Development of the Czech labour market in the Q2 2026

3 September 2026

The Czech labour market continued to slightly increase not only in the absolute numbers but also in relative indicators, because both the employment rate and the unemployment rate were increasing. A long-term component of unemployment also increased. As for the structure, the shift to the sector of services continued. The average wage increased, in nominal terms, by 6.4%, year-on-year (y-o-y), and in real terms by 4.3%. Results for the first quarter have been refined.

Employment, unemployment, and economic inactivity

Results of the Labour Force Sample Survey (LFSS) showed for the Q2 2026 growth in both employment and unemployment, which was accompanied by a decrease in the remaining part of the economically inactive. The number of employed persons was by 87.2 thousand higher, year-on-year, the number of the unemployed (surveyed according to the methodology of the International Labour Organization, ILO) was by 17.1 thousand more. Demographic changes, both migration flows and population ageing, belonged to the main drivers of changes.

The increase in the number of working persons was mainly owing to an increase of employment in both sexes; the number of working males increased, year-on-year, by 64.7 thousand; the number of working females by 22.5 thousand. In terms of age, we observe considerable increases in marginal groups – in the youngest age category of 15–24 years (by 22.6 thousand persons or by 8.2%) and in the age group of 60+ years, where the number of working persons increased by 39.5 thousand (or by 6.5%). In the dominant group of 45–59 years, there was also a moderate increase, there were by 37.8 thousand working persons more (or by 1.8%), whereas in the age category of 30–44 years there was rather stagnation (an increase by 2.4 thousand or by 0.1%) and in the age group of 25–29 years, the number of working persons decreased by 15.1 thousand (or by 3.6%). These data follow more long-term trends – during the last 16 years, the average age of working persons increased by 3.5 years – from 41.3 years in the Q2 2010 to 44.8 years in the corresponding period of 2026. The average age of working females is by over a year higher compared to males, which is related to pauses in their careers due to maternity and parental leave.

While in the primary and the secondary sector the number of working persons decreased, y-o-y (by 7.4 thousand and 7.8 thousand, respectively), in the tertiary sector it further increased by 102.2 thousand. Contrary to this long-term shift between sectors, in the section of ‘wholesale and retail trade; repair of motor vehicles and motorcycles,’ there was a decrement in the number of working persons by 33.3 thousand persons or by 5.8%. In the sector of services and care, however, already 63.5% of working persons currently worked, while females were considerably dominating.

LFSS results indicated that there is a change in proportions between groups of entrepreneurs (self-employed) and employees. The number of the self-employed without employees (own-account workers) increased by 43.5 thousand (by 6.3%), year-on-year, whereas the number of the self-employed with employees (employers) was by 8.3 thousand lower, year-on-year (i.e. a decrease by 7.2%). The number of the largest group of employees increased by 50.2 thousand (i.e. by 1.1%). The share of the self-employed in the total employment thus increased by 0.4 percentage point (p. p.) to 15.8%.

The employment rate (the share of the number of working persons) increased in the observed group of the 15–64 years old by 0.4 p. p., whereas in total, in the population of the 15+ years old, it increased by 0.5 p. p. This development confirms that an increasing activity of the oldest working persons aged 65+ years is becoming all the time more significant structural change on the labour market.

A trend of expansion of part-time jobs also continued. Currently, the number of part-time jobs in the main job reached 549.4 thousand in total. In the year-on-year comparison, it increased by 49.3 thousand, i.e. by 9.9%. Reduced working hours are still used predominantly by females; among them, it makes 16% of all jobs, whereas in males it is only 5.4%.

The unemployment increased, year-on-year, when the number of persons seaking a job increased by 17.1 thousand to 163.1 thousand. The unemployment rate increased by 0.3 p. p. to 3.1%. The number of persons unemployed for one year and longer, i.e. the long-term unemployed, also increased, by 5.6 thousand to 50.4 thousand. In the Q2 2026, the long-term unemployed thus made 30.9% of all the unemployed.

When looking at the unemployment in terms of cohesion regions, the situation was the worst in the *Moravskoslezsko* cohesion region (the unemployment rate of 5.6%) and in the *Severozápad* cohesion region (5.2%). On the other hand, the lowest rates remained in the *Střední Čechy* cohesion region (1.5%) and in the *Praha* cohesion region (2.0%).

The surplus labour (persons who do not work and at the same time are not actively seeking a job, by which they do not comply with the LFSS requirements for the unemployed, who nevertheless state that they would like to work) decreased by 3.5 thousand to 79.3 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 long-term time series of data on employment, especially in the breakdown by age group. Each quarter, the LFSS weights are adjusted according to the results of demographic statistics.

Registered number of employees and average wages

It is necessary to read the data of the business statistics of the CZSO with understanding for the situation, in which the statistical system finds itself this year. Traditionally, labour and wage statistics used a combination of three key data sources. The “Labour 2–04” quarterly report (“*Práce 2–04*” questionnaire in Czech) observed development on a sample of larger employers, in the area of industry and construction supplemented by monthly reports in enterprises with 50+ employees. The remaining part of predominantly smaller employers which statistical questionnaires are not sent to was modelled by means of statistical methods (a system of grossing ups and weighting) based on administrative data of the Czech Social Security Administration. It supplied data for both – an update of the population, i.e. which employers are still active, births and deaths (which ceased to exist) – and heading of the main development by means of summary numbers (aggregates) of the insured persons and assessment bases. A departmental survey of the Ministry of Labour and Social Affairs (the Information System on Average Earnings, ISAE, abbreviated “*ISPV*” in Czech), in which wages of individual employees were sample surveyed, provided a structural view of the wage domain.

As at the beginning of this year, the ISAE data collection was cancelled and collection of data for the Czech Social Security Administration was shifted to a new Unified Monthly Employer Report (sometimes also translated as “Integrated Monthly Employer Report”; abbreviated “*JMHZ*” in Czech), which is to become the main and universal source of data on the labour market development. In the future, it will also replace all indicators on the numbers of employees and their wages in the reports (questionnaires). The CZSO obtained access to data from the *JMHZ* in the end of August; currently, these data are gradually transmitted to the system of processing at the CZSO, where their quality is analysed.

The only data source of those three mentioned above, which still remained untouched, are reports of the CZSO from a sample of enterprises. Unavailability of quality administrative sources for the first half-year of 2026, on which the methodology of estimates has been based up to now, had to entail changes in approaches and methodologies of processing, which in an important way influence the quality of outputs. Gradually, missing administrative data are retrospectively added and thus estimates for the non-surveyed part of the national economy are refined. Since the process of transmissions of data from the *JMHZ* to the CZSO is unfinished, further refinement of results will take place. However, we assume that it will already be in a lesser extent than it was namely during the processing of data for the Q1 that was influenced by the total absence of the aforementioned sources.

A structural view of individual wages (median wages, breakdown by sex, etc.) is temporarily not available with regards to changes in data sources.

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Preliminary data of the business reporting confirm a recovery on the labour market in the registered number of employees in full-time equivalent, which **in the Q2 2026** increased by 28.7 thousand, year-on-year, in relative terms by 0.7%. Since the total figures for the last two years 2024 and 2025 showed rather stagnation or even a decrease in the registered number of employees, what we observe now is a flip into the positive numbers.

With regards to the refinement of data for the first quarter, the analysis focuses on cumulative data **for the whole first half-year of 2026**. Development in economic activities was differentiated. In the breakdown by CZ-NACE section, we can find some considerable year-on-year increases, however, also huge slumps, which means that the labour market changes its internal structure and employees are fluctuating. The increase in the number of employees predominantly concentrated in the area of services and care and also in construction. In thirteen CZ-NACE sections, the number of employees increased, year-on-year, by 40 thousand in total, and in the remaining six sections, it decreased by 13 thousand. Individually, relative increments or decrements were widely ranging from -17.0% to 6.4%. However, those extremes were in economic activities that were numerically insignificant.

Roughly half of the decrease is due to ‘manufacturing’, in which there were by 6.6 thousand fewer employees. In relative terms, it was an insignificant decrease by 0.6%; however, that decrease follows a long row of those from the previous years. In the Q1 2018, ‘manufacturing’ still had 1 154.7 thousand employees, now it has 1 031.9 thousand, i.e. it decreased by 122.8 thousand (or by 10.6%). Anyway, ‘manufacturing’ is still the biggest CZ-NACE section in Czechia and it employed, as the only one, over one million employees. Tab. 2 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 five of those divisions, we can find decreases in the number of employees. The deepest one numerically expressed was in ‘manufacture of motor vehicles, trailers and semi-trailers’ (2.9 thousand; 1.8%). An increase in the number of employees only occurred in two selected divisions as follows: manufacture of fabricated metal products, except machinery and equipment' (2.1 thousand; 1.6%) and 'manufacture of food products' (1.5 thousand; 1.8%).

The biggest relative decrease in the number of employees was in the section of 'mining and quarrying,' an utterly marginal industry already, in which the number currently decreased by 17.0%, which was a decrease by 2.7 thousand to 13.3 thousand. What can be more surprising are negative values as for 'wholesale and retail trade; repair of motor vehicles and motorcycles,' where a decrease by 0.4% was a decrement by 1.7 thousand jobs to 495.5 thousand. Full-time equivalent employees in trade already showed a year-on-year decrease in the Q4 2025, whereas in the preceding three quarters they were still increasing. The decrease in the number of employees further continued in 'transportation and storage' (1.0 thousand; 0.4%) and also in 'financial and insurance activities' (0.4 thousand; 0.6%), where we could observe year-on-year decreases also during the entire last year. The last section with a negative value was 'information and communication', where the reduction of the number of jobs deepens (0.6 thousand; 0.4%) and it is possible to speculate about the impacts of the introduction of artificial intelligence.

The number of employees increased mainly thanks to two economic activities with a dominant public share: in 'human health and social work activities,' we can find a year-on-year increase by 8.4 thousand (or by 2.3%) and in 'education' by 7.7 thousand (or by 2.2%). A more moderate increase was also in 'public administration and defence; compulsory social security' (3.9 thousand; 1.3%). Therefore, in total, over one million employees currently work in those three economic activities.

The recovery in 'construction' is confirmed; the number of employees increased there in the first half-year of 2026 by 6.7 thousand (3.1%), year-on-year, which was the third highest contribution. An increase maintained in 'accommodation and food service activities' connected with tourism, in which there were by 3.2 thousand more employees, y-o-y, or there was an increase by 2.7%. Other changes are not that noticeable. In 'real estate activities', there was the highest relative increase by 6.4%, which in this small economic activity was an absolute increase by 2.7 thousand. However, that value was also affected by administrative shifts. A higher increase was also in 'professional, scientific and technical activities', in which there were by 2.1 thousand more employees (1.2%). 'Administrative and support service activities' (a section including various types of agencies) recorded an increase by 1.9 thousand or 1.0%. 'Agriculture, forestry and fishing' experienced a shift into the positive numbers (0.2 thousand; 0.3%). Also two smaller industrial economic activities were growing: in the power industry ('electricity, gas, steam and air conditioning supply'), the number of employees increased by 1.1 thousand (by 3.0%) and in 'water supply; sewerage, waste management and remediation activities' by 0.4 thousand (0.7%).

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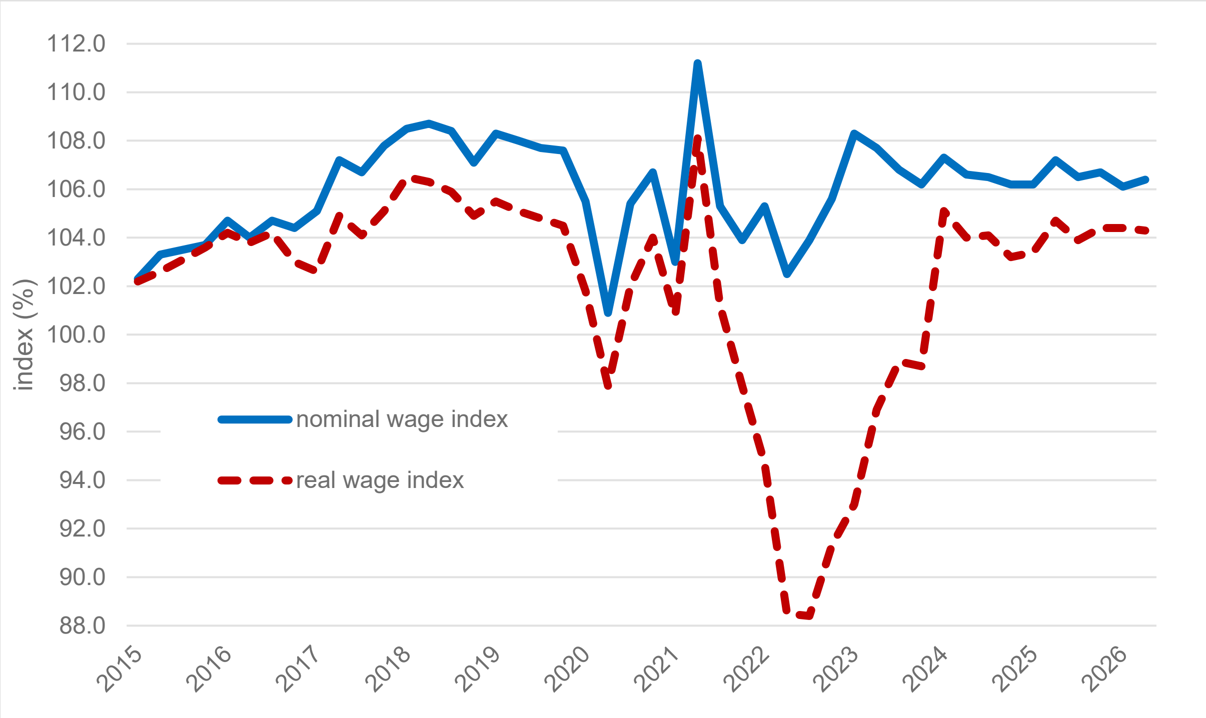
According to preliminary data, the average wage (CZK 51 966) increased in nominal terms, compared to the corresponding period of the previous year, by CZK 3 105 **for the Q2 2026**, i.e. by 6.4%. The growth for the Q1 2026 has been refined to the value of 6.1%. The nominal wage growth in the first half-year of 2026 thus amounted to 6.2% and it was just a slightly lower in comparison to the previous years 2024 and 2025, when it was the same, 6.6%.

What was more important from the point of view of employees, was the real development, which 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 increased in the Q2 2026 by 2.0%; the average wage thus increased in real terms by 4.3%, year-on-year. In the Q1 2026, prices increased by 1.6%, the real wage increase thus was 4.4%. In 2024 and 2025, real wages increased with about a 4% growth rate, this year's increments are thus slightly exceeding them.

Chart: Year-on-year indices of nominal and real average gross mothly wage (%)



Source: wage statistics of the CZSO

Average wages increased in real terms in all economic activities, although their dynamics varied widely; employees thus saw the purchasing power of their earnings increase in varying amounts. When we observe again cumulative results **for the whole first half-year of 2026**, then the highest nominal y-o-y increase (14.4%) can be found as for the section of 'administrative and support service activities', where the average wage reached CZK 39 487. The results from other sections did not come anywhere near matching that growth. The second highest growth (by 7.5%) can be found in 'public administration and defence; compulsory social security', where it is a consequence of a one-off increase of the pay scales, and the third one was in 'agriculture, forestry and fishing' (7.4%). A value above the seven percent level can be also found in 'professional, scientific and technical activities' (7.1%). In the section of 'water supply; sewerage, waste management and remediation activities' and in 'financial and insurance activities', the average wage increased the same, by 7.0%.

On the other hand, in some sections we can find much lower wage increases. In the energy sector ('electricity, gas, steam and air conditioning supply'), the level only increased by 2.8%, y-o-y; in that economic activity, bonuses paid in the beginning of the year pay an important role. Low values can also be found in 'other service activities' (3.0%), in 'mining and quarrying' (3.6%), and in 'transportation and storage' (4.4%). In 'human health and social work activities,' salaries increased by 4.6%. 'Manufacturing' also recorded a moderately below-average increase by 5.7%. Values in other economic activities (CZ-NACE sections) varied from 5.8% to 6.9%.

The highest level of wages in the first half-year of 2026 can be found, as usual, in 'information and communication', in which the average wage reached CZK 94 266. 'Financial and insurance activities' with the level of CZK 90 315 ranked second. 'Electricity, gas, steam and air conditioning supply' was the third with a margin with CZK 79 593. Those three economic activities have been leading for a long time. From the opposite side, the ranking was only slightly innovated. In ‘accommodation and food service activities,’ the average wage was still the lowest (CZK 29 574). The second lowest average wage was in ‘other service activities’; it only increased by 3.0%, year-on-year, to CZK 36 237, and only a small distance ahead of it, in the third place, with CZK 37 695, was ‘agriculture, forestry and fishing’.

Development in Regions

In terms of the registered number of employees, there was a year-on-year increase in vast majority of Regions of Czechia in both the Q2 and the first half-year of 2026. A partial decrease for the whole first half-year of 2026 was only recorded by the *Moravskoslezský* Region, by 0.2%, which was 0.8 thousand. In the *Zlínský* Region, the numbers stagnated. On the other hand, a massive increase can be found in Prague by 11.7 thousand, which was a relative increase by 1.5%. That value was also reached by the *Pardubický* Region; however, with regards to the small size of the Region, it was only by 2.8 thousand when expressed numerically. A more significant increment by 4.3 thousand was in the *Jihomoravský* Region (0.9%) and also in the *Středočeský* Region (0.9%; 3.7 thousand).

As for the development of average wages, the dispersion was substantially smaller among Regions than in the breakdown by economic activity (industry) in the first half-year of 2026. In nominal terms, wages were increasing in the range from 5.3% to 7.0%. This time, the highest wage growth was not in Prague (6.0%); the *Plzeňský* Region was leading (7.0%), followed by the *Moravskoslezský* Region (6.7%), the *Jihočeský* Region and the *Olomoucký* Region (both the same 6.4%). The *Ústecký* Region came off worst with 5.3%.

According to the absolute level of earnings, however, Prague still remained to be the richest among the Regions of Czechia, with the average wage of CZK 66 482. It was followed by the *Středočeský* Region with CZK 51 779 and then by the *Jihomoravský* Region with CZK 49 538 on the third place. The threshold of 47 thousand was also overcome by the *Plzeňský* Region (CZK 47 375), other Regions remained below it. In the *Královéhradecký* Region, the average wage reached CZK 46 645, in the *Ústecký* Region CZK 46 085. The *Liberecký* Region and the *Jihočeský* Region ended up close to each other with CZK 45 458 and CZK 45 450, respectively. In the *Vysočina* Region, the average wage was CZK 45 673 and in the *Moravskoslezský* Region CZK 45 129. On the other hand, the *Karlovarský* Region still remained to be the Region with the lowest wage level (CZK 43 224); in the *Zlínský* Region, the average wage reached CZK 44 033 and in the *Olomoucký* Region CZK 44 476.

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