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COLLECTIVE BARGAINING IN GERMANY 2024

Thorsten Schulten and the WSI Collective Agreement Archive

WSI TARIFARCHIV

Content

1 Economic Framework Conditions of the 2024 Collective Bargaining Round in Germany

In the wake of the economic consequences of the war in Ukraine, the past few years have been characterised by historically high inflation rates, which were caused by a rapid rise in energy and food prices. In 2022 and 2023, consumer prices in Germany rose by 6.9 % and 5.9 % respectively. As wages were unable to keep pace with this development, employees suffered considerable losses in purchasing power (Schulten/WSI-Tarifarchiv 2024). In contrast, inflation rates fell significantly again in 2024, meaning that consumer prices only increased by an annual average of 2.2% compared to the previous year (Statistisches Bundesamt 2025a). However, in view of the loss of purchasing power in previous years, there was still a considerable need for employees to catch up in terms of real wages.

Overall, the economic conditions in 2024 were characterised by continued stagnation. With a decline of 0.2 %, gross domestic product was slightly negative for the second year in a row (Statistisches Bundesamt 2025c). This was primarily due to a sharp decline in private investment, a relatively sharp slump in exports and only very weak growth in private consumption (Dullien et al. 2024). The number of unemployed roses by 178,000 to just under 2.8 million in 2024, which corresponds to an unemployment rate of 6.0 %. However, there are major differences in employment trends depending on the sector, which have a direct impact on the bargaining power of trade unions. While many industries, particularly in the service sector, are struggling with an increasing shortage of labour and skilled workers, some industrial sectors that have been particularly hard hit by the current crisis are facing significant job losses. This applies especially to the automotive industry as one of the classic leading industries in Germany. Accordingly, securing employment in these sectors is a key priority for the trade unions, which is also reflected in collective bargaining policy. Overall, the difficult economic conditions in many industries have significantly exacerbated the distribution conflict, which has also been reflected in a significant increase in strikes and labour disputes (Dribbusch et al 2024; Schulten 2024).

2 Collective agreements 2024 at a glance

2.1 Newly concluded collective agreements

According to the German Federal Ministry of Labour and Social Affairs (BMAS 2025), a total of just over 6,000 new collective agreements were registered in 2024, of which just under 1,900 were sectoral agreements concluded by trade unions and employers’ associations and around 4,100 were company agreements concluded by trade unions and individual employers (Table 1). The core of the 2024 collective bargaining round consisted of around 1500 new collective pay agreements, including just under 500 sectoral agreements, and around 1000 company agreements.

Table 1: Number of new collective agreements registered in 2024 at the Collective Bargaining Register of the German Federal Ministry of Labor and Social Affairs

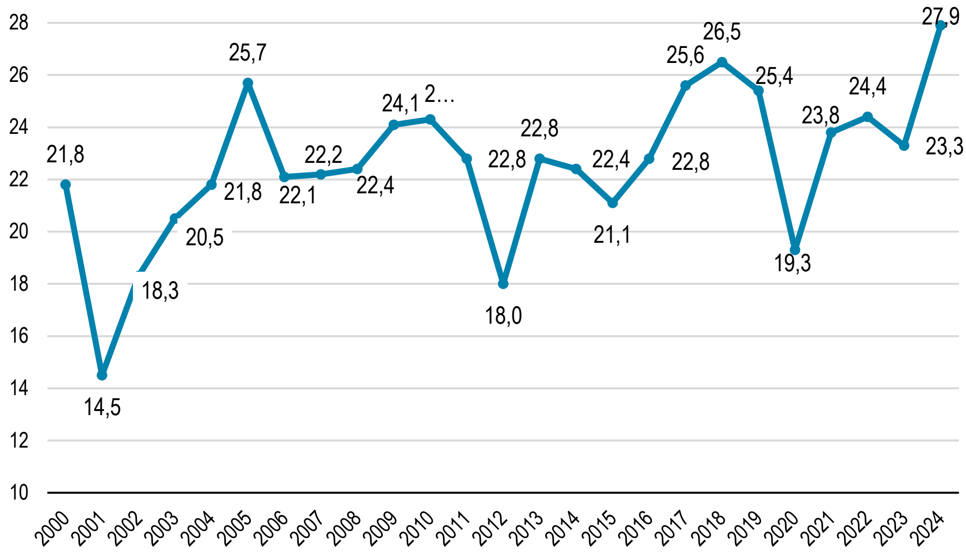
	Pay Agreements	Framework Agreements	Agreements with individual Framework Conditions	Amendment and Parallel Agreements	In total
Sectoral Agreements	495	80	741	559	1.875
Company Agreements	1.014	345	1.747	1.045	4.151
In total	**1.509**	**425**	**2.488**	**1.604**	**6.026**

Source: Federal Ministry of Labor and Social Affairs (BMAS 2025)

In total, 20.6 million employees benefited from pay rises negotiated by the DGB trade unions in 2024. New wage agreements were concluded for around 12.7 million employees. These included almost all major collective bargaining sectors, such as the construction industry with around 730,000 employees, the chemical industry with almost 590,000 employees, the retail sector with 2.4 million employees, wholesale and foreign trade with almost 1.2 million employees and the metal industry with 3.7 million employees. Of the major collective bargaining sectors, only the public sector, with a total of 3.6 million employees, did not conduct collective bargaining in 2024 due to long-standing collective agreements from the previous year.

The average duration of the collective wage agreements reached in 2024 was 27.9 months (Figure 1). This is the highest value measured in a collective bargaining round to date. Particularly long durations of 36 months were agreed in the construction industry, retail, wholesale and foreign trade and in some collective bargaining areas in the hospitality industry (Figure 1). Although the trade unions continue to formulate their collective bargaining demands for a one-year basis in most cases, there are hardly any more collective agreements with a term of less than two years. In the collective agreements effective in 2024, only 2.4 % of employees had a collective agreement duration of twelve months. For 81.1% of employees, on the other hand, the collectively agreed duration was 24 months or longer.

Figure 1: Average duration of collective agreements 2000–2024
In months



Source: WSI-Collective Agreement Archive

2.2 Pay Claims and Settlements

Against the backdrop of the massive loss of purchasing power in previous years, the unions' pay claims in 2024 were at a similarly high level as in the previous year despite declining inflation rates (Table 2 1). This is also due to the fact that in some of the collective bargaining areas negotiated in 2024, the last regular pay rise was two years or more ago and sometimes - such as in the construction industry - even took effect before the rapid rise in inflation rates in 2022. The 2024 pay round completed the pay cycle in these sectors that began in 2023.

As a result, demands for pay increases were still in double digits in numerous collective bargaining sectors, such as the private transport industry with 15.0%, the energy industry with 13.5%, the private banking industry with 12.5% or Deutsche Telekom and the printing industry with 12.0% each. By contrast, the sectors particularly affected by the crisis were the chemical industry and the metal industry, each with a pay claim of 7.0%. In some sectors, such as construction or the cleaning industry, only fixed wage claims were collected from the outset, which also totalled a double-digit volume of claims, with above-average growth rates targeted for the lower wage groups. In many sectors, there were also combined demands for a percentage increase plus a fixed pay claim as a base amount, which was also aimed at above-average raising the lower wage groups. By demanding a pronounced social component in the wage agreements, the trade unions were responding to the fact that the high inflation rates have hit the lower wage groups particularly hard.

The average increase of wage settlements concluded in 2024, which reflects the effective increases of wages over the entire term of the agreements, was 9.7%, of which an average of 5.5% took effect in 2024. There were particularly high increases in the construction industry at 17.8 % and in the retail sector at 13.9 %. Most collective agreements contain two- or multi-stage pay increases, with the first stage generally being significantly higher than the subsequent stages. In contrast to the previous year, the 2024 collective bargaining round once again mainly involved percentage pay increases. Exceptions with fixed pay increases and basic amounts included the construction, the cleaning industry and retail trade.

Table 2: Selected pay claims and settlements of the bargaining round 2024

Settle-ment date	Bargaining Unit	Pay claim	Pay increases 2023/2024	Pay increases 2025/2026	Duration
07/02/24	**Wood and plastics industry** Westfalen-Lippe	8.5 %, social component	10 Zero months 1150 € Inflation adjustment premium each in 03/24 and 09/24 **5.0 %** from 10/24	**3.0 %** from 06/25	23 months until 10/25
13/02/24	**Energy Industry** Nordrhein-Westfalen (GWE-area)	13.5 %, min. 550 €/Mon.	**6.5 %** from 02/24	**3.7 %** from 01/25	23 months until 12/25
01/03/24	**Temporary agency work**	85 %	6 Zero months **3.7 %** from 10/24	**3.8 %** from 03/25	18 months until 09/25
30/04/24	**Private Transport Industry** Nordrhein-Westfalen	15.0 %, min. 400 €/Mon.	5 Zero months **5.7 %** from 10/24	**4.3 %,** min. 120 €/Mon. from 10/25 **4.0 %,** min. 120 €/Mon. from 10/26	34 months until 02/27
17/05/24	**Deutsche Telekom**	12.0 %, min. 400 €/Mon.	6 Zero months 1550 € Inflation adjustment premium in 07/24 **6.0 %** from 10/24	**190 €/Mon**. from 08/25 (by introducing an additional monthly salary)	24 months until 03/26
21/05/24	**Retail trade** Nordrhein-Westfalen	2.50 €/hour, Minimum remuneration of 13.50 €/hour.	5 Zero months **5.3 %** from 10/23 **4.7 %** from 05/24 1000 € Inflation adjustment premium latest in 08/24	**40 €/Mon.** Base amount plus **1.8 %** from 05/25	36 months until 04/26

Continue Table 2

Settle-ment date	Bargaining Unit	Pay claim	Pay increases 2023/2024	Pay increases 2025/2026	Duration
07/06/24	**Textile Industry** East	8.5 %, social component	1 Zero month 500 € Inflation adjustment premium each in 07/24 and 08/24, 250 € in 09/24 **5.0 %** from 10/24	**2.0 %** from 03/25 **1.5 %** from 10/25 **1.5 %** from 01/26	22 months until 03/26
14/06/24	**Construction**	500 €/Mon.	1 Zero month **1.2/2.2** % West/East plus table-effective fixed amount of **230 €/Mon**. each from 05/24	**4.2/5.0 %** West/East from 04/25 **3.9 %** West, Alignment East to Western level (= **4.9/5.2 %** Wage/Salary in average) from 05/26	36 months until 03/27
14/06/24	**Hospitality Industry** Sachsen	3000 €/Mon. Star-ting wage	5 Zero months **7.0 %** from 06/24	**5.0 %** from 06/25 **5.0 %** from 06/26	36 months until 12/26
21/06/24	**Printing Industry**	12.0 %	4 Zero months **3.9 %** from 07/24	**2.0 %** from 07/25 **1.9 %** from 03/26	29 months until 07/26
27/06/24	**Chemical Industry**	7.0 %	2 Zero months **2.0 %** from 09/24	**4.85 %** from 04/25	20 months until 02/26
01/07/24	**Wholesale and foreign trade** Nordrhein-Westfalen	13.0 %, min. 400 €/Mon.	5 Zero months **5.1 %** from 10/23 **5.0 %** from 05/24	**2.0 %** from 05/25	36 months until 04/26
03/07/24	**Private Banking**	12.5 %, min. 500 €/Mon	2 Zero months **5.5 %** from 08/24	**3.0 %** from 08/25 **2.0 %** from 07/26	28 months until 09/26
25/07/24	**Hospitality Industry** Bayern	3000 €/Mon. Star-ting wage	3 Zero months **4.9 %** from 07/24 400 € Inflation adjustment premium in 08/24	**4.5 %** from 04/25 **4.9 %** from 08/25	29 months until 08/26
12/11/24	**Metal industry** Coast District, Bayern	7.0 %, social component	600 € flat rate for 6 Months	**2.0 %** from 04/25 T-ZUG B/ZUB: from 18.5 to 26.5 % from 02/26 **3.1 %** from 04/26	25 months until 10/26
14/11/24	**Confectionery In-dustry** Nordrhein-Westfalen	9.9 %, min. 360 €/Mon.	4 Zero months **5.0 %,** min. 152 € from 11/24 810 € Inflation adjustment premium in 12/24	**2.5 %** from 10/25	22 months until 04/26
15/11/24	**Cleaning industry** (Workers)	3.00 €/hour in all wage groups		**0.75 €/hour** (0,95 €/hour for wage group. 6 a.7) from 01/25 **0.75 €/hour** from 01/26	24 months until 12/26
29/11/24	**Paper manufac-turing Industry**	8.0 %, min. 280 €/Mon.	100 € flat rate for 3 Months	**2.5 %** from 01/25 **2.0 %** from 01/26 **1.4 %** from 10/26	27 months until 12/26

Source: WSI-Collective Agreement Archive

2.3 Inflation Compensation Premium

Inflation compensation premiums (*Inflationsausgleichsprämien*), which are net one-off payments, were once again agreed in numerous wage agreements for 2024. Compared to a regular pay increase, they are intended to provide employees with a higher net wage and employers with lower labour costs. In October 2022, as part of its third relief package to mitigate the consequences of the energy crisis, the German government introduced a regulation that allows companies to pay their employees an amount of up to €3,000 until the end of 2024, for which neither taxes nor social security contributions have to be paid. The inflation compensation bonus was initially the subject of controversial debate within the trade unions. On the one hand, it offers employees a highly attractive one-off payment to compensate for current price increases in the short term. On the other hand, however, it reduces the wage increases that take effect on the pay scale, which leads to correspondingly lower pay for employees in the long term (Bispinck 2023).

According to an analysis by the Federal Statistical Office (Statistisches Bundesamt 2025b), a total of 86.3 % of employees covered by collective agreements were entitled to an inflation compensation premium over the entire period from 2022 to 2024 (Table 3). While between 80 % and 100 % of employees in the majority of economic sectors were entitled to an inflation compensation bonus, there were also some economic sectors, such as the hospitality industry or other economic services, in which only a minority of just over 10 % received an inflation compensation bonus. In addition, employees in companies not bound by collective agreements also received an inflation compensation premium, albeit much less frequently than in companies covered by collective agreements (Behringer/Dullien 2024).

On average, employees covered by collective agreements received an inflation compensation bonus of €2,680 between 2022 and 2024, although in most cases this was paid out in several instalments (Table 3). Depending on the economic sector, the inflation compensation premiums vary between full utilisation of the amount of €3,000 in public administration to just over €1,000 in the construction industry. In companies not bound by collective agreements, the amount of the inflation adjustment premium is generally significantly lower than in comparable companies with collective agreements (Behringer/Dullien 2024). Overall, the inflation compensation premiums have made an important contribution in recent years to limiting employees' loss of purchasing power (see also Schulten/WSI-Tarifarchiv 2024). However, as these bonuses are one-off payments, they will have a strong dampening effect on the development of collectively agreed earnings in 2025, as their elimination must first be compensated for by future pay increases (see below).

Table 3: Collective agreements with inflation compensation premium (2022 to 2024)

Economic Sectors	Average in Euro	Entitled persons in percent
Public administration, defense, Social security	3,000	100.0
Education and teaching	3,000	99.3
Art, entertainment and relaxation	2,976	93.3
Water supply, waste disposal	2,942	96.2
Energy supply	2,882	89.0
Health and social services	2,880	92.6
Other services	2,850	84.7
Manufacturing Industry	2,777	97.7
Hospitality Industry	2,701	11.6
Freelance scientific, technical services	2,688	86.9
Financial and insurance services	2,509	52.2
Information, communication	2,505	78.7
Mining and quarrying	2,143	98.3
Real estate and housing	2,123	96.5
Agriculture, forestry and fishing	1,980	77.9
Other economic services	1,886	12.2
Transportation and warehousing	1,704	73.5
Trade, maintenance, repair of motor vehicles	1,419	90.8
Construction Industry	1,103	88.8
Total Economy	**2,680**	**86.3**

Source: Special evaluation of the Federal Statistical Office (Statistisches Bundesamt 2025b):

3 Annualised rise in collectively agreed pay

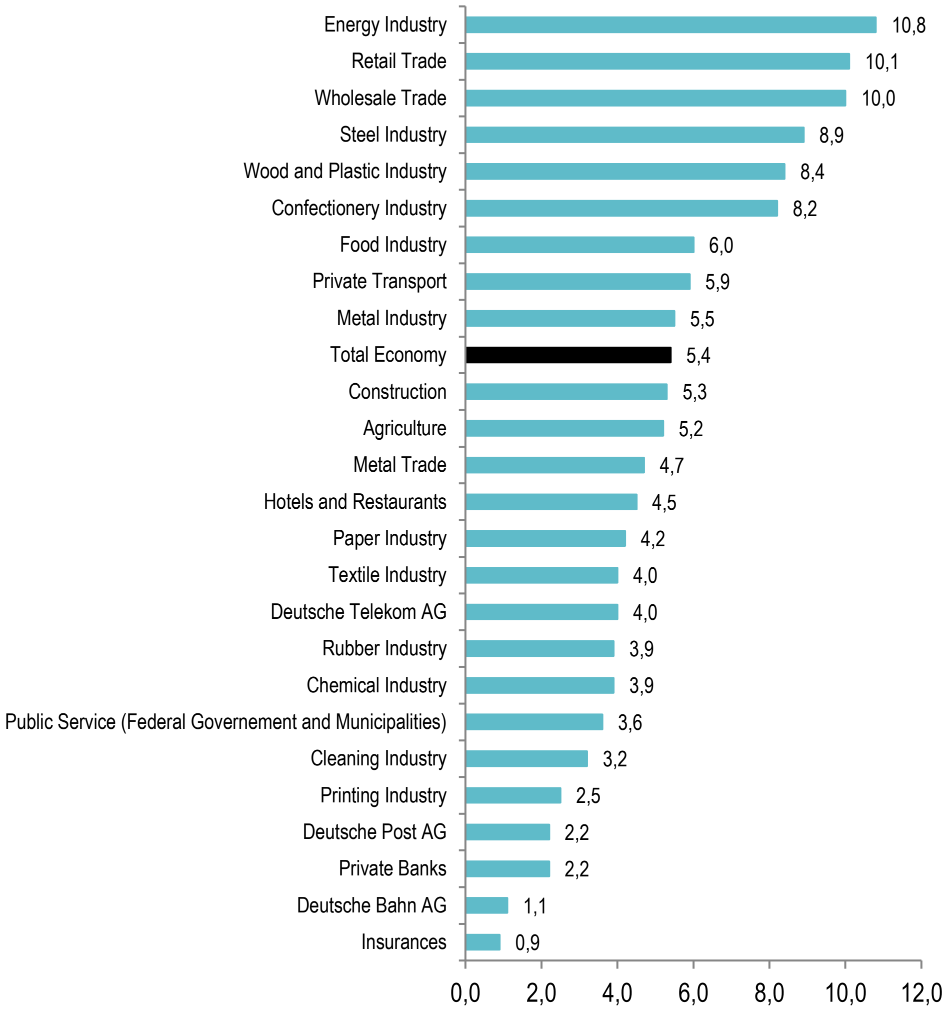
In order to be able to compare the result of collective bargaining with other economic framework data, an annualised collectively-agreed pay increases must be calculated, which express the average increase in collectively agreed wages compared to the previous year. In contrast to the increases agreed in the pay settlements, the calculation of the annualised wage increases also takes into account the different timing and duration of the wage agreements as well as any agreed zero months with no pay increases. In addition, both new agreements from the reporting year and agreements from previous years that only take effect in the reporting year are included. One-off and lump-sum payments are also taken into account. The calculation of the average pay increases for 2024 is therefore based not only on the new agreements concluded this year, but also on collective agreements from previous years in which step increases were set for 2024.

3.1 Annualised pay rises in 2024

Taking into account the newly concluded collective agreements and the pay rises already agreed for 2024 in previous years, pay rises in 2024 increased by an average of 5.4 % in nominal terms (Figure 2). A wide range can be observed between the collective bargaining sectors, ranging from growth rates of 10.0 % and more in sectors such as the energy industry, retail and wholesale and foreign trade to less than 1.0 % in the insurance sector. In most industries, the annual increase in collectively agreed wages varies between 3.0 % and 6.0 % in most sectors.[1]

[1] The inflation compensation premiums agreed in many collective agreements are counted as gross one-off payments in the calculations presented here by the WSI Collective Agreement Archive. The tax and contribution savings are not taken into account in the inflation compensation premiums, as they can vary greatly depending on the tax bracket and household context and are therefore difficult to calculate. However, due to the ‘gross-for-net’ effect of the inflation compensation premiums, the collective wage increases in 2024 will be significantly higher in some sectors.

Figure 2: Increase in collectively agreed wages in 2024 in selected sectors
in percent compared to the previous year

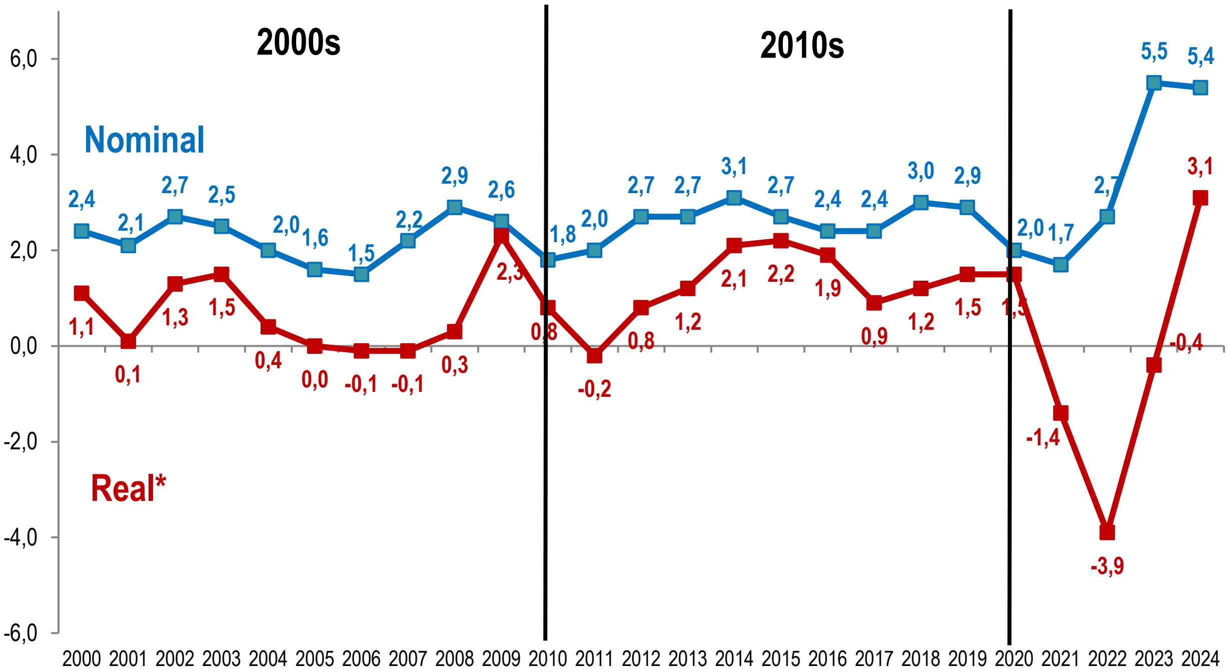


* Summary of several collective bargaining sectors
Source: WSI-Collective Agreement Archive

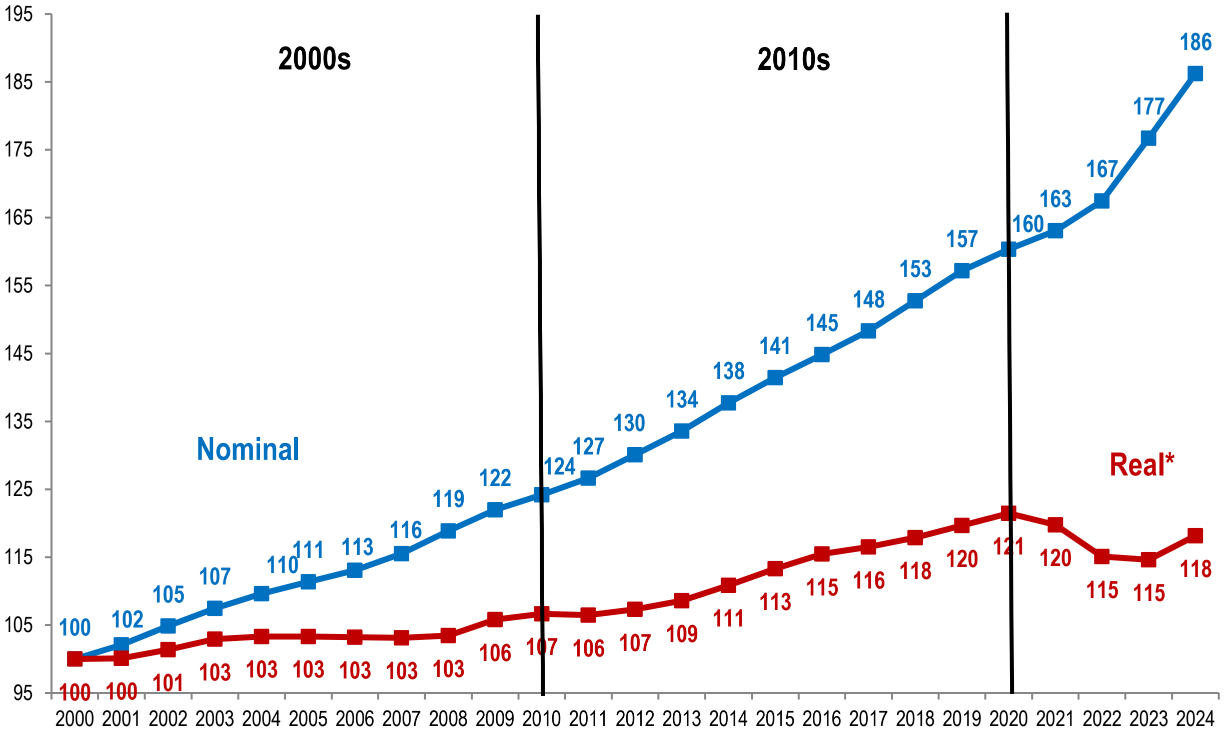
3.2 Long-term development of collectively agreed wages

At 5.4 % in total, the average increase in pay-scale remuneration in 2024 is almost exactly the same as in the previous year. A long-term analysis of the last two decades (Figure 3.1) shows just how unusually high the nominal pay increases in 2023 and 2024 are. Since the early 2000s, nominal increases in collectively agreed wages have only varied between 1.5 % and 3.1 %.

Figure 3: Development of nominal and real collectively agreed wages 2000–2024
3.1: In percent compared to the previous year



3.2: 2000 = 100



* Deflated by the development of national consumer prices
Source: WSI-Collective Agreement Archive, Destatis

The exceptionally high nominal pay increases in 2024 are a direct reaction to the historically high inflation rates in 2022 and 2023, to which collective bargaining policy has now responded with a certain time lag. In 2022, the pay increases, which had largely been agreed in two-year collective agreements before the price shock triggered by the war in Ukraine, led to a historically high real wage loss of minus 3.9 % for employees covered by collective agreements (Schulten/WSI-Tarifarchiv 2023). In 2023, the persistently high price increases were almost offset by the growth in collectively agreed wages (Schulten/WSI-Tarifarchiv 2024). In view of a significant decline in the average increase in consumer prices of only 2.2 %, the growth in collectively agreed wages led to a strong real wage increase of 3.1 % for the first time again in 2024.

Overall, the purchasing power of employees covered by collective wage agreements thus increased significantly again. However, this was still well below the pre-crisis level and roughly corresponded to the level of 2018 (Figure 3.2). The real wage gains in 2024 compensated for around half of the purchasing power losses from 2021 to 2023. There is still a considerable need to catch up in order to raise the purchasing power of collectively agreed wages back to the pre-crisis level of 2020.

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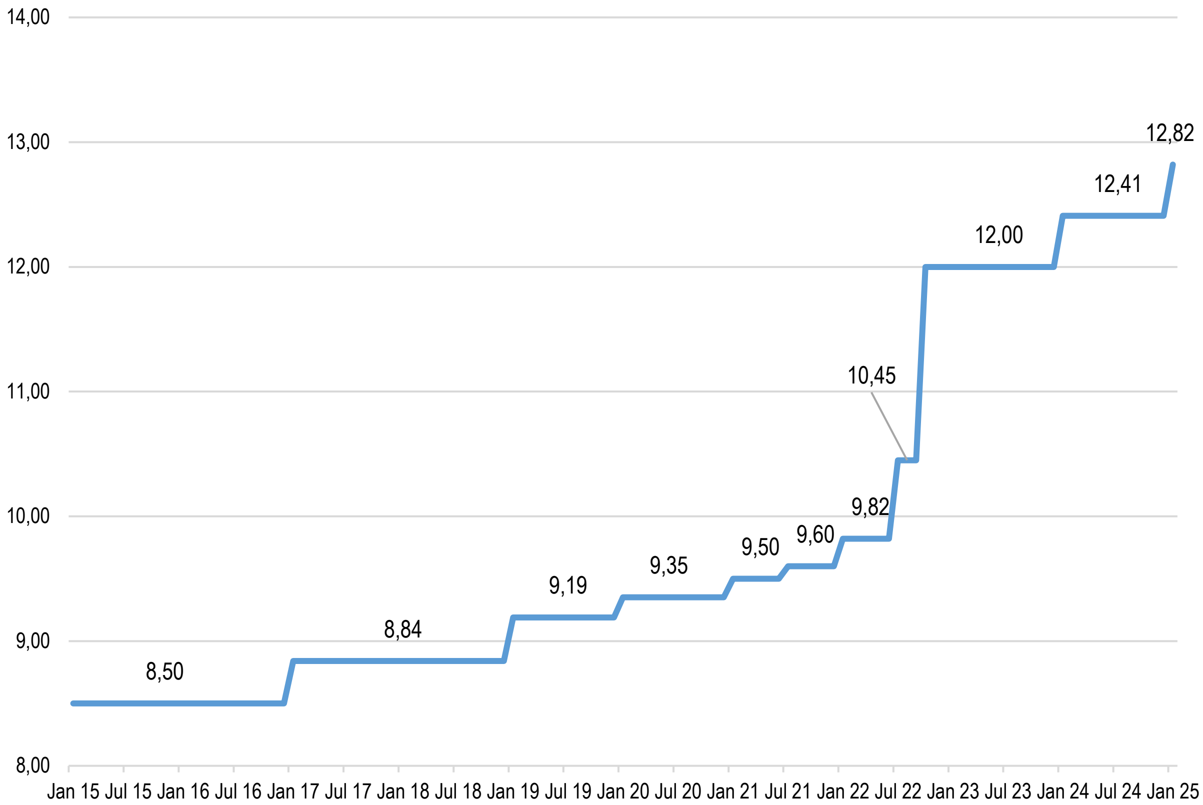
4 Statutory minimum wage and collectively agreed sectoral minimum wages

In January 2025, the statutory minimum wage celebrated its tenth anniversary. It is now largely regarded as a success story that has made a decisive contribution to limiting the low-wage sector in Germany again, without the negative effects on the labour market (Grabka 2024). The statutory minimum wage has also had a positive effect on collective bargaining policy, as it has helped to push through significantly stronger wage dynamics, especially in poorly organised sectors with low collectively agreed wages (Bispinck et al. 2023). The trade unions themselves were able to use the statutory minimum wage as the lowest benchmark in collective bargaining policy to enforce significantly higher collectively agreed minimum wages (Reuter 2025).

Since 1 January 2025, the minimum wage has been € 12.82 per hour and is therefore around 50 % higher than its initial level of € 8.50 in 2015 (Figure 4). However, measured against the European Minimum Wage Directive, which recommends an amount of at least 60 % of the national median wage for an ‘appropriate’ minimum wage level (Müller/Schulten 2022), the minimum wage in Germany is still significantly too low and should already be over € 15 (Lübker/Schulten 2025). In January 2025, the German Minimum Wage Commission (2025), which is made up of equal numbers of union and employer representatives, agreed as part of its new rules of procedure to set the minimum wage ‘on the basis of an overall assessment of wage developments and the reference value of 60% of the gross median wage for full-time employees’. Accordingly, the next increase, which is scheduled to take place on 1 January 2026, would have to be followed by a significant increase step.

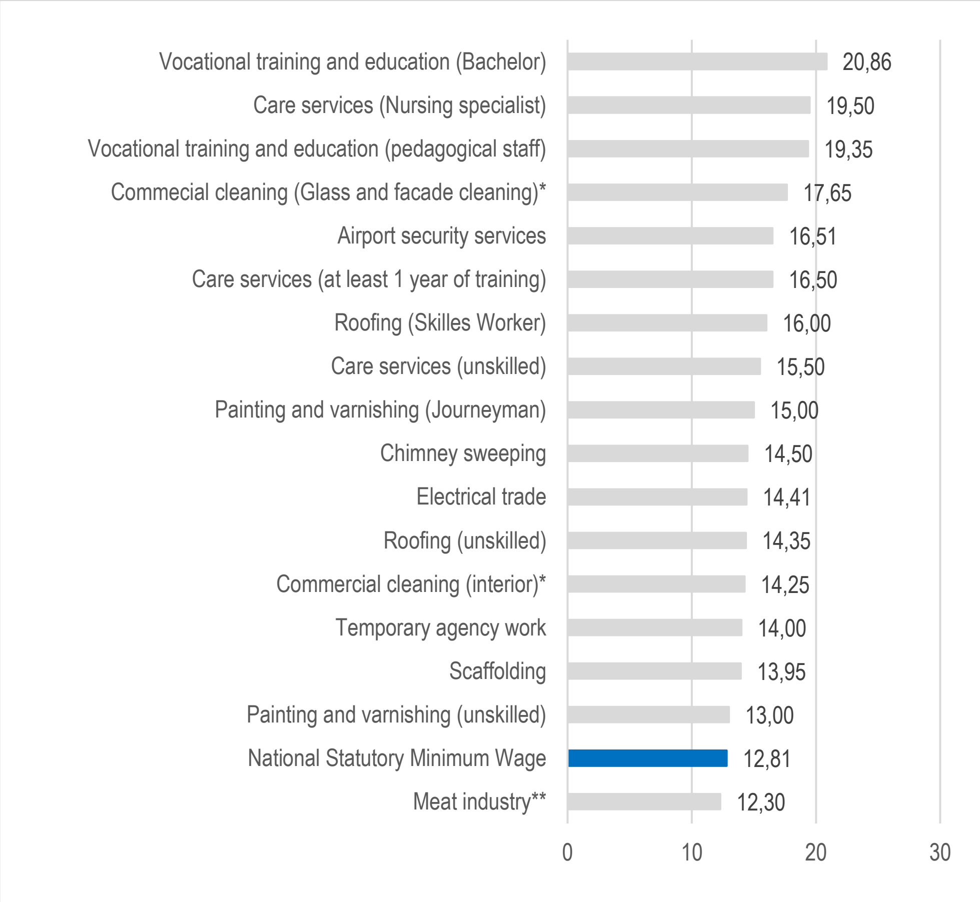
Figure 4: Development the of statutory minimum wage in Germany 2015–2025
In Euro per hour



Source: Minimum Wage Commission

In addition to the statutory minimum wage, there are collectively agreed minimum wages in ten sectors at the start of 2025 that have been declared generally binding on the basis of the Posted Workers Act or, in the case of chimney sweeps and the electrical trade, the Collective Agreement Act and, in the case of temporary agency work, the Temporary Employment Act (Figure 5, see also Bispinck 2025). The level of collectively agreed sectoral minimum wages varies between € 13.00 for unskilled workers in the painting and lacquering trade and € 19.96 for employees in training and further education with a bachelor's degree. The minimum wage in the meat industry, which at € 12.30 is significantly below the statutory minimum wage of € 12.82, expired at the end of November 2024 and is to be renegotiated in 2025

Figure 5: Generally binding industry minimum wages
In Euro per hour

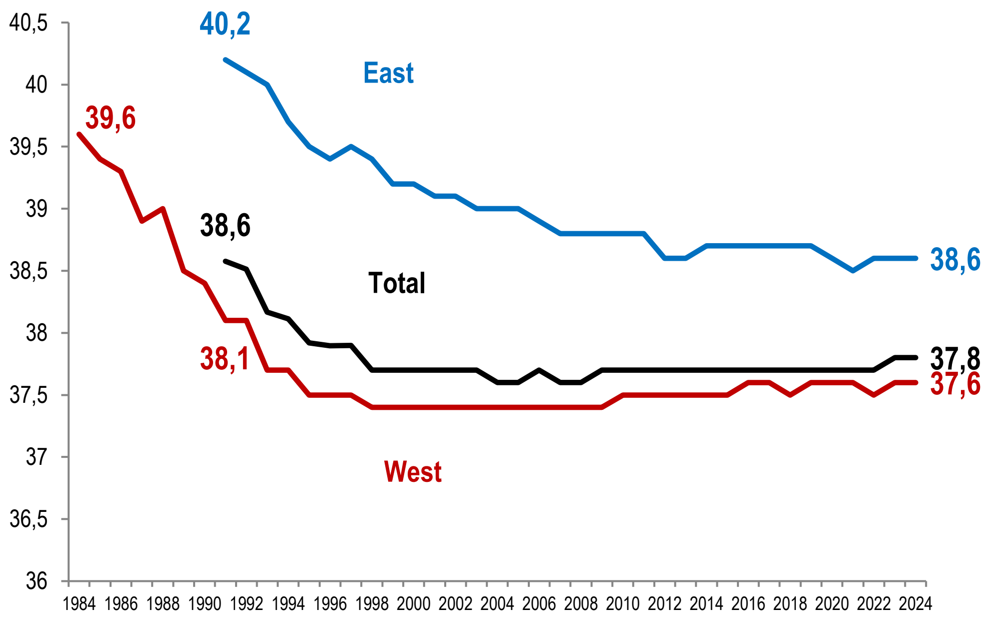


* Declaration of general applicability not yet issued
** Expired on 30.11.2024
Source: WSI-Collective Agreement Archive, as of 01.01.2025

5 Collectively agreed working hours

In the years before the coronavirus pandemic, the issue of collectively agreed working time policy became much more important again (Schulten/WSI-Tarifarchiv 2020, p. 13ff.). In many collective bargaining sectors, the main aim was to strengthen individual working time sovereignty by introducing collective bargaining options that allow employees to choose between higher pay, shorter working hours and other social benefits within certain limits. In addition, a collective reduction in weekly working hours was also negotiated, particularly in eastern Germany, in order to match the still lower level of working hours in western Germany in many collectively agreed sectors. On average, eastern German employees covered by collective agreements still have to work 38.6 hours per week, almost one hour longer than their western German colleagues at 37.6 hours. Overall, the collectively agreed weekly working hours have hardly changed since the mid-2000s (Figure 6).

Figure 6: Average collectively agreed weekly working hours in Germany 1984–2024
In hours per week

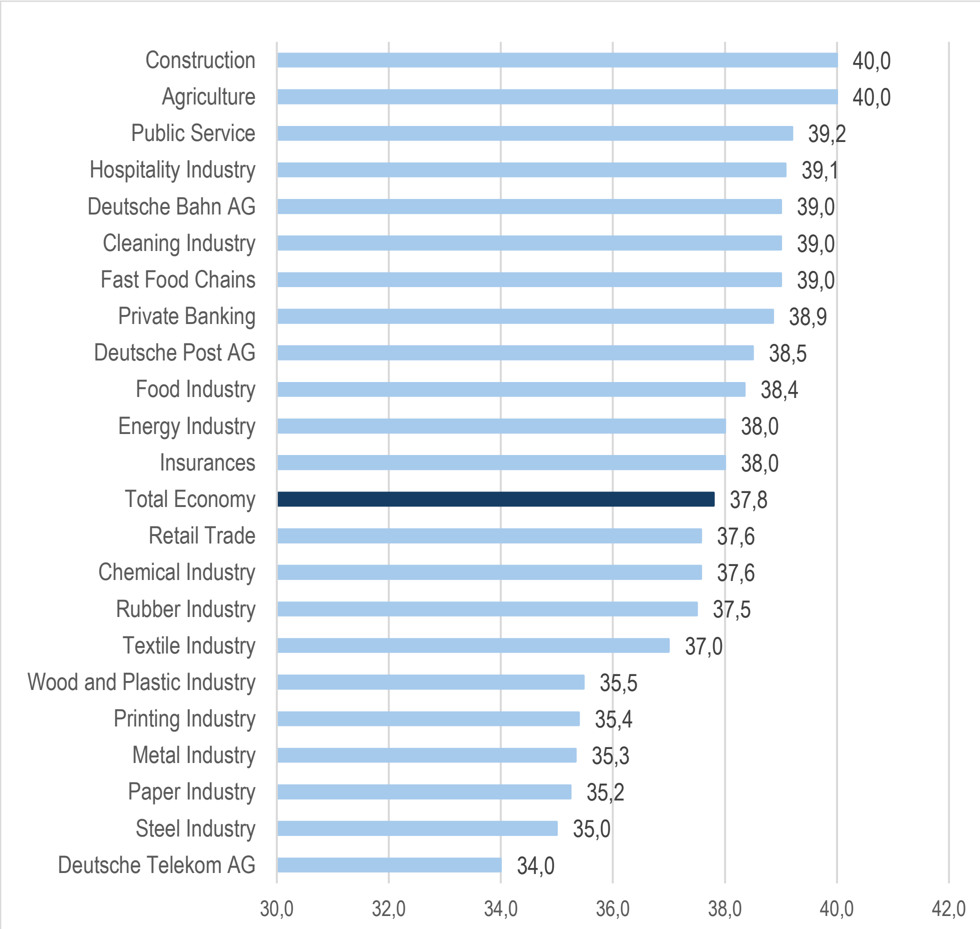


Source: WSI-Collective Agreement Archive

The collectively agreed weekly working hours vary between the major sectors, ranging from 40 hours in the construction industry and agriculture to 34 hours at Deutsche Telekom. Only a minority of employees covered by collective agreements still enjoy a 35-hour week, which began 40 years ago in the metal and electrical industry with a major industrial dispute (Andresen et al. 2025). Only just under 20 % of employees covered by collective agreements work 35 or fewer hours per week. Around 30 % have a collectively agreed working week of between 35 and 38 hours, for a further 40 % it is between 38 and 40 hours and for just over 10 % it is 40 hours or more.[2]

[2] Calculations by the WSI Collective Agreement Archive, as at 31/12/2024

Figure 7: Average collectively agreed weekly working hours by sectoral agreements, in 2024
in hours per week



Source: WSI-Collective Agreement Archive

In view of the significant loss of purchasing power and persistently high inflation rates in previous years, the 2024 collective bargaining round again clearly focussed on increasing pay. Demands for a reduction in weekly working hours hardly played a role. One exception was the German Train Drivers' Union (GDL), which entered the collective bargaining negotiations at Deutsche Bahn AG with the demand for a reduction in weekly working hours and ultimately achieved a gradual reduction in the standard working week from 38 to 35 hours by 2029 with full pay compensation. This is accompanied by a further flexibilization of working hours with a working time corridor of 35 to 40 weeks per week, meaning that not all employees will see a reduction in working hours (Regneri 2024).

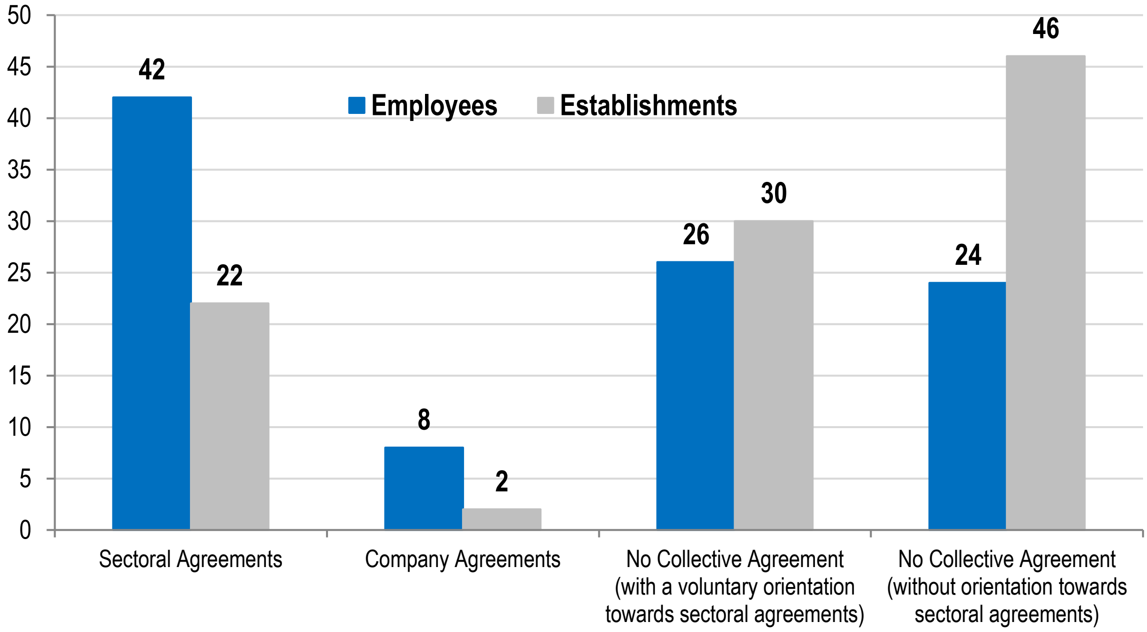
The IG BCE trade union has also achieved a small ‘collective bargaining revolution’ (Bild-Zeitung), as it was able to implement a member benefit regulation for the first time in a major sectoral agreement. While similar regulations have so far almost exclusively been set out in company agreements (Bahnmüller 2025), an additional day off was agreed in early summer 2024 as part of the new collective agreements for the chemical industry, which only benefits union members. In addition, active IG BCE members with a union membership of 10, 25, 40 or 50 years will receive another day off in the year of their anniversary. These ‘extra days off’ are explicitly intended to compensate for the trade union's ‘commitment to social partnership and collective bargaining’ (BAVC 2024).

6 Collective bargaining coverage

Since the mid-1990s, collective bargaining coverage in Germany has fallen sharply (Hohendanner/Kohaut 2024). According to data from the IAB Establishment Panel, in 2023 only 50 % of all employees in Germany worked in companies covered by collective agreements, including 42 % in companies with sectoral agreements and 8 % with company agreements (Figure 8). Beyond the public sector, which is predominantly covered by collective agreements, only 42% of employees in the private sector still work in companies covered by collective agreements.

Working conditions in companies not bound by collective agreements are generally significantly worse than in companies with collective agreements. On average, employees without a collective agreement have to work almost one hour longer per week, but at the same time receive almost 21% less pay (Lübker/Schulten 2024, p. 11). If the differences are adjusted for various structural effects (such as company size, industry affiliation, etc.), there is still a significant pay gap: employees without a collective agreement therefore work 53 minutes longer and earn over 10 % less. As a rule, even the voluntary ‘orientation’ towards existing collective agreements stated by almost a third of companies (30%) is no substitute for a binding collective agreement. On average, pay and working conditions in these companies are also significantly worse than in comparable companies with binding collective bargaining coverage (Ellguth/Kohaut 2020).

Figure 8: Collective bargaining coverage in Germany 2023
in percent of employees and establishments



Source: IAB Establishment Panel (Hohendanner/Kohaut 2024), own calculations

In view of the ongoing erosion of the German collective bargaining system, various approaches to strengthening collective bargaining coverage have been increasingly discussed in recent years (Behrens/Schulten 2023; Schulten/Müller 2024). These include, on the one hand, the various organising and unionisation projects of the trade unions, which aim to build up new organisational power at company level and thereby also establish and secure collective bargaining coverage. This process is to be supported by member benefit provisions in collective agreements, although their specific effects can vary greatly from case to case (Bahnmüller 2025).

In addition to building up trade union organisational power, the state also has various options for strengthening collective bargaining coverage again. These include political measures such as simplified rules for the declaration of collective agreements as universally binding or collective bargaining compliance requirements for public contracts and grants. With the European Minimum Wage Directive adopted in October 2022, the EU member states have committed to increasing the scope of collective agreements across Europe (Müller/Schulten 2022). Accordingly, all member states in which collective bargaining coverage is below 80% are to develop a policy to strengthen collective bargaining coverage together with trade unions and employers' organisations and present concrete action plans to this end (Schulten/Müller 2024). In Germany, the Traffic light coalition government composed of Social Democrats, Greens and Liberals had already formulated a series of measures in its 2021 coalition agreement, none of which could ultimately be implemented in practice due to the different positions of the coalition parties.

A new government composed by Christian Democrats and Social Democrats which came into force after the general election in February 2025 has also expressed its political will to see a higher bargaining coverage in Germany. However, no concrete measures have been determined in its coalition agreement except for a new law which aim to promote collective bargaining through public procurement (CDU, CSU and SPD 2025).

7 Outlook

With the 2024 round of collective bargaining, the trade unions have succeeded in significantly increasing real wages of employees covered by collective agreements for the first time, thereby compensating for around half of the loss of purchasing power in previous years. This was made possible by the fact that the nominal increase in collectively agreed wages was similar to the previous year, while the rise in consumer prices was again significantly lower.

However, many employees are still struggling with the consequences of the years of hyperinflation. There is still a considerable amount of catching up to do in order to fully restore the purchasing power level of the pre-crisis years. Accordingly, the unions' pay demands for the 2025 pay round are still quite high. In large collective bargaining sectors such as the public sector (federal and local authorities), Deutsche Post AG and Deutsche Bahn AG, which will characterise the 2025 collective bargaining round, the wage demands are between 7.0% and 8.0%. In view of an inflation forecast of closer to 2.0% (Dullien et al. 2024), this underlines the unions' claim to achieve further strong real wage increases. On the other hand, the abolition of inflation adjustment premiums in many collective bargaining sectors will have a strong dampening effect on the development of collectively agreed earnings in 2025. Overall, the economic and collective bargaining framework conditions therefore point to a rather conflict-ridden round of collective bargaining in 2025.

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