

# BARSERVICE



## Smart bargaining in the services sector: overview, challenges, opportunities

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## Bibliographical information

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## Introduction

This methodological toolkit will explain in detail the structure of the CBAs Database and how it works in terms of the whole coding process: the codebook, the CBAs database team involved in the coding, sampling and collection criteria, CBAs anonymization, analysis and related outputs and outcomes within the international public social bargaining debate. Each topic can be further investigated following the links provided in each paragraph.

All the steps of the process that bring from the collection of a collective agreement to its actual annotation, analysis and publication on the Wageindicator Database Websites will be thoroughly described in order to guarantee the maximum transparency regarding the applied methodology.

### **BARSERVICE project's target focuses on the following Services Sector collective agreements' NACE codes**

Commerce (including wholesale and retail, NACE 45, 46 and 47), Publishing (NACE 58), Finance (NACE 64), and Social Care (NACE 87 and 97).

### **BARSERVICE Countries' sample**

While the spectrum of the analysis will be opened to all the Services sector' Collective Agreements in the EU 27 plus candidates countries contained in the WIF Database - as per the same BARSERVICE project's target and guidelines -, the priority is assigned to the following 9 countries:

Croatia, Czechia, France, Italy, North Macedonia, Romania, Slovakia, Serbia, Türkiye.

### **BARSERVICE CBAs target in numbers**

The BARSERVICE project aims at collecting and analysing at least 72 collective agreements from the previously mentioned services sector/countries.

### **The CBAs' analysis is made according to the following 12 main labour topics and related sub-subjects:**

1. **Job titles** (job descriptions and job classification system).
2. **Social security and pensions** (pension, disability and unemployment funds).
3. **Training** (general training/apprenticeship, training programmes related to remote work, training programmes related to the introduction of green provisions at work, training programmes for the use of advanced technologies at work).
4. **Employment contracts** (trial period, severance pay, dismissal, part-time and temporary agency workers).
5. **Sickness and disability** (sick leave, disability and work accidents).

6. **Health and medical assistance** (health insurance, health and safety workplace policy, medical checkup or visits provided by the employer, support to funeral/burial costs for employees or their relatives, COVID-19 and HIV related clauses).
7. **Work/family balance arrangements** (maternity leave, pregnancy and breastfeeding, leave for marriage, death and care of children and relatives).
8. **Gender equality issues** (equal pay for work of equal value, discrimination, violence and sexual harassment at work).
9. **Wages** (wages pay scales, minimum wage, wages increases, overtimes, premiums, bonuses and extra payments, seniority, hardship shift, transport and meal allowances).
10. **Working hours** (working hours, schedules, rest periods, flexible work arrangements, holidays and days of leave).
11. **Workers' Representation & Conflicts** (i.e., workers participation in the institution of a bilateral commission or a works council, reference to conflicts and/or strikes).
12. **New Technologies & Green clauses** (introduction of advanced technologies including Artificial Intelligence and Algorithmic Management, provisions related to environmental issues, climate change and/or anything that aims at improving the working conditions by providing a greener workspace).

#### **Conceptual notes on the used methodology in the BARSERVICE project**

- a) The analysis and findings of the project's related reports will exclusively be based on the annotation and further analysis of the Services Sector CBAs contained in the WageIndicator Collective Agreements Database; hence, the whole CBAs analysis and related findings that will follow must be seen in this same framework.
- b) CBAs' annotation and analysis will focus exclusively on the contents that are clearly and explicitly stated in the texts of the agreements, regardless of personal assumptions and/or what might be established by the labour law in other separate and different documents.
- c) This methodological toolkit reflects the research approach used by the authors of this document.
- d) The contents of this document solely reflect the opinion of the authors and do not necessarily reflect the official opinion of the European Commission.

## **1.The WageIndicator Collective Agreements Database**

### **1.1. What is a collective bargaining agreement?**

When independent labour unions and employers (or employers' organisations) engage in negotiations to establish terms and conditions of employment and regulate their relationship, this process is known as "collective bargaining" (as defined by ILO Convention 154). The resulting written document from these negotiations is called a collective bargaining agreement (CBA). These agreements can be established either at the company level (involving one or multiple companies), at the sector level, or even at an inter-professional level, encompassing all workers within a country.

A CBA sets the terms and conditions of employment, it is effective for a specified duration which is stated in the agreement itself but, unlike regular contracts, the parties' obligations do not end on the expiration date, unless a new CBA is negotiated by the social partners. The significance of collective bargaining agreements is recognized worldwide; however, only a few countries maintain comprehensive databases documenting the provisions agreed upon in these agreements. Moreover, even in cases where such databases exist, such as in the UK, Netherlands, New Zealand, and Brazil, they are not comparable across countries.

Since 2012, the WageIndicator Foundation has been actively collecting and categorising CBAs on a global scale within the WageIndicator Collective Agreements database.

### **1.2. The WageIndicator Collective Agreements Database**

WageIndicator Foundation holds responsibility for the Collective Agreements database. The foundation operates national websites in 206 countries (including territories and overseas areas) across all continents, catering to the general public with labour-related content. As part of Development Aid projects in collaboration with social partners in the global south, WageIndicator began collecting collective agreements in December 2012 with the intention of publishing their complete texts on its websites. The primary goal was to enhance working conditions and attain decent wages by promoting the use and circulation of collective agreements in actual negotiations. In all participating countries, social partners expressed great interest in publishing their CBAs, recognizing it as an effective and cost-efficient method of communicating the outcomes of their bargaining efforts to their constituents and a broader audience. These partners submit the texts of their agreements to WageIndicator to be entered in the database. By the end of 2023, WageIndicator has collected, analysed and published more than 2600 collective agreements from 64 countries worldwide. These agreements are available in 27 different languages.

### **1.3. The CBA database as an international tool**

The WageIndicator CBA database and its related coding scheme have been conceived as an international and comprehensive tool, in order to collect, host, analyse and compare collective agreements from all over the world, at all bargaining levels (national, sectoral, company). CBA sampling is, each time, customised according to specific projects' requirements, in terms of countries, industries (based on NACE codes), coverage, bargaining level and time range. The database allows to conduct reliable and customised

statistical analysis, because it is accessible using statistical software. Comparative analysis, in particular, can be performed at many levels, such as cross-country comparison on some topics/provisions, changes over time in one country/sector/CBA, variations between different CBA types and qualitative analysis on specific clauses.

Almost all CBAs are published full text on WageIndicator's national webpages. Employees, employers, trade unions, employers' associations, NGOs and researchers can freely access these texts. As the texts are coded, web visitors can also compare the coded CBA information across industries and across countries. The Collective Agreements can be accessed from [each country](#) website or from the [platform economy](#) webpages.

## **1.4. The CBAs collection process**

The WageIndicator CBA database applies three approaches for gathering the collective agreements:

- Downloading from national registries or official national archives
- Downloading from websites where signatories have published their CBA, using smart Google searches
- Directly asking the bargaining social partners (trade unions and employers' organisations) for full text agreements

Overall, in recent years, social partners signatories publish their CBAs online more frequently and gathering their agreements has become easier; while, for certain countries, the collection process keeps being quite problematic and challenging.

## **1.5. Anonymity**

When asking for the full text agreements, sometimes signatories are reluctant to share their CBAs. This happens for competitive reasons, or because CBAs are claimed to be available and accessible only for the signatories' parties. The WageIndicator CBA database is able to guarantee total anonymity - if explicitly requested - to both the signatories of the agreements as well as the people who would like to share them with the database team. To ensure anonymity two options are provided:

- The CBA can be fully hidden to the public. This means that the text will not be published on the WageIndicator website and that it will only be coded and analysed internally solely for research purposes.
- The CBA can be published but without showing any sensitive data regarding the signatories. All data regarding the names and affiliations of the signatories are deleted by the team prior to publishing the text of the agreement on the WageIndicator website.

## **1.6. Sampling of CBAs**

The number of multi- and single-employer collective agreements throughout the European Union is estimated at slightly over 85,000, based on an inventory of CBA registries in 2020 and updated in 2021/22

(Tijdens et al, 2022). Data regarding the number of CBAs worldwide is missing, but an educated guess would point to double this number. Given these large numbers, it is important to assess how the relatively small number of 2600+ CBAs in the database can be used for generalising findings to the entire labour market. Collective Agreement analysis is also a crucial part of our [DecentWorkCheck](#) Projects, which assess awareness of and compliance with Labour Laws in factories.

Three methods are followed to select which CBAs are entered into the database:

- The collection of CBAs is in part funded from projects and these are determining which CBAs are gathered.
- Other projects aim to gather CBAs from all industries until a threshold is reached, depending on their availability.
- CBAs are gathered to achieve a representative sample of CBAs for the selected industries and countries.

## 1.7. The coding process

Gathered CBAs can have various formats: Word, PDF, JPEG, or even a printed booklet. These formats need to be converted, or 'cracked', through an OCR (Optical Character Recognition) software. In a next step, an HTML editor software is used to assign headings for titles, chapters, and articles. Then, the text can be uploaded in HTML format in the WageIndicator CBAs database. The whole "conversion" process is a time-consuming effort, specifically in case of long full texts, in case of numerous tables and graphs, or in case the original text is in JPEG format.

Once texts are uploaded on the database platform they are ready to be coded. The coding process consists of answering a series of questions and finding, for each question, the appropriate paragraph, the so-called 'clause', that answers that specific question. The collective agreements are annotated according to a coding scheme with more than 1000 variables and relate to fourteen macro topics (and related sub-questions):

- General CBA data
- Job titles
- Social security and pensions
- Training
- Employment contracts
- Sickness and disability
- Health and medical assistance
- Work/family balance arrangements
- Gender equality issues
- Wages
- Working hours
- Workers' Representation & Conflicts
- New Technologies & Green clauses
- Coverage

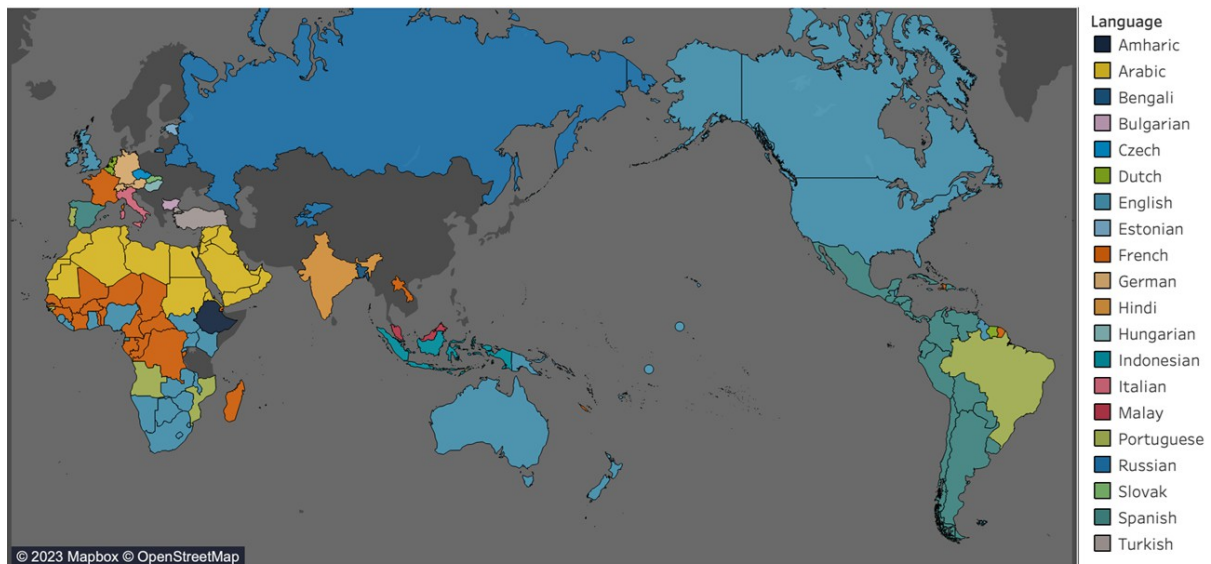


The coding scheme is updated to incorporate changes in the world of work, such as COVID-19 clauses or flexible work arrangements, such as remote work, green provisions and AI/AM related contents. CBAs already in the database can be coded backward in order to create time-line series of the same CBA and point out how the same collective agreement has evolved or improved along the years. The CBAs dataset allows to identify which coding scheme is used for the annotation of each collective agreement. The latest version of the codebook is available here: [Codebook Ceccon and Medas, 2023](#).

### 1.8. The WageIndicator CBA database team

The annotators working on the CBAs database are skilled and experienced professionals who are able to manage multiple languages. The Figure below shows the countries potentially covered by all the languages spoken (20) in the group of annotators. If needed, the team can be expanded to include more languages.

Figure 1 Countries covered by the languages spoken in the group of annotators.



Source: WageIndicator Collective Agreements Database (2024).

On top of the linguistic skills, all team members have a deep knowledge and understanding in the field of industrial relations and collective bargaining. All annotators can work remotely from different parts of the world, having the chance to instantly connect online with other team members any time by using an internal communication channel in the database platform. This is used as an opportunity for sharing knowledge, new ideas or doubts regarding the annotation.

## 2. Output and outcomes of the database

### 2.1. CBAs Web pages

The annotated CBAs texts are published on the national WageIndicator websites, in national languages. In these sites users can browse the CBAs in their countries, select relevant clauses, view CBAs visualisations and read annotations. The list of countries with related web pages can be found here: [Collective Agreements Database](#).

### 2.2. [Model Collective Agreements](#)

The database with full texts is used to generate model agreements, with the most optimal clauses per country. The CBA team has made model agreements for Burundi, Colombia, El Salvador, Ghana, Guatemala, Kenya, Rwanda, Tanzania, and Uganda, as well as an agreement focused on improved gender clauses in Spain. See [Model Collective Agreements](#).

### 2.3. Database with full texts and coded topics

A file with the full collective agreements' texts; these texts are annotated, indicating the sentences in the texts relevant for the coding of a topic, as selected by the annotator.

A file with the coded topics; the full list of questions is available in the WageIndicator Collective Agreements Database Codebook. See the latest [Codebook Cecon and Medas, 2023](#).

### 2.4. Monthly data dump for statistical analyses

Each month a data dump of this file with coded topics is generated for statistical analyses, and used in research projects. The datafiles used for specific projects are stored in the publicly accessible data archive Zenodo: <https://zenodo.org/records/5651624>

### 2.5. Comparison tool

The comparison tool permits for easy analysis and comparison of selected topics in collective bargaining agreements captured in the WageIndicator CBAs database, and can easily be accessed through the [national country websites](#).

## 3. CBA collection targets and strategies

The project aims at collecting, annotating and analysing at least 72 collective agreements in the services sector from the following 9 countries: Croatia, Czechia, France, Italy, North Macedonia, Romania, Slovakia, Serbia, Türkiye. This means that from each country at least 8 CBAs will be collected. Each partner involved in the project is responsible for the collection of its share of CBAs according to its country of origin.

In case one or more countries would not be able to reach the target of 8 CBAs (each), it will be possible to compensate the missing amount with a surplus of CBAs from other countries, in order to reach the general project target.

The collective agreements selection and collection are narrowed to the **following NACE sector codes**:

- Commerce (including wholesale and retail, NACE 45, 46 and 47)
- Publishing (NACE 58),
- Finance (NACE 64),
- Social Care (NACE 87 and 97).

As per the collection strategies applied by the project partners, they are invited to gather the CBAs through these main channels:

- From social partners: trade unions and employers organisations
- From official collective agreements national archives, if possible.
- From websites where signatories have published their CBAs, using smart Google searches

The collected CBAs should be submitted to the team responsible for this task (WageIndicator). If required with the signatory parties of a CBAs, before the submission the CBA can be anonymized to hide the identity of the employer at which the CBA has been concluded. The CBAs is then stored securely as part of the WageIndicator dataset of CBAs, coded for a list of variables (see Section 2 above) and analyzed to provide a main overview of what do CBAs regulate in the European services sectors, with special attention to green and digital clauses.

## ANNEX 1: Codebook

### Codebook WageIndicator Collective Agreements Database - Version 6 - 2023

The WageIndicator Collective Agreements Database coding scheme has been conceived as an international tool in continuous evolution, updated to incorporate the most recent changes in the labour world, such as: Industry 4.0., Green provisions, COVID-19 clauses, flexible work arrangements - such as remote work-, AI/AM (Artificial Intelligence and Algorithmic Management clauses).

Collective Agreements already in the database can be coded backwards in order to create time-line series of the same CBAs and point out how the same collective agreement has evolved or improved along the years. The CBAs dataset allows to identify which coding scheme is used for the CBAs analysis.

The full version of the latest codebook (2023) is available here: [Codebook Cecon and Medas, 2023](#).