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Wage Bargaining in the Context of Liberalisation of Industrial Relations in Europe: A comparison of nine countries and four sectors

BARWAGE Report No. 12

Janna Besamusca¹ and Marta Kahancová²

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¹ Contact: University of Utrecht, Department of Interdisciplinary Social Sciences, j.w.besamusca@uu.nl.

² Contact: Central European Labour Studies Institute, Zvolenská 29, 821 09 Bratislava, Slovakia.
kristina.gotthardova@celsi.sk, marta.kahancova@celsi.sk.

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Abstract

This report explores how collective wage setting across 9 EU Member States and 4 sectors therein is practiced, to assess trends towards more individualized/discretionary wage setting mechanisms. The report summarises country-specific evidence collected in individual country studies on how collective and individual wage setting co-exist and interact with each other, and what other challenges can be identified in the wage setting system, both across countries and sectors. The analysis builds on original empirical evidence conducted by a team of researchers within the BARWAGE project in 2022-2024.

Keywords: wage setting, collective bargaining, statutory minimum wage, industrial relations

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BARWAGE investigates the potential of collective bargaining as a tool for ensuring adequate minimum wages in the European Union. It explores the size of four wage-setting arenas across EU countries and industries: the national or peak level, sector-level collective bargaining, firm-level collective bargaining, and individual (non-collective) negotiations. BARWAGE uses microdata to identify what share of the workers are earning under 110% of the statutory minimum wage are covered by sectoral or enterprise collective bargaining. Using coded data of 900 CBAs from 9 EU countries, the presence and nature of pay scales in the sectoral and firm-level collective bargaining agreements (CBAs) are analyzed. To deepen the insight into the impact of collective wage bargaining, national level data will be used to detail the wage arenas in 2 EU countries (Netherlands and Italy). The project lasts 2 years (2022-2024) and includes 6 work packages.

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Introduction

Wage setting belongs to core issues in collective bargaining (CB). However, neo-liberalization of collective bargaining, as discussed by Baccaro and Howell (2017), poses conflicting challenges on collective bargaining as a wage setting mechanism. In fact, the question is to what extent bargaining maintains its role, and to what extent wage setting is being shifted towards more market-oriented practices, including greater employer discretion on wages (Ibsen and Keune 2018). Greater discretion allows employers to exercise more control over wage-setting rather than adhering strictly to collectively negotiated agreements.

Additionally, there has been a significant move towards the decentralization of wage bargaining, which has led to a decrease in the coverage of agreements (ibid.). This decentralization often results in less comprehensive wage provisions, as negotiations tend to become less detailed and expansive, for example by fixing only wage floors or specifically allowing individual firms to pay out bonuses and premiums on top of bargained pay rates. Furthermore, the fragmentation of wage components has become more common, with wage structures becoming increasingly disjointed and complex, further complicating collective bargaining efforts. These pressures collectively challenge the effectiveness and cohesion of collective wage bargaining in Europe.

Within this general context, the current report explores how collective wage setting in Europe is practiced, to question trends towards more individualized/discretionary wage setting mechanisms. The report summarises country-specific evidence collected in individual country studies on how collective and individual wage setting co-exist and interact with each other. The report builds on original empirical evidence conducted by a team of researchers within the BARWAGE project in 2022-2024. The report has a dual focus. First, it summarises the key findings from across 9 EU Member States showing the European diversity of collective bargaining systems and their responses to the common challenge of wage setting liberalisation. Second, the focus is on a comparison of four sectors across the studied 9 countries, which also highlight the diversity of labour force and the sectoral characteristics, allowing an analysis on wage bargaining structures and trends therein from a different angle.

The countries covered include Austria, Bulgaria, Czechia, Estonia, France, Italy, the Netherlands, Portugal and Spain. The sectors studied include (urban) public transport, construction, waste management and hospitality. These sectors highlight a diversity in wage setting with or without bargaining in public vs. private services, and also among low-wage and/or precarious workers (e.g., due to seasonality in the hospitality sector) and workers in more standard employment situations (e.g., public transport). Moreover, the studied sectors also demonstrate different trade union bargaining power, e.g. workers in the waste management and urban transport have a large structural bargaining power, or an ability to distract the functioning of essential (public) services, than workers in private sectors.

The provided evidence is a summary of individual country evidence within the BARWAGE project. The data collection methods in all countries included desk research as well as original research interviews. All individual interviews were conducted by the authors, online or offline, in English or the local language. All interviews that were recorded upon the consent of the respondent were later transcribed using transcription software. In interviews without recording, the authors took detailed notes. The qualitative data were subject to analysis of the authors of the respective country reports. All country reports are included in the list of references.

The report is structured into three main parts. The first part provides an analytical framework that guided the empirical study. The second part provides short country summaries based on individual country reports. The third part provides a sectoral focus, summarising the key findings across four studied sectors in 9 countries. The concluding section summarises the key findings in the light of the analytical framework, focusing on the dominant wage setting mechanisms, the role of collective bargaining vis-à-vis individual employer discretion in wage setting.

1. Analytical framework

Wage setting is a core issue in collective bargaining, a fundamental pillar of industrial relations in Western political economies. In post-war Western Europe, these relations became strongly institutionalized, characterized by collective governance and rulemaking (Streeck 2011). However, this structure varies across European countries, leading to diverse wage-setting models. These range from corporatist systems in Nordic countries to liberal models in the UK and Ireland, and statist systems in France, Spain, and others. The EU enlargements in 2004 and 2007 further diversified these models, particularly with the inclusion of post-socialist Central and Eastern European (CEE) countries. CEE countries have been categorized into liberal systems (e.g., the Baltics), embedded neoliberal systems (e.g., Visegrad countries), and Slovenia as a contested corporatist system (Bohle and Greskovits 2012).

While literature on varieties of capitalism suggests institutional stability with incremental changes, recent pressures of liberalization have challenged this stability. Baccarro (2022) argues that liberalization is shifting the responsibility for wage setting from collective bodies to individual actors, though the mechanisms differ by country. For instance, while in countries like Italy or Sweden the decentralization of industrial relations occurred through institutional conversion rather than institutional deregulation, in other countries, e.g., Germany, the UK and France, the liberalization of industrial relations occurred via a so-called organized decentralization primarily through formal institutional deregulation (Ibsen and Keune 2018).

Within these broader trends, a variety of potential interests of workers and employers, and changing roles of trade unions, governments and employers' associations, the BARWAGE project sheds light on the actual processes of wage setting across different industrial relations systems in Europe. If liberalization is indeed occurring, the aim is to empirically show how exactly is it occurring, which actors are involved, what is the starting point of this process and where does it lead to in terms of institutional stability or change. Besides providing a country-specific overview of wage setting, the focus is on a sectoral comparison across these countries. This is not only because of varying bargaining powers across sectors, but also because the relevance of sector-level bargaining, or at least multi-employer bargaining, has been stressed (Ceccon et al. 2023).

To operationalize this broad aim, the BARWAGE project starts with an assumption that collective wage setting is important across European countries as one of the pillars of capitalist governance of political economy. Yet, it questions whether and how this collective wage setting is changing, or shifting, towards more individualized/discretionary wage setting mechanisms; how the collective and individual wage setting co-exist and interact with each other, and whether discretion over wage setting is undergoing a shift e.g., from collective to more individual discretion of employers and the worker.

Considering this analytical lens, nine country studies have been implemented within the BARWAGE project. First, wage setting levels/arenas per country were identified. These include the predominant levels at which wages are set, including statutory regulation if relevant (e.g., legislation on statutory minimum wages), collective bargaining at various levels, and individualized wage setting where the discretion of the employer over the actual wage level is the highest. The understanding of the concept of discretion in the project builds on Evans and Hupe (2020) where discretion refers to control over wage setting. Each actor involved in the wage setting process at the above-mentioned levels/arenas is equipped with a certain extent of discretion over wage setting and wage levels. In the liberalization process, employers are expected to gain more power over controlling the wage setting process and the actual wage levels, in particular, at the company level. Wage setting at the company level may still occur via bargaining (a single wage setting procedure for all workers), individual negotiation between the employer and the employee, or a unilateral wage setting by the employer, where the employer possesses high discretion over the wage level, while the worker has very limited discretion over the wage. At the same time, from the trade union perspective, unions may trade off a certain part of their collective discretion in wage setting for more individual discretion of workers, or a 'decentralised discretion' shifting more bargaining powers to the company level (c.f. Boumans 2022).

All in all, various levels of wage setting are not mutually exclusive, but can also co-exist and interact with each other. It was an empirical question in the BARWAGE project to present which levels play a role in which country and sector and draw general conclusions on wage setting trends and levels across a diversity of European industrial relations systems.

2. Collective bargaining levels and coverage across nine countries

The dynamic landscape of collective bargaining across Europe has been subject to many studies, e.g., recently in form of a thorough country-specific and summary investigation by Müller et al. (2019). While these authors trace how collective bargaining has been influenced by various social, political, and economic factors across the EU Member States, the findings of this book are the starting point for the BARWAGE project. The diversity of the European collective bargaining systems can be summarised by two fundamental indicators – the predominant level of bargaining and the bargaining coverage (see Table 1).

Table 1 Basic industrial relations characteristics

Country	Predominant level of bargaining	Bargaining coverage (in %)
Austria	Sector	98 (2020)
Bulgaria	Enterprise/company	23,4 (2018)
Czechia	Enterprise/company	33 (2020) *
Estonia	Enterprise/company	6 (2020) **
France	Sector	98 (2018)
Italy	National/sector	100 (2019)
Netherlands	Sector	75,6 (2019)
Portugal	Sector/company	77,2 (2021)
Spain	Sector	80,1 (2018)

Note: most recent data available.

Source: Müller et al. (2019) and the ICTWSS database (OECD 2023)

* Šumichrast (2024)

** Lindma and Siniväli (2024), Kallaste (2023)

Both indicators set the scene for country and sector-specific analysis in the BARWAGE project. Beyond the bargaining level, the project analysed which part of the wage are set at the predominant level, and whether there are multiple discretions in parts of the wage being set at one level and others at other level(s). The next sections provide a summary of country and sectoral findings. The sectoral findings exclude Portugal, where detailed sector-specific evidence is not available.

3. Wage setting with or without collective bargaining? An overview of 9 countries

3.1 Austria

Wage setting in Austria is characterized by a stable and hierarchical structure where sector-level collective bargaining is the foundation, supplemented by company-level wage negotiations (Fidrmuc and Kahancová 2024). This system, considered transparent by social partners, remains consistent across sectors. However, differences in actual wages arise due to factors like regional disparities, years of experience, the flexibility of sectoral wage levels as minimum standards, and the willingness of employers to pay beyond these minima. Union strength and labour market conditions, such as skill shortages and seasonal fluctuations, also influence wages. Despite high bargaining coverage, close to 100%, there are still variations in actual wage levels due to the discretionary nature of company-level wage supplements. Such decentralisation of partial wage components is however well-coordinated at the sector level. Decentralization may also result from changes in company structures, such as mergers or splits, particularly in sectors like waste management and public transport. In summary, Austria's wage bargaining system is robust due to the strong commitment of social partners and remains largely unaffected by EU regulations like the Directive on Adequate Minimum Wages.

3.2 Bulgaria

In Bulgaria, collective bargaining is primarily decentralized, with most negotiations occurring at the enterprise level. The statutory minimum wage is the most important wage-setting mechanism, given the low rates of collective bargaining at the sectoral and national levels. Exceptions include sectors like urban transportation and waste management, where municipal collective bargaining is more common due to public sector involvement. A significant issue is the extension of collective agreements to non-union members, which is rare and contingent on employer approval. This non-extension relates to trade union

membership requirements, with only two unions in Bulgaria meeting the threshold to be nationally representative.

The trend toward decentralization and increased employer discretion challenges Bulgaria's ability to meet the EU Directive on Adequate Minimum Wages, which aims for 80% collective bargaining coverage. Key obstacles include limited employer interest in coordinated bargaining, exclusion of public sector workers from collective bargaining, and the inefficiency of tripartite councils in wage setting. To meet the threshold for bargaining coverage from the EC Directive, a shared commitment from all social partners is essential, e.g. to improving the functioning of tripartite bodies, encouraging extensions of bargaining coverage, and legislative changes allowing collective bargaining in the broadly understood public sector (Gotthardová and Kahancová 2024).

3.3 Czechia

According to Šumichrast (2024), wage setting in Czechia is primarily occurring at the company level through collective agreements. Sectoral collective bargaining plays a minor role, mostly regulating specific wage components like bonuses, night work allowances, and overtime. This sectoral bargaining is particularly weak or non-existent in sectors like urban transport and waste management, with the construction sector being a partial exception. There is a trend of employers avoiding sectoral bargaining by changing their legal status or leaving traditional employers' organizations. This leaves trade unions without counterparts to negotiate with, weakening collective bargaining further. For 2024, changes include freezing some levels of guaranteed wages, with only the lowest and highest levels seeing increases, impacting sectors like HORECA, where the statutory minimum wage is more relevant. Overall, wage growth is primarily driven by company-level agreements, with limited influence from the statutory minimum wage, except in the HORECA sector.

3.4 Estonia

The findings on Estonia (Lindma and Siniväli 2024) indicate that wage bargaining in Estonia is still in a nascent stage, with its practice confined to a limited number of sectors and subsectors. As a result, there are significant disparities in wage-setting practices between

sectors where no bargaining occurs and those where some form of collective bargaining is present. The limited scope of wage bargaining that does exist tends to take place at the company level, which leaves employers with considerable autonomy in setting wages. Understanding the reasons behind the limited influence of trade unions and the constrained role of collective bargaining requires an examination of the cultural perceptions of trade unions within different systems. The findings indicate hostility towards trade union in Estonian workplaces rather than a proactive tool for ensuring workers' rights. Such a cultural mentality may contribute to a reluctance to form unions and engage in collective bargaining, as it shifts the focus from collective to individual discretion in wage setting. Consequently, the existence of unions is often viewed as a sign of dysfunction rather than a standard element of workplace governance. This perception, in turn, limits the development and impact of collective bargaining in the country.

3.5 France

Industrial relations in France are marked by active yearly collective bargaining but are often seen as deficient or unequal due to several factors. First, there is a long-standing conflict culture, where strikes are common and viewed to balance power in favour of trade unions. Second, a low unionization rate of around 10% in the early 2020s weakens the legitimacy and influence of unions (Leonardi 2024a). Traditionally, collective bargaining in France occurred mainly at the industry-wide level, particularly from the 1950s to the 2000s. However, since the 2017 reforms, there has been a shift towards decentralization, with more bargaining taking place at the company level. Despite this trend, the statutory minimum wage continues to play a central role in wage dynamics, acting as a key reference point for wage negotiations across sectors. The minimum wage's influence has led to a narrowing wage range, particularly for lower-paid workers, where base wages from collective agreements often hover just above the SMIC. Employers typically bridge this gap with tax-exempt bonuses to comply with legal standards. This narrowing of wage distribution limits career progression opportunities for low-wage workers. While the minimum wage legislation remains crucial to keep wages above the poverty line, wages in France are not as central to collective bargaining as in countries like Germany, partly due to the existence of the minimum wage, and due to the lack of coordinated wage bargaining across industries. In this decentralized system, meaningful

negotiations occur mostly in large companies where unions have a strong presence, while smaller companies see more individualized wage setting and non-wage remuneration practices.

3.6 Italy

In Italy, a significant debate is underway about potentially introducing a statutory minimum wage, shifting from the traditional reliance on collective bargaining for wage setting (Leonardi 2024b). The debate is fuelled by dissatisfaction with current wage standards, with many Italians supporting a proposed minimum wage of 9 euros per hour, a proposal rejected by the current right-wing government, which favours extending existing collective agreements instead. Italy thus currently faces a paradox: having the highest collective bargaining coverage in the EU but some of the worst wage dynamics, which underscores the need for reform (Brunetti 2024). The system is plagued by issues like non-compliance, "pirate agreements," and low wages, particularly in sectors at risk of poverty. There is broad agreement that a statutory minimum wage should complement, not replace, collectively agreed wages, and should be supported by stronger labour inspections and measures to reduce job precariousness. Without these additional measures, merely setting a minimum wage could be ineffective. The experience of Spain is a potential model for Italy to follow, combining wage laws with broader labour reforms to improve workers' conditions.

3.7 Netherlands

In the Netherlands, wage setting occurs on multiple levels: national (via statutory minimum wage), sector and firm levels (through collective agreements), and within individual companies, sometimes involving works councils (Besamusca 2024). The statutory minimum wage is revised twice yearly, making minimum wage adjustments predictable. Many collective agreements align their wage floors with the statutory minimum wage. Firms are covered by either sector-level or firm-level agreements, with both types encompassing all bargaining topics. Around 75% of employees are covered by collective agreements, with over 90% of covered employees falling under sector-level agreements, which are often extended to include both organized and unorganized employers. This extension creates a level playing

field, a key reason for employers to engage in wage bargaining. Both firm-level and sector-level collective agreements typically include detailed pay systems, with pay grades linked to job classifications and periodic steps within those grades. Most sectors have pay scale tables or a pay spine. Trade unions focus on pay grades that contain most of their members, often aligning with how all employees are distributed across the grades. Bargaining success is evaluated more on pay grade outcomes than on wage floors, especially in sectors with permanent contracts, like waste management. Additional pay components, such as overtime or night/weekend work premiums, vary by sector. For example, urban transport employees receive premium rates for these hours, while hospitality workers do not, despite both sectors having similar work schedules.

Traditionally, employers were expected to adhere strictly to collectively agreed pay provisions, but there is an ongoing shift towards allowing more employer discretion. Sector-level bargaining faces challenges, such as decreasing coverage in the construction sector due to the rise of solo self-employed subcontractors, and hospitality employers resorting to gig platforms due to labour shortages. Waste management and urban public transport are less affected by these issues, possibly due to the public-private sector divide and the prevalence of small firms in hospitality and construction. In result, many collective agreements now permit upward deviations or are classified as "minimum agreements," which set wage floors but allow for superior pay conditions. Also, discretion in wage setting varies: some agreements ensure employees advance annually within pay scales, while others tie advancement to performance. Job classifications can also be vague, enabling employers to assign different salary groups. Additionally, collective agreements often include provisions for bonuses or profit-sharing, with firm-level discretion over their implementation. High inflation and minimum wage increases have driven significant wage adjustments across sectors, leading negotiators to use non-traditional methods like nominal or stepped wage increases, which alter pay structures and may prompt future revisions to pay systems to sustain career growth opportunities.

3.8 Portugal

In Portugal, there are three types of binding agreements: industry-level agreements, agreements for groups of companies, and single employer agreements, with lower-level agreements often prevailing. The collective bargaining system has been dominated by branch

agreements with high coverage due to widespread use of extension decrees (Leonardi 2024c). Many agreements remained largely unchanged except for wage tables, with little coordination between sector and company levels of bargaining. Employers' attempts to renegotiate agreements were blocked by labour laws until the mid-2000s. The 1979 Collective Bargaining Act established key principles such as favourability for workers and the requirement for joint decision-making to end agreements. Company-level bargaining remains limited to larger companies due to the small size of most firms and the absence of union representation. Despite mandatory reporting, over 50% of companies still refer to outdated agreements from the 1980s, with only a small percentage reflecting recent economic renewals. Economic changes and internal devaluation led to an increase in low-wage jobs, precarious work, and bogus self-employment, contributing to labour market dualization. In response, trade unions have taken an inclusive approach by advocating for comprehensive collective agreements, extending protection to all workers, and working to integrate precarious workers into regular employment contracts. However, marginalization persists, with collective bargaining often being reduced to minimal wage increases and public sector wage bargaining constrained by the government. To counter these challenges, trade unions seek to enhance their political influence and continue expanding their organizational capacities in terms of membership, activism, and structural effectiveness to gain more discretion in the wage setting process.

3.9 Spain

The Spanish wage-setting model is a structured mix of law and collective autonomy (Leonardi 2024d). The law sets a minimum inter-sectoral wage and ensures the broad application (*erga omnes*) of collective agreements negotiated by representative social partners. Despite low union density, this framework ensures high collective bargaining coverage. The legal minimum wage serves as a key threshold, and the current goal, aligned with the EU Directive, is to reach a minimum wage of 60% of the national median wage. Wage bargaining is multi-level, with national sector-wide collective agreements playing a central role, and decentralized bargaining, including regional and company levels, being significant in sectors like hospitality, public transport, and waste collection. In May 2023, a new framework agreement was signed between Spanish unions and employer associations. The agreement underscores the importance of collective bargaining as a tool for wealth distribution and worker rights.

Supported by the Spanish government, this agreement stipulates wage increases of 10% over the next three years (4% in 2023, 3% in 2024 and 2025, with an additional 1% annually based on inflation). These recommendations are non-binding but will significantly influence the future of collective bargaining. Unions see this agreement as crucial for negotiating further collective agreements particularly in regions where a high share of collective agreements expired. Given these expectations, Spain is on track to meet the target set by the EU Directive for 80% collective bargaining coverage, with some sectors like local public transport already achieving 100%.

To summarise, the key difference between the studied countries emerges regarding the questions whether workers are covered by a single collective agreement or can be covered by several agreements simultaneously. For example, in Austria, Spain and Italy, multi-level collective bargaining agreements are structured in a nested manner, leading to simultaneous coverage by firm-level and sector-level agreements. In Spain and Italy, these agreements can contain different provisions, particularly regarding pay, with each level offering specific terms that complement or build upon the other. In contrast, in Austria these collective agreements are coordinated, the sector-level agreement setting a benchmark that can be further specified and improved if company-level bargaining occurs. In other cases, namely the Netherlands, the situation is somewhat different. Firms are typically covered either by a sector-level collective agreement or by a firm-level agreement, but not by both simultaneously. This means that the bargaining process in the Netherlands is more segmented, with firms choosing the level at which they engage in collective negotiations, leading to distinct sets of terms depending on the level of coverage. In Central and Eastern European countries, there is a technical possibility of simultaneous coverage by the sectoral and firm-level agreement. However, due to the limited scope of sectoral agreement, or in case such an agreement is valid but its content is limited to low benchmarks close to those stipulated in legislation, it is practically rare to see collective agreements stipulating diverse provisions, or raising questions on which agreement applies.

4. Wage setting across four sectors

Beyond a country-specific overview, the BARWAGE project provided deeper insight into sector-specific wage setting practices. This section zooms onto these four sectors. Figure 1 shows an overview of sectors covered and their key specificities that provide the context for analysing collective bargaining therein.

Figure 1: Sectors and their key characteristics relevant for bargaining

 Construction	 Waste management	 Hospitality	 Urban transport
<ul style="list-style-type: none"> • High share of self-employment and bogus self-employment • High share of individual contractors and/or SMEs • Important for economies in all studied countries 	<ul style="list-style-type: none"> • Increasing importance as part of the ecological transformation, growing employment in Europe • Often municipal services, decentralised, partly privatised or outsourced 	<ul style="list-style-type: none"> • Strongly affected by the COVID-19 pandemic • Important source of employment (e.g., Bulgaria about 10%) • Larger incidence of seasonal and undeclared work • Many SMEs - low bargaining coverage 	<ul style="list-style-type: none"> • Reasonably high employment in all studied countries • Part of urban transport is publicly provided - different bargaining dynamics • privatization process • high bargaining power because of an essential sector, unified workforce, ability to create disruption in the economy

Source: the authors.

4.1 Construction

The construction sector across eight countries studied³ shares common characteristics, including a high prevalence of self-employment, bogus self-employment, and the significant presence of individual contractors and small and medium-sized enterprises. This sector is vital to the economies of the countries studied, but it also faces challenges related to labour practices and industrial relations.

In **Italy**, the 2022 sectoral agreement in the construction industry marks a significant advancement, addressing training, safety, and quality in response to rising raw material costs and supply difficulties. For employers, this agreement resembles a step towards enhancing

³ France is excluded from section 4.1 on construction due to lack of data provided by the country-specific report (Leonardi 2024a).

sector standards, while for unions, it reinforces efforts to combat irregular work practices and wage dumping. The agreement specifically targets the widespread under-classification of workers, particularly immigrants, who are often misclassified to reduce labour costs. The contract introduces mechanisms to ensure proper worker classification, improving the sector's fairness and attractiveness over time.

Spain's construction sector, employing 6.5% of the workforce, has slightly higher temporary contract rates than the national average and lower part-time work rates. Industrial relations are governed by a robust model established in 1988, encompassing national, state, and provincial agreements. The general collective agreement in the construction sector, signed in 2022, introduced a 4% wage increase and a wage guarantee clause. The most recent agreement, signed in 2023, continues this trend of improving working conditions and wages across the sector.

In **Austria**, collective bargaining in construction is well-organized, with unions and employers typically meeting months in advance to align their demands. Wage increases are usually based on inflation, while employers seek more flexible working hours. The stable bargaining system, supported by strong union membership, ensures fair wages across the sector. Despite this, the union continues to work on integrating emerging labour markets, such as gig workers, into the collective bargaining framework. Austria's system is effective and does not face significant pressure from the EU's Minimum Wage Directive due to its already high bargaining coverage.

In **the Netherlands**, wage setting in construction is divided between construction site-based and office-based workforces. Recent collective agreements have focused on maintaining wages in line with inflation, particularly in the most populated pay grades. The statutory minimum wage plays a minimal role due to the significant margin above it. The latest bargaining round achieved a historic pay increase, addressing concerns over unpaid overtime and lagging wage increases. However, tensions remain between unions and employers over aligning actual paid wages with collectively bargained rates.

Estonia's construction sector employs 7.6% of the workforce. The sector is characterized by rapid employee turnover and lacks trade unions and collective bargaining agreements. Wages are primarily influenced by the statutory minimum wage and employment legislation. A common practice in the sector is the payment of "envelope wages," where part of the salary

is paid unofficially to reduce tax obligations. This practice, along with the high presence of foreign labour and short-term jobs, discourages unionization. Despite these challenges, wages are generally around or above the average wage in the economy; and this further diminishes the drive for setting up collective bargaining.

In **Czechia**, the construction sector is marked by flexible and precarious employment, including bogus self-employment, particularly among smaller companies and migrant workers from Ukraine. The sector has a well-established tradition of sector-level collective bargaining, with the most recent agreement covering 2019-2024. This agreement sets sector-specific minimum wages slightly above the national minimum wage. Despite the sectoral agreement, wage negotiations primarily occur at the company level, where additional payments and benefits are negotiated beyond the sectoral baseline. Collective bargaining coverage is estimated at 60-70%, with larger firms setting wages that serve as a benchmark also for smaller employers.

In **Bulgaria**, the construction sector's minimum wage serves as the legal baseline. A sectoral collective agreement sets standards such as increased annual leave, meal allowances, and night work bonuses. The agreement also established a sectoral minimum wage using a multiplier of the national minimum wage, with the latest agreement setting this at 1.4 times the national rate. Despite legislative efforts to curb informality, the sector remains characterized by significant informal practices, such as envelope wages, particularly among workers in low-paid jobs. The sector also suffers from low trade union density, with most companies not engaging in collective bargaining.

In summary, while the construction sector is vital across these countries, it faces significant challenges related to wage setting and wage levels, particularly concerning bogus self-employment, informal work and envelope wages, and varying levels how collective bargaining succeeds in addressing these challenges. While setting sectoral wage minima (in some countries as minimum standards, in others specific pay classifications), all countries show also discretion for defining wage components at the company-level. This practice emerges from various trends, including undeclared work and envelope payments (Estonia, Bulgaria, Czechia), under-classification of workers in the sectoral agreement (Italy), or the fact that the benchmark for sector-level wage setting is keeping pace with inflation (the Netherlands).

4.2 Hospitality

In all studied countries, the hospitality sector was strongly influenced by the COVID-19 pandemic. Other common features of the sector, regardless of the country, are a high incidence of seasonal and undeclared work, and low collective bargaining coverage, especially due to the prevalence of small and medium-sized enterprises.

In **Italy**, the sector is critical to the economy but suffers from precarious employment, low wages, and exploitative conditions. National industry-wide agreements have expired without renewal, leaving wages behind inflation and not reflecting workers' skills. The fragmentation of employer representation and prevalence of "pirate" agreements contribute to wage dumping and worsen conditions, particularly through involuntary part-time work. Unions demand urgent contract renewals, fair wages, and reforms to improve working conditions, though the sector's potential could offer more stable employment with systemic changes.

France's hospitality sector employs around one million people, with a significant portion in traditional catering, hotels, and collective restaurants. The sector features a high degree of part-time and seasonal work, with unionization close to the national average at 9%. The latest national sector agreement in 2023 set a median wage, but 65% of workers still earn close to the minimum wage. The sector's wage structure is organized into a detailed job classification grid, with negotiations occurring at both the national and company levels.

In **Spain**, collective bargaining in tourism and hospitality is primarily regional, leading to varying wage levels across the country. The sector is characterized by a significant underground economy, particularly affecting young and migrant workers. Wages are often set at the minimum level required by regional agreements, with unions focusing on ensuring compliance and combating practices like fake part-time work. The Balearic Islands' latest agreement, for example, covers a large number of seasonal workers but faces challenges from non-compliant employers.

Austria maintains a unified collective agreement for its hotel and restaurant sectors, with regional wage differences still present. The sector is challenged by the lack of strong works councils in smaller establishments, which hinders wage negotiations. The union Vida emphasizes improving wages and working conditions, but issues like lump-sum overtime

payments complicate negotiations. Austria's stable, regulated wage-setting system, though, is generally effective and valued by both unions and employers.

In **the Netherlands**, the hospitality sector's extended collective agreement includes detailed pay scales for different job categories, with distinctions based on qualifications and experience. Despite structured wage systems, challenges persist, such as the decreasing role of tips due to digital payments and higher hospitality costs. The collective agreement, renewed for 2024, introduces provisions for annual wage increases, but the sector-specific wage setting still tries to deal with the effects of recent statutory minimum wage increases and the alignment of wages with job functions.

Estonia's hospitality sector, employing 3.6% of the workforce, is characterized by low collective bargaining activity, partly due to the high prevalence of seasonal workers. The sector has been severely impacted by the COVID-19 pandemic and other crises, leading to increased wages to attract workers but also discouraging unionization. Issues like wage secrecy, envelope payments, and precarious contracts further exacerbate the challenges, with workers, especially seasonal and part-time, facing limited social protections.

In **Czechia**, the hospitality sector has the lowest wages in the national economy, with trade union presence primarily in the hotel industry. The COVID-19 pandemic severely impacted the sector, with wage-related negotiations becoming less common. The sector faces significant issues like envelope wages and a high prevalence of agency workers. Collective agreements in the sector often include a 10-tier wage tariff system, but wage negotiations are increasingly left to individual companies, with only a small percentage of agreements addressing wage developments.

Finally, **Bulgaria's** hospitality sector has the lowest average wages, with minimal collective bargaining coverage. The sector is dominated by short-term and seasonal employment, with a significant portion of the workforce being women who typically receive lower wages. Collective bargaining is limited, with only a few company-level agreements in place, and wage setting often determined through individual negotiations, particularly in international establishments.

Across these countries, the hospitality sector remains vital but faces ongoing challenges related to wage setting, namely, regional disparities (Spain), undeclared work (Italy, Portugal,

Bulgaria, Czechia, Estonia). These challenges delivered different mechanisms for wage uprating and leave a room for wage setting discretion in a decentralised way, at the company level. Another common challenge in the sector is tipping, which is informally considered part of the workers' income in some countries and thus demotivating proper wage uprating via collective bargaining.

4.3 Urban transport

The urban transport sector, critical for public infrastructure, has strong bargaining power across the studied countries due to its essential nature, homogenous workforce and the potential for significant economic disruption. However, the sector's employment conditions, wage structures, and collective bargaining dynamics differ significantly due to factors including public versus private ownership, regional differences, and the extent of unionization.

In **Italy**, the renewal of the national sectoral agreement in urban transport is seen by trade unions as a preliminary step towards necessary comprehensive reforms to protect workers' rights and enhance professionalisation of the sector's working conditions. Wage setting remains a contentious issue, with employers facing structural challenges and investment limitations. Inflation has exacerbated wage issues, but rather than wage uprating, it facilitated a greater worker turnover. The largest union in the sector (FILT-CGIL), emphasizes the urgent need for reform, including wage uprating to meet fair pay conditions, and better working conditions to sustain this essential (public) service, particularly in light of a severe driver shortage.

France's urban transport sector operates under a two-tier, centrally coordinated collective bargaining system, with the national industry-wide level bargaining being predominant. The collective agreement, signed in May 2023, ensures 100% employee coverage with mandatory annual wage increases. Wages are determined by both branch and company agreements, with a principle ensuring that no worker is paid below the collective agreement's minimum. The sector's pay scales are structured with a Kaitz Index of 67.5%, indicating a relatively well-protected wage floor. Trade unions have expressed concerns about discrepancies between conventional wage levels and actual company practices.

In **Spain**, urban transport is characterized by significant wage disparities, influenced more by geographic location than by job functions. The sector, employing around 120,000 people, is

managed by public administrations but operated by private companies under public concessions. Collective bargaining is strong, primarily at the provincial level, resulting in over 50 different contractual standards across the provinces. Wages are generally much higher than the legal minimum wage, with bus drivers and maintenance staff among the highest-paid roles. However, wage disparities across regions remain a significant challenge, with salaries in major cities like Madrid and Barcelona significantly higher than in smaller provinces. Trade unions actively work to recover traditional wage-setting systems, particularly in the wake of labor reforms in 2012.

In **Austria**, liberalization and privatization have fragmented the urban transport sector, creating a complex landscape where different agreements coexist within the same employers. Despite this, bargaining coverage remains high, particularly in municipal companies and the Postbus company, with union density around 80%. The bargaining structure is highly fragmented, involving sectoral agreements, company agreements, and civil servant pay schemes, often leading to wage disparities and conflicts. The sector faces challenges in establishing a level playing field for competition, which often includes setting a cap on labour costs.

The Netherlands has highly detailed pay systems in the urban public transport sector, with extensive pay scale tables and numerous wage premiums and allowances. The sector's three main collective agreements (GVB, RET, HTM) differ slightly in pay structures, with most employees classified within pay grades 4 to 6. These agreements also regulate annual salary advancements based on tenure and allow for performance-related bonuses and premiums for inconvenient hours. Recent wage negotiations, influenced by high inflation, have resulted in significant increases, particularly for lower pay grades, with unions prioritizing nominal increases to support lower-paid workers.

In **Estonia**, the urban transport sector is the most active in collective wage bargaining, driven by the Estonian Transport and Road Workers Union, which represents over 2,000 members. The sector benefits from both single and multi-employer collective bargaining agreements, contributing to high coverage rates. The most significant agreement, covering 2020-2025, sets the minimum monthly wage for drivers at €1,350 since April 2024. Despite being above the national minimum wage, this salary is still below the national average. The sector's strong union activity, dating back to the country's history in the last 50 years, has fostered good

relationships between unions and employers, though broader unionization faces cultural and economic challenges.

In **Czechia**, the urban transport sector sees varying wage levels, with metro drivers in Prague earning significantly more than those in smaller towns. The social dialogue involves the Transport Association and the Trade Union of Transport, but sectoral collective bargaining is weakening as many public transport organizations have withdrawn from the employers' association and focus on company-level wage setting. This shift has made sectoral wage agreements less influential, with unions now more involved in advising and negotiating at the company level.

In **Bulgaria**, the urban transport sector is dominated by municipal employers with high trade union density and transparent collective bargaining practices. Most public companies engage in collective bargaining, with wage increases typically negotiated at the municipal level, leading to significant regional differences. A sectoral collective bargaining agreement that expired in 2022 is being renegotiated, previously setting provisions for annual leave, meal supplements, and night work bonuses. Despite the strong union presence, challenges remain in ensuring consistent wage standards across different regions.

In sum, despite the essential character of the urban transportation sector, wage uprating therein varies due to regional differences and decentralisation of providers. The latter has raised uncertainty and curbed investments, therefore, the discretionary room for wage uprating has been constrained even at the company level.

4.4. Waste management

The waste management sector across Europe is gaining importance as part of the ecological transformation, leading to increasing employment opportunities. Yet the sector's structure varies significantly across countries, influenced by factors such as decentralization, privatization, and the role of municipal services. These factors also complicate collective bargaining.

In **Italy**, industrial relations in the waste management sector are generally positive, with timely renewals of national agreements. However, there is a notable challenge in curbing the proliferation of minor and alternative sectoral agreements, which lead to wage dumping

compared to the national multi-service agreement. This disparity creates inferior pay and working conditions, particularly affecting workers in the urban hygiene sector.

In **France**, about 20% of workers in the waste collection sector earn the sectoral minimum wage, mostly in entry-level positions or through temporary work agencies. Wages in the sector are structured, with 90% covered by sectoral minimums, but disparities arise due to the inclusion of both public and private sector agreements within the same groups. This leads to concerns among trade unionists about institutional instability and wage inequalities for similar roles across different agreements. The need for harmonization in collective bargaining is emphasized to standardize wages and conditions for both public and private management agencies.

Spain features extensive collective bargaining in the waste management sector, with national, regional, and company-level agreements covering the workforce. The national sectoral agreement in 2022 introduced a 4% wage increase, with further adjustments based on GDP and inflation. While 15% of workers earn only the inter-professional minimum wage (SMW), the majority benefit from better wages and conditions through company-level agreements. The wage-setting system, driven by company negotiations, is considered stable and effective by unions, though debates continue about the roles of different bargaining levels.

In **Austria**, the waste management sector is highly fragmented, with diverse unions and employers making collective bargaining challenging. Efforts to establish a sector-specific collective agreement have been unsuccessful due to disagreements among unions and the complex structure of the industry. Consequently, many employees are either covered by non-industry-specific agreements or none at all, depending on their employer's nature.

In the **Netherlands**, collective agreements in the waste management sector are detailed, with pay systems that ensure wages remain above the statutory minimum wage (SMW). Recent wage negotiations have led to significant increases to address high inflation, particularly for lower-paid workers. However, concerns about the sustainability of the pay system persist, especially as lower pay grades are being dropped due to rising SMW levels, potentially affecting career growth opportunities.

Estonia's waste management sector employs a small portion of the workforce, with limited collective bargaining activity. The only recorded bargaining occurred in 2002-2003 in a private

company, Ragn-Sells, with no active trade unions or employers' associations in the sector since.

In **Czechia**, the waste management sector is decentralized, with municipal services often provided by individual cities. Collective bargaining occurs at the company level, leading to regional wage differences, with higher wages in Prague compared to other regions. Municipal services employees benefit from substantial additional benefits, but there is no sector-specific bargaining. Instead, regional organizations manage waste management tasks through contracts with individual cities, with wage tariffs closely aligned with the statutory minimum wage.

In **Bulgaria**, the waste management sector is characterized by a significant number of municipal-level collective agreements covering waste collection and disposal activities. These agreements likely set sectoral minimum wages above the national statutory minimum wage, with a focus on improving working conditions. Many workers in low-paid positions, often of Roma origin, face challenges such as lack of transportation to work, earning slightly more than the statutory minimum wage, which constitutes about 80% of their total wages.

Overall, the waste management sector across these countries shows a complex and varied landscape, with collective bargaining playing different roles depending on the level of decentralization, privatization, and the structure of employment within the sector. Multiple wage standards are created mainly because of three factors. First, several collective agreements are valid across the sector, thus it is difficult to identify a sectoral level playing field in wages. Second, in several countries (e.g. Austria, Bulgaria) the fragmented ownership structure of waste management companies also creates various bargaining arenas and wage levels. Finally, in countries with detailed sectoral wage regulation (i.e., the Netherlands), the wage standards come under pressure with the rising national statutory minimum wage.

5. Conclusions: relevance of bargaining arenas to realising adequate wages

The EU exhibits a variety of capitalisms, which in turn results in a diversity of wage bargaining systems across different countries. Wage bargaining practices differ widely, with some countries maintaining centralized systems where national or sectoral agreements play a dominant role, while others are experiencing decentralization, shifting more bargaining power to the company level. In many countries, part of the wage is determined by legislation, such as the legal minimum wage, which sets a baseline below which no worker can be paid. Another significant portion is determined through collective bargaining, particularly in countries where sectoral or industry-level agreements are prevalent. Finally, individual discretion comes into play at the enterprise/company level, where employers and employees may negotiate wages beyond the collectively agreed standards or legislated minimums, particularly in countries undergoing decentralization.

Within the BARWAGE project, a qualitative insight into nine European countries showcases the diverse nature of these bargaining systems, reflecting the broader European variation in how wage determination is approached. Each country offers a distinct blend of legislative regulation, collective agreements, and individual wage negotiations, highlighting the complex landscape of wage bargaining across Europe. In result, there is significant variation across countries in whether collective bargaining exists at all, as well as in the extent of bargaining coverage. Nevertheless, decentralization in wage setting is a trend affecting all the countries studied. Countries that have an established relationship between the minimum wage and collective bargaining are better prepared to resist this decentralization trend, as their wage-setting mechanisms remain more centralized and structured. However, in most studied countries, there is a growing discretion given to individual employers in setting wages. Austria is an exception to this trend, where wage bargaining remains highly coordinated and follows a well-established formula to determine wage increases, thereby limiting the influence of individual employer discretion.

The summary analysis is a relevant insight also in the context of the Council Directive on Adequate Minimum Wages in the European Union (Directive 2022/2041). The Directive aims to strengthen coordinated setting of working conditions by setting a target of achieving 80% collective bargaining coverage. However, meeting the target of 80% bargaining coverage presents a major challenge in some of the studied countries, especially in Estonia with a very low bargaining coverage; Bulgaria, where there is no legal mechanism to extend the coverage of collective agreements, and Czechia, where sectoral wage bargaining remains limited. On the other extreme are countries with high bargaining coverage already exceeding the target of 80%, including Austria, France, Italy and Spain, with the Netherlands and Portugal almost reaching the 80% coverage.

In the context of raising bargaining coverage, the remaining relevant question is the relationship between the statutory and collective bargaining wages as two interconnected bargaining arenas. If statutory or bargained (minimum) wages increase, these exert pressure on existing wage systems, potentially leading to adjustments in how wages are structured and negotiated. Such adjustments can be done via bargaining or via growing discretion of employers or individuals yet ensuring that (negotiated) wages remain relevant and competitive. Therefore, to evaluate the potential effect of the Directive to meet its targets, the BARWAGE research provides information on country-specific situations in which the Directive will be implemented. This may involve renegotiating agreements to maintain the differentiation between wage levels and addressing potential compression of wage scales. The response of collective bargaining to these changes is crucial in maintaining the balance between decent wages and the sustainability of wage systems.

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