

# European employers sectoral coordination – 2024 national level survey on sectoral collective bargaining trends

Date: 1 October 2024

## Table of contents

- Key findings ..... 3
- Introduction..... 5
- 1.1. Overall current collective bargaining situation at the sectoral level in the Member States ... 6
- 1.2. Capacity building needs of sectoral employer organisations ..... 12
- 1.3. Collective bargaining trends and issues in the sectors since August 2023..... 15
- 1.4. Sectoral collective bargaining agreements on wages..... 16
- 1.5. Sectoral collective bargaining agreements on the working conditions..... 19
- 1.6. Sectoral collective bargaining agreements on skills ..... **Error! Bookmark not defined.**
- Conclusions..... 20
- Annex 1: List of collective bargaining agreements identified in the survey ..... 21
- Annex 2: List of survey respondents..... 21

### List of tables

- Table 1 Overview of national sectoral survey respondents, by country ..... 5
- Table 2 Overview of national sectoral survey respondents, by sector..... 5
- Table 3 How does the collective bargaining process work in your sector? ..... 6
- Table 4 How often do you negotiate collective agreements in your sector ..... 7
- Table 5 How does your organisation take part (directly or via your members) in the collective bargaining process in your sector?..... 8
- Table 6 What do you see as the main challenges to the collective bargaining process in your sector?10
- Table 7 Do you measure the trends in collective bargaining in your sector? If yes, how (e.g. on the basis of which indicators or other tools)? If not, why not?..... 12
- Table 8 What do you see as the most important capacity building needs for your organisation? ..... 12*
- Table 9 What do you see as the most important capacity building needs in relation to your capacity to participate in the social dialogue process? ..... 13
- Table 10 Do you use ESF+ funding for building capacity of your organisation? If yes, how? If not, why not? ..... 14
- Table 11 Have these collective bargaining agreements covered on any of the key social issues?..... 15
- Table 12 Do you think any of these social issues will be top collective bargaining priorities for your organisation in the next 6-7 months? ..... 16

Table 13 Do any of the existing collective bargaining agreements in your sector include provisions for adaptation to change, including restructuring due to green and digital transitions?..... 16

Table 14 Overview of CBAs with provisions on wages, by sector and Member State..... 16

Table 15 Overview of CBAs with provisions on working conditions, by sector and Member State..... 19

Table 15 Overview of CBAs with provisions on skills, by sector and Member State **Error! Bookmark not defined.**

**List of figures**

Figure 1 Which the following topics tend to be negotiated at the sectoral and which at the company level or both? ..... 7

Figure 2 Have there been any major changes to the collective bargaining process in your sector since August 2023? ..... 8

Figure 3 Have there been any collective bargaining agreements in your sector, concluded since August 2023, either by your organisation directly or by your members? ..... 15

**Acronyms used**

AI	Artificial Intelligence
CBA	Collective bargaining agreement
ESF	European Social Fund
EC	European Commission
EU	European Union
NEET	Not in education, employment or training
SME	Small medium enterprises
STEM	Science, technology, engineering, mathematics

## Key findings<sup>1</sup>

This report summarises the results of the survey undertaken in the period May-June 2024 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 15 national sectoral employer organisations, from 11 Member States, covering three sectors (banking, construction and hospitality).

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 most cases, the sectoral employer organisations are direct parties in the negotiations and sign the collective bargaining agreements. In most sectors, the collective bargaining process did not experience any changes in the survey period.

The majority of employers organisations see a number of challenges for their sectoral collective bargaining processes. 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.

Most 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. All nine agreements negotiated included provisions on wages, with one covering also the provisions on working conditions and skills.

The majority of the organisations expect the topic of wages and working conditions to be the top collective bargaining priority.

### **Capacity building needs of sectoral employer organisations**

The top priorities for capacity building included providing support, training, counselling, information, and communication to members, strengthening the membership base, adapting internal structures to respond to member needs, and expanding services.

Employer organizations emphasized the importance of getting their voice heard in policymaking, advocating for better legislative frameworks, and having resources to participate in social dialogue activities.

---

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

Some employer organizations highlighted the importance of maintaining dialogue with local institutions and improving services to strengthen their bond with members.

Most employer organizations do not use ESF+ funding for capacity building due to barriers like lack of familiarity, access, capacity, mandate, and complicated procedures. Key needs identified by employer organizations regarding ESF+ funding included more transparent information, awareness about funding opportunities, and application support

### **Sectoral collective bargaining agreements on wages**

Nine organisations indicated the sectoral collective bargaining agreements negotiated in the survey period also included the issues of wages. Four agreements were reported in the banking sector, three in the hospitality sector and two in the construction sector. Two organisations indicated that the bargaining processes for this agreement were accompanied by strikes or other industrial action.

The strong influence of inflation on the wage related negotiations was mentioned by six out of nine respondents. Information was available on the rules negotiated in six wage-related agreements. In three agreements (construction sector in and banking sector, both in Germany and banking sector in Austria) a wage increase based on a percentage increase was reported. In three agreements rules were negotiated with respect to wages following the developments in the minimum wage (hospitality sector in France and Portugal and construction sector in Portugal).

Four organisations also reported on the aims of the signatory employer organisations in negotiating the agreements. Three referred to the aims of increasing sector attractiveness, promoting the careers of workers and maintaining the employees purchasing power, also attracting new workers to the sector. One employer organisation referred to the aim of having long-term stability and ensuring a transparent cost basis.

### **Sectoral collective bargaining agreements on working conditions**

One organisation from the banking sector in Germany indicated that the sectoral collective bargaining agreement negotiated in the survey period also included the issues of working conditions. It has indefinite duration and is applicable to all sector companies if the employer chooses to implement the agreement. The agreement is jointly implemented and supervised with the trade union. The aim was to increase the attractiveness of the sector. The agreement relates to the pensions provisions for employees, and introduces a new form of pension with shared contributions. It also applicable to the apprentices and students in the sector.

## Introduction

This report summarises the results of the survey undertaken in the period May-June 2024 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 since August 2023. The information collected covers EU-27 Member States, Norway and Iceland (not covering the non-EU/EEA countries).

The survey was completed by 15 national sectoral employer organisations, from 11 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 11 Member States responded to the survey, with employer organisations particularly active in Germany (3 responses) and 2 responses from France.

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

Member State	Number of responses
Austria	1
Belgium	1
Finland	1
France	2
Germany	3
Italy	1
Lithuania	1
Malta	1
Poland	1
Portugal	2
Slovenia	1
<b>Total</b>	<b>15</b>

In total, the survey respondents cover 3 sectors across the different parts of European labour markets. This included the manufacturing industries such as the constructions, as well as service based sectors such as banking and hospitality (see Table 2). Particularly active have been the employer organisations from the hospitality and banking sectors (7 and 6 respondents respectively).

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

Sector	Number of respondents
Banking	6
Construction	2
Hospitality	7
<b>Total</b>	<b>15</b>

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

- Section 1.1: overall current collective bargaining situation in the sectors;
- Section 1.2: capacity building needs of sectoral employer organisations;
- Section 1.3: collective bargaining trends and issues in the sectors;
- Section 1.4: sectoral collective bargaining agreements on wages;
- Section 1.5: sectoral collective bargaining agreements on working conditions;
- Section 1.6: sectoral collective bargaining agreements on skills.

The report is accompanied by the following Annexes:

- Annex 1: List of collective bargaining agreements identified in the survey with the weblinks available for further information;
- Annex 2: List of 15 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 (12 out of 15, or 80%, see Table 3) 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 3 respondents from the banking sector in France and Poland and the hospitality sector in France. In France, the respondents noted that the collective bargaining takes place at both levels, sectoral and company. However, as the majority of hospitality companies are small, industry-level negotiations reach a very wide audience. Similarly in the banking sector in France, both levels of collective bargaining are present. At the sectoral level (for example, the minimum wages agreement, forward planning of employment and skills (GPEC), professional training agreement, definition of benchmark jobs for the sector and creation of a classification agreement. At the company level, agreements are reached on the issues of working hours and telework. In Poland, all collective bargaining agreements in banks are negotiated at company level. This is because banks in Poland vary from large institutions employing thousands to small ones employing below 100, therefore bargaining and social dialogue at company level are considered to be a better solution.

In other two countries, there was no sectoral or company level collective bargaining reported (hospitality sector in Malta and Lithuania, no further explanations provided).

*Table 3 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	12
Collective bargaining agreements are mostly negotiated by individual companies in your sector	3
None of the above, there are no / very few collective agreements in your sector	2

Source: Project survey, 2024. N=15, multiple choices possible.

In around half of the sectors, collective bargaining agreements are negotiated rather frequently, every year or every two years (see Table 4). This indicates a regular updating of the collective bargaining outcomes in the sectors. The other half of the respondents chose the option “other” duration, no further explanations were provided.

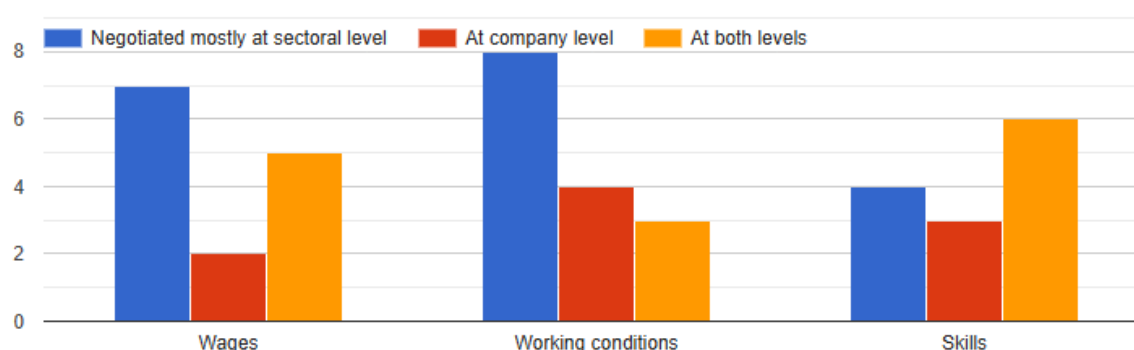
Table 4 How often do you negotiate collective agreements in your sector?

	Number of respondents
Every year	5
Every 2 years	2
Other	7

Source: Project survey, 2024. N=14.

Figure below illustrates further the interplay between sector and company level collective bargaining on the key topics of wages, working conditions and skills. On all three topics, fewest number of respondents indicated that these topics are handled at the company level. In contrast, wages and working conditions are more handled at the sectoral level, whereas the skills topic is handled both at the sectoral and company level collective bargaining.

Figure 1 Which the following topics tend to be negotiated at the sectoral and which at the company level or both?



Source: Project survey, 2024. N=15, multiple choices possible. Figure indicates the number of respondents per answer category.

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 12 organisations). This is based on a number of reasons, including on the organisations being the legally recognised representative employer organisation in the sector, as well as being the largest employer organisation in the sector. For example, in the construction sector in Portugal, as an Association representing companies in the construction Sector, AICCOPN has legitimacy, negotiates and signs the Collective Bargaining Agreement, in accordance with the provisions of the Labour Code.

In contrast, only one employer organisation plays an advisory role to their members who in turn take the lead in the collective bargaining negotiations. This is the banking sector employer organisation in Poland, PBA, which has no mandate from its members to participate directly or indirectly in these processes. Banks do this at company level. International banks also have Work Councils. Similarly, Lithuanian Association of Hotels and Restaurants (selecting the option “none of above”) also does not have a mandate from its members to participate in the collective bargaining process.

One further employer organisation in the banking sector in France AFB signs the collective bargaining agreements (sectoral level) and gives support to its members (commercial banks).

*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	12
Your organisation provides support to your members who are concluding agreements themselves	1
Your organisation takes part directly and signs the collective bargaining agreements AND Your organisation provides support to your members who are concluding agreements themselves	1
None of above	3

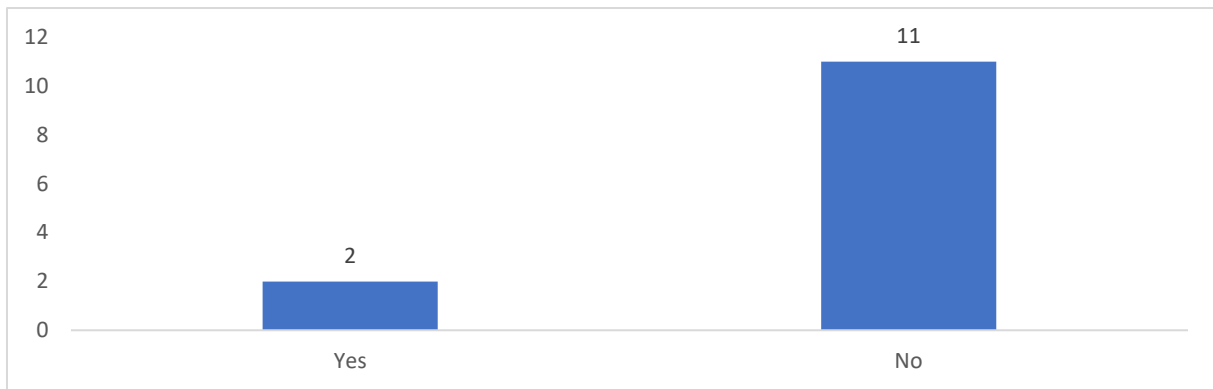
Source: Project survey, 2024. N=15, multiple choices possible.

**Two sectoral employer organisations indicated that they do not have a direct role in the collective bargaining process in their sector.** This was due to the lack of mandate for such negotiations, reported by the banking sector employer organisation in Poland and the hospitality employer organisation in Lithuania.

**In the majority of sectors, the collective bargaining process did not experience any changes in the survey period since August 2023** (see Figure 2). Changes were reported by two employer organisations. In tourism sector in Slovenia, TGZS and in the hospitality sector in Italy FIPE Confcommercio have re-started collective bargaining process with social partners in their sectors.

*Figure 2 Have there been any major changes to the collective bargaining process in your sector since August 2023?*





Source: Project survey, 2024. N=13, single response only.

Furthermore, 15 sectoral employer organisations reported on **the main challenges facing the collective bargaining process in their sectors** (see Table 6), which are many and versatile. **The majority of employers organisations see a number of challenges for their sectoral collective bargaining processes.**

**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.**

**Seven organisations reported challenges with the government’s support**, including four 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 of such challenges experienced by the employer organisations include the following:

- In the German banking sector, “the main challenges are that increasing legislation at all levels limits the room for social partners to negotiate a framework that fits for the special needs of the sector. As a result, Social Partners have little room to use their autonomy and thus demonstrate the true added value of social dialogue.”
- Similarly in the construction sector in Germany, “The Federal Government encroaches on the autonomy of collective bargaining through statutory regulations (e.g. by regulating the statutory minimum wage). This weakens the collective bargaining community in concluding industry-specific collective agreements and calls into question the motivation of the member companies in the voluntary organization.”
- In the hospitality sector in France, “on the one hand, the law places an increasing number of negotiation topics in the hands of the branches, but on the other, there is a sense of mistrust on the part of the public authorities, who closely supervise negotiations.”
- In Italy banking sector, “there is no specific regulation on who is entitled to sign a CBA. This entails that there are organisations which does not represent the majority of both the sector employer and employee that sign CBA whose provisions are worse in comparison to the provisions negotiated by organisations with the highest level of representativity.”
- Hospitality sector Portugal: “The biggest challenge is keeping up with national labour legislation, which has been changing cyclically since 2003 and has not stabilised. The unions, as a result of the COVID crises, government instability and their political affiliations, follow the paths set by the parties to which they are linked.”

**Two 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.

Table 6 What do you see as the main challenges to the collective bargaining process in your sector?

	Number of respondents
There is a lack of trust between the social partners in your sector	2
Government-related challenges:	
<ul style="list-style-type: none"> <li>The government does not respect and does not reinforce the autonomy of social partners in your sector</li> </ul>	4
<ul style="list-style-type: none"> <li>The government is not supporting politically and in practice the collective bargaining in your sector</li> </ul>	1
<ul style="list-style-type: none"> <li>There is a lack of supporting legislation for the collective bargaining in your sector</li> </ul>	2
Your organisation does not have a mandate from your members to do collective bargaining in your sector	1
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 social partners in your sector do not have a mandate from their members to do collective bargaining in your sector	1
Other: Demands for high wage increases from the union side: 1 Constant changes in the labour legislation: 1 Legal developments limiting the space for collective bargaining: 1 No further explanation provided: 3	6
Don't know	2

Source: Project survey, 2024. N=15, multiple choices possible.

Seven employer organisations also identified concrete actions they would like to see from their government to in their country to further promote collective bargaining in their sector. They include the following list:

- The government should refrain from further interference in the sphere of social partners;
- The government should stabilise the legal framework for labour law;
- Actively create areas for social partner opportunities to find solutions and use legislation only as a floor - for the national but also for the European legislators
- To give more autonomy to social partners: for example to open new fields of sectoral collective bargaining (fixed-term employment contract rules); respect the opening clauses in laws to enable deviating provisions in collective bargaining agreements;
- incentives for companies (and employees) to join professional organisations.
- legislative measures to prevent pirate bargaining from being applied and eventually enforced.

In relation to the role of the government, the concerns echo the current EU level developments where **the Council Recommendation in 2023<sup>2</sup> 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

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

for improving trust and cooperation between social partners on a bipartite level. The employer organisations were asked in the survey about the potential ways to use the 2023 EU Council Recommendation on strengthening social dialogue to achieve at the national level more space for autonomous collective bargaining in their sector. Six organisations responded they did not see further need for the Recommendation as the sectoral social dialogue is well developed in their countries.

**Three employer organisations provided indications on how the Recommendation could be used, namely:**

- Missing political actions to put the Recommendation's content to action by the European Commission. For example: Until today sectors are not directly addressed by the Commission but only via their horizontal partners, the new rules governing the organization of sectoral social dialogue make it difficult to attract new member states to the process, especially regarding central and eastern European countries. The integrating and supporting part of EU sectors for better national sectoral social dialogue is critically underestimated.
- This EU Council Recommendation and the guidelines it contemplates are obviously important to raise awareness of the relevance of collective bargaining and foster its dynamism in more sectors of economic activity.
- Further advocate the part of the recommendation that deals with the promotion of a higher level of coverage of collective bargaining.

Employer organisations were also asked about ways **the EU Action Plan on labour and skills shortages**<sup>3</sup> can achieve a better access to skills and skills matching in their sector. Six organisations responded to this question.

Four employer organisations identified that the Action Plan will support in terms of providing impetus to access existing EU funding opportunities (such as under ESF+, Erasmus etc) for upskilling and re-skilling and attracting new entrants into the labour market. For example, it can help in terms of financing new projects on activating and upskilling young people not in employment, education or training (NEETs) and setting up new skills partnerships under the Pact for Skills. Also, the expectations are that the Plan will be instrumental in providing companies with financial instruments that will allow them to invest in the training and help achieve new skills for their workers while increasing the attractiveness of the sectors. Another view was that thanks to the existing EU funds, it might be possible to revise education and training curricula to better meet the labour market needs, in order to achieve zero long-term unemployment and to activate and upskill young people not in employment, education or training (NEETs).

Two employer organisations highlighted that the Action Plan can help their existing efforts to address labour and skills shortages. Namely, in the banking sector in Belgium is very active in terms of diversity, inclusion and talent attractiveness and the Plan can help to reinforce this drive. Banking sector in Germany shows that the vocational training schemes in Germany are the result of joint tripartite discussions among employers, unions and the federal government. This is a long tradition in Germany. These results are constantly monitored and updated. Against these activities, the EU Action plan is a valuable support to recognize its importance.

Employer organisations were also asked about whether they measure the trends in collective bargaining in their sectors (see Table 7). The majority of employer organisations measure such trends, mostly through monitoring the wage developments. Other indicators include the indicators of trade union representativeness and the number of enterprises applying the sectoral CBA.

---

<sup>3</sup> [Tackling labour and skills shortages in the EU - European Commission \(europa.eu\)](https://european-council.europa.eu/media/en/press-operations/infographic-116226.pdf)

Table 7 Do you measure the trends in collective bargaining in your sector? If yes, how (e.g. on the basis of which indicators or other tools)? If not, why not?

	Summary of responses
Yes: 9	<p><i>Indicators used:</i> wages increase (also by measuring und comparing of the wages development by Westrick-formula),<sup>4</sup> holiday allowance increase, the scope and degree of representativeness of trade unions, number of enterprises applying the sector CBA</p> <p><i>Sources used:</i> economic forecasts and the various national and international initiatives that impact our sector; Annual report at sectoral level of companies agreements (= Rapport annuel de la Commission Paritaire Permanente de Negociation et d'Interpretation, CPPNI); analysing statistical information collected through surveys carried out regularly by official labour entities, such as the Labour Ministry; comparing and informal meetings of negotiators</p>
No: 5	<p>There is no CB in the sector: 1</p> <p>No further explanation: 4</p>

Source: Project survey, 2024. N=14, open text answers.

## 1.2. Capacity building needs of sectoral employer organisations

In this section, the sectoral employer organisations provided their views on the capacity building needs of their national sectoral members. The different aspects of the capacity building were defined using Eurofound's definition of capacity building and its objectives in the context of social dialogue and social partners.<sup>5</sup>

Firstly, in relation to their organisation-oriented capacities, there is a consensus between the respondents on the top priorities (see Table 8). The majority identified that the two key needs relate to provide / diversify / expand support, training, counselling, information and communication to the members, as well as strengthen the membership base of their employer organisations. Also important is the priority to adapt their internal organisational structures and work practices to respond to the needs of their members / new sector policy priorities and the priority to continue to provide / diversify / expand services for their members. Important need identified was to hire new staff and develop further the skills of their staff members – such as analytical skills, negotiation skills, other skills.

Table 8 What do you see as the most important capacity building needs for your organisation?

The needs in relation to the organisation-oriented capacities such as the membership, internal structures:

<sup>4</sup> The formula is used in the industrial relations context in Germany. In order to calculate the effective cost burden induced by the collective agreement, the percentage wage increase was multiplied by 12 in the simplified formula and divided by the number of running months, see [Das Einmaleins der Kostenrechnung - Institut der deutschen Wirtschaft \(IW\) \(iwkoeln.de\)](https://www.iwkoeln.de)

<sup>5</sup> Eurofound (2020), Capacity building for effective social dialogue in the European Union, Publications Office of the European Union, Luxembourg.

	1 least important	2 less important	3 neutral	4 important	5 very important
To continue to provide / diversify / expand support, training, counselling, information and communication to your members	1			8	5
To continue to provide / diversify / expand services for your members	1		1	7	5
To strengthen the membership base of the employer organisations		1	2	5	6
To adapt the internal organisational structures and work practices to respond to the needs of the members / new sector policy priorities	1	1	1	4	4
To hire new staff and develop further the skills of the staff members – such as analytical skills, negotiation skills, other skills	1	1	6	6	
Other	1		1		

Source: Project survey, 2024, n=15.

In relation to the capacity building needs in relation to the national members' capacities to participate in the social dialogue process, (see Table 9), **the majority of employer organisations agreed that the needs are** externally facing priorities being to get their voice heard in the policymaking process in their countries and to advocate for more conducive legislative and political framework supporting more space for collective bargaining in their sector. The second key need was to have sufficient human and financial resources to participate in the European level sectoral social dialogue activities and in their countries.

This echoes the key policy pointers on sectoral capacity building of social partners identified in the recent Eurofound study on the European collective bargaining processes<sup>6</sup>, which concluded that:

*“ The weakness or absence of collective bargaining in some Member States makes a strong case for building the capacity of the social partners in those Member States and for the establishment of frameworks and incentives to support sectoral collective bargaining”.*

*Table 9 What do you see as the most important capacity building needs in relation to your capacity to participate in the social dialogue process?*

<sup>6</sup> Eurofound (2022), Moving with the times: Emerging practices and provisions in collective bargaining, Publications Office of the European Union, Luxembourg.

	1 least important	2 less important	3 neutral	4 important	5 very important
To get the voice heard in the policymaking process in your country	1		3	7	7
To have sufficient human and financial capacity to participate in the European level activities for your sector - – such as advocacy, inputs into the policymaking at the EU level, projects, events, activities			4	5	5
To advocate for more conducive legislative and political framework supporting more space for collective bargaining in the sector			5	3	6
To ensure sufficient human and financial resources in the organisations to engage in collective bargaining, social dialogue in your country	1		7	1	5
To maintain or set up structures for social dialogue with the social partners	1	1	6	2	4
Other	1		3		

Source: Project survey, 2024, n=9.

In relation to further supporting the social dialogue structures at the national level, two employer organisations provided further information. One noted that there is no collective bargaining at the sectoral level; the other noted that “always bear in mind the importance of strengthening the bond with our membership base. This entails both improving and diversifying our services. At the same time, in order to be a key player in the Bar & Restaurant sector, we consider pivotal maintaining a dialogue with our local institutions, in order to support any legislation that might be in our favour.”

The majority of employer organisations do not use ESF+ for their capacity building needs (see Table 10). The reasons given by employer organisations for not using the ESF+ funding are multiple and point to a range of barriers, including the lack of familiarity, lack of access, lack of capacity, lack of mandate<sup>7</sup> as well as the complicated procedures to access the Fund. Therefore, the key needs here identified by employer organisations relate to more and better, more transparent, timely and easy to understand information, more awareness about the funding opportunities, and application support.

*Table 10 Do you use ESF+ funding for building capacity of your organisation? If yes, how? If not, why not?*

	Summary of responses
No: 12	No access: 1 Lack of familiarity: 2 Too complicated: 2

<sup>7</sup> This was identified by a banking sector employer organisation which explained that they do not have a mandate from their members to apply for such funding and participate in the projects.

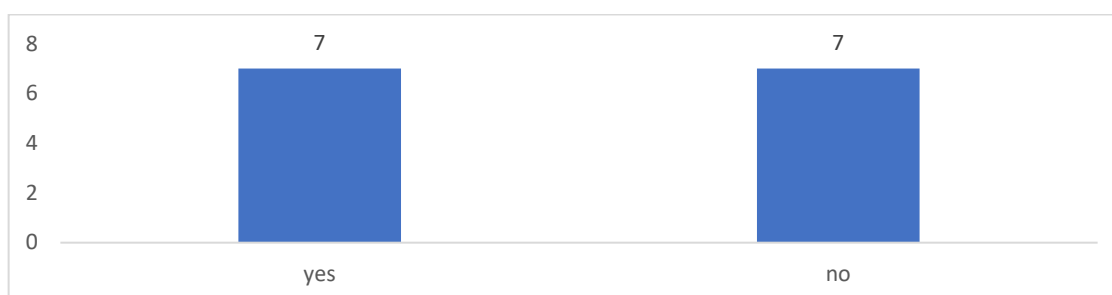
	No capacity: 1 No mandate: 1 ESF+ is not oriented towards the needs of employer organisations: 1
--	--

Source: Project survey, 2024, n=12.

### 1.3. Collective bargaining trends and issues in the sectors since August 2023

Half of employers organisations have reported new collective bargaining agreements in their sectors in the survey period, since August 2023 (see Figure 3). This was reported by 7 organisations. This indicates a high level of collective bargaining activity in the survey period.

*Figure 3 Have there been any collective bargaining agreements in your sector, concluded since August 2023, either by your organisation directly or by your members?*



Source: Project survey, 2024, n=14.

**All nine agreements reported<sup>8</sup> negotiated included provisions on wages. One agreement also included the rules on the working conditions** (see Table 11). This demonstrates the centrality of wage related issues in the sectoral collective bargaining processes in the Member States.

*Table 11 Have these collective bargaining agreements covered on any of the key social issues?*

Topics	Yes
Wages	9
Working conditions	1

Source: Project survey, 2024, N=14. 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 12). **The majority of the organisations expect the topics of wages and working conditions to be the top collective bargaining priority (reported by 8 organisations). Comparatively lower is the number of organisations expecting the skills to be the top collective bargaining priority (reported by 5 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 4 organisations do not plan collective bargaining round in the next months following the survey.

<sup>8</sup> It appears that the answers in Figure 3 and Table 11 do not match, as seven organisations reported concluding the agreements, but nine organisations indicated the agreements on wages in the follow-up question. All nine agreements on which information was provided are analysed.

Table 12 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	8	2		3	13
Working time	8	3	1	2	14
Skills	5	3	1	4	13

Source: Project survey, 2024, N=14.

As shown in table below, three sectoral employer organisations reported that their collective bargaining agreements in the sector contain providing for adaptation to change, including due to digital and green transitions.

Table 13 Do any of the existing collective bargaining agreements in your sector include provisions for adaptation to change, including restructuring due to green and digital transitions?

Yes: 3	No: 8
<ul style="list-style-type: none"> <li>Banking sector Belgium: Febelin’s 2023-2024 Convention provides for reflections on themes such as mobility, use of AI and sustainability (ESG)</li> <li>Banking sector Germany: to change/restructuring: in order to prevent job loss and use skilling as an alternative to job loss</li> <li>Banking sector Austria: teleworking / home-office</li> </ul>	

Source: Project survey, 2024, N=11.

1.4. Sectoral collective bargaining agreements on wages

Nine 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 Austria, Germany, France, Finland, and Portugal (5 Member States) and three sectors of banking, construction and hospitality (see Table 14 below).

Four agreements were reported in the banking sector, three in the hospitality sector and two in the construction sector. In terms of the coverage of the collective bargaining agreements including provisions on wages, four agreements were applying to all sector employers, and three were reported to have a more partial coverage. Four agreements were supervised jointly between the employer organisation and trade union, and no agreements not supervised at all.

Two organisations indicated that the bargaining processes for this agreement were accompanied by strikes or other industrial action (this was reported by the banking sector and construction sector in Germany). In contrast, seven organisations noted the absence of such strikes and other industrial actions.

Table 14 Overview of CBAs with provisions on wages, by sector and Member State



Sector	MS	Name of CBA	Modalities of the agreements
<b>Banking (4)</b>	Austria	KOLLEKTIVVERTRAG betreffend Änderungen des Kollektivvertrages für Angestellte der Banken und Bankiers	increase of collective minimum wages: 7.25% plus 37.50 EUR (on average plus 8.3%)
	Finland	Collective Agreement of Financial sector	No further information
	Germany	Gehaltstarifvertrag	it contains amount of wages according to wages scales included not in this agreement, but in the underlying basic collective agreement
	France	Accord Salarial 2024	No further information
<b>Hospitality (3)</b>	Germany	Several agreements	No further information
	France	Number linked to the collective agreement	compulsory annual negotiations, and compulsory negotiations when the minimum wage exceeds the lowest level in the sector
	Portugal	CCT APHORT FESAHT e CCT APHORT SITESE <sup>9</sup>	To follow the minimum wage
<b>Construction (2)</b>	Germany	Tarifvertrag zur Regelung der Löhne und Ausbildungsvergütungen im Baugewerbe, Tarifvertrag zur Regelung der Gehälter und Ausbildungsvergütungen im Baugewerbe	Procentual wage increases
	Portugal	"Contrato Coletivo de Trabalho (CCT) aplicável ao Setor da Construção Civil e Obras Públicas" (Collective bargaining agreement of the construction sector) <sup>10</sup>	The main criteria for negotiating and setting the wages are the degree of skills, specialization and experience of the workers, which will then be translated into the minimum wages defined for each of the 18 professional Groups contemplated in the Sector's Collective Bargaining Agreement.

Source: 2024 project survey, n=9. 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 six out of nine 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.

<sup>9</sup> <http://bte.gep.mtsss.gov.pt/documentos/2024/5/01160118.pdf>

<sup>10</sup> [BTE\\_13\\_2024\\_CCT Construção Civil 2024.pdf - Google Drive](#)

Information was available on the rules negotiated in six wage-related agreements. In three agreements (construction sector in and banking sector, both in Germany and banking sector in Austria) a wage increase based on a percentage increase was reported. In three agreements rules were negotiated with respect to wages following the developments in the minimum wage (hospitality sector in France and Portugal and construction sector in Portugal).

Four organisations also reported on the aims of the signatory employer organisations in negotiating the agreements. Three referred to the aims of increasing sector attractiveness, promoting the careers of workers and maintaining the employees purchasing power, also attracting new workers to the sector. One employer organisation referred to the aim of having long-term stability and ensuring a transparent cost basis.

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 2024-2025 period)**.

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

**Four wage related agreements were reported in the Banking sector.** Information was available on two agreements. In Austria, an approximately 8% wage increase was reported, whereas in Germany the amount of wages was defined according to wages scales included not in this agreement, but in the underlying basic collective agreement.

Two wage related agreements were reported in the Construction sector. Information was available on two agreements. In Germany, the rules involved a wage increase based on a percentage. In Portugal, The main criteria for negotiating and setting the wages are the degree of skills, specialization and experience of the workers, which will then be translated into the minimum wages defined for each of the 18 professional Groups contemplated in the Sector's Collective Bargaining Agreement.

**Three wage related agreements were reported in the Hospitality sector.** Information was available on two agreements. In France, the rules involved compulsory negotiations when the minimum wage exceeds the lowest level in the sector. In Portugal, the rules were defined to follow the minimum wage.

A new agreement was also reported in the **chemical sector in Germany**, see Box below.

**Box 1: Collective agreement in the chemicals sector, Germany, September 2024**

The new collective agreement in the chemical industry in Germany by employer organisation BAVC and trade union IG BCE applies from September 2024. The agreement covers around 585 000 employees and 1,700 companies in the sector. It introduces a salary increase of 2% effective from 1 September 2024, followed by a 4.85% increase on 1 April 2025. The agreement includes provisions for postponement of salary increase for chemical companies in case of economic difficulties. The agreement also modernises wage structures, allowing digital pay slips and improves the remuneration corridor to maintain the sector competitiveness. The latter makes it possible to reduce the remuneration of employees within a 10% limit, subject to the agreement of the parties to the collective agreement and can now be used without time limit to preserve specific sites and/or jobs.

A strategic initiative in the agreement aims to adapt collective agreements by 2030 to evolving work challenges in the sector. The objective is to adapt the agreements by 2030 to the challenges of constantly evolving structural aspects of the sector as well as simplifying them.

Additionally, an online platform called "regional manpower radars" introduced in the agreement will help to retain talent by connecting the sector companies with qualified personnel. Finally, unionised employees will receive one day of additional paid leave as a reward for their union engagement, with specific conditions for eligibility.

Source: [Der Mantelvertrag: Rahmenbedingungen für Arbeitsverhältnisse \(bavc.de\)](https://www.bavc.de/der-mantelvertrag-rahmenbedingungen-fuer-arbeitsverhaeltnisse)

[Tarifrunde #Chemie24: Tarifabschluss erzielt \(bavc.de\)](https://www.bavc.de/tarifrunde-chemie24-tarifabschluss-erzielt)

### 1.5. Sectoral collective bargaining agreements on the working conditions

1 organisation from the banking sector in Germany indicated that the sectoral collective bargaining agreement negotiated in the survey period also included the issues of working conditions. It has indefinite duration and is applicable to all sector companies if the employer chooses to implement the agreement. The agreement is jointly implemented and supervised with the trade union. The aim was to increase the attractiveness of the sector. The agreement relates to the pensions provisions for employees, and introduces a new form of pension with shared contributions. It also applicable to the apprentices and students in the sector.

Table 15 Overview of CBAs with provisions on working conditions, by sector and Member State

Sector	MS	Name of CBA	Modalities of the agreements
Banking	Germany	TV Altersverorgung und Tarifvertrag fuer Auszubildende und Studierende (collective agreement for apprentices and students)	all employees can participate in the new form of pension if the employer chooses to implement the agreement. All Apprentices/students are covered.

Source: 2024 project survey, n=14. Please note that weblinks are provided where they were given by the survey respondents.

For more information on this collective agreement and its provisions on pensions, see Box below.

#### Box 2: collective agreement on pensions, private banking sector, Germany

In November 2023, the social partners in the private banking sector in Germany have reached a new collective agreement on the pensions. Its main rules are as follows.<sup>11</sup>

The decision on whether the new model will be implemented lies with the companies. In companies with a works council, the implementation primarily occurs through a works agreement, which regulates certain details (such as the eligible group of persons, the employee contribution share, and possible financing forms); the employer's contribution share is already conclusively regulated in the collective agreement. The collective bargaining parties have agreed on a model works agreement, which is an annex to the collective agreement.

The model allows for a pure contribution commitment, where employers are only obligated to pay contributions to a pension institution without liability for specific pension benefits, enabling higher potential returns on investments. The pension fund offers two financing options: an opportunity-oriented variant with higher returns and a security-oriented variant. Both options are applicable to companies with and without collective bargaining agreements.

<sup>11</sup> [Pressemeldung \[Nov 23, 2023\] — AGV Banken](https://www.agv-banken.de/pressemitteilung/2023/11/23)

In the first two years after its introduction, the employers organised under the collective agreement will make a total contribution of 1.75 % of the gross monthly base salary, in the following two years 2.0%, and subsequently 2.25 % (maximum level). In companies without collective agreements, these levels are lower (starting level 1.15 % / intermediate level 1.4 / maximum level 1.65 %); this makes it easier for these companies to offer retirement benefits to previously uncovered employees and thus increase their overall coverage.

Employee contributions are set at a minimum of 1.0% of gross salary, with special provisions for lower-income employees, allowing for higher employer contributions and potentially waiving employee contributions altogether. For employees with lower incomes (monthly gross salary currently a maximum of 2,575 euros), the employer contributes directly upon the introduction of the social partner model the maximum contribution of 2.25 % (collectively covered companies) or 1.65 percent (non-collectively covered companies).

## Conclusions

The survey collected the most recent information from 15 national sectoral employer organisations about the latest sectoral social dialogue processes and the collective bargaining agreements in 11 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.

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

The links to the following agreements were provided in the survey.

Hospitality	Italy	<b>CONTRATTO COLLETTIVO NAZIONALE DI LAVORO PER I DIPENDENTI DA AZIENDE DEI SETTORI PUBBLICI ESERCIZI, RISTORAZIONE COLLETTIVA E COMMERCIALE E TURISMO</b> Testo Ufficiale – 8 febbraio 2018 <sup>12</sup>
Hospitality	Portugal	CCT APHORT FESAHT e CCT APHORT SITESE <sup>13</sup>
Construction	Portugal	"Contrato Coletivo de Trabalho (CCT) aplicavel ao Setor da Construo Civil e Obras Publicas" (Collective bargaining agreement of the construction sector) <sup>14</sup>

## Annex 2: List of survey respondents

Sector:	Country:	Organisation:
1. Finance/Banking	Austria	Austrian Bankers Association
2. Banking	Belgium	Febelfin
3. Service sector employers Palta	Finland	Palta Financial sector
4. Banking	France	Association Francaise des Banques (AFB)
5. HCR	France	GHR
6. hospitality	Germany	DEHOGA
7. Private Banking Industry	Germany	Arbeitgeberverband des privaten Bankgewerbes e.V.
8. Construction industry	Germany	Zentralverband Deutsches Baugewebe

<sup>12</sup> [CCNL Fipe \(the text\) - FIPE](#)

<sup>13</sup> <http://bte.gep.mtsss.gov.pt/documentos/2024/5/01160118.pdf>

<sup>14</sup> [BTE\\_13\\_2024\\_CCT Construção Civil 2024.pdf - Google Drive](#)

9. Bar & Restaurant	Italy	FIPE Confcommercio
10. Hospitality	Lithuania	Lithuanian Association of Hotels and Restaurants
11. Hospitality	Malta	Malta Hotels and Restaurants Association
12. banking	Poland	Polish Bank Association (PBA)
13. Tourism ( Restaurants and Accommodation)	Portugal	APHORT-Portuguese hotel, catering and tourism association
14. Construction	Portugal	Associaco dos Industriais da Constructo Civil e Obras Publicas - AICCOPN
15. Tourism	Slovenia	TGZS