

BARSERVICE



Towards smart bargaining in the commerce sector in Czechia

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Executive summary

The commerce sector in Czechia is a vital contributor to employment and the national economy. Despite its significant role, the sector faces critical challenges, including wage inequality, precarious employment, and resistance to collective bargaining. This report explores the current trends, collective bargaining practices, and challenges, proposing strategies to achieve "smart bargaining" for a more equitable labour environment.

The report is based on desk research. Key trends in the sector include rapid digital transformation, globalization of supply chains, and demographic shifts. These trends have driven innovation but also exacerbated disparities in wages and working conditions. The sector is dominated by multinational corporations such as Lidl, Kaufland, and Tesco, which have significant influence over labour practices.

Collective bargaining in the commerce sector is predominantly decentralized, occurring at the company level. Sectoral agreements are rare, limiting the scope for standardized improvements across the industry. Trade unions face resistance from employers, low union membership, and challenges in organizing a fragmented and transient workforce. Despite these obstacles, there have been successes, such as wage increases and improved benefits negotiated by unions with major retailers like Penny, Albert, and Tesco.

The report highlights persistent issues, including employer reluctance to engage in bargaining, the prevalence of precarious contracts, and the need for stronger legal protections for union activities. It advocates for "smart bargaining" approaches, emphasizing digital tools for worker engagement, sector-wide agreements, international collaboration, and strategies to address high turnover and union fragmentation.

On a European level, Czech trade unions are increasingly participating in cross-border initiatives, such as efforts led by UNI Europa, to address the challenges of multinational corporations. These collaborations underscore the importance of solidarity and coordinated action in securing fair labour standards.

This report concludes by emphasizing the need for innovative strategies and enhanced collaboration among stakeholders to improve working conditions and ensure equitable representation for workers in Czechia's commerce sector.

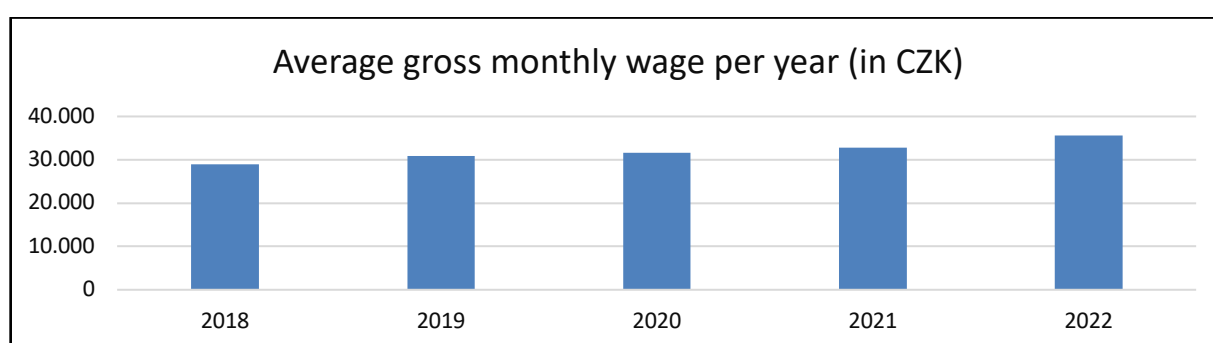
I. Sector identification and trends

The commerce sector in Czechia, encompassing wholesale and retail trade as well as the repair of motor vehicles and motorcycles (NACE 45, 46, and 47), is a significant contributor to employment (see Table 1). In 2022, the sector employed an average of 532,164 individuals, with retail trade (NACE 47) accounting for approximately 250,727 of these positions.¹ According to data from the Czech Statistical Office, the average gross monthly wage in the commerce sector in 2022 amounted to CZK 35,679 or €1,421.72 (see Figure 1).² Wages, particularly in the retail sector (non-managerial and manual roles), are lower than the national average. In 2021, the average wage for cashiers ranged from CZK 18,000 to CZK 36,000 (€717.23 to €1,434.49). Lidl offers the highest starting wages, around CZK 30,000 (€1,195.41) while other retail chains report entry-level wages of approximately CZK 25,000 (€996.18). The sector is also characterized by significant wage inequality.³

	2018	2019	2020	2021	2022
Average registered number of employees (headcount)	521 976	525 734	522 409	526 813	532 164

Source: Czech Statistical Office

Figure 1. Average gross monthly wage per person (headcount)



Source: Czech Statistical Office

¹Czech Statistical Office (2022).

²Czech Statistical Office (2024).

³ Martišková & Šumichrast (2023).

Sector Identification:

- **NACE 45:** This category includes activities related to the wholesale and retail trade of motor vehicles and motorcycles, as well as their maintenance and repair.
- **NACE 46:** This segment covers wholesale trade activities, excluding those involving motor vehicles and motorcycles.
- **NACE 47:** This area pertains to retail trade activities, excluding motor vehicles and motorcycles, and includes the sale of goods in stores, online, or through other means directly to consumers.

In the 1990s, Czechia became a frontrunner in Central and Eastern Europe when it came to the introduction of retail chains. This shift was driven by foreign acquisitions and new investments, which led to a retail market that is now mostly controlled by international companies. Domestic retailers, like Hruška and COOP, hold only about one-third of the market share. The leading players in the sector are largely from Germany, the Netherlands, and the UK, with Lidl and Kaufland—both owned by the same parent company—standing out as the most profitable.⁴

The commerce sector in Czechia is being influenced by a range of interconnected processes, including technological advancements, globalization and demographic changes.

One of the most significant drivers of change is technological innovation. The rapid growth of e-commerce has transformed retail trade (NACE 47), prompting businesses to invest heavily in digital platforms and logistics infrastructure. Automation and digitalization are also reshaping operations across wholesale and retail sectors, with the adoption of tools such as self-checkout systems, inventory management software, and supply chain automation. Furthermore, the increasing use of data analytics and artificial intelligence enables companies to optimize sales strategies, enhance customer engagement, and make informed market predictions.⁵

Globalization continues to exert a profound influence on the sector, particularly through the integration of supply chains. The commerce sector depends on international trade networks for sourcing goods, especially in wholesale (NACE 46) and motor vehicle trade (NACE 45). This reliance exposes the sector to global market fluctuations and competition from multinational retail chains, which intensify pricing pressures and influence consumer behaviour. Additionally, the rise of cross-border e-commerce has expanded consumer choices but also heightened competition for local businesses, requiring them to adapt quickly to

⁴ Martišková & Šumichrast (2023).

⁵ McKinsey & Company (2022).

global standards and demands.⁶ An aging workforce presents challenges for roles requiring physical labour, particularly in retail and logistics. Urbanization has concentrated commerce activities in cities, creating regional disparities in employment opportunities.

The Czech economy has been influenced by global challenges, including the aftermath of the COVID-19 pandemic and geopolitical tensions. These factors have affected consumer behaviour, supply chains, and overall economic activity, subsequently impacting the commerce sector. Overall, the commerce sector in Czechia continues to adapt to changing economic conditions, technological advancements, and consumer preferences, playing a vital role in the country's economic landscape.

II. Current state of collective bargaining

Collective bargaining in the commerce sector in Czechia is predominantly decentralized, occurring mainly at the company level. Sectoral-level agreements are less common, and there is no mandatory extension of collective agreements to non-organized employers.⁷ The main trade union representing the interests of workers in the commerce sector is the Union of Employees of Trade, Logistics and Services (UZO). It is also a member of the Czech-Moravian Confederation of Trade Unions (ČMKOS). UZO engages in collective bargaining with the Confederation of Trade and Tourism of the Czech Republic (an employers' union) as well as with individual employers to secure fair working and wage conditions for employees in trade, logistics, and other service sectors.⁸ However, the sectoral agreement concluded in 2019 with the Confederation of Trade and Tourism had limited impact, particularly in terms of coverage within foreign-owned retail chains and enhancing working conditions. Improving wages and working conditions relies more heavily on company-level bargaining than on sectoral agreements.⁹

In the Czech commerce sector, several multinational enterprises (MNEs) dominate the market. Albert and Spar operate under the Dutch multinational Ahold, while Billa and Penny Market are part of the German REWE Group. Another significant player is Globus, owned by Globus Holding, also based in Germany. Lidl and Kaufland, subsidiaries of the German Schwarz Gruppe, are prominent as well. Finally, Tesco Stores ČR represents the UK-based multinational Tesco.¹⁰

⁶ Totonchi & Manshady (2012).

⁷ <https://wageindicator.org/documents/barcom-2018/one-pager-english/one-pagers-english-203a-czech-republic-en>

⁸ <http://uzo.cz/co-delame/>

⁹ Martišková & Šumichrast (2023).

¹⁰ <https://wageindicator.org/documents/barcom-2018/one-pager-english/one-pagers-english-203a-czech-republic-en>

In the Czech commerce sector, collective bargaining often leads to agreements that include wage increases for employees. This outcome reflects the sector's efforts to address ongoing challenges, such as low wages, employee turnover and labour shortages, by improving employee compensation. Negotiations typically involve representatives from trade unions and employers, focusing on aligning wage growth with economic conditions and sector-specific developments.

The widespread company-level bargaining allows for tailored agreements that address specific needs of individual employers and their workforce. On the other hand, the absence of sector-wide agreements can lead to disparities in working conditions and wages across companies.

In March 2024, PENNY, a retail chain operating 421 stores across Czechia, implemented its 11th wage increase in nine years, raising the basic monthly salary for cashiers by CZK 1,300 (€51.79), bringing it to a starting amount of CZK 29,300 (€1,167.31). This represents an average wage increase of 4.6%, significantly exceeding the Czech National Bank's projected inflation rate of 2.6% for 2024. In addition to wage adjustments, PENNY has allocated over CZK 160 million (€6,374,467.20) to the 2024 salary package, which includes enhanced benefits for its workforce. These improvements include an increased monthly pension contribution of CZK 800 (€31.87) and a referral bonus of CZK 15,000 (€597.62) for employees recommending new hires. The company has also integrated quarterly bonuses into the base pay for store managers, a change now extended to logistics staff, providing greater financial stability and fostering loyalty. The company has made notable strides in employee satisfaction and retention. It has invested in upgrading employee facilities, such as break rooms, lockers, and showers, in response to feedback from logistics staff. Furthermore, PENNY has introduced educational programs like store manager training academies and talent development initiatives, aimed at fostering leadership and creating a positive workplace atmosphere. These measures have had a tangible impact on workforce stability. In 2023, employee turnover decreased by 7%, and over 1,500 employees have remained with the company for more than a decade, while 300 have surpassed 20 years of service. The collaborative negotiation process with labor unions was marked by constructive dialogue and mutual respect, leading to a swift agreement that both sides viewed as highly satisfactory. This case serves as a model of successful collective bargaining.¹¹

In a similar manner, Albert, one of the largest retail chains in Czechia, implemented a substantial wage increase for its 20,000 operational store employees in 2024, effective April 1. The company allocated nearly CZK 700 million (€27,886,250.00) to fund the wage raises and additional financial incentives for roles such as cashiers, bakers, warehouse workers, produce clerks, and team leaders.

¹¹ <http://uzo.cz/zprava/zamestnanci-penny-si-znovu-prilepsi-zakladni-mzda-pokladnich-roste-o-1300-korun/>

Operational employees received an average wage increase of 10%, with a guaranteed minimum raise of 8.5%. In addition to the wage adjustments, Albert continued to provide a variety of benefits, including financial support for transportation, meals, and pension insurance.¹²

The retail chain BILLA also continued its investment in employee development by announcing a 4% increase in the base wages of its staff, effective from April 1. The starting wage for cashiers and retail assistants went up to CZK 27,000 (€1,075.64). Since 2019, the base salary for these positions has increased by CZK 8,000 (€318.72). Additionally, the company increased its meal voucher contribution from CZK 50 (€1.99) to CZK 75 (€2.99) per day. Overall, BILLA invested an additional CZK 100 million (€3,984,000) into its workforce this year. The wage increases and other benefits were negotiated through a constructive dialogue between BILLA and trade unions, including the Union of Trade, Logistics, and Services Employees (UZO) and the Agricultural and Food Workers Union (OSPZV – ASO), leading to a mutually beneficial agreement. Since 2021, BILLA has also offered up to CZK 12,000 (€478.13) annually through its "Benefit Cafeteria" program. The company provides other benefits, such as five weeks of vacation, contributions to pension plans, bonuses for work anniversaries, and incentives for referring new employees. BILLA also supports its employees with MultiSport cards and discounts with partner companies like Xiaomi, Datart, and EximTours.¹³

From July 1, 2024, Tesco implemented significant wage increases following agreements with union representatives. Base wages for employees in operational roles with tariff-based salaries rose by an average of 8%, while employees in distribution centres received an average increase of 7%. Employees with contractual salaries also benefited from wage adjustments. Alongside these increases, Tesco made substantial investments in enhancing employee benefits, including higher contributions to pension plans and increased support for MultiSport cards. Tesco also introduced raising the maximum pension contribution and, earlier in the year, adding a "FIT Day," an extra day off for employees with six or more years of service. This brings the total to three additional days off annually. Employees also continue to enjoy a unique benefit—a 15% discount on all Tesco purchases throughout the year, including already discounted items, available from the first day of employment.¹⁴

In Czechia, trade unions are actively focused on the issue of the law regulating retail opening hours and are advocating for its preservation. This law restricts opening hours on specific public holidays, which unions argue is essential for ensuring employees' rest and their right to free time. Trade unions emphasize that

¹² <http://uzo.cz/zprava/albert-navysuje-mzdy-zamestnancum-prodejen-v-prumeru-o-10/>

¹³ <https://www.billa.cz/tiskove-zpravy/billa-od-dubna-plosne-navysuje-mzdy>

¹⁴ <https://nezavisleodborytesco.blogspot.com/2024/05/tesco-navysuje-zakladni-mzdy-nad-uroven-20.html>

maintaining this law protects the working conditions of retail employees, who often face demanding and irregular work schedules. At present, the law is under renewed pressure to be repealed, primarily from certain employers and business associations that claim the restrictions negatively impact revenues and business freedom. From the unions' perspective, this law remains a crucial tool for balancing employees' work and private lives.¹⁵

Despite the positive changes mentioned earlier, the commerce sector in Czechia has also been battling with challenges related to collective bargaining.

III. Challenges to collective bargaining

Trade unions often face the significant challenge of employers being reluctant to acknowledge their presence or engage in collective bargaining. Building trade unions required starting from scratch, often encountering opposition from management, which either refused to support or deliberately obstructed the effort. Organizing workers has proven challenging, both historically and today, due to the scattered nature of the sector and the use of flexible contracts that discourage union membership.¹⁶

The retail chain Lidl presents itself as a case in point regarding this discussion. Collective bargaining has been absent at Lidl for a significant period. The company only recently established a trade union, which led to the submission of a proposed collective agreement, paving the way for negotiations. However, as of 2023, these negotiations had yet to occur. The retail chain ignored the proposal for several months, despite being required to respond within seven days.¹⁷

A similar situation was present when the online giant Amazon decided to open fulfilment centres in Czechia. The representatives of the company argued that there is no need to establish a trade union, because the company has employee forums.¹⁸ Amazon managers were reportedly directed to report any employee who mentioned the word "union," enabling the company to dismiss them before they could organize. To counter this, the founder of the union in Dobruška in 2016 kept his plans confidential until officially notifying Amazon of the union's establishment. Under the Labour Code, members of a trade union are protected from termination, ensuring their job security once the organization is formally created.¹⁹ In 2017, a year after the trade union was finally established, despite

¹⁵ <https://www.jataky.cz/zakon-o-prodejni-dobe-ma-smysl/>

¹⁶ Martišková & Šumichrast (2023).

¹⁷ <https://www.asocr.cz/obsah/54/lidl-uz-v-cesku-prehnal-vydava-se-za-neco-cim-neni-uz-resi-i/334262>

¹⁸ https://www.lidovky.cz/byznys/cesi-pracujici-pro-americky-gigant-si-stezuji-na-tlaky-branici-zalozeni-odboru-mame-zamestnanecka-fo.A170323_213216_firmy-trhy_ELE

¹⁹ <https://www.voxpot.cz/amazon-v-cesku-na-vyssi-platy-zapomente-hlavne-byt-blizko-dalnice-do-nemecka/>

resistance from management, the organization faced the threat of dissolution. Union representatives claimed the company was obstructing their activities.²⁰ Employee representatives attempted to negotiate a collective agreement with Amazon, but their efforts over several months proved unsuccessful even in 2021, although a mediator was present. The union advocated for amendments to the Labour Code that would require employers to engage an arbitrator if collective bargaining fails. Currently, this step is voluntary. Unlike mediators, arbitrators would have the authority to impose the terms of a collective agreement if negotiations remain unresolved.²¹

With union membership hovering at a mere 5-6 percent, the capacity of trade unions to secure stronger worker protections remains limited. In some workplaces, the presence of competing unions further weakens social dialogue. Tesco stands out as an example of large trade union plurality - by 2022, UZO had 19 affiliated organizations representing workers across various stores. Additionally, 10 organizations were linked to the Independent Trade Union Tesco (NOT), which primarily operated in Brno and the South Moravian region. The sectoral trade union for the food processing industry also represented a portion of employees, while another smaller independent union was active in Prague.²²

Furthermore, many workers in the commerce sector are employed on part-time or temporary contracts, reducing their bargaining power and making it harder to unionize.²³ The frequent employee turnover also undermines long-term unionization efforts and continuity in bargaining.²⁴

IV. Towards Smart Bargaining

The commerce sector in Czechia faces persistent challenges in collective bargaining due to employer resistance, fragmented workforces, and precarious employment conditions. These issues require innovative approaches that can effectively address the realities of the sector while ensuring workers are fairly represented and protected. The following strategies explore how trade unions can adopt smart bargaining methods to overcome these hurdles and create a more equitable labour environment.

One of the foundational challenges in the commerce sector is the difficulty of

²⁰ https://www.lidovsky.cz/byznys/amazon-nas-systematicky-likviduje-vola-sef-odboru-firma-to-popira.A171029_194510_firmy-trhy_pev

²¹ <https://www.e15.cz/byznys/obchod-a-sluzby/napeti-mezi-odbory-a-vedenim-amazonu-v-dobrovizi-sili-situaci-chce-resit-malacova-1380631>

²² Martišková & Šumichrast (2023).

²³ *ibid.*

²⁴ Myant (2020).

organizing workers. The scattered nature of workplaces, flexible contracts, and employer resistance make it essential to adopt innovative and inclusive approaches to union building. Trade unions must prioritize creating robust organizational frameworks and engaging workers meaningfully:

- 1. Utilize Digital Tools For Outreach:** In a sector where employees are often geographically dispersed and work irregular hours, technology can bridge organizational gaps. Unions could create apps or online platforms where workers can connect with union representatives, access educational resources about labour rights or participate in discussions or voting processes virtually. A successful example comes from Germany's IG Metall, which used digital tools to organize dispersed tech workers.²⁵ Czech unions can implement similar methods to reach retail and commerce employees.
- 2. Focus On Community Building:** Highlighting shared worker experiences—such as struggles with unpredictable schedules, low pay, and unsafe working conditions—can foster solidarity. Community campaigns can spotlight these challenges while emphasizing the collective benefits of union membership.
- 3. Engage Non-Traditional Allies:** Partnering with NGOs, advocacy groups, and academic institutions can amplify union efforts. These collaborations can bolster campaigns, provide legal expertise, or help unions gain broader public support.
- 4. Strengthening Legal and Procedural Leverage**

The legal framework in Czechia provides some protections for union activities, but it also presents gaps that employers often exploit. Strengthening legal tools and utilizing existing protections effectively are critical to overcoming these obstacles. Trade unions can push for amendments to the Labour Code, such as mandating arbitration when collective bargaining fails. Arbitration ensures an impartial third party can impose binding agreements if negotiations remain at a stalemate, which would significantly counter employer intransigence. Many workers are unaware that union members are protected from dismissal under Czech law. Awareness campaigns can empower employees to organize confidently, leveraging these protections. Ensuring workers understand their rights builds a stronger foundation for union activities. Unions can strategically challenge anti-union practices in court, setting legal precedents that deter employers from obstructing organizing efforts. For example, documenting and legally contesting Lidl's delayed response to

²⁵ <https://www.igmetall.de/politik-und-gesellschaft/zukunft-der-arbeit/crowdworking>

collective bargaining proposals could expose gaps in enforcement and create pressure for stricter compliance.

5. Engaging Employers and Leveraging Public Accountability

To overcome employer resistance, unions must combine direct engagement with public pressure. Highlighting inconsistencies between a company's public image and its labour practices can influence negotiations. Companies like Lidl and Amazon promote corporate social responsibility initiatives but often undermine labour rights internally. Public campaigns exposing this contradiction can create significant pressure. For example, the global "Make Amazon Pay" campaign united workers and activists to demand better conditions, showcasing the power of coordinated public pressure.²⁶

6. Innovating Bargaining Models

Given the unique structure of the commerce sector, traditional bargaining approaches may not always be effective. Adapting new bargaining models can address challenges like flexible contracts, high turnover, and fragmented workplaces. Sectoral agreements establish baseline standards for wages, benefits, and working conditions across an entire industry, reducing reliance on individual negotiations. This model has proven effective in countries like Belgium, where sector-wide agreements ensure consistent protections for all workers, including those in smaller workplaces. Collective agreements must explicitly address the needs of part-time and temporary employees, who often face reduced protections.

7. Managing Union Fragmentation

The presence of multiple unions within a single workplace or company, as seen in Tesco, can dilute bargaining power. Coordinating efforts among these organizations is crucial for effective negotiations. Unions can establish platforms to coordinate strategies, aligning their priorities to present a united front during negotiations. For instance, unions could collectively advocate for sector-wide minimum wages, even if their memberships differ in specific focus areas. A coalition of unions from different companies can negotiate collectively with employer associations. This approach strengthens bargaining power and ensures broader representation for workers.

8. Addressing Precarity and High Turnover

Precarious employment and high turnover are significant barriers to long-term unionization and collective bargaining continuity. Unions must design

²⁶ <https://makeamazonpay.com/>

strategies that specifically address these issues. High turnover often stems from poor working conditions. Agreements focusing on career development, predictable schedules, and retention bonuses can improve worker satisfaction and encourage longer-term employment. Establishing mentorship programs for new hires can help integrate them into the workplace and educate them about the benefits of union membership. Providing support during the onboarding process can also foster a sense of belonging and reduce turnover.

9. Leveraging International Collaboration

Globalization and the presence of multinational employers like Amazon make international solidarity and knowledge-sharing critical for effective bargaining. Trade unions in Czechia can enhance their efforts by learning from global best practices and collaborating with counterparts in other countries. International forums and conferences provide opportunities for unions to exchange ideas, share strategies, and learn from each other's successes. Czech unions can benefit from participating in these events, gaining insights that can be applied locally. Furthermore, coordinating with unions across borders to target multinational employers can amplify pressure for fair practices. Transnational campaigns—such as those addressing Amazon's labour policies—highlight the interconnectedness of workers' struggles and demonstrate the power of global solidarity. For example, Czech unions could collaborate with European counterparts to demand uniform labour standards from major retailers operating across the EU.

By embracing these strategies, Czech trade unions can overcome the challenges of organizing in the commerce sector, ensuring workers are better represented and protected in an increasingly complex labour environment.

V. European Perspectives

The Union of Employees of Trade, Logistics and Services is a member of the global trade union federation UNI Global Union. It is also affiliated with the regional organization UNI Europa. Additionally, through its membership in the Czech-Moravian Confederation of Trade Unions (ČMKOS), UZO is part of the European Trade Union Confederation (ETUC) and the International Trade Union Confederation (ITUC).

Collective power can make a big difference for workers in the Czech commerce sector. As an example, in October 2024, representatives from various trade unions across Europe, including Czechia, gathered in Berlin to coordinate efforts and

define strategies for achieving a global framework agreement with Schwarz Group, the parent company of Lidl and Kaufland. The primary goals include improving labour standards, ensuring workers' rights, and fostering fair working conditions globally. UNI Europa, plays a pivotal role in supporting these efforts by providing a platform for cross-border collaboration and aligning union strategies across countries. Czech trade unions are actively involved in these initiatives, showcasing their commitment to solidarity and shared goals on the European level. This development highlights the importance of international collaboration in addressing the challenges faced by workers in multinational companies, especially in ensuring decent wages, stable working conditions, and respect for labour rights.

Conclusions

The commerce sector in Czechia remains a cornerstone of the national economy, providing significant employment opportunities across wholesale, retail, and motor vehicle trade. However, persistent challenges, including low wages, precarious employment, and decentralized collective bargaining, underscore the need for systemic improvements. The sector's reliance on multinational corporations further complicates efforts to standardize labour conditions and enhance worker protections.

Despite these challenges, Czech trade unions have demonstrated resilience and adaptability. Through company-level negotiations, they have secured important advancements, such as wage increases and enhanced benefits. However, the absence of sectoral agreements and limited union density continue to hinder broader progress. Employer resistance and the fragmented nature of the workforce exacerbate these difficulties, requiring innovative approaches to collective bargaining.

This report underscores the potential of "smart bargaining" to address these systemic issues. By leveraging digital tools, fostering international collaboration, and advocating for stronger legal frameworks, trade unions can overcome barriers and secure more equitable conditions for workers. The report also highlights the importance of addressing precarious employment, high turnover, and union fragmentation to strengthen the collective voice of workers.

On a European level, Czech trade unions' involvement in initiatives like UNI Europa demonstrates the critical role of cross-border solidarity in tackling the challenges posed by multinational employers. Coordinated action at this level not only amplifies the impact of local efforts but also sets the stage for more robust labour standards across the region.

In conclusion, achieving sustainable progress in Czechia's commerce sector requires the combined efforts of trade unions, employers, and policymakers. By embracing innovative strategies and fostering collaboration, stakeholders can create a fairer, more stable labour environment that benefits both workers and the broader economy.

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