while that in the non-business one accounts for CZK +186. Following Table shows changes in CZK in respective periods of 2011.

Period	Spheres	
	Business	Non-business
Q1 2011	-41	164
Q2 2011	-40	171
Q3 2011	-40	185
Q4 2011	-45	223
Q1-Q2 2011	-40	167
Q1-Q3 2011	-41	173

Thus the wage levels of the business sphere and the non-business one moved somewhat closer to each other but merely virtually, of course. When monitoring the current development one can find a slower pace in the growth of wages in the non-business sphere. This also appeared in Q1 2012 when the nominal growth in this sphere was +3.5% and in real terms wages dropped by 0.2% here, while the business sphere average wage grew nominally by +3.6% and by -0.1% in real terms. This was the first decline in the average real wage in the business sphere since Q4 2010. On the contrary, the non-business sphere has been experiencing declining average wage for already the second year in a row.

The number of employees fell in both the spheres; in the business sphere by 0.4%, and in the non-business one by 0.5%.

* * *

The minimum wage has showed no change since January 2007 and accounts for CZK 8 000.

Dalibor Holý

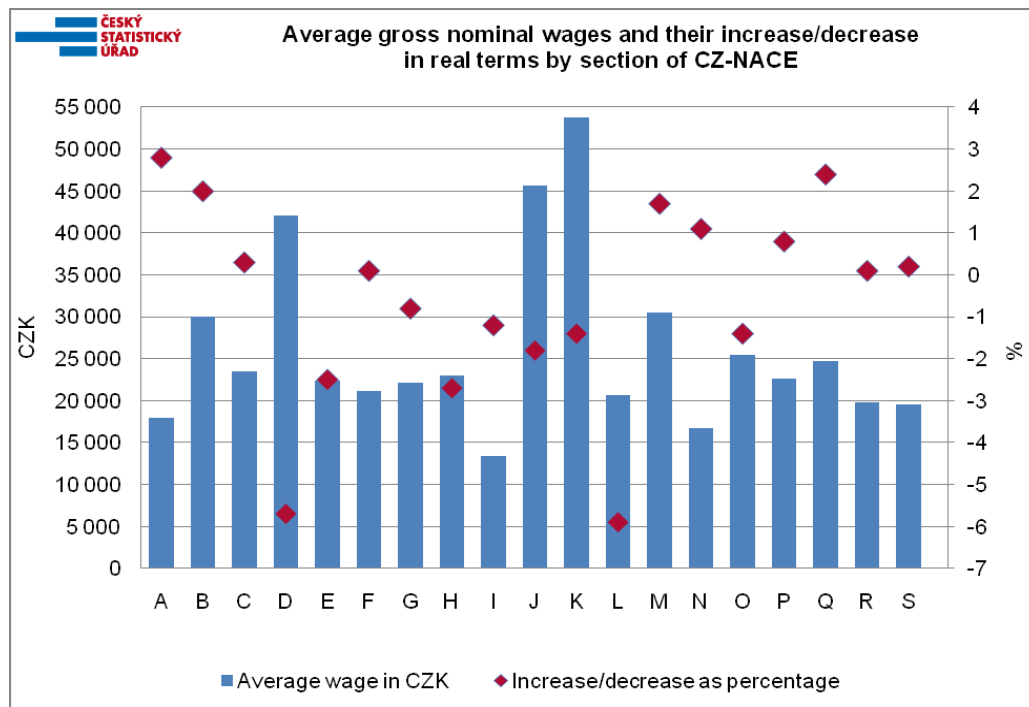
Labour Market and Equal Opportunities Statistics Department of the CZSO

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Graph



ECONOMIC ACTIVITIES according to CZ-NACE	
A	Agriculture, forestry and fishing
B	Mining and quarrying
C	Manufacturing
D	Electricity, gas, steam and air conditioning supply
E	Water supply; sewerage, waste management and remediation activities
F	Construction
G	Wholesale and retail trade; repair of motor vehicles and motorcycles
H	Transportation and storage
I	Accommodation and food service activities
J	Information and communication
K	Financial and insurance activities
L	Real estate activities
M	Professional, scientific and technical activities
N	Administrative and support service activities
O	Public administration and defence; compulsory social security
P	Education
Q	Human health and social work activities
R	Arts, entertainment and recreation
S	Other services activities

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