

## ANALYSIS

6 March 2026

### Development of the Czech labour market in the Q4 2025

**The average wage increased in nominal terms by 7.4%, year-on-year (y-o-y), in real terms by 5.1%. Trends in main indicators of the Czech labour market were not very pronounced, the unemployment continued to gradually increase, recently faster in females. People in their forties and fifties dominate the labour market.**

#### Employment, unemployment, and economic inactivity

For the labour market, it is the employment rate that is a key indicator. It virtually stagnated in the Q4 2025 (the y-o-y decrease by 0.1 percentage point (p. p.) to 75.7%). In absolute numbers of the employed, movements are affected by demographic factors, including migration, which also change internal structures according to age and now they mainly show an ongoing trend of aging of the working population. Results of the Labour Force Sample Survey (LFSS) for the Q4 2025 show an increase in the total number of both the employed and the unemployed, whereas the number of the economically inactive was lower, year-on-year.

The number of working persons increased by 68.2 thousand, year-on-year, which is an increase by 1.3%. In females, the increase was by 78.3 thousand, whereas the number of working males decreased by 10.1 thousand persons. This opposing trend was not a novelty; it already peaked in the first half of 2025 and now it is already rather exhausted.

In total, employment of people living in dwellings (flats) reached CZK 5 272.2 thousand persons. In terms of age, mainly marginal groups contributed to the year-on-year increment. The age group of 60+ years contributed the most (by 79.5 thousand), followed by the age group of 45–59 years (by 38.5 thousand) and, on the other side, in the youngest age group of 15–24 years, there were by 26.4 thousand persons more. The number of working persons aged 25–44 years decreased, y-o-y.

As for the status in employment, all three main categories increased this time; the number of working persons with the status of employees increased by 33.2 thousand, the number of the self-employed (own-account workers) increased by 34.0 thousand, and the number of employers increased by 2.3 thousand, year-on-year. The share of entrepreneurs in the total employment was 15.9% in the Q4 2025.

The employment in the primary and the secondary sector slightly decreased; only the tertiary sector, where we can find an increase by 115.8 thousand, ensured the overall growth of the employment. 10 years ago, in the Q4 2015, 58.8% of all working persons worked in the tertiary sector, whereas currently it is already 63.2%.

The employment shift is also accompanied by an increase in the number of those with higher education, the number of whom was already 1 540.8 thousand (29.2% of the total employment), which is a year-on-year increase by 55.3 thousand.

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In the Q4 2025, 514.2 thousand persons worked in their main job part time, which is by 30.9 thousand more, year-on-year (an increase by 6.4%). Part-time jobs are predominantly used by caring females; among men, they are used more solely in the age group of 60+ years.

The unemployment continued to gradually increase; in the year-on-year comparison, the number of persons seeking a job increased by 24.7 thousand to 158.2 thousand. The increase affected both sexes; the number of unemployed females increased by 9.1 thousand to 82.1 thousand, the number of unemployed males by 15.6 thousand to 76.1 thousand; the trends turned around during the year to the disadvantage of females. Currently, mainly persons in their lower middle age become unemployed; the highest number of the unemployed was in the age group of 30–44 years. There were 22.7 thousand males and 31.5 thousand females unemployed in that age.

The number of the unemployed who were jobless for one year or longer (the long-term unemployed) also increased, year-on-year, by 12.9 thousand to 52.2 thousand; currently, they already made almost a third of the unemployment.

The unemployment rate of the 15–64 years old (according to the ILO definition) increased by 0.4 p. p. to 3.0%. In terms of Regions, the situation continued to be the worst in the *Karlovarský* Region and in the *Ústecký* Region, where it exceeded a five percent level.

The surplus labour (persons who do not work, are not actively seeking a job and therefore they do not comply with the ILO requirements for the unemployed, yet they state that they would like to work) decreased by 1.9 thousand to 75.1 thousand.

*Note: The LFSS only covers persons living in dwellings (flats), not those living in hostels and similar collective households. It has a negative influence on the capture of some groups of foreigners who often use such ways of housing. Since 2023, the methodology of weighting and grossing up in the LFSS has been adapted to this type of survey, which has had an impact on the time series of absolute data on employment, especially in the breakdown by age group. The LFSS weights are newly adjusted according to the results of demographic statistics for each quarter.*

### **Registered number of employees converted to full-time equivalent employees**

Preliminary data of the CZSO's business statistics confirm a not very pronounced growth trend in the Czech economy. The registered number of employees in full-time equivalent (FTE) increased, y-o-y, in the Q4 2025, by 9.5 thousand; in relative terms, it was by 0.2%. (The registered number of employees (headcount) increased by 14.4 thousand or by 0.3%.)

While the overall figure shows a moderate value, in the breakdown by CZ-NACE section we can find some significant increases and decreases in the numbers of employees, which indicate that the labour market is changing its structure and that employees are fluctuating.

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The sector of services and care remained an area of growth also in the Q4 2025, whereas in the primary and the secondary sector we can find a decrease in the registered number of employees again. In seven sections of the CZ-NACE, the number of employees decreased, y-o-y, by 19.9 thousand in total and in the remaining twelve sections it increased by 29.4 thousand in total. In individual economic activities, the relative increments or decrements ranged widely from -8.7% to 8.9%. These extreme changes, however, were in economic activities that are insignificant as for the number of their employees.

The overall majority of the decrease is owing to 'manufacturing', where there were by 12.8 thousand less employees, y-o-y. In relative terms, it was not a very dramatic decrease - by 1.2%; however, the decrements have been accumulating already for many successive years. 'Manufacturing', however, is still the biggest industry (economic activity) in Czechia and it employed also in the Q4 2025, as the only section, over one million employees (1 037.7 thousand). The Tab. 1 in the news release on average wages therefore provides CZ-NACE divisions of this section, which were the biggest as for the number of employees. In six of those divisions, we can find decreases in the number of employees. The deepest one in both the relative and absolute terms was in 'manufacture of motor vehicles, trailers and semi-trailers' (by 3.0%; 4.9 thousand). The only selected division with an increase in the number of employees was 'manufacture of food products' (by 1.6%; 1.3 thousand).

The largest relative decrease in the number of employees was in 'mining and quarrying', an utterly marginal industry already, in which the number of employees currently decreased by 8.7%. It was a decrement by 1.5 thousand to 15.4 thousand. Also in 'agriculture, forestry and fishing', in which 88.9 thousand employees were currently employed, there was a moderate decrease (by 1.7%; 1.6 thousand).

In the energy sector ('electricity, gas, steam and air conditioning supply'), there was a downward trend during the year 2025; in the first three quarters, there still were year-on-year increases that were gradually decreasing, however, in the last quarter we can already see a decrease by 1.9% or by 0.7 thousand. In 'transportation and storage', a decrease by 0.9% occurred, which meant a drop by 2.3 thousand to 254.1 thousand. What can be more surprising is the development in 'financial and insurance activities', where the number of employees decreased by 1.1% or by 0.8 thousand. The last section with a negative value was 'administrative and support service activities' with a decrease by 0.4 thousand or by 0.2%.

On the other hand, two economic activities in which the state is dominating contributed the most to the increase in the number of employees: in 'human health and social work activities' we can find a year-on-year increase by 8.9 thousand (or by 2.5%) and in 'education' by 6.9 thousand (by 2.0%). A slight increase was also in 'public administration and defence; compulsory social security' (by 1.9 thousand; 0.6%). Therefore, in those three economic activities, over one million employees in total currently work.

Another markedly increasing CZ-NACE section belongs to the tertiary sector: 'real estate activities' recorded a high relative increase by 8.9%, which in this smaller economic activity was an increase by 3.9 thousand persons.

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As for other economic activities, it is also 'construction', which is standing out – the number of workers increased there by 1.9 thousand to 217.7 thousand (a relative increment by 0.9%) – and 'accommodation and food service activities', in which it increased by 1.7 thousand to 121.8 thousand (1.4%).

### Quarterly average gross monthly wages

The average wage (CZK 52 283) increased nominally, compared to the corresponding period of the previous year, by CZK 3 616 in the Q4 2025, i.e. by 7.4%, according to preliminary data. It is an average of a very diverse development on the level of individual branches (fields of activity), enterprises, or organisations.

The year-on-year wage growth thus roughly kept the pace from the recent years when wages constantly grew in nominal terms about seven per cent. What was more important from the point of view of standard of living of employees was the real development that compares the increase of earnings with the consumer price increase (inflation) and thus it shows how many goods and services an employee could purchase for his/her wage. The consumer price index reached the value of 2.2% in the Q4 2025, which was the second lowest value since spring 2021. In 2022 and 2023, the Czech labour market underwent a turbulent period of high inflation, which peaked at 17.6% (in the Q3 2022), which brought about a considerable slump of real wages. Since the beginning of 2024, the inflation has already been just between two to three per cent. The average wage thus increased in real terms by 5.1%, year-on-year, in the Q4 2025.

Although average wages markedly increased in all sections (economic activities), their dynamics varied widely again. Nominal increases ranged from 3.4% to 15.8%. The highest year-on-year increase can be currently found in the energy sector (i.e. the section called 'electricity, gas, steam and air conditioning supply'), where the average wage reached CZK 82 236. Moreover, the following three sections had over a ten per cent nominal y-o-y growth: 'professional, scientific and technical activities' where the wage level increased by 11.8% to CZK 67 114, 'agriculture, forestry and fishing', where it increased by 11.5% to CZK 43 133, and 'construction', where it increased by 10.9% to CZK 46 129.

This time, high increases can also be found in 'arts, entertainment and recreation', in which wages increased by 9.8% to CZK 47 126, in 'administrative and support service activities' with the growth by 9.1%, and in 'real estate activities' with 8.8%.

On the other hand, the weakest wage increase was currently in 'other service activities' (3.4%) and in 'financial and insurance activities' (3.7%). Under the five per cent level we can also find 'human health and social work activities' (4.5%) and 'mining and quarrying' (4.7%).

The highest wages in the Q4 2025 were, as usual, in 'information and communication', in which the average wage reached CZK 90 694. Further ranking was not as usual, mainly because bonus wages came into play that are paid out in the end of the year in some branches. The second highest wages thus currently were in the energy sector (CZK 82 236) and 'financial and insurance activities' with the level of CZK 77 059 ranked third.

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The ranking from the opposite side was not much surprising. In 'accommodation and food service activities', the average wage was still lower and it barely exceeded the thirty thousand level (CZK 30 272). The second lowest average wage was in 'administrative and support service activities' with the average wage of CZK 36 248 and the third lowest were 'other service activities' with the average wage of CZK 38 842.

From industries (economic activities) of manufacturing that have the largest numbers of employees, the lowest average wage was in 'manufacture of food products' (CZK 41 808), whereas the highest one was in 'manufacture of motor vehicles, trailers and semi-trailers' (CZK 59 409).

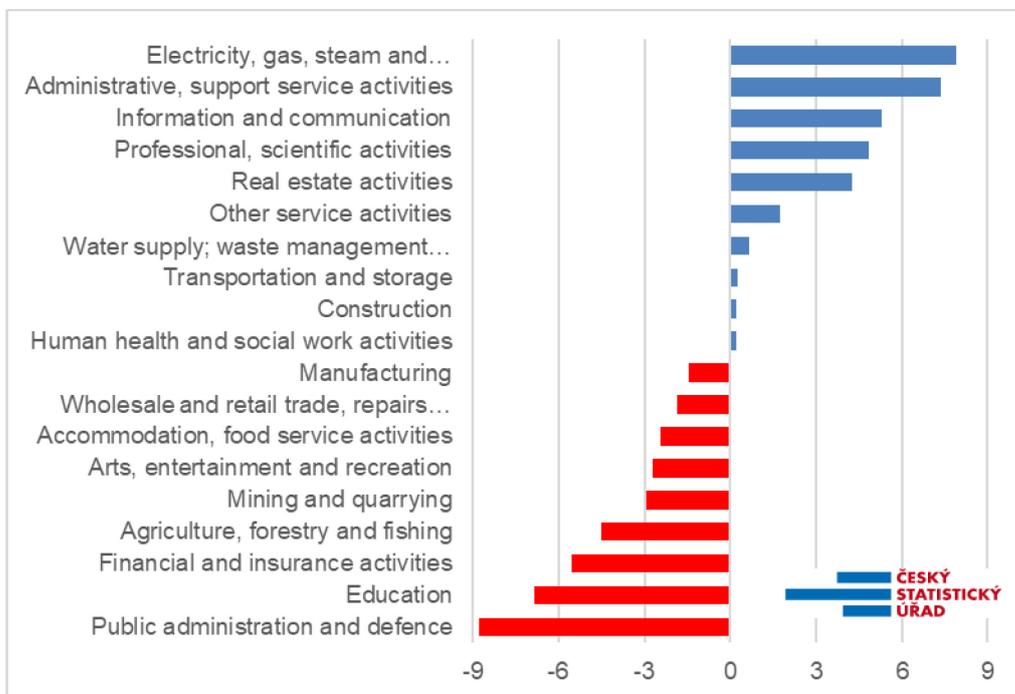
### **Long-term development of wages in economic activities (CZ-NACE sections) – comparison of the year 2025 with the year 2019**

It must be noted that new data for the year 2025 are preliminary, they come from the task with a smaller sample of enterprises or organisations ("*Práce 2-04*" questionnaire/report). After including results of larger annual tasks ("*ÚNP 4-01*" and "*P 5-01*" questionnaires/reports) and after connecting it with administrative data sources they will be refined in the periods to come. The year 2019 is closed with final results.

In total, the average wage increased from CZK 34 578 in the year 2019 to CZK 49 215 in the year 2025. It is a nominal increase by 42.3%. In real terms, however, it decreased by 0.6%, because prices in that period increased by 43.3%. Nevertheless, this general picture does not say much about the situation of employees from various fields.

### **Chart: Increment of real average wage by CZ-NACE section, years 2025 and 2019 compared (%)**

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Sources: wage and price statistics of the CZSO

Ten sections of CZ-NACE currently report the real wage level higher than they had in 2019, whereas the remaining nine still have not reached it. In the reference period, the real average wage increased the most in the energy sector ('electricity, gas, steam and air conditioning supply'; by 7.9%). It is followed by 'administrative and support service activities' with an increase by 7.4%, 'information and communication' with 5.3%, 'professional, scientific and technical activities' with 4.8%, and 'real estate activities' with 4.2%.

On the other hand, those who work in three economic activities where wages slumped in real terms by 5 or more per cent, have a noticeably worse wage level. What they have in common is the fact that there are huge requirements for qualification and there is a high share of employees with higher education. It is in 'public administration and defence; compulsory social security' (-8.8%), 'education' (-6.9%), and 'financial and insurance activities' (-5.5%). In 'agriculture, forestry and fishing', the average wage decreased in real terms by 4.5%. In the remaining sections, the values range from +1.7% to -2.9%.

In some economic activities, the trends were smoother, whereas in the other there were step changes in wage levels. It was mainly related to the tumultuous development on the labour market connected with measures against the COVID-19 infection. That is also why the year 2019 has been selected as a base for this comparison, because it was the predeceasing year to that. For example, in 'education', the average wage increased in real terms between the years 2019 and 2021 by nine per cent, however, it slumped afterwards in 2023 to 89% compared to 2019 and in 2025 it got to 93%.

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'Real estate activities' are an opposite example; they were hit harshly already in the covid year 2020, when the wages decreased in real terms to 92% of the level from the year 2019; their crisis deepened afterwards and in 2023 they slumped to mere 86%. However, the recovery then catapulted them upwards and in 2025 they reached the level of 104%.

### Development in Regions

In terms of the number of employees, there was again a different development in different Regions in the Q4 2025. Four Regions were increasing at the expense of all the other ones and the increase was again dominated by Prague. There, the registered number of employees increased by 17.6 thousand, i.e. by 2.1%. The Capital City was seconded by the *Jihomoravský* Region with its centre in the city of *Brno*, where the numbers increased by 2.2 thousand (by 0.5%) and also the *Pardubický* Region with 0.5 thousand and the *Středočeský* Region with 0.4 thousand contributed a bit (0.2% and 0.1%, respectively).

The most marked decrease by 3.6 thousand was in the *Moravskoslezský* Region, which was 0.9% when taken its size into account. In the *Liberecký* Region, the number of employees decreased by 0.8%, in the *Jihočeský* Region and in the *Zlínský* Region the same by 0.7%, in the *Karlovarský* Region and in the *Královéhradecký* Region by 0.5%, in the *Ústecký* Region and in the *Vysočina* Region by 0.4%.

As for the development of average wages, the dispersion is substantially smaller among Regions than in the breakdown by economic activity (industry) in the Q4 2025. Wages increased, y-o-y, in nominal terms in a narrow range from 6.1% to 7.8%. The highest wage growth was in the Capital City of Prague (by 7.8%), followed by the *Pardubický* Region (7.7%) and by the *Jihomoravský* Region (7.5%). In the *Vysočina* Region and in the *Moravskoslezský* Region, they increased by 7.4%. The *Karlovarský* Region came off worst; earnings are the lowest there for a long time and currently they increased the least there, only by 6.1%. Low increases were also in the *Liberecký* Region (by 6.2%) and in the *Zlínský* Region (by 6.3%).

According to the absolute level of earnings, Prague still remained to be the richest (as for earnings) among the Regions of Czechia. The average wage there was CZK 64 980. The *Středočeský* Region was the second with CZK 52 035 and the third one was the *Jihomoravský* Region with CZK 51 922. Also the *Plzeňský* Region was close to the threshold of 50 thousand with CZK 49 332. On the other hand, the *Karlovarský* Region remained to be the Region with the lowest wage level (CZK 44 981) and, currently, the only Region below the CZK 47 thousand threshold. In the *Moravskoslezský* Region, which is following Prague, the *Jihomoravský* Region, and the *Středočeský* Region a Region with the highest number of employees (414.7 thousand), the average wage reached the value of CZK 47 257.

### Median wages and decile intervals of wages, broken down by sex

The reference year 2025 was the last one when the Ministry of Labour and Social Affairs carried out the Information System on Average Earnings (ISAE) statistical survey that was a basis for a statistical-mathematical model of wage distribution in individual quarters. For the reference year 2026, this data source was cancelled and data on the wage distribution will thus be temporarily unavailable. The news release of the CZSO for the Q4 2025 still contains data on

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the median wage from the ISAE (it shows the wage of a middle employee, i.e. a common wage level) and on extreme deciles in the breakdown by sex. At the same time, data from the corresponding period of 2024 have been revised. It is our aim to create a similar model of the distribution in the future while using data from the Unified Monthly Employer Report (*abbreviated "JMZH" in Czech*) and to follow in the previous time series; however, in the meantime, such a model will not exist.

In the Q4 2025, the wage median reached CZK 45 523; it is by 8.8% (CZK 3 663) more than in the corresponding period of the previous year. One tenth of employees with the lowest wages were receiving a gross wage below CZK 23 282 (the bottom decile increased by 13.8%, y-o-y), whereas the tenth with the highest wages had wages over CZK 89 006 (the top decile increased by 7.8%). The decile ratio as one of the indicators of the range of the distribution decreased by 0.21, year-on-year, to the value of 3.82; the ISPV data show that the area of the lowest wages increased the most and the higher the wage level, the lower the year-on-year growth.

Male median wages were higher than female ones; the female median wage was CZK 42 692 (it increased by 9.5%, year-on-year), whereas the male median wage was CZK 48 342 (it increased by 8.2%). The gap between median earnings by sex decreased by 1.0 p. p., year-on-year, to 11.7%. At the same time, however, wages of males were distributed over a substantially wider interval, especially in the area of high earnings: the top decile for females was CZK 81 545 and for males it was CZK 96 658, by which there was a gap of 15.6% in high earnings. On the other hand, as for low earnings, the difference was smaller and weaker, year-on-year: the bottom decile for females was CZK 22 881 and for males CZK 23 783, which is a gap of 3.8%.

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Results from the **Information System on Average Earnings (ISAE) of the Ministry of Labour and Social Affairs for the year 2025** bring a view of wage structures, distributions, and socio-economic breakdowns in this last year of the survey. However, the ISAE applied a different methodology for the calculation of personal earnings of an employee (first of all, it excluded all absences at work) and therefore these data are not comparable to values of indicators given in tables annexed to the news release of the CZSO.

Annual ISAE results show the median wage of CZK 44 325, by 6.4% higher, year-on-year. The distribution has changed, the median zone was growing slower than the extreme deciles, where the rate was seven per cent; the decile ratio remained at 3.2. The female median wage was CZK 41 050 and the male one was CZK 47 653. The number of records on males increased by 0.1%, y-o-y; in females, it increased more markedly by 1.0%.

In the breakdown according to the valid Classification of **Occupations (CZ-ISCO)**, managers having the median wage of CZK 87 822 were the group with the highest earnings. The median increased above standard by 8.2%, year-on-year. Wages of managers were highly differentiated; the decile ratio was 4.5, because a tenth of the best-paid earned over CZK 202 968, while the opposite tenth received less than CZK 45 178. The second major group of professionals had the second highest median wage of CZK 60 806, while the richest tenth

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earned over CZK 124 228. The decile ratio was 3.0. At the same time, the median wage increased in them less (by 6.3%).

The third CZ-ISCO major group includes technicians and associate professionals; they had the median wage of CZK 50 276. The fourth major group of clerical support workers had the median wage of CZK 38 886. Median wages of those two major groups increased by 6.7%, year-on-year. In the fifth major group of service and sales workers, approximately one of three belonged to low-income employees (in general, such an employee is considered to be a low-income (low-wage) employee who earns less than 2/3 of the total median wage; according to the ISAE for the year 2025, the threshold was CZK 29 550); they had the decile ranging from CZK 23 075 to CZK 52 420 and their median wage was CZK 33 871. At the same time, their wages increased the least, y-o-y (the median wage by 5.7%). Qualified workers in 'agriculture, forestry and fishing' are a major group with a low number of employees; their median wage was CZK 36 767, which increased by 6.3%, year-on-year. Craft and related trades workers had the median wage of CZK 41 560 and plant and machine operators and assemblers had CZK 40 078; there was an increase by 5.7% and 6.0%, respectively. At elementary occupations, there is constantly the lowest wage level; currently, the median increased the strongest there (by 8.4%) to CZK 27 993. Despite that, they thus had over a half share of low-income employees, their decile range was from CZK 21 316 to CZK 43 743, which shows the smallest decile ratio (2.05), i.e. weak differentiation.

For median wages broken down by **age group** it generally holds true that there were faster year-on-year increases in higher age groups (40 years and more), whereas in the youngest category of employees up to 20 years it was the weakest. In this not numerous category, the median wage only increased by 4.6%; moreover, there is usually the lowest median wage, currently it only was CZK 30 928. At the same time, there were more of them in the survey sample (by 2.4%). In the age of 20–29 years, the median wage was already on a much higher level (CZK 40 818); its y-o-y growth was 5.5%. For the category of 30–39 years, the median wage was by far the highest (CZK 46 530), it increased by 6.2%, y-o-y. The number of records for this age category dropped by 2%. In another ten-year category, the wage level (CZK 45 976) is only slightly lower than the one of those in their thirties; it increased by 6.7%, y-o-y, and the number of records dropped by 2.2%. On the other hand, in the category of 50–59 years, the number of records has risen by 3.6%; the median wage increased the most (by 6.9%), year-on-year, to CZK 43 719. For those aged 60+ years, the median wage was CZK 43 318, i.e. just by several hundred CZK lower than for those in their fifties. However, in this category, the number of employees is already small, only 40%, while it is usual that those who are more qualified and paid better remain to work longer. However, the number of records increased there by 7.9%, year-on-year, because the population is ageing on average, and workforce exit is postponed to a higher age.

Wages are highly structured by the **level of educational attainment** of an employee – the highest earnings were also in the year 2025 earned by employees with higher education; their median wage was CZK 61 110; moreover, in the y-o-y comparison, it increased the most (by 6.7%). On the other hand, wages of employees with primary education or with incomplete primary education increased the least (by 5.6%) and remained the lowest (CZK 34 895).

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Graduates of secondary schools with an A-level examination earned much more (CZK 44 817) than those without the A-level examination (CZK 37 646), but less than employees with short-cycle tertiary education or graduates from bachelor study programmes (CZK 51 448), for which the number of records increased the most, year-on-year (by 3.6%). On the other hand, the numbers in secondary school graduates decreased, mainly as for those without the A-level examination (a decrease by 1.6%), whereas the number of records for the primary and incomplete education increased by 3.1%, which may be related to the (non)recognition of education for comers from Ukraine.

Namely the number of employees with Ukrainian passport was considerably increasing on the Czech labour market; the number of records increased by 5.2%, year-on-year. It is because the ISAE also monitored employees from large groups of foreigners by **state citizenship**. In total, about a tenth of records in the ISAE belonged to an employee with another citizenship than Czech. Besides Ukrainian ones, there was also an increasing number of Slovak ones (the number of records increased by 3.4%, y-o-y). On the other hand, Poles, Romanians, and Bulgarians were markedly decreasing. From those groups, Ukrainians had far the lowest median wage in 2025, only CZK 34 428. On the other hand, Slovaks had CZK 51 662, which was the level by 16% higher than that of employees with Czech citizenship (CZK 44 722). Lower than Czech ones were wage levels of other three monitored groups, i.e. of Bulgarians (by 9% lower), Romanians and Poles (both by 3% lower). In an expanding group of other foreigners without differentiation, the median wage reached CZK 43 428.

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