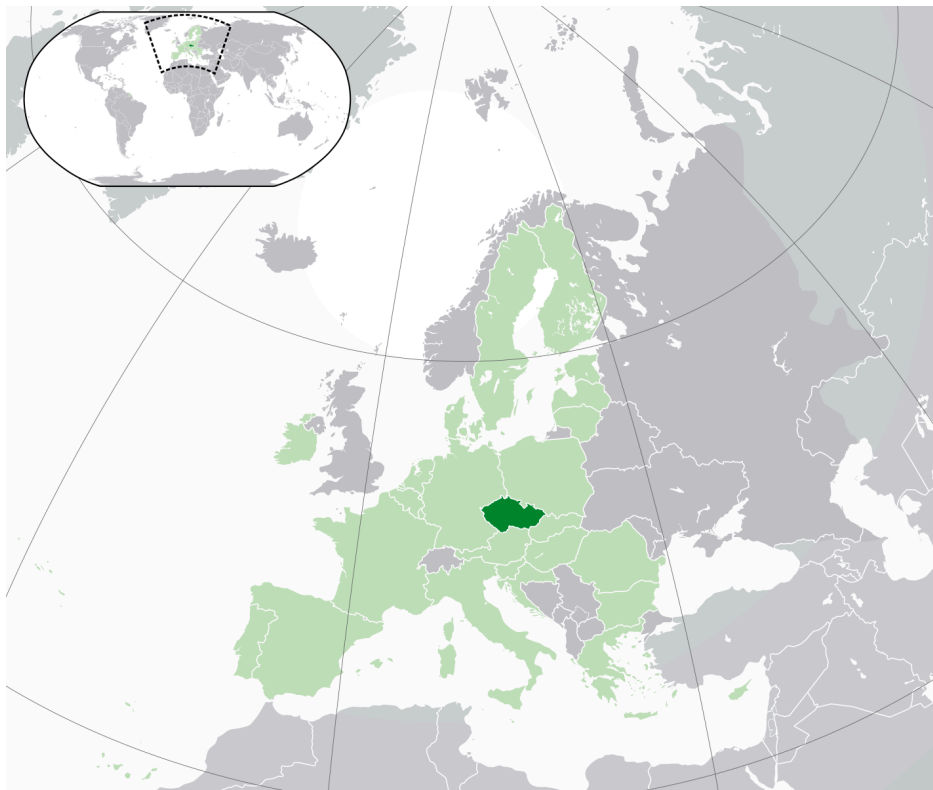


## EUROPEAN STUDIES

# Road freight transport in the Czech Republic in 2023





# Comité national routier (CNR)

## EUROPEAN STUDIES

### Road Freight Transport in the Czech Republic

2023 study

Comité National Routier – Paris

[www.cnr.fr](http://www.cnr.fr) – [cnr@cnr.fr](mailto:cnr@cnr.fr)

The map on the cover comes from [https://commons.wikimedia.org/wiki/File:EU-Czech\\_Republic.svg](https://commons.wikimedia.org/wiki/File:EU-Czech_Republic.svg)



## WARNING

Following on from the 2019 survey of the Czech Republic RFT sector, this study, which was conducted in 2023, is intended to provide up-to-date figures on the sector's activities, as well as on the typical operating conditions and costs of a 40-tonne HGV operating internationally.

Some data have been updated with available figures for 2025. The standard profiles drawn up are nevertheless based on the economic conditions prevailing in 2023.

It is also important to note that this survey was carried out during the second year of the war in Ukraine. Some of the data in this study are thus likely to have been impacted by the political climate. This factor should be taken into account when interpreting the results.

Since the exchange rate of the Czech koruna ranged from 23.94 to the euro at the start of 2023 to 24.20 to the euro at the end of 2025, an average flat rate of 24 korunas to the euro will be used throughout this survey.



## SUMMARY

The Czech road haulage sector is increasingly adopting the standards found in neighbouring Western European countries. This is evidenced by the introduction of a collective agreement following industrial action by drivers, as well as tax reforms, and investments in infrastructure.

In terms of pay, the previous minimum wage scale based on 8 different levels of professional responsibility was abolished in 2024. It has been replaced by a new scale composed of 4 grades linked to employees' educational qualifications. Whilst in theory this represents a downgrade for drivers, in practice it has no impact on the wages received by long-distance drivers, as their pay was already above the national minimum wage and remains so. However, the Czech Republic remains one of the only countries in Eastern Europe with a collective agreement in the road haulage sector. Although currently somewhat limited in scope, this collective agreement is likely to be expanded in the coming years to address employees' main demand, namely the establishment of minimum wage levels in the road haulage sector.

On the tax front, a number of changes directly affecting the road haulage sector have been introduced: a 2% increase in corporation tax, a 40% reduction in the axle tax following a major reform, and a rise in toll charges to cover the costs associated with CO<sub>2</sub> emissions.

As regards infrastructure, the current level of road network development appears sufficient in terms of quality and capacity to meet domestic demand. Nevertheless, significant investment will be required to link the domestic network up with the motorway networks of neighbouring countries. An ambitious network improvement project supported by the European Union is currently underway.

In terms of costs in the RFT sector, the war in Ukraine has had two direct consequences. Firstly, wages are rising sharply due to labour market tensions compounded by the departure of hundreds of Ukrainian drivers to join the fighting in their homeland. According to the CNR's calculations, the cost of a driver has risen by 44% since the last survey in 2019. Secondly, fuel prices are rising across international markets.

All in all, the per-kilometre cost in the Czech sector stands at 1.21€, up by more than 30% in just a few years.



# CONTENTS

<b>CONTENTS</b>	<b>9</b>
<b>1. ECONOMIC, LABOUR AND ENVIRONMENTAL CONDITIONS IN THE CZECH SECTOR</b>	<b>11</b>
<b>1.1. THE CZECH REPUBLIC IN BRIEF</b>	<b>11</b>
<b>1.2. ROAD FREIGHT TRANSPORT IN THE CZECH REPUBLIC</b>	<b>12</b>
1.2.1. TRANSPORT POLICY AND INFRASTRUCTURE	12
1.2.2. ROAD FREIGHT TRANSPORT OPERATORS	16
1.2.3. THE CZECH RFT SECTOR IN 2023 – KEY DATA	18
<b>1.3. FISCAL AND LABOUR REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT IN THE CZECH REPUBLIC</b>	<b>21</b>
1.3.1. COMPANY TYPES	21
1.3.2. ROAD FREIGHT TRANSPORT TAXES	21
1.3.3. LABOUR REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT	26
<b>2. CONDITIONS AND COSTS OF OPERATING A CZECH 40-TONNE HGV INTERNATIONALLY</b>	<b>32</b>
<b>2.1. BUSINESS OPERATING CONDITIONS AND COSTS</b>	<b>32</b>
2.1.1. TRANSPORT EQUIPMENT – Use	33
2.1.2. TRANSPORT EQUIPMENT – Financing	33
2.1.3. FUEL	34
2.1.4. MAINTENANCE & REPAIRS	34
2.1.6. TOLLS	35
2.1.7. INSURANCE	35
2.1.8. AXLE TAX	35
<b>2.2. EMPLOYMENT CONDITIONS AND DRIVER PAY</b>	<b>36</b>
2.2.1. EMPLOYMENT CONDITIONS	36
<b>2.3. OVERVIEW OF CONDITIONS AND COSTS OF OPERATING A "TYPICAL" HGV INTERNATIONALLY</b>	<b>39</b>
<b>3. BIBLIOGRAPHY</b>	<b>41</b>



# 1. ECONOMIC, LABOUR AND ENVIRONMENTAL CONDITIONS IN THE CZECH SECTOR

## 1.1. THE CZECH REPUBLIC IN BRIEF

Capital	Prague
Area	78,871 km <sup>2</sup>
Population	10,900,555 inhabitants (2024)
Official EU language(s)	Czech
Political system	Parliamentary Republic
President of the Republic	Petr Pavel
Prime Minister	Petr Fiala, since 28 November 2021
Minister for Transport	Martin Kupka, since 17 December 2021
Date of EU membership	1 May 2004
Date of joining the euro	Non-member of the Euro zone 1 € = 24.009 Czech korunas (CZK), average rate in 2023
Seats in the European Parliament	21 seats
European Commissioner	Jozef Sikela, Commissioner for International Partnerships, since <sup>1</sup> December 2024
Real GDP growth (%)	+1.1% (Eurostat, 2024)
Inflation (%)	+3.3% (Eurostat, 2024)
Unemployment rate (% of working population)	+2.6% (Eurostat, 2024)
Balance of trade	25.8 billion euros (CNB, 2023)
Minimum gross monthly wage	20,800 korunas, i.e. approximately 832€, as of 1 January 2025
Greenhouse gas emissions	8.52 tonnes/inhabitant (Eurostat, 2023)

## 1.2. ROAD FREIGHT TRANSPORT IN THE CZECH REPUBLIC

### 1.2.1. TRANSPORT POLICY AND INFRASTRUCTURE

#### *Transport policy*

Covering the period 2021–2027, the government’s official strategy document, entitled “*Transport Policy of the Czech Republic*”, sets out the national transport policy through to 2050. Its key objectives are:

- To develop an effective, safe and reliable transport system for passengers and freight.
- To promote the sustainable use of natural resources and reduce the environmental impact of the transport sector.
- Contribute to the development of the Trans-European Transport Network (TEN-T), in particular the European corridors linking the Czech Republic to its main neighbours, in particular Germany and Austria.
- To prepare the Czech transport system to meet European and international commitments on climate, energy and sustainable mobility.
- To promote road safety and bolster infrastructure resilience in the face of the challenges posed by climate change.

As far as road transport is concerned, priority is being given to building, modernising and extending the national motorway network, particularly the D3 and D6 motorways linking the capital Prague with north-western Austria and Bavaria.

The government is promoting a shift from road to rail and waterways to reduce environmental impacts. Against this backdrop, the Czech Republic is investing significantly in the modernisation and sustainability of its rail network: upgrading lines, expanding capacity, improving safety and renovating regional and international infrastructure, often with European funding or via public-private partnerships (PPPs).

High-speed line projects are also in the pipeline, with the aim of linking major Czech cities and strengthening cross-border connections with Germany, Austria, Poland and Slovakia.

Czech transport policy is designed to contribute to the EU’s and the country’s climate and energy objectives. The country plans to accelerate the full electrification of rail transport and improve the energy efficiency of existing infrastructure by promoting clean fuels and electric mobility (the development of hydrogen as a fuel as well as charging infrastructure for clean vehicles).

Modal split of freight transport in % (based on t-km)

2021	Road	Rail	Inland waterways
European Union	77.4%	17.0%	5.6%
Czechia	77.1%	22.8%	0.0%

Source : Eurostat

Thanks to its location at the heart of Europe, the Czech Republic is an important crossroads between Northern Europe, Poland and Austria, as well as Italy and France to the south. Its transport infrastructure is centred around the capital, Prague, as well as the cities of Brno and Ostrava. Its geography does not represent any particular obstacle to transport development.

The country's main transport corridor runs east-west: Vienna and Bratislava in the east are linked to the cities of Brno and Prague in the Czech Republic, before connecting up with Dresden and Bavaria via the German motorway and rail networks.

The Czech Republic has a well-developed motorway network linking all the country's major cities. Initially designed to connect the main towns in the two former Czechoslovak republics, the current Czech motorway network is set to undergo further improvements with the construction of the following missing sections:

- on the stretch between the Czech Republic and Germany, around the tourist town of Karlovy Vary,
- on the stretch between the Czech Republic and Austria, at České Budějovice in the Czech Republic and Linz in Austria, as well as between Brno and Vienna.
- on the stretch between the Czech Republic and Poland to the north of the Czech town of Hradec Králové, a major industrial centre.

The Czech motorway network is managed entirely by the state-owned Roads and Motorways Authority (RSD), part of the Ministry of Transport.

According to the RSD, as of 2024, the country had 1,480 km of completed motorways, with 201.4 km under construction; in addition, construction work on 361.8 km was scheduled to begin in 2025, followed by a further 73.3 km in 2026.

---

<sup>1</sup> "Czech Republic" sheet published by the Treasury Department, Ministry of the Economy, Finance and Industrial and Digital Sovereignty of the French Republic

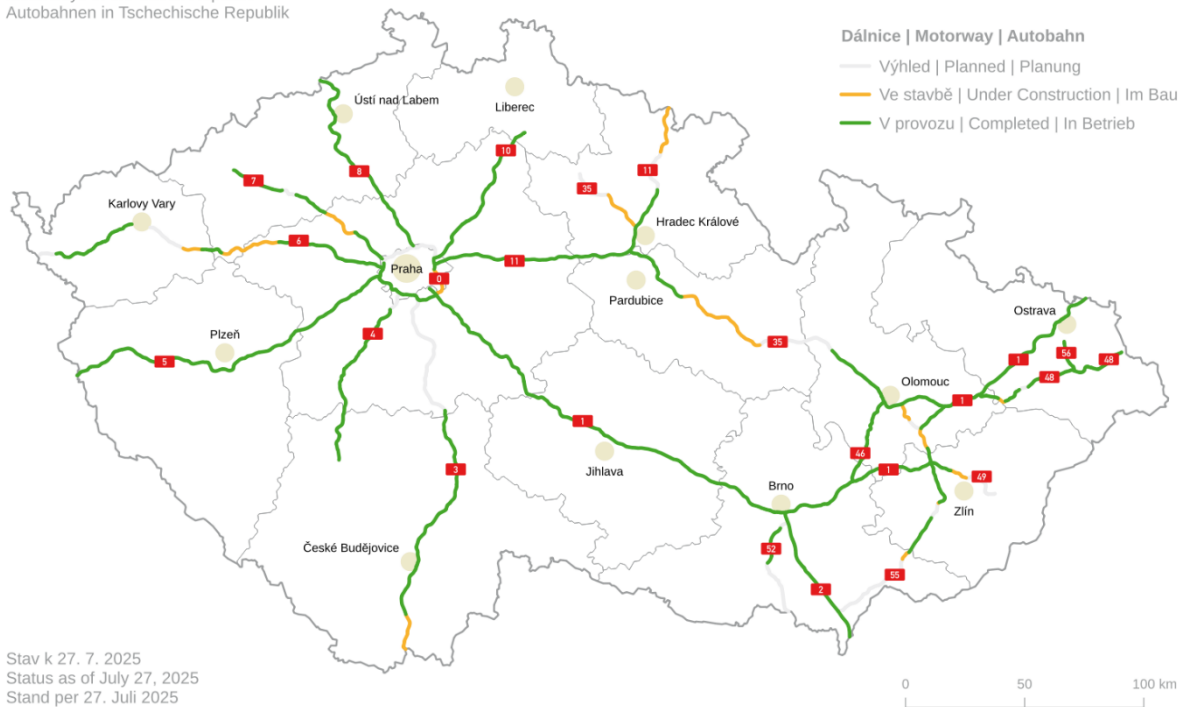
## The Czech Republic's motorway network

### Dálnice v České republice

Motorways in the Czech Republic  
Autobahnen in Tschechische Republik

 **ceskedalnice.cz**

© 2025 Stanislav Hudec



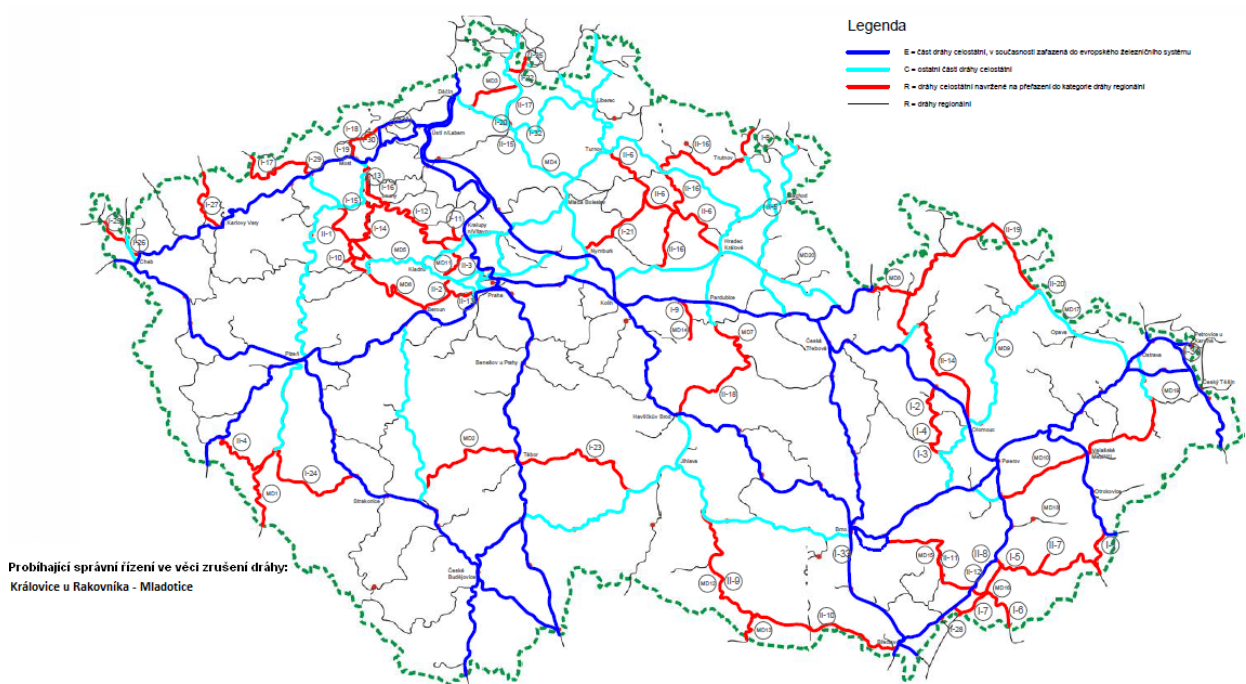
Czech freight transport is mainly road-based. Rail, which accounts for more than 20% of freight volume, has been in decline for several years. The investment planned for the development of rail transport is focused mainly on passenger transport projects.

The Czech rail network has been managed by the public body Sprava Zeleznic (SZ) since a 2003 reform, which was based on the French model of the time (SNCF/RFF). SZ owns and manages rail infrastructure at both national and regional levels, while the public company Ceske Drahy (CD) operates rail services.

An additional national high-speed railway line (RS) is set to go into service by 2033, with operating speeds of between 260 and 300 km/h. The first section of this high-speed line will link the German city of Dresden to the Czech capital. This line is part of the new European high-speed line that is set to link Hamburg to Istanbul via Berlin, Dresden, Prague, Bratislava, Vienna, Budapest and Sofia.

## Czech rail network

(dark blue: national network, part of the European network; light blue: other national network; red: former national network recategorised as regional; black: regional network)



The Czech Republic is landlocked, and only a small portion of the waterways north of Prague allow for economically viable transport along the Vltava River.

## Czech airports



Air transport is primarily centred around Prague Airport, which offers scheduled flights to most major European cities, as well as a handful of intercontinental routes. Other regional airports offer charter flights during the summer season.

**Transport Infrastructures of Czechia**

	2021
<b>Length of national routes</b>	5,800 km
<b>of which highways</b>	1 346 km
<b>Length of other secondary routes</b>	123,611 km
<b>Length of rail network</b>	15,272 km
<b>of which electrified</b>	6,922 km
<b>Length of inland water channels</b>	39 km
<b>Length of inland natural waterways</b>	654 km

Source : Eurostat

**1.2.2. ROAD FREIGHT TRANSPORT OPERATORS**

*Institutional stakeholders*

*Roads and Motorways Authority (RSD CR)*

The Roads and Motorways Authority is an inter-ministerial body created by the Ministry of Transport. The organisation’s main activities involve the management of state-owned road infrastructure, road safety, the administration, maintenance and repair of roads and motorways, as well as their upgrading.

It also manages the SFDI, the state fund for the development of road infrastructure, which receives substantial backing from the European Union.

*Road Transport Service Centre*

The “Road Transport Service Centre” provides legal assistance to the haulage sector. It supports other government departments in their work on road safety and the rules of the road. It also organises technical training courses for staff from other public bodies.

*Transport Research Centre (CDV)*

The Transport Research Centre is the sole public body dedicated to scientific research in the field of transport, and falls under the remit of the Ministry of Transport. It was founded in 1992 as the successor to the Czechoslovak Federal Transport Research Institute in Zilina and became a public body in 2007.

The centre's is charged with carrying out research in the field of transport, developing its activities, providing expertise and implementing projects and services on behalf of the Ministry of Transport. The centre also provides expert advice to public and private authorities in relation to new infrastructure projects or potential changes to technical regulations. The centre employs over 150 experts.

### *RFT trade organisations*

ČESMAD – Bohemia has become the sole road haulage association in the Czech Republic; other associations such as Svaz Dopravy and SPD have recently refocused on intermodality and logistics. It brings together more than 2,100 companies, operating nearly 25,000 vehicles. In the past, the association has played an important role in the creation and modification of legislation relating to road transport and in the negotiation of intergovernmental agreements, as well as the national collective agreement.

The association also has a subsidiary (ISD, Road Transport Institute) specialising in driver training and recruitment.

The association represents the interests of road haulage companies in dealings with the authorities at national, European and international levels. It plays an active role in the EU debate on road transport. Its main areas of focus are as follows:

- It seeks to promote the interests of its members by calling for greater flexibility in the rules governing driver mobility and less burdensome market access requirements.
- It opposes any rules perceived as overly restrictive, particularly regarding the application of driver-related regulations, which, in its view, put Czech hauliers at a disadvantage.
- It defends an open but fair European road transport market. Recently, the association criticised the EU-Ukraine agreements, which have given Ukrainian carriers unconditional access to the European market, arguing that this could create unfair competition.
- It is calling for tighter controls and clear rules to ensure that foreign companies comply with the same obligations and standards as domestic hauliers.
- In EU debates, the association advocates for lighter and more flexible measures for drivers and hauliers, whilst also acknowledging the importance of proper professional training and a sensible enforcement of the rules.
- Overall, it campaigns for a supportive regulatory environment that does not burden transport operators with “unnecessary constraints”.

### *Union representation*

*Odborový svaz dopravy (OSD)* is the national trade union organisation representing all employees in the transport sector, across all modes of transport. The union is affiliated to the Czech-Moravian Confederation of Trade Unions (ČMKOS) (*Českomoravská konfederace odborových svazů*).

The OSD negotiates collective agreements with employers' associations (Česmad Bohemia and Svaz dopravy, road transport section) in the road haulage sector.

### 1.2.3. THE CZECH RFT SECTOR IN 2023 – KEY DATA

#### Structure of the Czech RFT sector in 2023

Structure of the Czech RFT sector in 2023

2023	Goods transported	Tonne-kilometers achieved		Average distance	Vehicle.kilometres achieved
	thousand tonnes	million t.km	%	km	million of vehicle.km
<b>TOTAL</b>	<b>433,685</b>	<b>64,806</b>	<b>10.0%</b>	<b>149</b>	<b>5,782</b>
Domestic transport	379,008	28,633	4.4%	76	2,911
International transport	54,677	36,173	5.6%	662	2,871
<i>International transport of goods loaded in Czechia</i>	23,438	14,808	2.3%	632	1251
<i>International transport of goods unloaded in Czechia</i>	18,018	12,750	2.0%	708	999
<i>Cross-trade</i>	9,022	7,321	1.1%	811	507
<i>Cabotage</i>	4,199	1295	0.2%	308	114

Source : Eurostat

Accounting for over 55% of total activity, international transport is clearly the main focus of the Czech sector. Its geographical position at the heart of Europe and its trade links with Germany explain this positioning. Internationally, cross-trade accounts for a fifth of total activity, while cabotage accounts for only 2%. Average distances for international trips are over 660 km, and over 800 km in the case of cross-trade. The countries most frequently served by Czech hauliers are Germany and the Benelux countries, particularly the ports of Rotterdam and Antwerp.

#### Evolution of the Czech RFT sector

Evolution of the Czech RFT sector in million tonne-kilometres

In million t-km	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	AAGR*
<b>TOTAL</b>	<b>54,892</b>	<b>54,092</b>	<b>58,715</b>	<b>50,314</b>	<b>44,273</b>	<b>41,073</b>	<b>39,059</b>	<b>56,090</b>	<b>63,756</b>	<b>65,794</b>	<b>64,806</b>	1.67%
Domestic transport	15,392	16,813	21,184	22,304	21,899	23,543	25,012	28,271	29,764	30,762	28,633	6.40%
International transport	39,500	37,279	37,531	28,010	22,374	17,530	14,047	27,819	33,992	35,032	36,173	-0.88%

\*Average annual growth rate

Source : Eurostat

Official statistical data, which have been affected by technical issues as a result of methodological changes between 2017 and 2019, make it difficult to analyse trends in the activity of the Czech haulage sector. That said, a comparison of the figures for 2023 with those for 2013 reveals that domestic business has doubled over this ten-year period, whilst international business has fallen by 10%.

## Cabotage

### Cabotage under Czech flag in the 3 main "cabotaged" countries

In million tonne-kilometres	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	AAGR*
<b>Cabotage under Czech flag</b>	<b>1,344</b>	<b>1,371</b>	<b>1,148</b>	<b>986</b>	<b>614</b>	<b>464</b>	<b>512</b>	<b>995</b>	<b>1,118</b>	<b>1,098</b>	<b>1,295</b>	<b>-0.37%</b>
<i>in Germany</i>	898	854	664	635	427	317	297	688	767	757	754	-1.74%
<i>in France</i>	135	157	125	143	63	44	50	93	105	118	161	1.81%
<i>in Austria</i>	144	98	52	46	27	23	39	68	66	65	106	-3.02%
<b>Share of cabotage in Czech transport %</b>	<b>2.45</b>	<b>2.53</b>	<b>1.96</b>	<b>1.96</b>	<b>1.39</b>	<b>1.13</b>	<b>1.31</b>	<b>1.77</b>	<b>1.75</b>	<b>1.67</b>	<b>2.00</b>	<b>-</b>

\*AAGR : average annual growth rate

Source : Eurostat

The trend in Czech cabotage activity mirrors that of international business as a whole. Germany alone accounts for 58% of Czech cabotage. 79% of Czech cabotage is focused on just three countries.

### Cabotage in Czechia

In million tonne-kilometres	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	AAGR*
Cabotage in Czechia	63	96	310	193	181	199	285	275	186	317	244	14.42%
Penetration rate of cabotage*	0.41%	0.57%	1.44%	0.86%	0.82%	0.84%	1.13%	0.96%	0.62%	1.02%	0.84%	-
Market share cabotage**	0.52%	0.71%	1.82%	1.09%	1.06%	1.07%	1.45%	1.25%	0.81%	1.32%	1.07%	-

\*AAGR : Average annual growth rate

Source : Eurostat

\*cabotage foreign flag / (total domestic transport + cabotage under foreign flag)

\*\*cabotage foreign flag / (domestic transport for hire and reward + cabotage under foreign flag)

Cabotage by other European hauliers on Czech soil remains negligible, with a penetration rate of less than 1%. The main hauliers involved in cabotage in the Czech Republic hail from Poland and Slovakia.

## RFT companies

According to Eurostat statistics, there are approximately 32,000 road haulage companies in the Czech Republic, employing just under 100,000 people. According to information gathered in the course of our interviews with hauliers, this figure also includes self-employed drivers who do not own a vehicle. In reality, the number of road haulage companies, as per the European Union definition, is likely closer to 5,000, with a domestic fleet of nearly 55,000 vehicles.

### RFT\* Business Statistics in Czechia

	2020
Number of enterprises	32,300
Number of persons employed	128,578
Number of employees	96,468
Net sales	9,113,900 k€
<b>Costs</b>	
Total amount of purchased goods and services	6,444,700 k€
of which merchandise for resale	439,600 k€
of which materials, supplies and intermediate goods	3,500 k€
Personnal expenses	1,501,800 k€
of which wages and salaries	1,126,600 k€
of which social security costs	375,200 k€
Apparent social security contributions rate	33.3%
Gross operating profit	1,148,300 k€

\* RFT companies as in European Nomenclature NACE Rev2 - Classe H4941

Source : Eurostat

### Vehicle numbers

There is little data available on the number of RFT vehicles in the Czech Republic. The official data published by Eurostat do not reflect reality.

Vehicle Statistics in Czechia							
		2018	2019	2020	2021	2022	2023
Road Tractors	Total	4,360	3,991	3,706	3,589	3,461	3,380
	Less than 2 years	204	180	72	36	5	12
	Between 2 and 5 years	88	100	155	144	115	56
	Between 5 and 10 years	226	160	152	142	121	129
	Between 10 and 20 years	3,842	3,551	3,327	3,267	3,220	3,183
Lorries > 3.5 tonnes	Total	264,959	275,484	281,969	288,206	302,514	154,132
Lorries <= 3.5 tonnes	Total	441,303	444,203	446,122	443,860	449,090	618,073

nd : non disponible

Source : Eurostat

Vehicle Statistics in Czechie - 2							
		2018	2019	2020	2021	2022	2023
Semi-trailers	Total	50,030	46,257	43,035	40,666	37,052	35,089
Trailers	Total	441,769	443,216	443,888	444,294	444,829	444,336

nd : non disponible

Source : Eurostat

## 1.3. FISCAL AND LABOUR REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT IN THE CZECH REPUBLIC

### 1.3.1. COMPANY TYPES

Types of companies in Czechia and their main characteristics	
<b>Partnerships</b>	
<b>Sole proprietorship (Zivnost)</b>	
Number of partners and associates: only one physical person	
Minimum and/or maximum capital: no limitation	
Liability of partners: the owner bears unlimited sole liability.	
<b>General commercial partnership (Verejná obchodni společnost - V.o.s.)</b>	
Number of partners and associates: 2 or more partners, no maximum	
Minimum and/or maximum capital: no limitation	
Liability of partners: the partners bear unlimited joint liability.	
<b>Limited liability partnership (Komanditni společnost - K.s.)</b>	
Number of partners: 2 partners or more, physical persons, at least one as associate and others as partners	
Minimum and/or maximum capital: no limitation	
Liability of shareholders: the liability of associates is illimited. The liability of partners is limited to the amount of the contributions	
<b>Capital companies</b>	
<b>Limited liability company (Společnost s ručením omezeným - S.r.o.)</b>	
Number of partners and associates: at least one person, maximum 50	
Minimum and/or maximum capital: 1 € minimum	
Liability of shareholders: the liability of shareholders is limited to the amount of the contributions	
<b>Joint stock company (Akciová společnost - A.s)</b>	
Number of partners and associates: no limitations in number of partners and associates	
Minimum and/or maximum capital: 2,000,000 CZK minimum, at least 30% paid-up	
Liability of shareholders: the liability of shareholders is limited to the amount of the contributions	

Source: BNP Paribas

### 1.3.2. ROAD FREIGHT TRANSPORT TAXES

#### *Corporation tax - (Daň z příjmů právnických osob)*

Corporations and similar companies, as well as commercial and non-commercial organisations, whether public or private, are subject to corporation tax, as are non-resident companies in respect of profits made in the Czech Republic.

Until the end of 2023, the basic rate of corporation tax was 19% for companies in general; the rate for investment funds stood at 5%, while private pension funds were exempt from this tax. A portion of profits earned in the Czech Republic by non-resident companies are subject to a 15% tax rate.

In addition, a flat rate of 15% is levied on dividends and other profit distributions, solely on the amount of any reduction in capital that was previously increased through self-financing and on capital gains from the sale of assets.

Beginning in 2024, this general rate has been raised to 21%, while the special rates remain unchanged. Tax credits on losses can be spread over 5 years.

### *VAT (DPH)*

The standard rate of VAT is 21% for most goods and services. A reduced rate of 12% applies to foodstuffs, pharmaceutical products, accommodation, construction and public works, the provision of heating, air conditioning, drinking water and waste water services.

A super-reduced rate of 0% applies to books.

### *Axle tax (Silniční daň)*

The 1993 law establishing the axle tax (known in the Czech Republic as road tax), was substantially amended in 2022; up until then the only changes had been regular updates of the annual rates payable.<sup>2</sup> Under the amended legislation, the tax has been completely abolished for passenger cars and commercial vehicles with a GVWR of over 12 tonnes. Meanwhile, the tax on heavy goods vehicles has been considerably reduced. These changes went into effect in 2023, with rates scheduled to be reviewed regularly, beginning in 2025.

The new law also streamlines the vehicle classification system, grouping them into 4 categories for motor vehicles and 1 for trailers:

- BA - rigid truck - tipper
- BB - rigid truck - van
- BC - road tractor
- BD - articulated lorry
- O - trailer

---

<sup>2</sup> Government service for the publication of legislation, [https://financnisprava.gov.cz/assets/cs/prilohy/d-seznam-dani/Letak\\_DSL\\_2024.pdf](https://financnisprava.gov.cz/assets/cs/prilohy/d-seznam-dani/Letak_DSL_2024.pdf)

Under this new system, a 40-tonne articulated vehicle was subject to an annual tax of 1,008€ in 2023 and 2024, compared with 1,718€ in 2019.

<b>Motor Vehicles Tax in Czechia in 2024</b>			
<b>Lorries (BA ou BB)</b>			
<b>Number of axles</b>	<b>GVW</b>	<b>Amount in CZK</b>	<b>Amount in EUR</b>
2 axles	until 12 tonnes	-	-
	from 12 to 13 tonnes	800.00 CZK	33.33 €
	from 13 to 14 tonnes	2,300.00 CZK	95.83 €
	from 14 to 15 tonnes	3,200.00 CZK	133.33 €
	more than 15 tonnes	7,200.00 CZK	300.00 €
3 axles	until 12 tonnes	-	-
	from 15 to 17 tonnes	1,400.00 CZK	58.33 €
	from 17 to 19 tonnes	2,900.00 CZK	120.83 €
	from 19 to 21 tonnes	3,800.00 CZK	158.33 €
	from 21 to 23 tonnes	5,800.00 CZK	241.67 €
	more than 23 tonnes	9,000.00 CZK	375.00 €
4 axles or more	until 23 tonnes	-	-
	from 23 to 25 tonnes	3,800.00 CZK	158.33 €
	from 25 to 27 tonnes	6,000.00 CZK	250.00 €
	from 27 to 29 tonnes	9,400.00 CZK	391.67 €
	more than 29 tonnes	14,000.00 CZK	583.33 €
<b>Road tractors (BC) or Articulated vehicles (BD)</b>			
<b>Number of axles</b>	<b>GVW</b>	<b>Amount in CZK</b>	<b>Amount in EUR</b>
2 axles	until 16 tonnes	-	-
	from 16 to 18 tonnes	400.00 CZK	16.67 €
	from 18 to 20 tonnes	900.00 CZK	37.50 €
	from 20 to 22 tonnes	2,000.00 CZK	83.33 €
	from 22 to 23 tonnes	2,600.00 CZK	108.33 €
	from 23 to 25 tonnes	4,600.00 CZK	191.67 €
	from 25 to 28 tonnes	8,000.00 CZK	333.33 €
	from 28 to 31 tonnes	8,700.00 CZK	362.50 €
	from 31 to 33 tonnes	12,100.00 CZK	504.17 €
	more than 33 tonnes	18,400.00 CZK	766.67 €
3 axles or more	until 36 tonnes	-	-
	from 36 to 38 tonnes	11,800.00 CZK	491.67 €
	from 38 to 40 tonnes	16,300.00 CZK	679.17 €
	more than 40 tonnes	24,200.00 CZK	1008.33 €
<b>Trailers (O)</b>			
<b>Number of axles</b>	<b>GVW</b>	<b>Amount in CZK</b>	<b>Amount in EUR</b>
-	until 12 tonnes	-	-
	more than 12 tonnes	3,600.00 CZK	150.00 €

Source : Ministry of transport

## Motorway tolls

Since 2007, HGVs weighing 3.5 tonnes or more using Czech motorways, expressways and certain other national roads have been subject to an infrastructure charge. The tax is calculated on a per-kilometre basis, and varies depending on the vehicle's EURO class, the number of axles and the time of day. Myto CZ, an entity belonging to the Ministry of Transport and the Road and Motorway Directorate (RSD CR), is responsible for managing the toll collection system.

From March 2024, the time of day will no longer be taken into account when determining the per-kilometre rate. On the other hand, in line with EU regulations, CO<sub>2</sub> emission classes have been created to allow externalities to be factored into the calculation of tolls.

On 1 March 2025, motorway tolls increased significantly, by approximately 12% in the case of most vehicle categories. No increase is expected in 2026, but the government plans to lower CO<sub>2</sub> emission thresholds, which will result in higher tolls for certain vehicles.

Tolls in Czechia in 2025 for vehicles of 12 tonnes and more

Tolls on highways and national express roads																												
Class EURO	EURO 0-IV				Euro V, EEV				Euro VI												Zero Emission (ZEV)							
CO2 Emission Class	N° 1				N° 1				N° 2				N° 3				N° 4				N° 5							
Number of axles	2	3	4	≥5	2	3	4	≥5	2	3	4	≥5	2	3	4	≥5	2	3	4	≥5	2	3	4	≥5	2	3	4	≥5
Price CZK/km	3.53	4.63	5.87	6.89	3.07	4.09	5.39	6.45	2.83	3.74	4.93	5.96	2.82	3.72	4.89	5.92	2.80	3.70	4.85	5.88	2.66	3.53	4.56	5.52	2.29	3.07	3.90	4.73
Price €/km	0.15	0.19	0.24	0.29	0.13	0.17	0.22	0.27	0.12	0.16	0.21	0.25	0.12	0.16	0.20	0.25	0.12	0.15	0.20	0.24	0.11	0.15	0.19	0.23	0.10	0.13	0.16	0.20

National Roads (except the express roads)																												
Class EURO	EURO 0-IV				Euro V, EEV				Euro VI												Zero Emission (ZEV)							
CO2 Emission Class	N° 1				N° 1				N° 2				N° 3				N° 4				N° 5							
Number of axles	2	3	4	≥5	2	3	4	≥5	2	3	4	≥5	2	3	4	≥5	2	3	4	≥5	2	3	4	≥5	2	3	4	≥5
Price CZK/km	2.42	3.13	3.96	4.58	1.95	2.59	3.49	4.14	1.72	2.24	3.02	3.65	1.70	2.22	2.99	3.61	1.68	2.20	2.95	3.56	1.55	2.03	2.65	3.21	1.17	1.57	1.99	2.41
Price €/km	0.10	0.13	0.17	0.19	0.08	0.11	0.15	0.17	0.07	0.09	0.13	0.15	0.07	0.09	0.12	0.15	0.07	0.09	0.12	0.15	0.06	0.08	0.11	0.13	0.05	0.07	0.08	0.10

Source : Myto.cz

## Discount on motorway tolls

Since 2015, hauliers signed up to a contract with Myto CZ have been eligible for a discount calculated on the basis of the annual tolls incurred by each vehicle.

For example, a vehicle with tolls of 75,000 CZK/year (i.e. 3,125€) would qualify for a 5% discount. This discount increases based on certain thresholds: 8% on annual tolls in excess of 110,000 CZK/year (4,583€); 11% for amounts above 190,000 CZK/year (7,917€) and 13% on tolls above 300,000 CZK/year (12,500€).

## Excise duty on commercial diesel

The authority responsible for collecting excise duties in the Czech Republic is the Taxes and Duties Authority, a part of the Customs Office.

Excise duty currently stands at 9,950 CZK per 1,000 litres, or 39.36€ per hectolitre (based on the official exchange rate for the Czech koruna used by the European Commission in its annual

figures). This amount may vary slightly from one survey to another, depending on fluctuations in the value of the Czech koruna.

There is no system of partial reimbursement of excise duty on commercial diesel fuel.

### *State aid*

The Czech government is using public funds and state resources to actively promote the transition to zero-emission lorries. A call for projects (TRANSCoM CZ) has been launched to subsidise the purchase of electric lorries and the installation of charging points for heavy goods vehicles. Under this scheme, road haulage companies can receive grants of up to 50% of eligible costs for electric vehicles (categories N2 and N3) depending on their size, and 30% for charging stations.

## 1.3.3. LABOUR REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT

### *Collective agreement (CC)*

The first non-binding collective agreement in the road haulage sector in the Czech Republic dates back to the period between 2013–2017. It set out the main regulations specific to the RFT sector. A second version of this collective agreement was signed on 1 June 2017 and covered the period 2018-2020. This updated collective was now binding and included improvements compared with the previous version, such as clarifications on how working hours were to be calculated, travel allowance rates, limits on overtime, etc. However, it did not stipulate a standard minimum wage and continued to give precedence to company contracts.

The fourth, more comprehensive version of the collective agreement, initially scheduled to run from 2021 to 2024, is still in force. Like previous versions, this mandatory collective agreement still does not provide any stipulations regarding wages. However, since the collective agreement in the RPT sector was updated in 2024 to include a minimum hourly wage for drivers, the Ministry and the trade unions have been pressuring the ČESMAD Bohemia road haulage federation to accept a similar change to their collective agreement. Negotiations were still ongoing at the end of 2025.

### *Employment law*

The Czech Republic has incorporated the general rules set out in European legislation into its own regulations and collective agreements, without introducing any specific national exceptions. Labour legislation is comprehensive and has been thoroughly harmonised with EU standards.

Since 1 January 2001, the statutory working week has been 40 hours. However, employment law relating to working hours takes into account the level of arduousness of the work and the way it is organised. This has implications in certain specific cases, such as for lorry drivers working in the mining industry or those working mainly night shifts.

A lorry driver's daily working hours may not exceed 12 hours. An employer may ask an employee to work overtime if there are "serious operational reasons" for doing so.

The minimum period of maternity leave is 14 weeks, including 6 weeks following childbirth, but this may be extended to 28 weeks. In the case of twins or more, this can be extended to 37 weeks. While women are free to choose the duration of their leave, they cannot take it on a part-time basis in a series of short periods. Employees are entitled to a minimum of 70% of their basic salary for the duration of their maternity leave.

An insured person may also take 14 days' paternity leave, paid at the same rate as maternity leave, to care for a child under 6 weeks old (one-off payment).

If a company has more than 50 employees, the employees have the right to elect a representative to the Works Council. The right to strike is guaranteed by law.

### *Overtime and other grounds for salary increases as set out in the CC*

#### Overtime

Employers may require employees to work up to 8 hours of overtime per week, subject to an annual limit of 150 hours. Beyond the 150 hours per year, the employer must obtain the employee's written consent before requesting that they carry out additional overtime. The total number of overtime hours (including the first 150 hours) may not exceed an average of 8 hours per week in a full year, i.e. a total of 416 hours per year. Overtime is paid at a rate 25% above the normal hourly rate. If the employer offers time off in lieu within three months of the overtime being worked, this premium is no longer mandatory.

#### Arduous working conditions

If work is performed in a challenging working environment (arduous conditions, exposure to risks), the employee is entitled to their normal pay plus a bonus equivalent to at least 10% of the minimum wage. The precise definition of what constitutes difficult conditions is set by government decree.

#### Night work

For work carried out at night, the employee receives their normal pay plus a bonus of at least 10%, unless a more favourable rate is provided for in company-level agreements.

#### Weekend work

For work performed on Saturdays and Sundays, the employee is entitled to their normal compensation plus a bonus of 30%, unless more favourable provisions have been agreed at company level.

### *Paid leave*

The annual leave provided for in the collective agreement is 22 working days instead of the usual statutory entitlement of 20 days.

### *Pay*

#### Minimum monthly wage

In 2023, the Czech minimum wage was 17,300 CZK (720€) for a full month's work. As of 1 January 2024, the minimum gross monthly salary was raised to 18,900 CZK (787€). The minimum monthly wage is based on a 40-hour working week.

Until the end of 2024, Czech labour law provided for 8-level minimum wage scale for employees in the private sector, known as "guaranteed minimum wages by occupation", according to which the minimum wage is adjusted using a coefficient set by the Ministry of Labour. For example, in the case of a senior manager whose job, by definition, involves significant responsibility and who thus falls into the highest pay band, the minimum compensation in 2023 was double the basic minimum wage, i.e. 1,441€. In the same year, lorry drivers responsible for driving, safeguarding and maintaining a lorry with a GVWR of 3.5 tonnes or more were categorised in band 3 and were thus entitled to a minimum salary of 19,700 CZK, i.e. 820€ gross per month.

On 1 January 2025, new regulations governing the minimum wage went into effect. The new law abolishes the previous 8-level minimum wage scale. The aim of abolishing the guaranteed minimum wage is to streamline the compensation system and give employers greater flexibility in setting wages.

This measure has been particularly welcomed by small businesses, which have long struggled to cope with the heavy administrative burden of complying with minimum wage regulations. For workers, however, this has made the fight for better working conditions more difficult.

Meanwhile, the reform has introduced a new minimum wage scale. This scale is made up of four bands, with the lowest being the national minimum wage and the highest amounting to 1.6 times that figure.

Bands are now based on educational qualifications. The first group comprises those in the lowest educational category, who have not obtained a secondary school diploma. The minimum wage for people in this band stood at 20,800 CZK (867€) in 2025.

The second band includes people with a secondary school diploma (but not A-levels) or a national vocational qualification. The baseline salary in this band is 20% higher than the minimum wage, i.e. 24,960 CZK (1,040€).

The third band includes people who have obtained their A-levels and an official professional qualification. The baseline salary in this band is 40% higher than the minimum wage, i.e. 29,120 CZK (1,213€).

The final band is made up of people with a university degree (bachelor's, master's or doctorate) as well as certain people who have completed an advanced vocational training diploma course. In 2025, the baseline salary in this was 60% higher than the minimum wage, i.e. 33,280 CZK (1,387€), in the case of full-time employment.

Drivers' professional qualifications are not sufficient for them to qualify for band 2. Thus, in 2025, the minimum wage for Czech drivers stood at 20,800 CZK, i.e. 867€ per month.

Minimum wage in Czechia								
	2023		2024		2025		2026	
Group	Monthly Minimum Salary		Monthly Minimum Salary		Monthly Minimum Salary		Monthly Minimum Salary	
1	17.300 CZK	720.83 €	18.900 CZK	787.50 €	20.800 CZK	866.67 €	22.400 CZK	933.33 €
2	17.900 CZK	745.83 €	19.500 CZK	812.50 €	24.960 CZK	1040.00 €	26.880 CZK	1120.00 €
3	19.700 CZK	820.83 €	21.300 CZK	887.50 €	29.120 CZK	1213.33 €	31.360 CZK	1306.67 €
4	21.800 CZK	908.33 €	21.800 CZK	908.33 €	33.280 CZK	1386.67 €	35.840 CZK	1493.33 €
5	24.100 CZK	1004.17 €	24.100 CZK	1004.17 €				
6	26.600 CZK	1108.33 €	26.600 CZK	1108.33 €				
7	29.400 CZK	1225.00 €	29.400 CZK	1,225.00 €				
8	34.600 CZK	1,441.67 €	37.800 CZK	1,575.00 €				

Source: Ministry of Labor and Social Affairs of Czech Republic

### *Travel allowances (Cestovní náhrady)*

Travel allowance rates for each country are set annually by ministerial decree.

The decree stipulates that a trip abroad lasting less than one hour does not qualify for travel allowances. If the journey lasts between 1 and 12 hours, drivers are entitled to one third of the daily allowance applicable to the country in question. If the journey lasts between 12 and 18 hours, they are entitled to two thirds of the daily allowance. In the case of a journey lasting several days, it is thus necessary to calculate the allowances for the first and last days of the journey separately.

### Travel Allowances for Czech drivers in Europe in 2025

Country	Amount
Germany	45 €
Austria	45 €
Belgium	50 €
Belarus	45 €
Bulgaria	40 €
Cyprus	45 €
Croatia	50 €
Denmark	65 €
Spain	50 €
Estonia	45 €
Finland	65 €
France	45 €
Greece	40 €
Hungary	50 €
Ireland	55 €
Italy	55 €
Latvia	45 €
Lithuania	40 €
Luxemburg	55 €
Malta	50 €
North Macedonia	40 €
Norway	65 €
Netherlands	50 €
Poland	50 €
Portugal	45 €
Romania	45 €
UK	45 £
Russia	45 €
Serbia	40 €
Slovakia	35 €
Slovenia	40 €
Sweden	65 €

Source : Ministry of Labor and Social Affairs of Czech Republic

### *Social security contributions*

Czech social security contribution rates changed slightly in July 2019 and have remained unchanged since then. The data presented below are the latest available, and are valid for the period 2019–2026.

#### **Social Contributions in Czechia**

Social contributions applicable to driving staff in 2025, unchanged until 2019	Employer	Employee
Sickness and Maternity Leave	2.100%	-
Health Insurance, Health Care	9.000%	4.500%
Old-age, Invalidity, Death Pensions	21.500%	6.500%
Accidents at work and occupational diseases	0.084%	-
Unemployment	1.200%	-
<b>Total</b>	<b>33.884%</b>	<b>11.000%</b>

Source: Eurostat, Cleiss et Ministry of Social Affairs

The occupational accident contribution rate applicable to lorry drivers is 0.084%. This rate has remained unchanged since 2014.

### *Income tax*

In the Czech Republic, the “basic” income tax rate stands at 15%. Tax is calculated on gross salary. The total resulting from this calculation is rounded up to the nearest 100 CZK. Income in excess of 1,676,072 CZK per annum is subject to a 23% rate of tax.

Each employee is entitled to a monthly tax credit of 2,570 CZK, i.e. 107.08€, which is deducted from the total amount of tax due, as calculated using the basic rate.

In the case of employees, income tax is deducted at source. The tax credit is automatically deducted from their monthly tax bill.

## 2. CONDITIONS AND COSTS OF OPERATING A CZECH 40-TONNE HGV INTERNATIONALLY

This part of the study describes the economic and labour conditions prevailing at the end of 2023, at the time of this most recent survey. In carrying out this study, the CNR has drawn on research focused primarily on the fiscal and labour aspects of the RFT sector, as well as on previous CNR surveys and feedback from the experts with whom the CNR collaborates. These different sources provide an overview of the Czech international RFT sector and highlight the main developments since the last study. This research and process of dialogue are further backed up by interviews with Czech hauliers and lorry drivers.

All the figures ultimately used by the CNR in order to construct the standard profile represent the best expert appraisal of this set of data sources.

### 2.1. BUSINESS OPERATING CONDITIONS AND COSTS

This section is mainly based on face-to-face interviews with 12 Czech road freight transport companies involved in long-distance transport operations, mainly internationally. All the companies visited were able to provide the information requested. The 12 companies selected for the purposes of this study can be described as follows:

	No of tractors	No of semi-trailers	Main markets	No of drivers	Turnover
Company 1	6	6	DE, AT	6	1 000 000 €
Company 2	23	27	DE, Benelux, AT	26	3 453 000 €
Company 3	9	10	PL, Scandinavia	11	1 230 000 €
Company 4	8	10	SK, HU, AT	9	1 250 600 €
Company 5	14	18	DE, DN, Scandinavia	17	2 640 000 €
Company 6	33	40	DE	36	5 000 000 €
Company 7	3	4	AT, HU, IT	3	430 000 €
Company 8	17	20	DE	18	2 780 000 €
Company 9	60	68	AT, CH, IT, FR	66	10 342 000 €
Company 10	22	24	DE, Scandinavia	24	3 000 000 €
Company 11	7	8	Benelux, DE	7	nd
Company 12	48	56	DE	51	7 950 000 €

The companies visited for this study are extremely diverse in terms of their size and structure. They all specialise in international haulage, and most are independent, although a quarter are subsidiaries of German companies. Some of the smaller companies are part of a chain of subcontractors working for local or regionally based companies.

For the purposes of comparison with data from the CNR's other national surveys, only companies whose main activity was international long-distance haulage have been selected.

The findings in this report are based on interviews conducted by the CNR, and thus cannot be used for statistical purposes. However, they do shed some light on figures and information obtained elsewhere. Ultimately, the CNR uses the best available expert opinion to calculate the costs and operating conditions of a "typical" HGV operating internationally.

### 2.1.1. TRANSPORT EQUIPMENT – Use

According to hauliers, vehicles were operated between 230 and 252 days annually. The figure used in this survey is 244 days, which is consistent with the number of days worked by drivers. This represents a sharp decline compared with the 2019 figure of 262 days.

Data collected on-site shows a wide range of mileage figures, from 90,000 km at the low end to over 150,000 km, with a clustering around 122,000 km. Following our interviews with drivers, this initial estimate was recalculated and an average annual mileage figure of 128,900 km was reached, which is also down compared with 2019 (147,000 km). This downward trend in both the number of operating days and mileage appears consistent.

The length of time road tractors are kept is approximately 7 years, one year longer than in 2019. The microchip shortage in 2021 is also thought to have lengthened the length of time vehicles are being kept, with demand for tractors remaining extremely sluggish in 2022-2023. Semi-trailers are often kept for as long as ten years.

The tractor/semi-trailer ratio recorded in the company surveys is in line with the European average and stands at around 1.16 in the Czech RFT sector, unchanged since 2019.

### 2.1.2. TRANSPORT EQUIPMENT – Financing

The preferred method of financing rolling stock is leasing (typically under a lease-purchase agreement or, less commonly, a long-term lease), which accounts for over 90% of cases. Road tractors are often leased for 48 months and kept for a further 3 years after the end of the contract. Semi-trailers are leased for 6 years and kept for a total of ten years. Interest rates on leasing contracts range from 3.9% to 4.6%.

48- or 60-month leasing contracts with a purchase option typically involve an initial payment of around 10% of the price of the vehicle, a high monthly payment and a purchase option at a symbolic 1% (or 1€) of the vehicle's original price at the end of the contract. Rental-only arrangements are not common practice when it comes to rolling stock. A few rare companies had opted for self-financing, due to the relatively high interest rates prevailing during the period covered by this survey.

The average purchase price of a Euro VI tractor as reported in interviews with Czech hauliers was 106,000€, an increase of almost 20% compared with the average price recorded in 2019. The purchase price of a semi-trailer is estimated at 26,500€, also up 13%. Information regarding the terms of leasing contracts gathered on-site have been enabled us to calculate the annual cost of owning a 40-tonne articulated lorry: 16,418€.

### 2.1.3. FUEL

The average fuel consumption reported during interviews was 28.40 litres per 100 km.

As far as fuel is concerned, Czech hauliers purchase most of their supplies wholesale in the Czech Republic. The difference in price between filling up at the pump and using an on-site fuel tank in the Czech Republic is estimated to be 1.5 Czech koruna, i.e. approximately 6 euro cents. According to CNR estimates, fuel tanks account for 60% of total consumption (at an average price of 1.2192€ per litre in 2023). The remaining 40% is reportedly purchased in Poland (20%, at 1.1573€/litre), Germany (10%, at 1.3780€/litre) and Luxembourg (10%, at 1.2232€/litre).

The average price paid by Czech hauliers in 2023 for this “basket” of diesel is thus estimated at 1.2231€/l.

### 2.1.4. MAINTENANCE & REPAIRS

Companies that take out maintenance contracts with the manufacturer for the duration of the lease pay an average of approximately 6,500€/year over 6 years. Some service contracts include tyre changes and other motorway services. These have to be disregarded for reasons of comparability.

On the other hand, large companies with their own maintenance centres report costs of 5,100€ per year per vehicle for this item. Meanwhile, companies that bought second-hand vehicles, particularly in 2022 and early 2023, spent more than 8,000€ on maintenance.

Consequently, estimating this highly variable cost item remains subjective and is based here on ‘expert opinion’. In conclusion, we have arrived at a figure of 6,600€ for maintenance and repair costs, in the case of 40-tonne HGV without an all-inclusive maintenance contract.

This figure represents an increase of approximately 6.5% in the space of 4 years.

### 2.1.5. TYRES

In the case of companies whose tyre costs could be calculated separately, the annual cost per vehicle amounts to nearly 4,600€, with figures ranging from 4,000€, at the lower end of the scale, to as high as 7,400€. Tyre contracts would appear to have a higher annual cost, in the region of 6 euro cents per kilometre (i.e. 7,734€ per year based on average mileage figures).

According to the CNR’s own calculations, the average annual cost of tyres for a Czech articulated lorry comes to around 4,920€, slightly down from 2019. Based on expert appraisal, this average cost seems consistent with market realities, the intensity of vehicle use and the price of equipment in a sector where non-European brands are beginning to capture significant market share thanks to competitive pricing.

#### 2.1.6. TOLLS

The Czech haulage sector makes frequent use of motorway and road networks, both domestically and in neighbouring countries; these are subject to tolls and are relatively expensive to use. In its previous survey, the CNR had already highlighted the growing weight of this cost item for Czech haulage companies. In 2019, this cost item amounted to 21,400€ per year per vehicle.

In 2023, this figure appears to have risen to 24,800€. For the most part, this cost is made up of road tolls introduced in Germany, Austria, the Czech Republic, Slovakia and Belgium, as well as the cost of the Eurovignette for companies operating in those countries.

Faced with this increase, a large proportion of Czech companies are beginning to opt for service contracts that exclude tolls, with these costs being invoiced separately on an actual-cost basis.

#### 2.1.7. INSURANCE

The cost of insurance is comparable with the regional average. According to hauliers, comprehensive insurance for a road tractor costs between 2,000€ and 2,500€ a year, and between 400€ and 600€ for a semi-trailer.

The estimated used in this survey is 2,730€ (per year, per vehicle), down slightly on the 2019 figure of 2,800€.

#### 2.1.8. AXLE TAX

According to the Ministry of Transport table included above, the annual axle tax is 1,008€/year for a 40-tonne vehicle with more than 4 axles, compared with 1,718€/year in 2019 (i.e. before the 2022 tax reform).

#### 2.1.9. FIXED COSTS

Information on fixed costs is often difficult to collect. Thanks to the cooperation of a large number of Czech companies that the CNR was able to visit, this cost item is estimated at 8.5% of total costs in the case of transport companies whose business is primarily conducted abroad.

## 2.2. EMPLOYMENT CONDITIONS AND DRIVER PAY

Employment conditions and driver pay in the Czech Republic were surveyed during two rounds of interviews: a first phase in companies with employers; and a second phase, involving face-to-face interviews with drivers in car parks and rest stops. During this second phase, approximately twenty drivers, employees with Czech contracts, agreed to be interviewed about their working conditions and pay.

Based on an analysis of these sources, the CNR has produced a typical profile (in terms of employment conditions and pay) of an RFT driver with a Czech contract working internationally.

### 2.2.1. EMPLOYMENT CONDITIONS

Czech drivers we met in Slovakia and Austria say they prefer to work for companies that offer relatively short international assignments, such as journeys to Germany, Austria or Poland. Czech drivers are very much aware that travel allowances allow them to significantly increase boost their earnings beyond basic salary provisions. On the other hand, they have no qualms about pressuring their employers to allow them to return home as often as possible, i.e. 2–3 days off every 10 days. Drivers often earn bonuses by working on weekends. Domestic journeys tend to be carried out by young, inexperienced drivers.

Czech drivers, who are all hired on permanent contracts, often without a trial period, are entitled to 25 days' paid leave, a figure in excess of that provided for under the collective agreement.

Approximately 50% of the drivers questioned report performing round trips to neighbouring countries (Germany, Austria, Slovakia). After 5 or 6 days of driving, they return to base for the weekend. For more than 30% of drivers who travel to Spain, Italy, the Netherlands or the UK, trips are longer (between 10 and 12 days in total), often followed by 3 or 4 days off at home.

According to information obtained during interviews with drivers, they work approximately 230 days per year (i.e. 45 weeks) and drive approximately 125,000 km per year. The companies interviewed reported a figure closer to 218 days, with an annual mileage figure of 112,000 km. Taking into account expert opinion, the CNR has arrived at a typical estimated mileage figure of 117,500 km per year per driver, and a figure of 220 days worked annually.

Czech payslips do not provide any further information on working hours. Calculated on the basis of average speed data, which is slightly below 62 km/h, average driving time, as estimated by the CNR, is 1,920 hours for the typical driver, down from 1,980 hours in 2019.

The estimated driver/tractor ratio in the Czech Republic is 1.1.

NOTE ON THE BREAKDOWN OF DRIVER COSTS

### *International driver pay*

Until 2023, drivers with permanent Czech contracts were entitled to the minimum salary applicable for workers in band 3 of the pay scale (i.e. 820€ gross per month in 2023, the year when this survey was carried out). However, as the concept of job-related responsibilities was eliminated in the 2025 reform, most lorry drivers are now classified as low-skilled workers, and thus fall into band 1, where the minimum wage is 867€ per month.

However, the reality on the ground is different. Due to a tight labour market, Czech drivers working near major cities can often command a basic gross salary of 34,000 CZK, i.e. approximately 1,417€. Elsewhere, salaries vary between 28,000 CZK and 32,000 CZK. The average figure included in this survey is 32,000 Czech koruna, i.e. approximately 1,333€ gross per month. The recent reform has thus had no direct impact on the real wages of lorry drivers.

Basic salaries are often supplemented by a large number of bonuses. Many of these are designed to help recruit and retain drivers. Below are a few examples of bonuses that may be cumulative, depending on the driver and the company involved:

- Hiring bonus of as much as 30,000 CZK, often paid in instalments after 6 months' service with the company,
- Clothing bonus on recruitment, often paid once a year,
- Seniority bonus of approximately 2,500 CZK per month, increasing over time, starting from the first year of service with the company,
- Punctuality bonus, 1,000 CZK at the end of each trip, up to 4,000 CZK/month
- "Good work" bonus for careful drivers who also have a low accident rate. This bonus can amount to as much as 4,000 CZK per month in the case of the best employees,
- Weekend bonus, if a driver agrees to return to base late on a Saturday evening or to leave early on a Sunday night,
- Fuel bonus, i.e. approximately 100€ of free fuel for personal use,
- Fuel card bonus, provision of a family fuel card entitling the driver's entire family to wholesale prices.

During interviews, drivers reported that they no longer receive mileage-based pay and appeared to have memorised a script regarding the illegality of this method of wage calculation. All the drivers surveyed said they were paid a fixed basic salary, plus bonuses and travel allowances. They know the exact amount of the allowances for the countries they visit and report that they receive the correct amount for the actual number of days they work.

According to the CNR's calculations, a driver working exclusively internationally and making a mixture of short, medium and long journeys could be entitled to close to 1,100€ in travel allowances.

Based on the information gathered, the total cost of a driver comes to 38,202€ annually.


## TYPICAL PROFILE OF A DRIVER WITH A CZECH CONTRACT WORKING INTERNATIONALLY AND BREAKDOWN OF THEIR COST

Standard profile of an international driver - Czechia - 2023					
Characteristics		<ul style="list-style-type: none"> <li>- 90% of driver's work realized on international routes.</li> <li>- Short and medium distance international trips (Germany, Austria, Benelux, Italy, Spain)</li> <li>- Rounds of 5 to 6 days concern more than 50 % of drivers interviewed.</li> <li>- 25 days of paid holidays, 3 to 4 weeks of paid holidays systematically taken in summer period, then the reste during Christmas time.</li> <li>- Income composed of a fixed salary higher than the national minimum (group 1), completed by a variable part composed of travel allowances, diverse premia.</li> <li>- Travel allowances usually reflect the reality and their amounts are respected.</li> <li>- Monthly working time close to 220 hours. Mileage is maximised.</li> </ul>			
Annual mileage achieved		117,500 km			
Number of actual working days per year		220			
Number of working weeks per year		44			
Number of driving hours per year		1,920			
Cost breakdown of a standard Czech international driver in 2023					
Presentation of a standard pay slip					
EMPLOYER			EMPLOYEE		
<b>Gross salary</b>	€/month	<b>1624.67 €</b>	<b>Salaire Brut</b>	€/month	<b>1624.67 €</b>
Fixed gross salary	€/month	1333.00 €	Fixed gross salary	€/month	1333.00 €
Other bonuses and extras (on monthly basis)	€/month	291.67 €	Other bonuses and extras (on monthly basis)	€/month	291.67 €
<b>Social contributions</b>	<b>33.88%</b>	<b>550.50 €</b>	<b>Social contributions</b>	<b>11.00%</b>	<b>178.71 €</b>
Sickness and Maternity Leave	2.10%	34.12 €	Sickness and Maternity Leave	0.00%	0.00 €
Health Insurance, Health Care	9.00%	146.22 €	Health Insurance, Health Care	4.50%	73.11 €
Old-age, Invalidity, Death Pensions	21.50%	349.30 €	Old-age, Invalidity, Death Pensions	6.50%	105.60 €
Accidents at work and occupational diseases	0.084%	1.36 €	Accidents at work and occupational diseases	0.00%	0.00 €
Unemployment	1.20%	19.50 €	Unemployment	0.00%	0.00 €
			<b>Salary after contributions</b>		<b>1445.96 €</b>
			Income tax		219.20 €
<b>Monthly salary after payment of contributions</b>		<b>2,175.17 €</b>	<b>Net salary after social contributions and income tax</b>		<b>1226.76 €</b>
<b>Travel allowances for a full working month (11 months in a year)</b>		<b>1,100.00 €</b>	<b>Travel allowances for a full working month (11 months in a year)</b>		<b>1,100.00 €</b>
<b>Monthly cost of a driver for a month of full activity</b>		<b>3,275.17 €</b>	<b>Net income of a driver for a month of full activity</b>		<b>2,326.76 €</b>
Breakdown of annual cost of a standard Czech driver in 2023					
Fixed gross salary + bonuses * 12 months		19,496.00 €	Fixed gross salary + bonuses * 12 months		19,496.00 €
Employer's social contributions * 12 months		6,606.02 €	Employee's contributions and income tax* 12 months		4,774.90 €
Total salary costs * 12 months		26,102.02 €	Net fixed income after income tax * 12 months		14,721.10 €
Travel allowances * 11 months		12,100.00 €	Travel allowances * 11 months		11,825.00 €
<b>Total annual cost</b>		<b>38,202.02 €</b>	<b>Annual net income</b>		<b>26,546.10 €</b>
<b>Cost of one hour of driving in €</b>		<b>19.90 €</b>	<b>Average monthly net income</b>		<b>2,212.17 €</b>
<b>Cost per kilometre in €</b>		<b>0.33 €</b>			

Source : CNR European Studies

In the last 4 years since the last 2019 survey of the Czech RFT sector, the basic wages for drivers have almost doubled (as a result of the country's economic recovery, but also due to high inflation), while annual mileage has fallen by 9%. At the same time, travel allowances remained unchanged. Consequently, the driver cost in 2023, as calculated by the CNR, was 44% higher than in 2019. Thus, the cost of an hour of driving has risen to 19.90€ (compared with 13.36€ in 2019) and the per-kilometre cost to 0.33€, compared with 0.20€ in 2019.

## 2.3. OVERVIEW OF CONDITIONS AND COSTS OF OPERATING A "TYPICAL" HGV INTERNATIONALLY

Operating conditions and costs excluding overhead costs, for a 40-tonne HGV operated on long distance international routes, 2023 values 		
	unit	Czechia Simulation
Yearly mileage of a vehicle	km	128,900
Number of operating days	days/year	244
Semitrailer/tractor ratio		1.16
Cost of one driver	€/year	38,202
Driver/tractor ratio		1.10
Yearly cost of vehicle financing and possession	€/year	16,418
Average consumption per 100 km	litres	28.40
unit fuel price, 2023 average	€/litre	1.2231
Yearly fuel cost	€/year	44,775
Tyres	€/year	4,920
Maintenance-repair	€/year	6,600
Tolls and vignettes	€/year	24,800
Insurance (vehicle)	€/year	2,730
Axle tax and other vehicle taxes	€/year	1,008
<b>Synthesis - cost price (excluding overhead costs)</b>		<b>143,120</b>
Cost/mileage ratio per annum	€/km	1.110
Overhead costs	€/year	13,295
<b>Synthesis - complete cost price</b>		<b>156,415</b>
Complete cost per kilometer	€/km	1.21

Source : CNR European studies

According to CNR calculations, the per-kilometre cost of operating a Czech 40-tonne HGV internationally (excluding fixed costs) was 1.11€, compared with 0.85€ in 2019 (i.e. an increase of 30% compared with our previous study). This increase is largely due to increases in driver and vehicle ownership costs. The fall in fuel consumption is significant, but the gains in terms of annual cost are undermined by the cyclical rise in the price of diesel in 2023 (+25%). Vehicle mileage fell by 10%.

In conclusion, when fixed costs (estimated at approximately 8.5% of total costs) are factored in, the overall cost at the start of 2023 amounted to 1.21€.



### 3. BIBLIOGRAPHY

#### Institutional sources

Eurostat <https://ec.europa.eu/eurostat>

Cleiss - [https://www.cleiss.fr/docs/regimes/regime\\_republique\\_tcheque\\_salaries.html](https://www.cleiss.fr/docs/regimes/regime_republique_tcheque_salaries.html)

Czech Ministry of Finance - <https://www.mfcr.cz/en/>

Ministry of Transport - <https://www.mdcr.cz/?lang=en-GB>

Ministry of Labour and Welfare - <https://www.mpsv.cz/>

#### Other useful sources

“Czech Republic” sheet published by the Treasury Department, Ministry of the Economy, Finance and Industrial and Digital Sovereignty of the French Republic

Czech motorways - [www.ceskedalnice.cz](http://www.ceskedalnice.cz)

Road tax on motor vehicles - <https://www.kurzy.cz/dane-danova-priznani/dan-silnicni-2023.htm>

Tolls in the Czech Republic - <https://www.myto.cz>

Salary simulator - <https://kalkulacky.idnes.cz/>

#### Trade associations

Česmad Bohemia - [www.cesmad.cz](http://www.cesmad.cz)