

Q3 2026

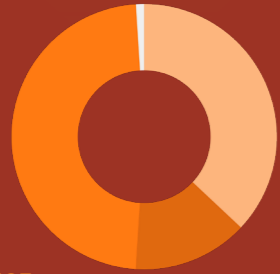
MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY

The ManpowerGroup Employment Outlook Survey for the third quarter 2026 was conducted by interviewing a representative sample of 524 employers in the Czech Republic. All survey participants were asked, "How do you anticipate total employment at your location to change in the three months to the end of september 2026 as compared to the current quarter?"



ManpowerGroup®

1%
DON'T
KNOW



37%
INCREASE

14%
DECREASE

48%
NO CHANGE

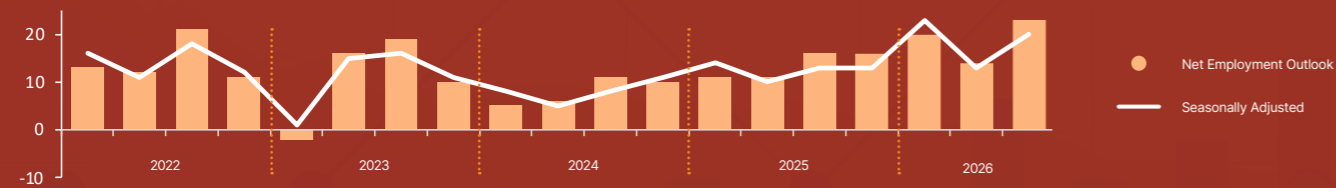
NET EMPLOYMENT OUTLOOK | 23%

Hiring optimism decreased by 6 percentage points compared to the previous quarter and increased by 3 percentage points year-on-year.

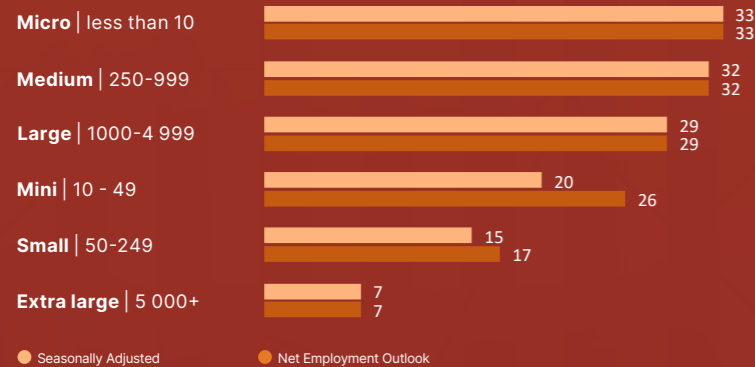
32% of employers expect an increase in headcount, 18% anticipate a decrease, and 49% of employers do not foresee any changes.

Based on these figures, the Net Employment Outlook for the Czech Republic for Q2 2026 stands at 14%.

NET EMPLOYMENT OUTLOOK DEVELOPMENT



ORGANISATION – SIZE COMPARISONS

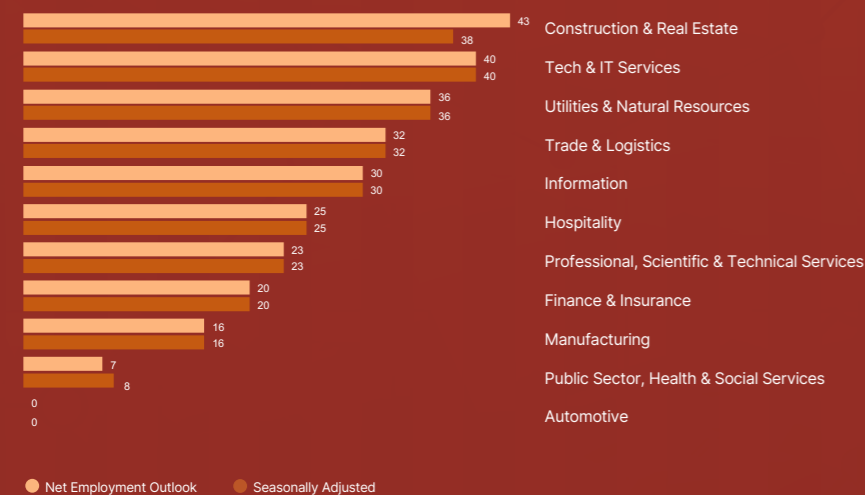


NET EMPLOYMENT OUTLOOK

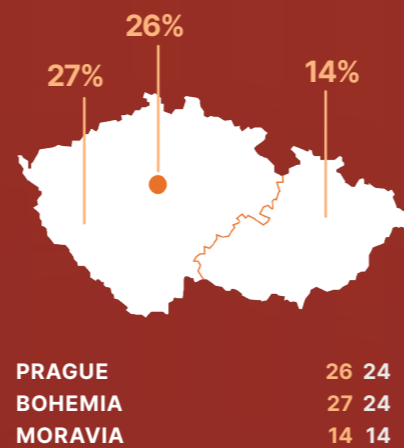
16% VS 23%

Q3 2025 Q3 2026

SECTORS



REGIONAL COMPARISONS



GLOBAL EMPLOYMENT OUTLOOK

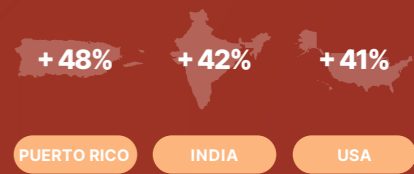
Seasonally Adjusted

Companies' global hiring plans weakened slightly in the third quarter of 2026. According to the ManpowerGroup Employment Outlook Survey (MEOS), which surveyed more than 40,000 employers in 42 countries, the global labor market index fell to 26%. This is primarily due to growing geopolitical uncertainty, higher energy costs, and disruptions to international transportation related to the conflict with Iran.

Europe is reporting the greatest challenges. The European employment index fell to 14%, with the weakest results coming from key economies that are also important for Czech industry and exports – namely Germany (6%), France (3%), and Italy (3%). Slovakia has also slipped into negative territory (-6%), confirming the ongoing weakening of European industry and lower investment activity in the region.

In contrast, the United States remains the main driver of global employment with an index of 45%. Strong demand also persists in the technology sector, particularly for experts in artificial intelligence and engineering. Although large tech companies are laying off employees, firms around the world continue to struggle with a shortage of specialists in AI and digital technologies.

STRONGEST

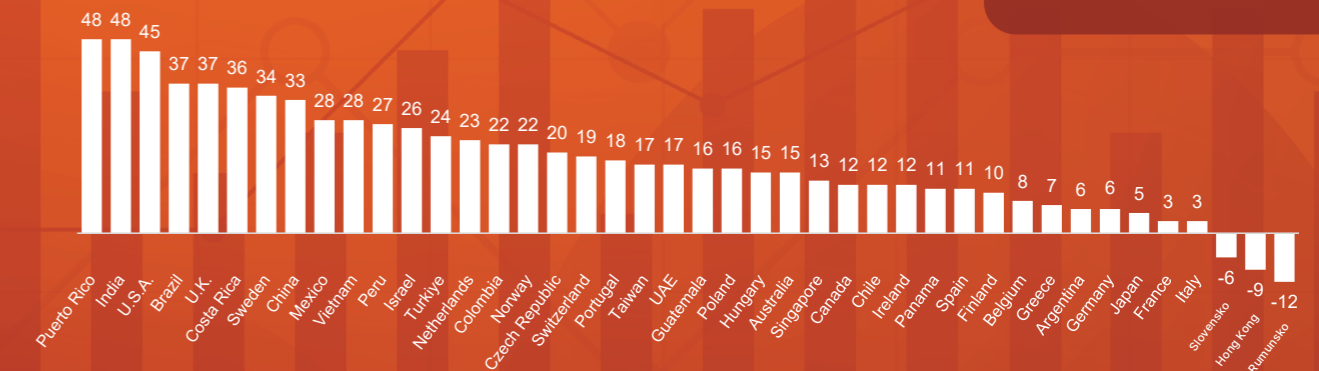


WEAKEST



INTERNATIONAL COMPARISONS

Hiring plans of more than 40 000 employers in 42 countries (Q3 2026), Seasonally Adjusted



GLOBAL OUTLOOK

World average 26%



"The Czech labor market is entering the second half of 2026 in a paradoxical situation. Companies are eager to hire, and according to our surveys, hiring optimism is exceptionally high, particularly in technical fields, construction, energy, and IT. However, companies are increasingly running into a skills shortage, especially in technical, digital, and specialized professions. The Czech economy is undergoing a structural transformation, with the workforce gradually shifting from traditional industry to services, logistics, technology, and the health and social care sectors. This is not a short-term fluctuation, but a long-term trend linked to economic transformation, automation, digitization, and demographic changes. Today, companies must address not only the recruitment of new employees, but increasingly also retraining, work flexibility, and the ability to retain employees in an environment of rapid change. It is precisely adaptability and investment in skills development that will determine the competitiveness of companies and the entire Czech economy in the coming years."

JAROSLAVA REZLEROVÁ

Country Manager ManpowerGroup Czech Republic

ABOUT THE MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY

The ManpowerGroup Employment Outlook Survey is conducted quarterly to measure employers' intentions to increase or decrease the number of employees in their workforces during the next quarter. ManpowerGroup's comprehensive forecast of employer hiring plans has been running for over 60 years and is one of the most trusted surveys of employment activity in the world. Various factors underpin the success of the ManpowerGroup Employment Outlook Survey:

Unique: It is unparalleled in its size, scope, longevity and area of focus.

Projective: The ManpowerGroup Employment Outlook Survey is the most extensive, forward-looking employment survey in the world, asking employers to forecast employment over the next quarter. In contrast, other surveys and studies focus on retrospective data to report on what occurred in the past.

Independent: The survey is conducted with a representative sample of employers from throughout the countries and territories in which it is conducted. The survey participants are not derived from ManpowerGroup's customer base.

Robust: The survey is based on interviews with more than 40 000 public and private employers across 42 countries and territories to measure anticipated employment trends each quarter. This sample allows for analysis to be performed across specific sectors and regions to provide more detailed information.

Focused: For more than five decades the survey has derived all of its information from a single question: For the Quarter 4 2025 research, all employers participating in the survey worldwide are asked the same question:

"How do you anticipate total employment at your location to change in the three months to the end of June 2026 as compared to the current quarter?"

Methodology

The ManpowerGroup Employment Outlook Survey is conducted using a validated methodology, in accordance with the highest standards in market research. The survey has been structured to be representative of each national economy. The margin of error for almost all national, regional and global data is not greater than +/- 5%.

Throughout this report, we use the term "Net Employment Outlook." This figure is derived by taking the percentage of employers anticipating an increase in hiring activity and subtracting from this the percentage of employers expecting to see a decrease in employment at their location in the next quarter.

The result of this calculation is the Net Employment Outlook. Net Employment Outlooks for countries and territories that have accumulated at least 17 quarters of data are reported in a seasonally adjusted format unless otherwise stated.

Employment Outlook Survey celebrates 60 years of being the most trusted source for global hiring intentions. In the Czech Republic from 2008.



ABOUT MANPOWERGROUP

ManpowerGroup™ (NYSE: MAN) is a global leader in providing innovative, customized services and solutions, covering the employee lifecycle and helping its clients achieve their goals and increase their competitiveness. ManpowerGroup has been helping clients in more than 75 countries and territories improve their employees' performance for nearly 80 years. In 2026, ManpowerGroup was named one of the world's most desirable companies for the seventeenth consecutive year, thereby strengthening its position as the most trusted company in its industry.

In the Czech Republic, ManpowerGroup handles HR and payroll for nearly 5,500 employees it has recruited and who work for its clients. Thanks to its network of 21 branches, ManpowerGroup fills 2,000 specialized positions for its clients each year.

For more information about ManpowerGroup, visit www.manpower.cz

