

European employers sectoral coordination – 2023 national level survey on sectoral collective bargaining trends

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Key findings¹

This report summarises the results of the survey undertaken in the period July-October 2023 amongst the national sectoral employer organisations which are members of the European sectoral employer organisations. In this survey, recent information was collected from the national sectoral employer organisations about the latest sectoral social dialogue processes and the collective bargaining agreements. The survey was completed by 57 national sectoral employer organisations, from 19 Member States, covering a range of 10 sectors.

The survey was undertaken in the context of the EU funded project on sectoral employer coordination, implemented by BusinessEurope, SGI Europe and SMEunited. The key findings from the survey are summarised below.

Current sectoral collective bargaining situation and future outlook

In most sectors covered in the survey, the collective bargaining takes place at the sectoral level, covering many or most of the sector companies and workers. The sectoral bargaining is rooted in the national framework of collective bargaining, reflecting the legal framework and traditions in the industrial relations systems. Moreover, there is a sector wide coverage of the sectoral collective bargaining agreements negotiated by the sectoral employer organisations. In many instances reported these agreements cover many of the companies in the respective sectors. In the majority of cases, the sectoral employer organisations are direct parties in the negotiations and sign the collective bargaining agreements. In the majority of sectors, the collective bargaining process did not experience any changes in the survey period between December 2022 and July 2023.

The majority of employers organisations see a number of challenges for their sectoral collective bargaining processes. However, only six organisations explicitly stated difficult economic conditions

¹ The report was written in 2023 by independent researcher Inga Pavlovaite. When quoting, please use Pavlovaite, I. (2024). European employers sectoral coordination – 2023 national level survey on sectoral collective bargaining trends, Report.

affecting the negotiations and leading to difficult and protracted processes to achieve collective agreements. The two core challenges perceived by the sectoral employer organisations relate to the lack of support to the collective bargaining process from the side of the government, as well as the lack of trust between the social partners in the sector.

The majority of organisations have concluded new collective bargaining agreements in their sectors in the survey period. This indicates a high level of collective bargaining activity in the survey period. Almost all (38 out of 39) agreements negotiated included provisions on wages, with a half covering the rules on the working time and 13 agreements including provisions on skills.

The majority of the organisations expect the topic of wages to be the top collective bargaining priority (reported by 32 organisations). Comparatively lower is the number of organisations expecting the working time aspects to be the top collective bargaining priority (19 organisations). Least organisations expect to be bargaining on the issues related to the skills of the workers (reported by 15 organisations).

Sectoral collective bargaining agreements on wages

39 organisations indicated the sectoral collective bargaining agreements negotiated in the survey period also included the issues of wages. In 23 cases, the agreements apply to all companies and workers in the sector or at least most of the companies and workers in the sector. In 14 cases, the agreement applied to the companies members of the sectoral organisation, or those who signed the agreement or otherwise a proportion of the companies. Most (28) agreements were supervised jointly between the employer organisation and trade union, and six were either supervised by the company or not supervised at all. Only four organisations indicated that the bargaining processes for this agreement were accompanied by strikes or other industrial action, and in two cases the strikes had a significant impact on the companies in the sector.

All 39 collective bargaining agreements reported included a wage increase, which has been defined in a number of ways. Firstly, a specific percentage of wage increase was reported in 15 agreements, and ranged from the lowest 2.65% rise in the railways sector in France and highest 15% in the railways sector in Ireland (over the seven year period). Putting aside these outliers, **the average rises amounted to 5-6%**. In five agreements, the rises of around 5% were reported, four agreements contained a wage rise of around 6%, five of around 7%, and one of 9.3%.

Second type of wage increases were rises as a lump sum amount in EUR (either as a one off or more often as a standard addition to the salary). Such comparisons across countries need to be treated with caution, taking into account the different costs of living between the countries covered. As an example, in Germany, a one off lump sum payment was negotiated in the construction sector, including an extra tax free inflation related payment EUR 500 till 30.09.2023 and further EUR 500 till 30.09.2024. Thirdly in some agreements were new professional salary scales for different types of employees defined.

Furthermore, the increases negotiated were **related to different aspects of labour remuneration**- either to the basic wage (most frequently), the minimum wage paid, or the performance related bonuses paid or other benefits, such as pensions, or the combination of the elements above. **In several sectors, special increases or allowances were negotiated for specific groups of workers** or specific aspects of remuneration (training, housing, lower paid workers, workers in the well performing companies).

Furthermore, **the time horizon varied across the collective bargaining agreements**, from one off immediate payment, to **most typically the pay deals over the next two years after the negotiation of the agreements (so typically covering the 2023-2024 period)**. Noteworthy is the outlier in the railway sector agreement in Ireland specifying the pay increases over the period of 7 years. Noteworthy is also the **flexibility achieved as to when to apply the wage increases in some agreements**.

Sectoral collective bargaining agreements on working conditions

15 organisations indicated that the sectoral collective bargaining agreements negotiated in the survey period also included the issues of working conditions. In all cases, the agreements apply to all companies and workers in the sector or at least most of the companies and workers in the sector. Most (10) agreements were supervised jointly between the employer organisation and trade union, and two were either supervised by the company or not supervised at all. **Two organisations** indicated that the bargaining processes for this agreement were **accompanied by strikes or other industrial action. In contrast, 10 organisations noted the absence of such strikes and other industrial actions.** Among them, two explicitly mentioned that there were no strikes in their sectors for the first time in a long time.

The main common themes in the collective bargaining agreements on the working conditions relate to negotiated rules on the working time, leave and time off, and employment contractual issues. Other topics dealt with also include remote working, restructuring and social dialogue.

The rules on the working time were reported in three sectoral collective agreements in Finland (in education, hospitality, and recruitment sectors), in two agreements in Sweden (in the hospitality sector and recruitment sectors), in Portugal education sector and in Lithuania railway sector agreements. Across the sectors, the common theme was the definition of the number of working hours, the calculation rules for the rest periods, the calculation of the overtime hours, and other aspects of the working time.

Secondly, the rules for the different types of leave and time off were reported in the four agreements in Finland (in the education, hospitality, recruitment and chemicals sector), Belgium construction sector and Portugal education sector. A third major area relates to regulating the employment contracts and contractual issues.

In two sectors, collective agreements also dealt with the digitalisation in the workplaces. In the banking sector in Belgium, the agreement established the right to disconnect. The same agreement also reminder of national rules in the event of the introduction of new technologies (AI). In Finland, the private education sector agreement specified the categories of workers for whom remote work can be provided. **Two sectors also included provisions on how to deal with restructuring and two on social dialogue in their collective agreements.**

Sectoral collective bargaining agreements on skills

13 organisations indicated that the sectoral collective bargaining agreements negotiated in the survey period also included the issues of skills. 7 agreements with such information available were almost equally split between the sectors and countries where the agreements apply to all companies and workers in the sector and those agreements which had a more limited application scope. Six agreements were supervised jointly between the employer organisation and trade union, and two were either supervised by the company or not supervised at all. All 10 organisations reporting the agreements indicated that the bargaining processes for this agreement were not accompanied by strikes or other industrial action.

The main common themes in the collective bargaining agreements relate to the provisions for trainees and apprentices, defining the time for training, specifying the training contents and planning the training.

Firstly, rules for trainees and apprentices were reported in the agreements in the hospitality sector in Denmark and Finland, and in the chemical industry in Finland. The second common topic in the agreements is defining the time for training, reported in the hospitality sector in Finland, the banking sector in Belgium (5 days of training per year) and the education sector in Portugal (40 hours of training per year).

A third common thread in the agreements on skills is specifying the contents of training, reported in Italy in the construction (safety) and railways (digital skills) sector, in Belgium in the banking sector (additional subjects) and in Finland in the hospitality sector (occupational safety). Finally, provisions

for planning the training were reported in Italy (developing a National Training Catalogue) in the construction sector and Portugal education sector.

Introduction

This report summarises the results of the survey undertaken in the period July-October 2023 amongst the national sectoral employer organisations which are members of the European sectoral employer organisations. In this survey, recent information was collected from the national sectoral employer organisations about the latest sectoral social dialogue processes and the collective bargaining agreements.

The survey was undertaken in the context of the EU funded project on sectoral employer coordination, by BusinessEurope, SGI Europe and SMEunited.

All information provided in the survey was treated as in principle non-confidential so that it can be used in the report. The timeframe covered in the information collection was from December 2022-June 2023 (as the survey was issued in July 2023). The information collected covers EU-27 Member States, Norway and Iceland (not covering the non-EU/EEA countries).

The survey was completed by 57 national sectoral employer organisations, from the majority of Member States, covering a range of sectors (see tables 1 and 2 and Annex 2 for a full list of survey respondents). In total, the sectoral organisations from 19 Member States responded to the survey, with employer organisations particularly active in Finland (6 responses), Belgium, Hungary, Italy (5 responses each). Also noteworthy is active participation of employer organisations from smaller Member States, such as Cyprus, Estonia, Lithuania and some eastern and central European countries (the two Baltic countries, as well as Czechia, Hungary, Poland). At the same time, no responses were received from sectoral employer organisations in Bulgaria, Latvia, Romania, Slovenia and Slovakia (as well as Malta, Luxembourg).

Table 1: Overview of national sectoral survey respondents, by country

| Member State | Number of responses |
|----------------|---------------------|
| Austria | 3 |
| Belgium | 5 |
| Cyprus | 2 |
| Czech Rep. | 1 |
| Denmark | 2 |
| Estonia | 1 |
| Finland | 6 |
| France | 4 |
| Germany | 4 |
| Greece | 1 |
| Hungary | 5 |
| Italy | 5 |
| Ireland | 3 |
| Lithuania | 1 |
| Netherlands | 3 |
| Poland | 1 |
| Portugal | 4 |
| Spain | 2 |
| Sweden | 4 |
| Total | 57 |

In total, the survey respondents cover a wide range of 10 sectors across the different parts of European labour markets. This included the manufacturing industries such as the chemicals, service based sectors such as banking and hospitality as well as infrastructure oriented sectors such as railways and transport (see Table 2). Particularly active have been the employer organisations from the education sector (11 respondents), as well as construction, hospitality and baking sectors (9 and 8 respondents respectively).

Table 2: Overview of national sectoral survey respondents, by sector

| Sector | Number of respondents |
|----------------------|-----------------------|
| Banking | 8 |
| Chemicals | 6 |
| Cleaning | 1 |
| Recruitment industry | 4 |
| Construction | 10 |
| Education | 11 |
| HORECA | 9 |
| Railways | 7 |
| Total | 56 |

Note that one respondent did not specify which sector they cover.

Table 3: Overview of national sectoral survey respondents, by European sectoral employer organisation

| Organisation | Number of respondents |
|-----------------|-----------------------|
| Business Europe | 3 |
| CER | 6 |
| EBF | 8 |
| EBC | 1 |
| ECEG | 6 |
| EFCI | 1 |
| EFEE | 9 |
| FIEC | 4 |
| HOSPEEM | 1 |
| HOTREC | 7 |
| WEC Europe | 2 |
| None | 2 |

Note that 50 respondents provided information on this question. Several respondents indicated that they belong to several sectoral organisations at the European level.

The main survey results are analysed below, structured as follows:

- Section 1.1: overall current collective bargaining situation in the sectors;
- Section 1.2: collective bargaining trends and issues in the sectors;
- Section 1.3: sectoral collective bargaining agreements on wages;
- Section 1.4: sectoral collective bargaining agreements on working conditions;
- Section 1.5: sectoral collective bargaining agreements on skills.

The report is accompanied by the following Annexes:

- Annex 1: List of 20 collective bargaining agreements identified in the survey with the weblinks available for further information;
- Annex 2: List of 57 survey respondents, by country, sector and the name of employer organisation responding.

The focus of the analysis was on identifying common trends and differences between the sectors and views of the Secretariats, rather than on summarising the information for each individual sector and Secretariats. Hence, the analysis does not show the situation in each sector, but rather aims to portray general trends and overall views across the sectors and Secretariats, to support the exchange of information, coordination and joint working amongst the different Secretariats.

1.1. Overall current collective bargaining situation at the sectoral level in the Member States

In this section, the survey gathered views and experiences from the national sectoral employer organisations about the current collective bargaining situation in their sectors in their countries.

The first aspect relates to which level the collective bargaining takes place in the sectors – at the sectoral, company, a combination of both or no collective bargaining at all. The majority of the respondents (46 out of total 57, or 75%, see Table 4) reported that **the collective bargaining takes place at the sectoral level, covering many or most of the sector companies and workers.**

In contrast, company level collective bargaining was reported by 10 respondents (less than 20%). This was reported by four employer organisations in the railway sector (in Estonia, France, Lithuania and Netherlands), two in the chemicals sector (in Hungary and Italy (where the collective bargaining also takes place at the sectoral level)), and single organisations from the banking, education, hospitality and public services sectors. The situation in the railway sector was further explained by the survey respondents referring to the small number of companies in the sector which means that the company level collective bargaining covers most of the sector workers and companies. In other countries, the explanation provided was that there is no tradition of sectoral collective bargaining.

Only two respondents reported the absence of collective bargaining in their sectors (both are from the higher education sector in Hungary).

Table 4: How does the collective bargaining process work in your sector?

| | Number of respondents |
|---|-----------------------|
| Collective bargaining agreements are mostly negotiated at the sectoral level in your sector, covering many of your sector companies and workers | 46 |
| Collective bargaining agreements are mostly negotiated by individual companies in your sector | 10 |
| None of the above, there are no / very few collective agreements in your sector | 2 |
| Don't know | 1 |
| Other: National, sectoral, company levels of collective bargaining | 1 |

Source: Project survey, 2023. N=57, multiple choices possible.

Further information provided by the sectoral national employer organisations allow further insights into how the collective bargaining operates at the sectoral level.

The first aspect to highlight from the survey responses is how **the sectoral bargaining is rooted in the national framework of collective bargaining.** For example, the French law distinguishes between industry-level (sectoral) bargaining and company-level bargaining. Some subjects are exclusively the

responsibility of the branch (sector), but companies are obliged to negotiate at their own level, depending on the size of their workforce, particularly on pay. The two levels of negotiation are complementary. The Italian industrial relation system and the related collective bargaining procedures are based on the national-sectoral collective agreements which can be complemented by company level agreements. For a company it implies to be member of the national employer's association in the sector concerned that represents formally all the sector companies. This can be illustrated in the chemicals sector employer organisation in Italy, which also have company bargaining covering 88% of workers in the chemicals sector (data average 2020-21, ref. survey Confindustria-Federchimica).

In Belgium, another example reported by the construction sector employer organisation, shows that in every 2 years period they negotiate on the sectoral level with the trade unions. It is a closed agreement, which means that no additional changes can be demanded on a company level.

This aspect of importance of national context can be illustrated in the examples from Ireland (construction) and France (railways).

Box 1: Two examples how sectoral collective bargaining is rooted in the national frameworks – construction sector in Ireland and the railways sector in France

The Construction Sector in Ireland comprises of general construction/civils, mechanical, electrical, other specialist activities and home building. With the exception of the electrical sector, two Sectoral Employment Orders (SEO) are in place to provide for pay and conditions of employment for construction workers. One SEO covers general construction/civils, specialist contracting activities (excluding mechanical and electrical) and home building. The second SEO covers the mechanical sector. Efforts are underway between employers and the union concerned on a joint application for a new electrical SEO.

Sectoral Employment Orders are Statutory Instruments which are signed into law following acceptance of their terms by the Minister for Enterprise, Trade and Employment. SEOs provide for pay and conditions, and pensions and sick pay for construction workers. SEOs are introduced following discussions at national level between employers and trade unions in the construction sector. These discussions result in an application to the Labour Court to carry out an investigation into pay and conditions of workers in the sector and to make a recommendation on rates of pay and conditions of employment to the Minister for Enterprise, Trade and Employment.

Following acceptance of the Labour Court's recommendation, the Minister signs the Order thereby enshrining pay and conditions of employment into law. All SEOs provide for a dispute resolution procedure which must be followed before a trade union engages in industrial action. It requires employees (or trade unions with collective complaints) to raise individual disputes with their employer, at local level, first. The employer must respond within 5 working days. If it is not resolved, the dispute can be referred to the Workplace Relations Commission (WRC). WRC decisions can be appealed to the Labour Court. SEOs are updated regularly to keep abreast of general increases in pay throughout the economy.

SNCF from France reported the interaction of sectoral and company level collective bargaining agreements in the railway sector.

Collective bargaining agreements at the sectoral level:

- The agreement of 31 May 2016 on the employment contract and the organisation of work;
- The agreement of 6 June 2017 on vocational training;
- The agreement of 6 December 2021 on classifications and wages;
- The agreement of 20 December 2022 on minimum wage revaluation.

SNCF has negotiated agreements that tackle the same subjects as the previous collective bargaining agreements.

There are even more agreements negotiated at the company's initiative :

- The agreement of 7 June 2016 on the organisation of working hours
- The agreement of 9 November 2021 in favour of professional equality between men and women and gender diversity
- The agreement of 31 January 2022 in favour of the employment of disabled workers

- The agreement of 9 February 2023 relating to the supply of and access to housing for SNCF employees for the period 2023-2025.

Source: project survey.

The second aspect to highlight relates to **the sector wide coverage of the sectoral collective bargaining agreements negotiated by the sectoral employer organisations**. In many instances reported these agreements cover many of the companies in the respective sectors. Examples are provided in the responses to the survey in the hospitality sector. Here, FEDERALBERGHI in Italy negotiates a national collective agreement with the unions which is applied to all employers/employees of the sector affiliated to the signing bodies. National Collective agreement of restaurants and cafés signed by Fipe also in Italy is applied to 1 million of sector’s workers. In Finland, the collective agreements negotiated for the sector are universally binding in nature. Thus, they shall be followed without exception, if the employer operates in the areas of business covered by the collective agreements field of application. In Sweden, what distinguish the Swedish hospitality sector is the few but big collective agreements for the sector where Visita is a part. The large CBAs include hotels, conference facilities, spas, amusement parks, restaurants, campsites, etc.

Next aspect covered in the survey relates to **the role played by the sectoral employer organisation in the collective bargaining process** (see Table 5). **In the majority of cases, the sectoral employer organisations are direct parties in the negotiations and sign the collective bargaining agreements** (reported by 48 organisations). This is based on a number of reasons, including on the organisations being the representative employer organisation in the sector, as well as being the largest employer organisation in the sector. In contrast, only very few employer organisations play an advisory role to their members who in turn take the lead in the collective bargaining negotiations.

Table 5: How does your organisation take part (directly or via your members) in the collective bargaining process in your sector?

| | Number of respondents |
|--|-----------------------|
| Your organisation takes part directly and signs the collective bargaining agreements | 48 |
| Your organisation provides support to your members who are concluding agreements themselves | 2 |
| Your organisation takes part directly and signs the collective bargaining agreements AND Your organisation provides support to your members who are concluding agreements themselves | 3 |
| None of above | 5 |
| Other | 1 |

Source: Project survey, 2023. N=57, multiple choices possible.

Seven sectoral employer organisations indicated that they do not have a direct role in the collective bargaining process in their sector. This was reported by three organisations in Hungary (two in education and one chemicals sector), and single organisations in Ireland (education), Czechia (public services), Estonia (railways) and Poland (banking sector). This is due to a number of reasons (see Table 3), including the lack of mandate for such negotiations, the lack of sufficient human and financial resources for negotiations and the concentration on providing support to the members.

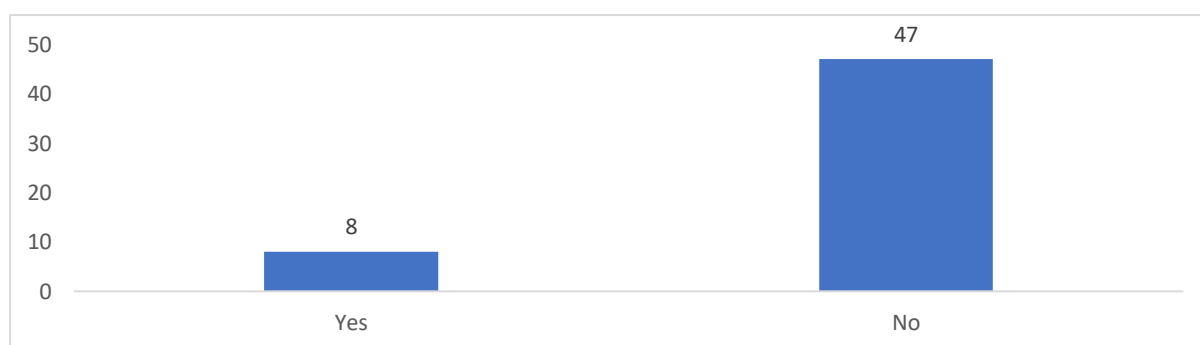
Table 6: If your organisation does not participate in any way in the collective bargaining process in your sector, can you tell us why?

| | Number of respondents |
|---|-----------------------|
| Your organisation does not have a mandate from your members to do collective bargaining in your sector | 2 |
| Your organisation provides support to your members in their negotiations with the trade unions, but does not participate directly | 2 |
| Your organisation does not have sufficient human /financial resources to participate in collective bargaining in your sector | 3 |
| Don't know | 1 |

Source: Project survey, 2023.

In the majority of sectors, the collective bargaining process did not experience any changes in the survey period between December 2022 and July 2023 (see Figure 1). Changes were reported by eight sectoral employer organisations, of which four were in the construction (Ireland, Denmark, Greece and Spain), two in the banking sector (Finland and Cyprus), and single organisations in the agency work in Denmark and education sector in Hungary.

Figure 1: Have there been any major changes to the collective bargaining process in your sector since December 2022?



Source: Project survey, 2023. N=55, single response only.

In two instances, **new social partners have entered the landscape**, in Cyprus and Hungary (no further information available). In Cyprus, the Employers' Association of Cyprus Banks has been established in December 2022. This Employer's Association will take over collective bargaining in the banking sector on behalf of the member banks.

In Ireland, there is a **legal challenge to the collective bargaining process** at the sectoral level. The Industrial Relations (Amendment) Act 2015 provides for the introduction of Sectoral Employment Orders (SEO). There have been a number of constitutional challenges to the SEO process by employer organisations outside the remit of the Construction Industry Federation (CIF). These organisations tend to represent smaller contractors. More recently, a trade union affiliated to the Irish Congress of Trade Unions has challenged a provision in an SEO that relates to dispute resolution. This challenge will be dealt with by the Supreme Court in due course. In this case, the union is seeking to confine the dispute resolution procedure to disputes concerning a provision of the Order only. A successful outcome for the union in this case would result in substantial changes to the current collective bargaining process.

Furthermore, 46 sectoral employer organisations reported on **the main challenges facing the collective bargaining process in their sectors** (see Table 4), which are many and versatile. Noteworthy is that only two organisations reported facing no such challenges (from construction and railways sectors in the Netherlands). **The majority of employers organisations see a number of challenges for their sectoral collective bargaining processes.**

Important to note is that only **six organisations explicitly stated difficult economic conditions** affecting the negotiations and leading to difficult and protracted processes to achieve collective agreements. As put by one respondent,

“The challenge is to find the right balance between the wishes of employees and employers. In difficult economic conditions with low margins, it is sometimes difficult for employers to meet the demands of trade unions. It must be viable for the various parties”

Very **few employer organisations also reported the lack of mandate** for negotiations either for themselves or their social partners. Also few had issues with human or financial resources for the participation in the negotiations.

The two core challenges perceived by the sectoral employer organisations relate to the lack of support to the collective bargaining process from the side of the government, as well as the lack of trust between the social partners in the sector. In relation to the role of the government, the concerns echo the current EU level developments where the Council Recommendation in 2023² on the social dialogue refers to the need for governments to create a conducive framework for social dialogue. This would in turn also help to lay the foundations for improving trust and cooperation between social partners on a bipartite level.

13 organisations reported challenges with the government’s support, including five reporting the government not respecting the social partner autonomy, lack of political and practical support and the lack of supporting legislation for collective bargaining in the sectors.

Examples reported in the survey include:

- Belgium, construction: *“The government interferes too much in the bargaining process, eg by introducing new tax-friendly premiums who have to be negotiated on a sectoral level.”*
- Italy, hospitality: *“We expect our Government to be more active to promote collective bargaining by lowering taxes on negotiated wage increases”*
- Italy, hospitality: *“Article 39 of the Italian Constitution provides for a mechanism of erga omnes extension of collective bargaining but the rule has remained unimplemented. In particular, the non-application of paragraphs 2, 3 and 4 of this article leads to the proliferation of multiple collective agreements insisting on the same production sector, fostering wage and contractual dumping phenomena.”*
- France, hospitality: *“The rather strict legislative framework limits the real scope for negotiation between the social partners, even though the law constantly refers subjects for negotiation to the branches. In the hospitality and tourism sector, social dialogue currently suffers from profound divergences.”*
- Germany, construction: *“The German legislature has the option of regulating essential working conditions by law if it is of the opinion that collective bargaining partners do not make any or insufficient regulations. The last time he did this was with the enactment of the Minimum Wage Act 2014 and the adjustment of the statutory minimum wage in 2023. From our point of view, this means that it encroaches on the tariff autonomy of social partners”.*

10 organisations reported the lack of trust between the social partners in their sectors. No further information was provided in the survey responses to further interpret this aspect. This issue will be further discussed with the Secretariats and followed up as a specific question in the second cycle of the national sectoral survey.

Table 7: What do you see as the main challenges to the collective bargaining process in your sector?

² <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32023H01389&qid=1701965565966>

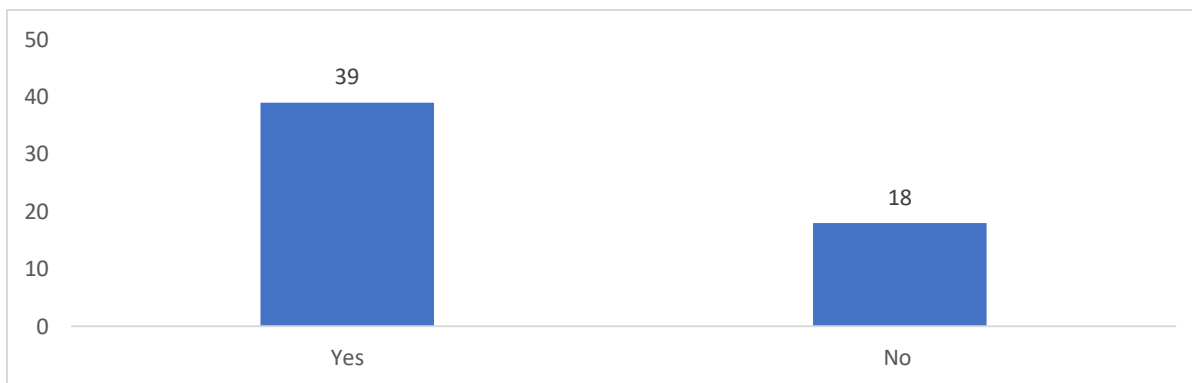
| | Number of respondents |
|---|-----------------------|
| There is a lack of trust between the social partners in your sector | 10 |
| Government-related challenges: | 13 |
| <ul style="list-style-type: none"> The government does not respect and does not reinforce the autonomy of social partners in your sector | 5 |
| <ul style="list-style-type: none"> The government is not supporting politically and in practice the collective bargaining in your sector | 5 |
| <ul style="list-style-type: none"> There is a lack of supporting legislation for the collective bargaining in your sector | 3 |
| Other social partners in your sector do not have a mandate from their members to do collective bargaining in your sector | 3 |
| Your organisation does not have a mandate from your members to do collective bargaining in your sector | 2 |
| Your organisation does not have sufficient human /financial resources to participate in collective bargaining in your sector | 1 |
| Other social partners in your sector do not have sufficient human /financial resources to participate in collective bargaining in your sector | 1 |
| Other: Difficult economic conditions: 6 Complexity and different interests of sector companies: 2 Low CB coverage: 2 No interest from trade union side : 2 Legal challenges: 1 EU legislation: 1 Not specified: 2 | 17 |
| No challenges | 2 |
| Don't know | 7 |

Source: Project survey, 2023. N=46, multiple choices possible.

1.2. Collective bargaining trends and issues in the sectors December 2022 – September 2023

The majority of organisations have concluded new collective bargaining agreements in their sectors in the survey period, December 2022-September 2023 (see Figure 2). This was reported by 39 organisations. This indicates a high level of collective bargaining activity in the survey period.

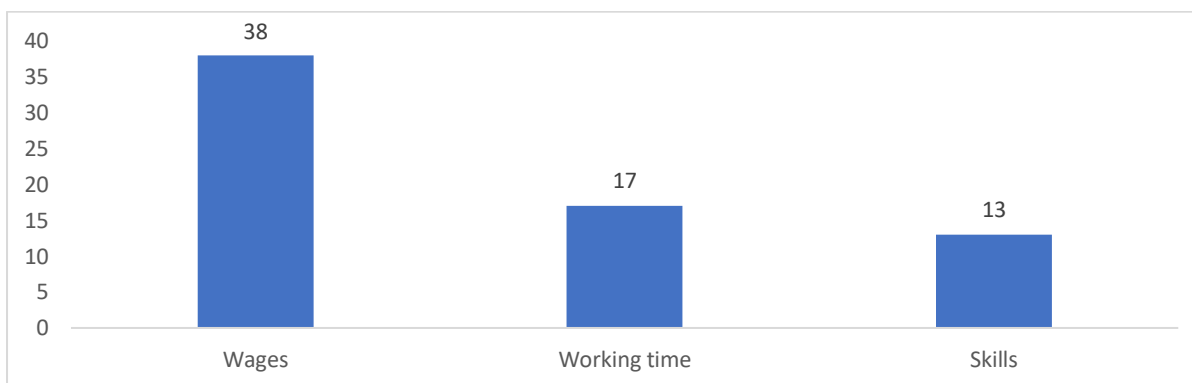
Figure 2: Have there been any collective bargaining agreements in your sector, concluded since December 2022, either by your organisation directly or by your members?



Source: Project survey, 2023. N=57.

Almost all (38 out of 39) agreements negotiated included provisions on wages, with a half covering the rules on the working time and 13 agreements including provisions on skills (see Figure 3). This demonstrates the centrality of wage related issues in the sectoral collective bargaining processes in the Member States.

Figure 3: Have these collective bargaining agreements covered on any of the key social issues?



Source: Project survey, 2023. N=39. Several organisations indicated that an agreement covers several issues.

The national sectoral employer organisations also reflected on the future collective bargaining priorities in the near term, for the next 6-7 months (see Table 8). **The majority of the organisations expect the topic of wages to be the top collective bargaining priority (reported by 32 organisations). Comparatively lower is the number of organisations expecting the working time aspects to be the top collective bargaining priority (reported by 19 organisations). Least organisations expect to be bargaining on the issues related to the skills of the workers (reported by 15 organisations).** Also noteworthy is that 30% of organisations do not plan collective bargaining round in the next months following the survey.

Table 8: Do you think any of these social issues will be top collective bargaining priorities for your organisation in the next 6-7 months?

| | Yes | No | Don't know | No collective bargaining planned in the next months | Total responses |
|-------|-----|----|------------|---|-----------------|
| Wages | 32 | 2 | 1 | 20 | 55 |

| | | | | | |
|--------------|-----------|----|---|-----------|----|
| Working time | 19 | 9 | 4 | 17 | 49 |
| Skills | 15 | 12 | 4 | 18 | 49 |

Source: Project survey, 2023.

1.3. Sectoral collective bargaining agreements on wages

39 organisations indicated the sectoral collective bargaining agreements negotiated in the survey period also included the issues of wages. All organisations provided further information about the provisions of such agreements, in 19 Member States and 10 sectors (see Table 9 below).

Most or 9 agreements have been reported in the construction sector, six in the banking sector and hospitality sector each, five in the railways sector, four in the chemical sectors, and three agreements in the recruitment and education sector.

In terms of the coverage of the collective bargaining agreements including provisions on working conditions, 37 agreements had such information available. In 23 cases, the agreements apply to all companies and workers in the sector or at least most of the companies and workers in the sector. In 14 cases, the agreement applied to the companies members of the sectoral organisation, or those who signed the agreement or otherwise a proportion of the companies.

Most (28) agreements were supervised jointly between the employer organisation and trade union, and six were either supervised by the company or not supervised at all.

Four organisations indicated that the bargaining processes for this agreement were **accompanied by strikes or other industrial action, and in two cases the strikes had a significant impact on the companies in the sector (this was reported by the rail sector employer organisation in Austria and chemical sector employer organisation in Finland). In contrast, 35 organisations noted the absence of such strikes and other industrial actions.** Among them, two explicitly mentioned that there were no strikes in their sectors for the first time in a long time.

For the second round of national sectoral survey, it would be useful to include questions about the aims of the signatory employers when entering the collective bargaining negotiations and in this light the compromise reached with the trade union counterparts in the agreements. Another question to possible include is the impact on inflation on the wage negotiations and outcomes and the extent of the discussions on the productivity and wage increases.

Table 9: Overview of CBAs with provisions on wages, by sector and Member State

| Sector | MS | Name of CBA | Modalities of the agreements |
|--------------------|----------|---|--|
| Banking (6) | Belgium | Collective labor agreement 2023-2024 ³ | Pay at least at the level of the sectoral scale salary. A possibility (not obligation) for individual companies to grant a bonus of max 750 euros per worker before the end of 2023 |
| | Finland | Collective agreement of financial sector | Total salary increases: 6% + lump sum 589€ |
| | Portugal | 1) The collective agreement between various credit institutions and the Federation of Independent Banking Unions – FSIB 2) The collective agreement | typically include salary scales, usually with a minimum and maximum value for each professional category. Salary raises are usually negotiated on an annual basis, establishing a specific percentage to be applied broadly. The banks and the unions have reached an agreement for a 4.5% salary increase for 2023. |

³ <https://emploi.belgique.be/fr/themes/commissions-paritaires-et-conventions-collectives-de-travail-cct/conventions-collectives-3>

| Sector | MS | Name of CBA | Modalities of the agreements |
|-------------------------|---------|--|---|
| | | between various credit institutions and the Federation of the Financial Sector Unions - FEBASE ⁴ | |
| | Austria | Kollektivvertrag für Angestellte der Banken und Bankiers ⁵ | The collective agreement provides a wage system of 7 occupational groups with 9 steps each. Each year an increase is negotiated between social partners, in 2022 the collective minimum wage was defined between 2119.95 EUR and 5545.41 EUR |
| | Germany | Tarifabschluss 2022 | Agreement as of July 2021: Increase in collective bargaining salaries by a total of 5.0 percent: 3.0 percent from August 2022 and a further 2.0 percent from August 2023. Two one-off payments of 500 euros each strengthen employees in lower and middle income groups. Significantly above average increase in the training allowances. |
| | Cyprus | Existing agreements | There are automatic annual salary increments (between 3%-4%) depending on the salary scale of each employee. There is also a salary increase to account for inflation increases. We call this cost of living adjustment. The payment of this, depends on meeting certain economy wide criteria, e.g. increase in GDP |
| Construction (9) | Ireland | 1. Sectoral Employment Order (Construction Sector) 2023 2. Electrical National Joint Industrial Council Agreement (ENJIC) – currently out to ballot 3. Mechanical Sector Pay Agreement – currently out to ballot. ⁶ | Each agreement contains hourly rates of pay for craft persons, general operatives and apprentices. In 2023 the CIF engaged in collective bargaining in the general construction/civils sector, and the mechanical and electrical sectors. Construction: In June 2023 the Minister of State at the Department of Enterprise, Trade and Employment made an Order for an amendment to the Construction Sectoral Employment Order. The amendment stated that construction workers would receive an increase in pay and pensions of 1.9% from the 18th of September 2023 and 3.5% from the 5th of August 2024. |
| | Denmark | There are many. Some of the main ones in the construction area are "The | Minimum wages and rules on wage setting. Minimum wage rates have been increased, other contribution rates have been increased, a special |

⁴ 1) The collective agreement between various credit institutions and the Federation of Independent Banking Unions - FSIB, published in the BTE No. 29 of 08/08/2016, main link: http://bte.gep.msess.gov.pt/bte_documento.php?doc=21082, and link to its last amendment: http://bte.gep.msess.gov.pt/bte_documento.php?doc=27439; 2) the collective agreement between various credit institutions and the Federation of the Financial Sector Unions - FEBASE, published in the BTE No. 29 of 08/08/2016, main link: http://bte.gep.msess.gov.pt/bte_documento.php?doc=21081, and link to its last amendment: http://bte.gep.msess.gov.pt/bte_documento.php?doc=27439

⁵ <https://www.wko.at/service/kollektivvertrag/kollektivvertrag-banken-und-bankiers-2023.html>

⁶ <https://enterprise.gov.ie/en/legislation/si-seo-construction-sector-2023.html>

| Sector | MS | Name of CBA | Modalities of the agreements |
|--------|-----------------|---|--|
| | | collective agreement for the construction and civil engineering agreement between DIO3 and 3F" and "The building agreement between DIO3 and 3F" ⁷ | housing allowance has been introduced in the construction sector |
| | The Netherlands | CAO Bouw & Infra ⁸ | Wages +5% (2,5% juli 2022 / 2,5% jan 2023) |
| | Belgium | accord sectoriel 2023-24 CP 124 | In Belgium it is legally forbidden to raise the wages in 2023-24 above indexation. But we have adjusted certain existing premiums and benefits to reflect the index. We also provided a 'purchasing power' premium for the workers of those companies that had high profits in 2022. |
| | ITALY | "Verbale di accordo 3 marzo 2022" signed by ANCE together with Legacoop Produzione e Servizi, Confcooperative Lavoro e Servizi, Agci Produzione e Lavoro and the trade unions Feneal-Uil, Filca-Cisl and Fillea-Cgil. | The Parties have agreed on a total pay increase of EUR 92.00 at parameter 100, referred to the common worker. Therefore, for workers classified at level 1, an overall increase of the minimum basic pay and salary of EUR 92.00 is provided, to be paid in two parts: EUR 52.00 as from 1 March 2022 and EUR 40.00 as from 1 July 2023. In addition, in order to encourage the presence of a young workforce, the Parties have established the so-called "entry bonus in the sector", intended for young people under 29 years of age, classified as workers, who are entering the sector for the first time and who remain in the same company for a minimum period of 12 months. The premium, amounting to EUR 100, will be paid as a lump sum at the end of the 12 months and will not affect the individual institutes provided by law and by collective bargaining. |
| | Greece | National inter-professional collective labour agreement | The contract defines the basic wages and daily wages of the workers covered by it and three categories are formed: craftsmen, craftsman's assistants and skilled workers and unskilled workers |
| | Sweden | The construction agreement | Handled by the agreement |
| | Spain | VII Convenio Colectivo General del Sector de la Construcción | The main rules on wages in the VII Convenio Colectivo General del Sector de la Construcción can be explained as follows: It is established a minimum annual gross remuneration by professional levels for the years 2022, 2023 and 2024; provincial agreements in their salary tables have to respect that (article 53). The VII |

⁷ An English language translation can be selected in the drop down window: <https://www.danskindustri.dk/vi-radgiver-dig/di-dokumenter-for-personale/personalejuras-dokumenter/overenskomster/bygge--og-anlagsoverenskomsten/>

⁸ <https://tbbouwinfra.nl/Assets/uploads/2023/05/CAO-BOUW-INFRA-2023-INTERACTIEF-mei-2023.pdf>

| Sector | MS | Name of CBA | Modalities of the agreements |
|----------------------|---------|---|---|
| | | | Convenio Colectivo General del Sector de la Construcción also set the economic increases to be applied in provincial salary tables for 2022, 2023 and 2024 (article 55). It is worth noting that in 2023 the minimum annual gross remuneration in construction is 22% higher than the legal interprofessional minimum wage. |
| | Germany | 1. Tarifvertrag zur Gewährung einer Inflationsausgleichsprämie im Baugewerbe 2. Tarifvertrag über die Gewährung eines 13. Monatseinkommens im Baugewerbe/Tarifvertrag über die Gewährung eines 13. Monatseinkommens für die Angestellten im Baugewerbe | Extra tax free inflation related payment 500 Euro till 30.09.2023 and further 500 Euro till 30.09.2024. 13th month payment was extended for those workers who are eligible for this payment. |
| Chemicals (4) | Hungary | n.a. | Defined salary increasing plus some positive changes in additional benefits. |
| | ITALY | National Collective Labour Agreement for workers in the chemical, chemical-pharmaceutical, chemical fiber and abrasive, lubricants and LPG sectors. | The nominal value of wages is defined in the pay tables based on the level of classification; the so-called "Minimum Economic Treatment" (TEM in the Italian acronym). Other contractual items with economic repercussions make up the "overall economic treatment" (TEC). The economic solution identified in the 2022 renewal provides: A nominal (average) wage increase agreed of 204€ for the median level of job classification (D1) corresponded in five tranches: 50€ (01/07/2022), 30€ (01/01/2023), 36€ (01/07/2023), 68€ (01/07/2024), 20€ (01/06/2025) |
| | Finland | Collective agreement for the Finnish and Chemical Product Industry ⁹ | 2023 general increase and lump sums and 2024 general increase plus increase which is targeted by company level |
| | Germany | Germany: Tarifabschluss für die Chemie- und Pharmaindustrie (Oktober 2022) ¹⁰ | Employees will receive 3.25 percent more pay from January 2023 and a further 3.25 percent from January 2024. Both levels of the pay increase are made more flexible; they can be postponed by up to three months each for economic reasons. In addition, the companies pay 3,000 euros per capita as one-time tax- and non-contributory inflation money. The disbursement will be made in two tranches of 1,500 euros each in January 2023 and January 2024 at the latest. |

⁹ <https://www.kemianteollisuus.fi/tyoelama/tyoehtosopimukset/>

¹⁰ Tarifrunde #Chemie22: Einigung im Tarifkonflikt erzielt (bavc.de)

| Sector | MS | Name of CBA | Modalities of the agreements |
|------------------------|-------------|---|---|
| Recruitment (3) | Finland | Collective Agreement for Employment Industry ¹¹ | Approximately 6 percent wage increase in the two year agreement period |
| | Sweden | Competence Agencies of Sweden has several collective agreements, one for blue collar and several for white collars. | The Swedish labor market model, or "the Swedish model" as it is also called, means that the labor market parties follows the industry's wage agreement, where the parties agreed on a wage increase of 7.4 percent over a two-year period. In the first year (2023) the increases will be 4.1 percent and in the second year (2024) 3.3 percent. |
| | Netherlands | Collective agreement | Agency workers follow the wages of the user company. We have included more elements of the userpay in the collective labour agreement |
| Education (3) | Ireland | Building Momentum ¹² | 7.5% pay increase |
| | Finland | General collective agreement for universities ¹³ | The collective agreement has a wage system. Pay rises total 6.1 % during 24 months, average cost impact 5,7 % (24 months). |
| | Portugal | Contrato coletivo entre a Confederação Nacional da Educação e Formação (CNEF) e a FNE - Federação Nacional da Educação e outros AND Contrato Coletivo de Trabalho entre a Confederação Nacional da Educação e Formação (CNEF) e a Federação Nacional dos Professores - FENPROF. ¹⁴ | Definition of tables for each profession, depending on tenure and performance evaluation. Agreement has been reached to increase salaries, because of general increases on minimum wages and adjustment to inflation rates. Salary scale based on seniority and performance assessment. A 4% one off premium is to be given in 2023/24 to compensate for inflation. A rise in wages in 24/25 in average 3.8%. |
| Hospitality (6) | Portugal | Contrato Coletivo de Trabalho - Collective Labour Agreement ¹⁵ | wages vary according to the seniority of work and professional category. all wages were increased as a result of the negotiations. |
| | Finland | The collective agreement for employees in the hotel, restaurant and leisure industry ¹⁶ | The contractual period includes two review dates. Pay review 1 June 2023 The personal monthly salaries of employees will be raised by EUR 96 and the hourly wages by EUR 0.60 on 1 June 2023 or from the start of the first payroll period |

¹¹ https://henkilostoala.fi/wp-content/uploads/2023/05/Henkilostoalan-tyoehtosopimus-2023-2025_englanninkielinen.pdf

¹² WWWbuilidingmomentum.ie

¹³ <https://www.sivista.fi/wp-content/uploads/2023/05/General-collective-agreement-for-universities-1-April-2023-%E2%80%9331-March-2025.pdf>

¹⁴ https://fne.pt/uploads/rte/cct-vencimentos/BTE_37_2021_10_08_CCT_CNEF_FNE_e_OUTROS.pdf
https://www.spgl.pt/Media/Default/Info/55000/700/80/4/BTE%2046_2022%20CCT%20CNEF-FENPROF.pdf

http://bte.gep.mtss.gov.pt/completos/2022/bte17_2022.pdf

¹⁵ http://bte.gep.msess.gov.pt/bte_documento.php?doc=28923

http://bte.gep.msess.gov.pt/bte_documento.php?doc=28520

¹⁶ https://www.mara.fi/jasenet/collective_agreement_marava_2022_employees.pdf

| Sector | MS | Name of CBA | Modalities of the agreements |
|--------------------|---------|--|---|
| | | | thereafter. At the same time, higher pay-scale wages for employees will enter into force separately. After the raise, employees must be paid at least as much as the new pay-scale wage. The remuneration payable to shop stewards and occupational safety representatives for tasks outside working hours will increase by 6.1% as of 1 June 2023. The increase covers the entire term of the collective agreement. Pay review 2 September 2024. The personal pay of employees and the pay-scale wages in the collective agreement will be raised on 1 September 2024 or from the start of the first payroll period thereafter by 1.7%. The working-hour supplements specified in euros will not be increased at either review. |
| | Austria | Collective agreement ¹⁷ | 9.3% on average from 1.5.2023 on the minimum wage |
| | Sweden | Collective Bargaining Agreement between Visita and Hotel and restaurant union HRF. Also CBA for blue-collar worker between VISITA and Unioen | Minimum wage, general raise with the possibility to individual pay. The social partners within the sector negotiate the level of minimum wage and salary increase for the upcoming years. The collective agreement in 2023 for the scope of the salary increase in total for the sector under 2 years was 7.4%. |
| | France | Addendum 31 to the French HCR collective bargaining agreement (it is not yet officially published) ¹⁸ | Since the addendum 6 to the French HCR collective bargaining agreement : Level 1 step 1 = French minimum wage (SMIC) + 1% |
| | Denmark | Main agreement between 3F and HORESTA Arbejdsgiver ¹⁹ | The main rule is minimum salary, which means you must consider whether and how much personal allowance each employee is entitled to. Beside the main rule a few have a fixed salary. |
| Railway (5) | Ireland | Building a Sustainable Future Together | Agreed increases apply to all colleagues. 7 Year Pay Deal concluded giving pay increases of above 15% over the lifetime of the agreement. |
| | Austria | Collective agreement for the employees of Austrian railway companies ²⁰ | The minimum wages in the collective agreement for the employees of Austrian railway companies have to be paid. The collective agreement on wages was concluded for 2 years. The minimum wages were increased by a certain percentage. In addition, the minimum wages were increased by certain amounts at certain points in time. |

¹⁷ https://www.wko.at/branchen/tourismus-freizeitwirtschaft/gastronomie/kollektivvertrag-gastgewerbe.html#heading_kollektivvertragsabschluss_2023

¹⁸ <https://hr-infos.fr/wp-content/uploads/2023/06/Avenant-n%C2%B031-grille-salaire-CPPNI-du-01.06.23.pdf>

¹⁹ <https://www.horesta.dk/dit-personale/ok-2023/>

²⁰ <https://www.wko.at/branchen/transport-verkehr/schienenbahnen/kollektivvertraege-eisenbahnunternehmen.html>

| Sector | MS | Name of CBA | Modalities of the agreements |
|--------|---------|--|---|
| | ITALY | No name | As far as tickets restaurant are concerned, there is only one rule about the value of the ticket restaurant. As far as performance bonus is concerned, the agreement defines the methods (KPI) to identify the bonuses. |
| | France | The agreement of 20 December 2022 on minimum wage reevaluation | In this specific case, it raises the minimum wages across the sector by 800€ or by 2.65% in case it's more beneficial to the employee |
| | Estonia | Estonian Railway Ltd and the Estonian Railways Trade Union COLLECTIVE AGREEMENT | Rates of bonuses and benefits. In the annex to the collective agreement, there have been agreed the percentages of the increase in basic salaries. |

Source: project survey, n=38. Please note that weblinks are provided where they were given by the survey respondents.

The influence of inflation on the wage related negotiations was mentioned by several respondents. Six organisations identified that the rises in inflation played a major role in the wage negotiations, and acted as a driver in determining the wage increases agreed. This was identified by two sectoral employer organisations in the education sector in Portugal, chemicals sector in Hungary and two construction employer organisations in Germany and a temporary agency employer organisation in Sweden. In practice, the inflation played a major role in the collective bargaining negotiations as follows:

- In Germany construction sector, the collective agreement was reached for an inflation compensation payment of €1,000, payable in two instalments of €500 each in September 2023 and September 2024.
- In Hungary, in the chemicals sector, the employer organisation pointed that due to the highest inflation in EU-27 it was a hard negotiation between social partners and companies. Demands for high increases in the wages clashed with the economic environment (competitiveness, high energy prices etc.).
- In Portugal education sector, the collective bargaining agreement specified that a 4% one off premium is to be given in 2023/24 to compensate for inflation.
- In Sweden, the employer organisation referred to the challenge of preserving the Swedish model and negotiate wages during a time of inflation as the main challenge. The Swedish labour market model means that the labour market parties - trade unions and employers - regulate wages, employment conditions, working environment, restructuring, occupational pensions, insurance and much more in industry-specific collective agreements.

All 39 collective bargaining agreements reported included a wage increase, which has been defined in a number of ways:

- As a proportion of the wages. A specific percentage of wage increase was reported in 15 agreements, and ranged from the lowest 2.65% rise in the railways sector in France and highest 15% in the railways sector in Ireland (over the seven year period). Putting aside these outliers, **the average rises amounted to 5-6%**. The main trend was as follows. In five agreements, the rises of around 5% were reported, four agreements contained a wage rise of around 6%, five of around 7%, and one of 9.3%.
- As a lump sum amount in EUR (either as a one off or more often as a standard addition to the salary). Such comparisons across countries need to be treated with caution, taking into account the different costs of living between the countries covered. As an example, in the construction sector in Italy, for workers classified at level 1, an overall increase of the minimum basic pay and salary of EUR 92 is provided. In the chemicals sector in Italy, a nominal (average) wage increase agreed was EUR 204. In Germany, a one off lump sum payment was negotiated in the

construction sector, including an extra tax free inflation related payment EUR 500 till 30.09.2023 and further EUR 500 till 30.09.2024.

- Defining new professional salary scales for different types of employees. Such comparisons across countries need to be treated with caution, taking into account the different costs of living between the countries covered. As an example, in the banking sector in Austria, the collective agreement provides a wage system of 7 occupational groups with 9 steps each. Each year an increase is negotiated between social partners, in 2022, the collective minimum wage was defined between EUR 2119.95 EUR and EUR 5545.41 for the different categories of workers.
- A combination of the elements above. For example, in the chemicals sector in Germany, employees will receive 3.25 percent more pay from January 2023 and a further 3.25 percent from January 2024. In addition, the companies pay EUR 3,000 per capita as one-time tax- and non-contributory inflation payment. In Finland, the collective agreement of financial sector included total salary increases of 6% + lump sum EUR 589.

Furthermore, the increases negotiated were **related to different aspects of labour remuneration**- either to the basic wage (most frequently), the minimum wage paid, or the performance related bonuses paid or other benefits, such as pensions, or the combination of the elements above.

In several sectors, special increases or allowances were negotiated for specific groups of workers or specific aspects of remuneration (training, housing, lower paid workers, workers in the well performing companies). Specifically, for young entrants into the workforce (in Italy construction sector in order to encourage the presence of a young workforce, the social partners have established the so-called "entry bonus in the sector", intended for young people under 29 years of age, classified as workers, who are entering the sector for the first time and who remain in the same company for a minimum period of 12 months. The premium, amounting to EUR 100, will be paid as a lump sum at the end of the 12 months and will not affect the individual institutes provided by law and by collective bargaining), extra training allowances and special payments to the lower to middle income groups of company workers. The latter occurred in the banking sector in Germany where the agreement included two one-off payments of 500 euros each strengthen employees in lower- and middle-income groups and a significantly above average increase in the training allowances. In Germany construction sector agreement, a special housing allowance has been introduced in the construction sector. Also in the construction sector, but in Belgium, the collective agreement provided a 'purchasing power' premium for the workers of those companies that had high profits in 2022 (see further details in the Box below).

Box 2: a purchasing power premium, construction sector in Belgium

In the collective bargaining agreement concluded for 2023-2024 period, it was agreed that a purchasing power premium will be paid if the enterprises made a high profit in 202, as follows:

- EUR 250 if the profit in 2022 is at least 1.15 times higher than the profit in the preceding three comparable time periods;
- EUR 500 if the profit in 2022 is at least 1.25 times higher than the profit in the preceding three comparable time periods.

For enterprises having exceptionally high profits in 2022, the premium was set at EUR 750. The sum of the premiums to be paid must not exceed the 15% of the profit made in 2022. If this threshold is exceeded, the premiums are reduced pro rata.

Source: accord sectorial 2023-24 CP 124.

Furthermore, **the time horizon varied across the collective bargaining agreements**, from one off immediate payment, to **most typically the pay deals over the next two years after the negotiation of the agreements (so typically covering the 2023-2024 period)**. Noteworthy is the outlier in the railway sector agreement in Ireland specifying the pay increases over the period of 7 years.

Noteworthy is also the **flexibility achieved as to when to apply the wage increases in some agreements**. In particular, in the chemicals sector in Germany the two levels of the pay increase are made more flexible; they can be postponed by up to three months each for economic reasons. In Belgium banking sector agreement, there is a possibility (not obligation) for individual companies to grant a bonus of max 750 euros per worker before the end of 2023.

Next is the discussion of main wage increase trends across the individual sectors in the different countries, in the alphabetical order.

Six wage related agreements were reported in the Banking sector. When wage increases were expressed in percentages, they ranged from 4.5% in Portugal, 5% in Germany (plus a EUR 1000 lump payment) and Cyprus, 6% + lump sum of EUR 589 in Finland. In Belgium the agreement 2023-2024 specified pay at least at the level of the sectoral scale salary, plus a possibility (not obligation) for individual companies to grant a bonus of max EUR 750 per worker before the end of 2023. In Germany, additional increases included two one-off payments of EUR 500 each strengthen employees in lower- and middle-income groups. Significantly above average increase in the training allowances. In Austria, the collective agreement provides a wage system of 7 occupational groups with 9 steps each. Each year an increase is negotiated between social partners, in 2022 the collective minimum wage was defined between 2119.95 EUR and 5545.41 EUR.

Nine wage related collective agreements were reported in the Construction sector, covering a percentage-based pay increase, lump sum increases, as well as special allowances (for housing and young people entering the sector).

When wage increases were expressed in percentages, they included the pay rises of 5% in the Netherlands and 5.4% in Ireland, over the period of two years. In Italy, a specific amount for wage increases has been agreed in the sector, of a EUR 92.00 at parameter 100, referred to the common worker. Therefore, for workers classified at level 1, an overall increase of the minimum basic pay and salary of EUR 92.00 is provided, to be paid in two parts: EUR 52.00 as from 1 March 2022 and EUR 40.00 as from 1 July 2023. In Germany, an extra tax free inflation related payment was agreed, of 500 Euro till 30.09.2023 and further 500 Euro till 30.09.2024. 13th month payment was extended for those workers who are eligible for this payment.

In Denmark, there are many and some of the main ones in the construction area are "The collective agreement for the construction and civil engineering agreement between DIO3 and 3F" and "The building agreement between DIO3 and 3F". In these agreements, the minimum wage rates have been increased, other contribution rates have been increased, and a special housing allowance has been introduced in the construction sector.

Similarly in Belgium, special allowance was introduced as a 'purchasing power' premium for the workers of those companies that had high profits in 2022. Since in Belgium it is legally forbidden to raise the wages in 2023-24 above indexation, the collective agreement has adjusted certain existing premiums and benefits to reflect the index.

A special allowance was also introduced in Italy to encourage the presence of a young workforce, the Parties have established the so-called "entry bonus in the sector", intended for young people under 29 years of age, classified as workers, who are entering the sector for the first time and who remain in the same company for a minimum period of 12 months. The premium, amounting to EUR 100, will be paid as a lump sum at the end of the 12 months and will not affect the individual incentives provided by law and by collective bargaining.

Four wage related agreements were reported in the Chemicals sector, in Germany, Italy, Hungary and Finland. The most generous increase was noted in Germany. Employees will receive 3.25 percent more pay from January 2023 and a further 3.25 percent from January 2024 (a total of 6.5%). Both levels of the pay increase are made more flexible; they can be postponed by up to three months each for

economic reasons. In addition, the companies pay 3,000 euros per capita as one-time tax- and non-contributory inflation money. The disbursement will be made in two tranches of 1,500 euros each in January 2023 and January 2024 at the latest.

In Italy, the economic solution identified in the 2022 renewal provides a nominal (average) wage increase agreed of 204€ for the median level of job classification (D1) to be paid in five tranches: 50€ (01/07/2022), 30€ (01/01/2023), 36€ (01/07/2023), 68€ (01/07/2024), 20€ (01/06/2025).

In Hungary, the agreement defined salary increases plus some positive changes in additional benefits. Similarly in Finland, for 2023 a general increase and lump sums and 2024 general increase plus increase which is targeted by company level have been reported.

Three wage related agreements were reported in the Education sector, in Finland Ireland and Portugal. The wage rises agreed included a 6.1% rise in Finland, 7.5% in Ireland, and 7.8% in Portugal, all for the period of two years.

In Portugal, the agreement has defined a salary scale based on seniority and performance assessment. A 4% one off premium is to be given in 2023/24 to compensate for inflation. A rise in wages in 2024/25 is on average 3.8%. this includes the definition of tables for each profession, depending on tenure and performance evaluation. Agreement has been reached to increase salaries, because of general increases on minimum wages and adjustment to inflation rates.

Six wage related agreements were reported in the Hospitality sector, in Austria, Denmark, France, Finland, Sweden, Portugal. The wage rises agreed included 7.4% rise in Sweden and 9.3% rise with respect to the minimum wage in Austria. In other countries, the pay increases were defined differently.

In Finland, the collective agreement for employees in the hotel, restaurant and leisure industry specified that the personal monthly salaries of employees will be raised by EUR 96 and the hourly wages by EUR 0.60 on 1 June 2023 or from the start of the first payroll period thereafter. At the same time, higher pay-scale wages for employees will enter into force separately. After the raise, employees must be paid at least as much as the new pay-scale wage. The remuneration payable to shop stewards and occupational safety representatives for tasks outside working hours will increase by 6.1% as of 1 June 2023. The increase covers the entire term of the collective agreement. The personal pay of employees and the pay-scale wages in the collective agreement will be raised on 1 September 2024 or from the start of the first payroll period thereafter by 1.7%. The working-hour supplements specified in euros will not be increased at either review.

In Portugal, the Collective Labour Agreement maintained that the wages vary according to the seniority of work and professional category and all wages were increased as a result of the negotiations.

In Denmark and France, references were made to the payment of minimum wages. In France, since the addendum 6 to the French HCR collective bargaining agreement specified that the pay at Level 1 step 1 = French minimum wage (SMIC) + 1%. In Denmark, in the main agreement between 3F and HORESTA Arbejdsgiver specified that the main rule is minimum salary, which means you must consider whether and how much personal allowance each employee is entitled to. Beside the main rule a few workers have a fixed salary.

Three wage related agreements were reported in the Recruitment sector, in Finland, Netherlands and Sweden. The wage rises agreed included a 6% rise in Finland and 7.4% rise in Sweden, both over the two-year period of the agreement. In the Netherlands, the agreement stipulated that the agency workers follow the wages of the user company. We have included more elements of the userpay in the CLA.

Five wage related agreements were reported in the Railways sector (in Austria, Estonia, France, Ireland, Italy). The wage rises reported included a rise in France of minimum wages across the sector

by 800€ or by 2.65% in case thus more beneficial to the employee and 15% rise over seven-year period in Ireland.

In Austria, collective agreement for the employees of Austrian railway companies was concluded for 2 years. The minimum wages were increased by a certain percentage. In addition, the minimum wages were increased by certain amounts at certain points in time.

Estonia Estonian Railway Ltd and the Estonian Railways Trade Union agreement specified the rates of bonuses and benefits. In the annex to the collective agreement has the percentages of the increase in the basic salaries.

In Italy, as far as performance bonus is concerned, the agreement defines the methods (KPI) to identify the bonuses.

1.4. Sectoral collective bargaining agreements on the working conditions

15 organisations indicated that the sectoral collective bargaining agreements negotiated in the survey period also included the issues of working conditions. Most (12) organisations provided further information about the provisions of such agreements, in six Member States and seven sectors (see Table below). Three agreements including aspects of the working conditions were reported in the construction sector, and also in the education sector, two in the hospitality and recruitment sectors each, and single agreements in the chemicals, railway and banking sectors. The three countries most active on the working conditions issues were Finland (4 such agreements reported), Sweden and Belgium (3 such agreements each) and single agreements reported in Cyprus, Lithuania and Portugal.

Table 10: Overview of CBAs with provisions on working conditions, by sector and Member State

| Sector | MS | Name of CBA | Modalities of the agreements |
|--------------|----------|---|---|
| Construction | Belgium | Accord sectoriel 2023-24 CP 124 | an extra holiday for the blue collar workers who drive more than 30.000 km/year (from home to the wharf and back) and an extra seniority day off (+30 years of seniority) |
| | Spain | VII Convenio Colectivo General del Sector de la Construcción | No information provided |
| Education | Cyprus | No official name | Employment contracts (Employees will be offered a contract of service and will, therefore, not be considered as "self employed" who provide services) |
| | Finland | Collective agreement for the private teaching sector ²¹ | Defining specific rules on Family leave Annual leave Remote work Working time, overtime |
| | Portugal | Contrato coletivo entre a Confederação Nacional da Educação e Formação (CNEF) e a FNE - Federação Nacional da Educação e outros AND Contrato Coletivo de Trabalho entre a Confederação Nacional da Educação e Formação (CNEF) e a Federação | Contractual arrangements (probation, temporary work) Working time Annual leave Definition of professional categories |

²¹ https://www.sivista.fi/wp-content/uploads/2023/06/YOA-TES-2022-2024-FINAL_EN-modifications-1.10.23.pdf

| | | | |
|-------------|-----------|---|--|
| | | Nacional dos Professores - FENPROF ²² | |
| Hospitality | Finland | The collective agreement for employees in the hotel, restaurant and leisure industry ²³ | The CA covers working conditions extensively, among others: Right of supervision, Employment contract and trial period, Working time, Remuneration, Absences, Annual holidays, Travel, and Local collective bargaining |
| | Sweden | Collective Bargaining Agreement between Visita and Hotel and restaurant union HRF. Also CBA for blue-collar workers between VISITA and Unioen | Calculation period on working hours, regulations on weekly rest, forms of employment, minimum levels of pay, working hours, inconvenient working hours, overtime, annual leave, sick leave and sick pay, insurances |
| Recruitment | Finland | Collective Agreement for Employment Industry ²⁴ | provisions for general terms of employment (employment contract contents, trail period, termination of the fixed term employment contract, terms of notice for termination, working time per week, flexi time, rest periods, paid sick leave etc.) |
| | Sweden | Competence Agencies of Sweden has several collective agreements, one for blue collar and several for white collars. | The collective agreements regulate employment conditions, working environment, restructuring, occupational pensions, insurance and much more. |
| Chemicals | Finland | Collective agreement for the Finnish and Chemical Product Industry ²⁵ | holiday bonus payment on specific dates |
| Railway | Lithuania | Part of Lithuanian railways branch collective agreement ²⁶ | Rules on redundancies OSH Working time and resting times Social dialogue |
| Banking | Belgium | Collective labor agreement 2023-2024 ²⁷ | Access to part-time work (1/2 or 4/5) from age 55; a declaration of the right to disconnect; reminder of national rules in the event of the introduction of new technologies (AI) |

Source: project survey, n=15. Please note that weblinks are provided where they were given by the survey respondents.

²² https://fne.pt/uploads/rte/cct-vencimentos/BTE_37_2021_10_08_CCT_CNEF_FNE_e_OUTROS.pdf
https://www.spgl.pt/Media/Default/Info/55000/700/80/4/BTE%2046_2022%20CCT%20CNEF-FENPROF.pdf

²³ https://www.mara.fi/jasenet/collective_agreement_marava_2022_employees.pdf

²⁴ https://henkilostoala.fi/wp-content/uploads/2023/05/Henkilostoalan-tyoehtosopimus-2023-2025_englanninkielinen.pdf

²⁵ <https://www.kemianteeollisuus.fi/tyoelama/tyoehtosopimukset/>

²⁶ Collective agreements are officially announced in web page of Ministry of Social Security and Labor - in Lithuanian language.
<https://socmin.lrv.lt/uploads/socmin/documents/files/veikla/paslaugos/sutartys/kolektyvines/Gelezinkel%20imon%20asociac%20sakos%20ks2022%2012%2016.pdf>

²⁷ <https://emploi.belgique.be/fr/themes/commissions-paritaires-et-conventions-collectives-de-travail-cct/conventions-collectives-3>

In terms of the coverage of the collective bargaining agreements including provisions on working conditions, 12 agreements had such information available. In all cases, the agreements apply to all companies and workers in the sector or at least most of the companies and workers in the sector.

Most (10) agreements were supervised jointly between the employer organisation and trade union, and two were either supervised by the company or not supervised at all.

Two organisations indicated that the bargaining processes for this agreement were **accompanied by strikes or other industrial action. In contrast, 10 organisations noted the absence of such strikes and other industrial actions.** Among them, two explicitly mentioned that there were no strikes in their sectors for the first time in a long time.

The main common themes in the collective bargaining agreements on the working conditions relate to negotiated rules on the working time, leave and time off, and employment contractual issues. Other topics dealt with also include remote working, restructuring and social dialogue.

The rules on the working time were reported in three sectoral collective agreements in Finland (in education, hospitality, and recruitment sectors), in two agreements in Sweden (in the hospitality sector and recruitment sectors), in Portugal education sector and in Lithuania railway sector agreements. Across the sectors, the common theme was the definition of the number of working hours, the calculation rules for the rest periods, the calculation of the overtime hours, and other aspects of the working time. **As an example, the agreement in the hospitality sector in Finland is provided below.**

Box 3: Collective bargaining agreement provisions on the working time

In Finland, the collective bargaining agreement in the hospitality sector included the following provisions.

The CA utilizes a periodical working hours system, in which the working hours are organised in periods of three weeks. The regular working hours in a three-week period are 112,5 hours. Minimum daily working hours are 4 hours (unless a justifeid reason can be provided to excuse a shorter shift) and maximum daily working hours are: 10 hours and with employee's consent 16 hours. A person is considered as a full-time employee, if the person works, according to the employment contract, 112,5 hours in a three-week period. Full-time employees always receive a monthly salary. If the person works, according to the employment contract, less than 112,5 hours in a three week period, the person is considered to be a part-time employee. Part-time employees always receive hourly wages. Part-time employees' working hours can be arranged as average minimum working hours. The agreed number of working hours must actually occur during a follow-up period of approximately one year (usually 17 or 18 consecutive three-week periods). The accumulation of working hours is followed up once a year within 2 months after the follow-up period has ended. The purpose of the follow-

p is to ensure that the agreement corresponds to the factual situation. If the actual average working hours are permanently longer than those agreed in the employment contract without justified reason, an agreement must be made to match the working hours to the factual hours. If the number of working hours falls short of the agreed minimum, the employer shall compensate the employee for the shortfall. However, there shall be no compensation obligation if the agreed working hours have fallen short for a reason attributable to the employee or due to an unpaid absence. Full-time employees' working hours can be averaged by using balancing systems. The CA contains three different balancing systems, varying in length from 18 weeks to 1 year. The balancing systems are based on averaging working hours so that the regular working hours can vary during the balancing period and exceed the regular working hours as long as the system balances out to the regular working hours on average during the balancing period. No compensation for additional or overtime work is paid as long as the working hours remain in the limits specified in each balancing system.

Secondly, the rules for the different types of leave and time off were reported in the four agreements in Finland (in the education, hospitality, recruitment and chemicals sector), Belgium

construction sector and Portugal education sector. These related to defining how many annual leave days are allowed, how and when they could be taken, by which categories of workers, as well as regulating specific types of leave such family leave or paid sick leave. As an example, in the Belgium construction sector, an extra holiday day was established for the blue-collar workers who drive more than 30.000 km/year (from home to the wharf and back) and an extra seniority day off (+30 years of seniority). Another example was from the construction sector in Finland where a holiday bonus payment was introduced for working on specific dates.

A third major area relates to regulating the employment contracts and contractual issues. This was reported in the Sweden in two sectors of hospitality and recruitment, in Cyprus education sector and in Portugal education sector, as well as in Finland hospitality sector. This mostly related to defining specific types of employment contracts and specifying their use for specific types of workers. As an example, in the education sector in Portugal collective agreement specified the use of temporary work contract and the rules on the probation period. In Cyprus, education sector agreement extended the coverage of regular employment contracts to specific group of educators. The Minister and unions agreed to change the working status of people working on various supportive educational programmes that are offered in addition to the main course of education provision. More specifically, it was decided to offer them contracts of service to establish an employee-employer relationship, instead of contracts for service (as during the last decade).

In two sectors, collective agreements also dealt with the digitalisation in the workplaces. In the banking sector in Belgium, the agreement established the right to disconnect. The same agreement also reminder of national rules in the event of the introduction of new technologies (AI). In Finland, the private education sector agreement specified the categories of workers for whom remote work can be provided.

Some sectors also included provisions on how to deal with restructuring and on social dialogue in their collective agreements. In the railway sector agreement in Lithuania, for example, the social partners specified the categories of workers which will be first affected and safeguarded during the restructuring situations. The same agreement also specified the rules for further developing the social dialogue in the sector. **Further details are provided in the boxes below.**

Box 4: examples of collective bargaining agreements with provisions on restructuring

In the railway sector in Lithuania,²⁸ the collective agreement specified when in the Group of Companies a reduction of the number of employees is planned, in addition to the criteria specified in the specified paragraph, the right of priority to remain in employment have the employees in this order:

- whose performance evaluation results in terms of annual performance exceptionally exceed / exceed / meets the expectations set, those who do not have valid warnings for violation of labor duties;
- having a higher length of service in the respective company of the Group of Companies;
- members of the Trade Union who have been members of the Trade Union for more than one year.

Box 5: collective bargaining agreements with provisions on improving social dialogue

In the railway sector in Lithuania,²⁹ the collective agreement contains several provisions aimed at strengthening the social dialogue in the sector, as follows:

- Trade unions that have signed this Collective Agreement have the right to control how the companies the group's companies comply with and carry out with the rights and interests of

²⁸ [Gelezinkel imon asociac sakos ks2022 12 16.pdf \(lrv.lt\)](#)

²⁹ [Gelezinkel imon asociac sakos ks2022 12 16.pdf \(lrv.lt\)](#)

the trade union members they represent related labour, economic and social laws, collective agreement and agreements.

- In the group of companies we allocate Trade unions premises free of charge only to those who have signed the Collective Agreement to perform their functions.
- At the request of the employees' representatives, the financing may be made by the Group of Companies and the Collective events organized by the trade unions that signed the contract.
- Additional guarantees for trade union members: Members of the governing bodies of trade unions operating in the companies of the Group of Companies duties usually performs during work. For this purpose, trade unions operating in the companies of the Group of Companies members of the management body (Employees) are exempted from work at least seventy-two hours a year.

In Belgium banking sector, reminder of national rules in the event of the introduction of new technologies (AI) where social partners have the right to be consulted when such new technologies are introduced.

1.5. Sectoral collective bargaining agreements on skills

13 organisations indicated that the sectoral collective bargaining agreements negotiated in the survey period also included the issues of skills. Most or 10 organisations provided further information about the provisions of such agreements, in 7 Member States and six sectors (see Table 8 below). Four organisations reported such agreements with provisions on skills in the construction sector, two in the hospitality sector and single organisations in the education, chemicals, banking and railways sectors. The two countries most active on the skills issues are Finland (2 sectors) and Italy (2 sectors), with single agreements being reported by sectoral employer organisations in Belgium, Denmark, Greece, Spain, and Portugal.

Table 11: Overview of CBAs with provisions on skills, by sector and Member State

| Sector | MS | Name of CBA | Modalities of the agreements |
|--------------|--------|--|---|
| Construction | Greece | National inter-professional collective labour agreement | Bonus for training (provides for a 10% bonus for those who have graduated from vocational education or vocational training programmes) |
| | Spain | VII Convenio Colectivo General del Sector de la Construcción | No further information provided |
| | Italy | "Verbale di accordo 3 marzo 2022" signed by ANCE together with Legacoop Produzione e Servizi, Confcooperative Lavoro e Servizi, Agci Produzione e Lavoro and the trade unions Feneal-Uil, Filca-Cisl and Fillea-Cgil | Identify the training needs of companies (the social partners have entrusted Formedil – the national paritarian body for training and safety – with the task of drawing up a National Training Catalogue (CFN) that identifies the training needs of companies and is updated on the basis of new technological and environmental sustainability requirements) Training contents (a special protocol on training and safety with the intention of giving structural and economic consistency to training activities) |

| | | | |
|-------------|-------------|--|---|
| | Netherlands | CAO Bouw & Infra ³⁰ | Small adjustments (a diploma bonus of EUR 2,500 for obtaining a sector specific qualification) |
| Hospitality | Denmark | CBA for trainees for hospitality between 3F and HORESTA Arbejdsgiver ³¹ | Provisions for trainees regulating the level for wages, the wage supplement, for different types of professions, the extra time, study time, night and shift work, apprenticeship contracts contents, holiday time and allowances |
| | Finland | The collective agreement for employees in the hotel, restaurant and leisure industry ³² | Training time and contents (a separate Agreement on work-based learning and professional skills assessment related to vocational education leading to a professional qualification, including compulsory internship in vocational education) Apprentices |
| Banking | Belgium | Collective labor agreement 2023-2024 ³³ | Time for training (an individual right to 5 days of training/Year) Training contents (introduction of additional subjects into the training offer) |
| Chemicals | Finland | Collective Agreement for salaried employees chemical industry ³⁴ | Apprentices (rules on apprenticeship the salary levels and compensation for apprenticeship trainers, apprenticeship notification, further increase of apprenticeship model) |
| Education | Portugal | Contrato coletivo entre a Confederação Nacional da Educação e Formação (CNEF) e a FNE - Federação Nacional da Educação e outros AND Contrato Coletivo de Trabalho entre a Confederação Nacional da Educação e Formação (CNEF) e a Federação Nacional dos Professores - FENPROF ³⁵ | Number of training hours (the right to 40 hours of training per year) Training plans (continuing training plans must cover, in particular each year, a minimum of 30% of the total workforce of the company) |
| Railways | Italy | No name | Training contents - on digital skills (provides for a minimum of 40 hours of training for each worker; improve digital skills according to digital transformation) |

Source: project survey, n=10. Please note that weblinks are provided where they were given by the survey respondents.

In terms of the coverage of the collective bargaining agreements including provisions on skills, 7 agreements with such information available were almost equally split between the sectors and countries

³⁰ https://www.bouwendnederland.nl/media/11458/cao-bouw-en-infra-2021-2022-eng_final.pdf

³¹ [elev-2023-2025.pdf \(horesta.dk\)](https://www.horesta.dk/elev-2023-2025.pdf)

³² https://www.mara.fi/jasenet/collective_agreement_marava_2022_employees.pdf

³³ [Sectoraal akkoord 2023-2024 | Group S; Prime de pouvoir d'achat 2023 | Group S](#)

³⁴ <https://www.kemianteoollisuus.fi/tyoelama/tyohtosopimukset/>

³⁵ https://fne.pt/uploads/rte/cct-vencimentos/BTE_37_2021_10_08_CCT_CNEF_FNE_e_OUTROS.pdf
https://www.spgl.pt/Media/Default/Info/55000/700/80/4/BTE%2046_2022%20CCT%20CNEF-FENPROF.pdf

where the agreements apply to all companies and workers in the sector and those agreements which had a more limited application scope.

Six agreements were supervised jointly between the employer organisation and trade union, and two were either supervised by the company or not supervised at all.

All 10 organisations reporting the agreements indicated that the bargaining processes for this agreement were **not accompanied by strikes or other industrial action**.

The main common themes in the collective bargaining agreements relate to the provisions for trainees and apprentices, defining the time for training, specifying the training contents and planning the training.

Firstly, rules for trainees and apprentices were reported in the agreements in the hospitality sector in Denmark and Finland, and in the chemical industry in Finland.

In Denmark, a specific agreement regarding trainees was concluded as a CBA for trainees for hospitality between 3F and HORESTA Arbejdsgiver on 1st of March 2023, with the validity until the 28th of February 2025. It covers all trainees in the sector³⁶ and sets a comprehensive detailed set of rules for the wages of trainees in the sector, by level of entry, duration of training, type of training, the working time, costs and expenses at work, holiday times, pension provisions, and the transfer from the traineeship into the full-time employment (the CBA is over 70 pages long).

In Finland, the collective agreement for employees in the hotel, restaurant and leisure industry contains clauses on apprenticeships. As an attachment to the CA there exists a separate Agreement on work-based learning and professional skills assessment related to vocational education leading to a professional qualification, including compulsory internship in vocational education.³⁷ It is valid from 1 April 2023 to 31 March 2025. The CA is universally binding. All companies operating on the areas of business determined in the scope of application of the CA shall follow the collective agreement irrespective whether they are members of MaRa or not. The CA is applicable to all employees of such employer irrespective of their membership in the union.

In Finland, the provisions for apprenticeship for young laboratory technician students (under 20 years) is provided in the collective Agreement for salaried employees chemical industry.³⁸ It is valid for 24 months and concerning apprenticeship the salary levels and compensation for apprenticeship trainers have been agreed. It applies to 300 companies and 9000 salaried employees. Further details of the provisions relating to apprenticeships are provided below.

Box 6: regulating the apprenticeships in the collective bargaining agreements

In Denmark, the collective agreement in the hospitality sector 2023-2025³⁹ defines a wide range of elements of the apprenticeship schemes in the sector, as follows:

- Wage levels for the different types of apprentices in the sector (such as receptionists, waiters, catering trainees, cooks), per month, the timing of the start of the pay from the probationary period,
- Students are entitled to an annual salary interview. As a special salary supplement, 6% is paid for all pupils (as of 1 March 2024 7.85%). The special salary supplement includes holiday allowance, holiday allowance and any holiday savings.
- All apprentices must have a training agreement has been concluded between the trainee and the company. The Agreement shall indicate the salary, as well as include all internships and

³⁶ [elev-2023-2025.pdf \(horesta.dk\)](#)

³⁷ https://www.mara.fi/jasenet/collective_agreement_marava_2022_employees.pdf (link accesible to members)

³⁸ <https://www.kemianteollisuus.fi/tyoelama/tyoehtosopimukset/>

³⁹ [elev-2023-2025.pdf \(horesta.dk\)](#)

school placements of the education, including the apprenticeship test. The training agreement must be in writing and signed no later than the beginning of the contractual relationship.

- According to current legislation, the probationary period for students is the first 3 months of the internship. During the probationary period, the training agreement may be terminated without notice and without justification by both company and student.
- Working hours: School time is to be counted as working time. The effective working time amounts to 148 hours over a 4-week rotation, unless a shorter or longer rotation period is agreed locally at the enterprise in writing 5. However, the rotation period may not exceed 13 weeks. A maximum of 50 hours of effective working time can be scheduled in each week. Night time working hours are regulated. The shift schedule is made in each company in consultation with trade union representatives. Any overtime must be notified well in advance and, as far as possible, the day before.
- This excepts force majeure, illness or the like. Overtime worked by pre-booked companies must be notified no later than the day before. For lack of notice, DKK 40.49 will be paid on 1 March 2023 and on 1 March 2024 DKK 41,91.
- Rules for payment on the benefits for sickness, pregnancy and maternity situations are defined.

In Finland, the chemical sector collective agreement specified that the employer is obliged to notify the chief shop steward of new apprenticeship and training contract pupils⁴⁰. Also, the apprenticeship model for young people of the Chemical Industries Federation of Finland and the Industrial Union of Finland is to increase the educational and educational skills of young students, aged 16-20 years. The model will be piloted in educational institutions and companies until 2025. The model aims to increase the attractiveness of the sector among young people, respond to the need for labour and the competence needs accelerated by the carbon neutrality development of the sector. Workplaces where the apprenticeship model for young people is introduced are visited together through the apprentice's induction practices. Working group composed of representatives of unions, pilot companies and educational institutions monitors the effectiveness of the apprenticeship model for young people and makes any necessary changes to the model.

The second common topic in the agreements is defining the time for training, reported in the hospitality sector in Finland, the banking sector in Belgium (5 days of training per year) and the education sector in Portugal (40 hours of training per year).

In Belgium, Collective labour agreement 2023-2024 for the banking sector contains an individual right to 5 days of training/year. It is valid for 2 years and introduces an individual right to 5 days of training/Year. This is applicable to all companies (and their employees) in the banking sector in Belgium.

In Finland, the collective agreement for employees in the hotel, restaurant and leisure industry has an attachment to the CA there exists a separate Training Agreement containing provisions on training provided by the employer or the Union.⁴¹ Valid from 1 April 2023 to 31 March 2025, the collective agreement and its attached agreements contains clauses, among others, on remuneration during training, participation in training, working hours, travel etc. The CA is universally binding.

In Portugal education sector, the two agreements⁴² stipulate the right to 40 hours of training per year, or, if contracted for a period of three months or more, a minimum number of hours proportional to the duration of the contract in that year, in accordance with the law.

⁴⁰ [Collective agreements - Chemical Industry \(kemianteollisuus.fi\)](https://www.kemianteollisuus.fi)

⁴¹ https://www.mara.fi/jasenet/collective_agreement_marava_2022_employees.pdf

⁴² https://fne.pt/uploads/rte/cct-vencimentos/BTE_37_2021_10_08_CCT_CNEF_FNE_e_OUTROS.pdf
https://www.spgl.pt/Media/Default/Info/55000/700/80/4/BTE%2046_2022%20CCT%20CNEF-FENPROF.pdf

A third common thread in the agreements on skills is specifying the contents of training, reported in Italy in the construction (safety) and railways (digital skills) sector, in Belgium in the banking sector (additional subjects) and in Finland in the hospitality sector (occupational safety).

In Italy, in the railway sector, an agreement was signed on 12 December 2022 and it provides of the rules about the training on digital skills. The objective of the agreement is to improve the digital skills of workers. It provides for a minimum of 40 hours of training for each worker; improve digital skills according to digital transformation; and training doesn't have any cost for the company.

In Italy construction sector, an agreement "Verbale di accordo 3 marzo 2022" signed by ANCE together with Legacoop Produzione e Servizi, Confcooperative Lavoro e Servizi, Agci Produzione e Lavoro and the trade unions Feneal-Uil, Filca-Cisl and Fillea-Cgil. It is valid 2 years and 4 months (1 March 2022 to 30 June 2024). The parties signed a special protocol on training and safety with the intention of giving structural and economic consistency to training activities to ensure the improvement of the professional quality and productivity of workers already hired and to be hired.

In Finland, the collective agreement for employees in the hotel, restaurant and leisure industry has an attachment to the CA there exists a separate Training Agreement containing provisions on training provided by the employer or the Union.⁴³ There are also clauses concerning training in Occupational safety agreement and in the Agreement on shop stewards. Valid from 1 April 2023 to 31 March 2025, the CA is universally binding.

Finally, provisions for planning the training were reported in Italy (developing a National Training Catalogue) in the construction sector and Portugal education sector.

In Italy construction sector, an agreement "Verbale di accordo 3 marzo 2022" signed by ANCE together with Legacoop Produzione e Servizi, Confcooperative Lavoro e Servizi, Agci Produzione e Lavoro and the trade unions Feneal-Uil, Filca-Cisl and Fillea-Cgil. Among the most important measures, for example, the social partners have entrusted Formedil - the national paritarian body for training and safety - with the task of drawing up a National Training Catalogue (CFN) that identifies the training needs of companies and is updated on the basis of new technological and environmental sustainability requirements. It is applicable for workers and employees (operai e impiegati) of construction and related companies and cooperatives.

In Portugal education sector, the two agreements⁴⁴ stipulate that continuing training plans must cover, in particular each year, a minimum of 30% of the total workforce of the company.

An interesting provision rewarding financially with a bonus for extra qualifications and upskilling for workers is reported in the construction sector in Greece and Netherlands. The National inter-professional collective labour agreement in the construction in Greece provides for a 10% bonus for those workers who have graduated from the vocational education or vocational training programmes. In the Netherlands, the collective agreement for the construction sector CAO Bouw & Infra includes a one-off diploma bonus in the amount of € 2,500 gross to the employee. The employee hands over the employer for this a copy of the diploma whose graduation date is in the period 1 September 2021 up to and including December 31, 2023. This is based on the employee in the period from 1 September 2021 until 31 December 2023, a diploma for a Training BBL 2, BBL 3 or BBL 4 in the domain of construction and infrastructure, and during this training, did the employee an employment contract for at least 6 months and work-based training agreement with the employer where he followed this training.

⁴³ https://www.mara.fi/jasenet/collective_agreement_marava_2022_employees.pdf

⁴⁴ https://fne.pt/uploads/rte/cct-vencimentos/BTE_37_2021_10_08_CCT_CNEF_FNE_e_OUTROS.pdf
https://www.spgl.pt/Media/Default/Info/55000/700/80/4/BTE%2046_2022%20CCT%20CNEF-FENPROF.pdf

Conclusions

The survey collected the most recent information from 57 national sectoral employer organisations about the latest sectoral social dialogue processes and the collective bargaining agreements in 19 Member States. This national level survey links with the European survey issued in the project which was answered by the Secretariats of the European sectoral employer organisations. Taken together, both surveys provide valuable information on the current landscape of the social dialogue, collective bargaining and capacity building needs at the European and national sectoral levels. A key common theme across both surveys is the continuing needs for further capacity building for both European and national sectoral employer organisations.

The survey findings are used by BusinessEurope, SMEUnited, SGI Europe and the sectoral European employer organisations for a further follow up and information to support their work as employers organisations at the European level. A second round of both surveys will be launched in 2024, with results available in summer 2024.

Annex 1: List of collective bargaining agreements identified in the survey

A total of 20 agreements were provided in the survey, and additional two were sent by email.

| MS | Sector | Weblink to the collective bargaining agreement (accessed last on 22 November 2023) |
|-----------------|------------------------------------|---|
| Belgium | Banking | https://emploi.belgique.be/fr/themes/commissions-paritaires-et-conventions-collectives-de-travail-cct/conventions-collectives-3 |
| Austria | Banking | https://www.wko.at/service/kollektivvertrag/kollektivvertrag-banken-und-bankiers-2023.html |
| Finland | Chemicals | https://www.kemianteoollisuus.fi/tyoelama/tyoehtosopimukset/ |
| Germany | Chemicals | Tarifrunde #Chemie22: Einigung im Tarifkonflikt erzielt (bavc.de) |
| France | Chemicals | https://www.legifrance.gouv.fr/jorf/id/JORFTEXT000047867747?datePublication=01%2F06%2F2023+%3E+29%2F07%2F2023&nature=bFbU0g%3D%3D&page=1&pageSize=25&query=industries+chimiques&searchField=ALL&searchType=ALL&sortValue=SIGNATURE_DATE_DESC&tab_selection=jorf&typePaging=DEFAULT |
| The Netherlands | Construction | https://tbbouwinfra.nl/Assets/uploads/2023/05/CAO-BOUW-INFRA-2023-INTERACTIEF-mei-2023.pdf |
| Ireland | Construction | https://enterprise.gov.ie/en/legislation/si-seo-construction-sector-2023.html |
| Ireland | Education | WWWbuilidingmomentum.ie |
| Portugal | Education | https://fne.pt/uploads/rte/cct-vencimentos/BTE_37_2021_10_08_CCT_CNEF_FNE_e_OUTROS.pdf https://www.spgl.pt/Media/Default/Info/55000/700/80/4/BTE%2046_2022%20CCT%20CNEF-FENPROF.pdf |
| Portugal | Education | http://bte.gep.mtss.gov.pt/completos/2022/bte17_2022.pdf |
| France | Hospitality | https://hr-infos.fr/wp-content/uploads/2023/06/Avenant-n%C2%B031-grille-salaire-CPPNI-du-01.06.23.pdf |
| Denmark | Hospitality | https://www.horesta.dk/dit-personale/ok-2023/ |
| Austria | hospitality sector | https://www.wko.at/branchen/tourismus-freizeitwirtschaft/gastronomie/kollektivvertrag-gastgewerbe.html#heading_kollektivvertragsabschluss_2023 |
| Finland | HORECA | https://www.mara.fi/jasenet/collective_agreement_marava_2022_employees.pdf |
| Portugal | Hotels and Restaurants Association | http://bte.gep.mtss.gov.pt/bte_documento.php?doc=28923 http://bte.gep.mtss.gov.pt/bte_documento.php?doc=28520 |
| Denmark | Hospitality | https://www.horesta.dk/dit-personale/ok-2023/ |
| Austria | Railway | https://www.wko.at/branchen/transport-verkehr/schienenbahnen/kollektivvertraege-eisenbahnunternehmen.html |

| | | |
|-----------|---|--|
| Lithuania | Railway transportation | Collective agreements are officially announced in web page of Ministry of Social Security and Labor - in Lithuanian language. https://socmin.lrv.lt/uploads/socmin/documents/files/veikla/paslaugos/sutartys/kolektyvines/Gelezinkel%20imon%20asociac%20sakos%20ks2022%2012%2016.pdf |
| Finland | Recruitment and employment industry | https://henkilostoala.fi/wp-content/uploads/2023/05/Henkilostoalan-tyoehtosopimus-2023-2025_englanninkielinen.pdf |
| Finland | Universities, private teaching sector, vocational education | https://www.sivista.fi/wp-content/uploads/2023/05/General-collective-agreement-for-universities-1-April-2023-%E2%80%93-31-March-2025.pdf |

Annex 2: List of survey respondents

| Country: | Sector: | Organisation: |
|-----------------|---------------------------------------|---|
| Belgium | Banking | Febelfin |
| Germany | Banking | AGV Banken |
| Spain | Banking | ASOCIACIÓN ESPAÑOLA DE BANCA - AEB |
| Cyprus | Banking | Association of Cyprus Banks |
| Finland | Banking | Finance Finland/Service sector employers Palta |
| Portugal | Banking | Portuguese Banking Association |
| Austria | Banking | Verband österreichischer Banken und Bankiers (Austrian Bankers Assoziation) |
| Poland | Banking | Polish Bank Association |
| Hungary | chemical industry | MAVESZ - Hungarian Chemical Industry Association |
| Finland | Chemical, Pharmaceutical and Plastics | Chemical Industry Federation of Finland |
| Italy | Chemicals | FEDERCHIMICA |
| Germany | Chemicals | Completed via ECEG |
| France | Chemicals | Completed via ECEG |
| Sweden | Chemicals | Completed via ECEG |
| Belgium | Cleaning | ABSU-UGBN |
| | | |
| Denmark | Construction | DI, Confederation of Danish Industry (www.di.dk) |
| The Netherlands | Construction | Koninklijke Bouwend Nederland |
| Belgium | Construction | embuild |
| Sweden | Construction | The Swedish Construction Federation |

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|-------------|---|---|
| Ireland | Construction | Construction Industry Federation |
| Greece | construction | Panhellenic Association of Engineers Contractors of Public works |
| Germany | Construction industry | Zentralverband Deutsches Baugewerbe |
| Italy | Construction industry | ANCE |
| Spain. | Construction. | Confederación Nacional de la Construcción (CNC). |
| Deutschland | Baugewerbe | Hauptverband der Deutschen Bauindustrie |
| Ireland | Education | Association of Community and Comprehensive Schools (ACCS) |
| Portugal | Education | ANESPO - Portuguese Association of Professional VET Schools |
| Portugal | Education | CNEF |
| Belgium | Education | Katholiek Onderwijs Vlaanderen |
| Cyprus | Education | Ministry of Education, Sport and Youth |
| Czech Rep. | Employers Organization - public services | Union. of Employers' Associations |
| Finland | Education | The Local Government and County Employers KT |
| Finland | Universities, private teaching sector, vocational education | Finnish Education Employers (FEE) |
| Hungary | Higher Education | Felsőoktatási Dolgozók Szakszervezete, BME Alapszervezet (Trade Union of Higher Education Labour, BME Basic Organisation) |
| Hungary | higher education | Dharma Gate Buddhist College / A Tan Kapuja Buddhista Főiskola |
| Hungary | higher education -private university | Budapest Metropolitan University |
| Finland | Hospitality | Matkailu- ja Ravintolapalvelut MaRa ry - Finnish Hospitality Association MaRa |
| France | Hospitality | GHR |
| Denmark | Hospitality | HORESTA Arbejdsgiver |
| Italy | Hospitality | FEDERALBERGHI |
| Italy | Restaurants and Cafès | Fipe |
| Austria | hospitality sector | APHA - Austrian Professional Hotel Association |
| Sweden | Hospitality sector | VISITA |
| Portugal | Hotels and Restaurants Association | APHORT |
| France | Hotels Cafes Restaurants (HCR) | FHE (UMIH, GNC, GHR) |
| Hungary | private education | Association of Private Schools |

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|-------------|--|---|
| Ireland | Railway | Iarnród Éireann/Irish Rail |
| Austria | Railway | Austrian Railways and Public Transport Association (Fachverband der Schienenbahnen) |
| ITALY | RAILWAY | FS ITALIANE |
| France | Railway | SNCF |
| Estonia | Railway | Estonian Railways Ltd |
| Lithuania | Railway transportation (passengers, cargo and railway infrastructure)) | Lithuanian railways (AB Lietuvos geležinkeliai) |
| Nederland | Railways | NS |
| Finland | Recruitment and employment industry | Employment Industry Finland HELA |
| Netherlands | Federation for Private employment agencies | ABU (Algemene Bond Uitzendondernemingen) |
| Sweden | Competence Agencies of Sweden | Competence Agencies of Sweden (Kompetensföretagen). The federation is part of Almega, a grouping of nine service sector employer/trade federations, as well as member of the Confederation of Swedish Enterprise, Svenskt Näringsliv. |
| Belgium | Temporary Agency work & services to individuals | Federgon |