

Article

Collective Bargaining Coverage in Greece: A Fragile Predominance of the Sector Level

Ioannis Zisimopoulos ^{1,2,*}  and Kostas Kappos ¹ ¹ Department of Business Administration, University of Patras, 26504 Patras, Greece; k.kappos@ac.upatras.gr² Department of Tourism Management, University of Patras, 26334 Patras, Greece

* Correspondence: jozisimo@upatras.gr

Abstract

This study examines collective bargaining coverage in Greece in 2024, analyzing its distribution across economic sectors and enterprise size classes. The empirical analysis draws primarily on administrative data. Through a content analysis of 1118 enterprise and sectoral/occupational collective agreements, this study calculates the collective bargaining coverage rate at the national, sectoral, and enterprise levels. The findings indicate that the coverage rate in Greece is among the lowest in the European Union. The results further reveal a fragile predominance of sectoral bargaining over enterprise-level bargaining within a generally weak collective bargaining system, and an uneven distribution of coverage by collective agreements across different economic sectors and enterprise sizes.

Keywords: collective bargaining; collective agreements; wage setting; labour market institutions

1. Introduction

The collective bargaining coverage (CBC) rate influences the extent of inequality between capital and labour in terms of the functional income distribution and wage inequality among wage earners (Keune 2021). In centralized collective bargaining systems—where bargaining occurs predominantly at the sectoral and cross-sectoral (national) level—a higher degree of bargaining coordination and centralization, when combined with broader collective agreement coverage, leads to lower income (Traxler and Brandl 2011) and wage inequality compared to decentralized systems (Garnero 2021; Hayter 2015), where enterprise-level bargaining prevails. Furthermore, the literature argues that there is a lack of compelling research evidence confirming the neoclassical theory's claim that collectively bargained wages negatively affect the employment prospects of the unemployed or that they operate to the detriment of non-unionized workers (Hayter 2015).

During the previous decade, there was heightened interest and a substantial body of literature concerning the impact of the economic crisis on collective bargaining systems. In the last two years, even the EU's public discourse has acknowledged the negative impact of policies that undermined collective bargaining, which were implemented by national governments with the support of international organizations, including the European Union (EU) itself. This recognition is also reflected in the 2022/2041 European Directive, whose declared objective is to increase the CBC rate in countries where it is less than 80%.

Estimates of the CBC rate in Greece are provided by trade unions and international organizations. However, these estimates diverge, either due to methodological differences or because they are outdated. Moreover, they focus on the overall CBC rate at the national level, without distinguishing between coverage by sectoral collective agreements and by



Academic Editors: Eunice Han and Peter Philips

Received: 21 April 2026

Revised: 16 June 2026

Accepted: 26 June 2026

Published: 1 July 2026

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enterprise-level collective agreements, which would allow for the identification of the dominant level of collective bargaining. On this basis, the aim of this study is, among other things, to provide accurate estimates of the coverage rate of collective agreements in Greece.

What is the actual CBC rate in Greece and how does it differ from that in other EU countries? How is it distributed across economic activities and enterprises of different sizes, and which is the dominant level of collective bargaining? These are the core research questions of the present study. By investigating these research questions, the present study could contribute to the mapping of collective agreements and of the collective bargaining coverage rate among EU countries, by providing evidence for Greece. The need for data collection in this direction, especially for enterprise-level collective agreements, has been highlighted by [Tijdens et al. \(2022\)](#) and [Schnabel \(2025\)](#).

The remainder of this paper is structured as follows: Section 2.1 provides a literature review of the crucial variables of a collective bargaining system, their relationships with the CBC rate, and the transformations that occurred in the Greek collective bargaining system during the memoranda and post-memoranda period. Section 2.2 is dedicated to presenting methodological issues concerning the calculation of the CBC rate. Section 2.3 provides a review of recent studies on the collective bargaining coverage rate in Greece. Section 2.4 develops the methodology of the empirical research, and Section 3 presents the results. Section 4 is devoted to a discussion of the key findings of empirical research and Section 5 dedicated to conclusions.

2. Materials and Methods

2.1. Literature Review

A key characteristic of a collective bargaining system is the extent to which employees are covered by collective agreements concluded at various levels of collective bargaining ([Traxler 1994](#)). The CBC rate is a basic quantitative-statistical indicator that shows the extent to which terms of employment for wage-earners are determined by collective agreements ([Traxler 1994](#); [ILO 2018](#)), rather than the alternative of individual employment contracts.

The levels at which collective bargaining takes place, which often coexist, are cross-sectoral (national), sectoral, enterprise, and workplace ([Traxler 1994](#)). Collective bargaining is considered centralized when it is conducted primarily between central (cross-sectoral) or sectoral collective organizations of employers and employees ([Traxler 1994](#)). A level of collective bargaining is considered predominant when it accounts for two-thirds of the total coverage of employees by collective agreements ([Visser 2016, 2021](#)).

The main variables of a collective bargaining system are those that, when acting in concert, determine its structure and, consequently, the predominant level at which collective bargaining is conducted in a country, thereby influencing the CBC rate:

(a) The presence or absence of the favourability principle and legal extension of collective agreements, (b) the level of trade union density, (c) the level of employers' organization density, (d) the presence or absence of institutions for compulsory mediation-arbitration, and (e) the extent of legal protection of the right to strike and of trade union action.

The legislative entrenchment of the favourability principle and of the legal extension of collective agreements enhances the articulation of collective agreements at different levels of bargaining ([Marginson 2015](#)). The favourability principle ensures that collective agreements concluded at the enterprise level cannot contain terms less favourable than those in sectoral or occupational agreements ([Visser 2024](#)). The compulsory legal extension of a sectoral/occupational collective agreement extends the validity of the agreement to employees and/or employers who are not members of the signatory organizations ([Hayter and Visser 2021](#)). When combined with the favourability principle, it restricts the

application of enterprise agreements containing less favourable terms, as well as the use of individual contracts. Consequently, in countries where compulsory legal extension is applied, it reinforces the central role of multi-employer bargaining and acts as a substitute for low trade union density (Marginson and Sisson 2004), thereby ensuring high CBC rates (Visser 2009; Keune 2021).

According to Muller and Schulten (2024), strong and representative organizations of both employees and employers are a prerequisite for strong sectoral collective bargaining. A high rate of union density is a precondition *“in order to bring employers to the negotiation table”* (Muller and Schulten 2024, p. 78). Among the factors influencing union strength, a crucial element for conducting collective bargaining, particularly at the sectoral level, is the degree of protection of union rights, such as union access to the workplace and protection against dismissals and anti-union practices (Muller and Schulten 2024).

In some countries, employers may be mandatory members of institutions (e.g., chambers) that represent them in sectoral-level collective bargaining, resulting in an increased CBC rate (see Traxler 1994). In other countries, employers may be reluctant to join sectoral employer organizations to avoid being bound by collective agreements, or employer organizations may be fragmented and have low density, thereby hindering the conduct of collective bargaining and reducing the coverage rate (Muller and Schulten 2024). The compulsory extension of collective agreements counteracts the above practices. Furthermore, high density rates of both trade unions and employer organizations, when combined with extension mechanisms, can secure high coverage levels. However, as Hayter and Visser (2021) point out, extension may be unfeasible even in countries where it is provided by law, when governments and employers are oriented towards the decentralization of collective bargaining, when employers' organizations are not strong enough to conclude agreements, or even when concluded agreements do not meet the minimum required representation threshold.¹

The resolution of collective disputes arising during the bargaining process, or the failure to conclude a collective agreement, falls within the scope of conciliation, mediation, and arbitration mechanisms. These mechanisms constitute a vital component of the collective bargaining system (Ibsen 2021). Particularly, arbitration constitutes an intervention by a *“neutral third party”* (the relevant state services) which examines the arguments of the negotiating parties and issues a decision that is binding on the parties (ILO 2007). The role of arbitration is particularly important for maintaining sectoral and occupational collective agreements, especially in countries (such as Greece), where sectoral and occupational unions are too weak to negotiate effectively, whereas employer organizations may be fragmented or refuse to engage in collective bargaining. In these cases, arbitral awards that are equated with collective agreements serve as a substitute for low union density, keep collective agreements active, and maintain CBC levels.

Given that *“[i]n the context of trade union freedom, strike action serves free collective bargaining and the conclusion of collective agreements”* (Leventis 2023, p. 54) and since *“[t]he strike has traditionally constituted the primary means of balancing the asymmetry of bargaining power of the parties in employment relations”* (Goulas 2024, p. 71), the extent to which the right to strike is legally protected generally influences the degree of development of collective bargaining, the conclusion of collective agreements, and consequently, the rate of employee coverage by them.

Taken together, the above variables contribute to shaping the structure of a collective bargaining system. In turn, the structure of the collective bargaining system largely determines the extent of collective bargaining coverage. Thus, the presence of the favourability principle, the legal extension of collective agreements, high levels of trade union and employer organization density, the existence of mediation and arbitration institutions, and

strong legal protection of the right to strike and collective action create the conditions for a more centralized collective bargaining structure and, consequently, higher CBC rates.

The research conducted by Traxler (1994) across 17 countries for the period 1980–1990 showed that the collective bargaining coverage rate in 1990 varied across countries. However, coverage rates were significantly lower (below 18%) in countries where single-employer bargaining was dominant. According to Traxler (1994), the empirical data could not support a “*generalized decentralization hypothesis*”. However, they indicated a trend primarily of “*organized decentralization*” in certain countries, that is a trend toward a gradual undermining of multi-employer bargaining, rather than toward “*disorganized decentralization*”, meaning a direct undermining and collapse of centralized collective bargaining. In EU countries, the dominant trend until the recent economic crisis was toward organized decentralization (Marginson et al. 2003; Marginson and Sisson 2004; Visser 2005, 2013, 2016).

During the recent economic crisis, collective bargaining was viewed by international organizations as a primary source of labour market rigidity, and their policies actively fueled the process of decentralization (Marginson 2015), while reforms to labour legislation concerning collective bargaining led to a reduction in the CBC rate (Hayter 2015). Thus, the trend toward decentralization accelerated, as many countries prioritized enterprise-level bargaining (Visser 2024). The bargaining coverage in OECD countries declined from an average of 51.4% in 1980 to 32.3% in 2019, while in nearly half of the member states the CBC rate did not exceed 17% (Visser 2024). Similar trends were indicated by Hayter and Visser (2021), who investigated the coverage rate in 80 countries during the period 2016–2018. In countries where the sectoral level (multi-employer bargaining) was dominant, the coverage rate averaged 67%. In countries where the enterprise level (single-employer bargaining) was dominant, the coverage rate was 13%, while in countries where neither the sectoral nor the enterprise level was dominant (a mixed system with no predominant level), the coverage rate fell between the rates mentioned above (Hayter and Visser 2021).

During the crisis period, EU policies encouraged the erosion of institutions that regulate and protect employment (Hyman 2018), undermining the so-called “*European Social Model of Labour Relations*” (Zisimopoulos et al. 2019). In this direction, the common feature in many EU countries was structural reforms aimed at the decentralization of collective bargaining (Hermann 2016). The decentralization of collective bargaining and its consequences—most notably the widening of wage inequalities resulting from the decline of the CBC rate—are clearly acknowledged by the EU, as revealed in the recitals of the 2022/2041 Directive. According to data from the OECD/AIAS ICTWSS database, the CBC rate in the EU decreased on average from 64.63% in 2008 to 53.36% in 2018 (see Table 1). It remained relatively stable in countries dominated by multi-employer bargaining (from 83.91% in 2008 to 84.78% in 2018), whereas conversely, it decreased significantly in countries dominated by single-employer bargaining (from 30.27% in 2008 to 26.04% in 2018) and in countries with a mixed system (from 51.08% in 2008 to 33.56% in 2018).

Table 1. Collective bargaining coverage rate and dominant level of collective bargaining in EU countries, 2008–2018.

Country	Coverage Rate (%)		Dominant Level of Collective Bargaining	
	2008 *	2018 *	2008	2018
Austria	98	98	MEB	MEB
Belgium	96	96	MEB	MEB
Bulgaria	40	27.8	MEB	MEB/SEB
Denmark	82.6	82	MEB	MEB

Table 1. *Cont.*

Country	Coverage Rate (%)		Dominant Level of Collective Bargaining	
	2008 *	2018 *	2008	2018
Finland	87.5	88.8	MEB	MEB
France	98	98	MEB	MEB
Germany	61.3	54	MEB	MEB
Greece	100	14.2	MEB	MEB/SEB
Ireland	40.5	34	MEB	SEB
Italy	100	100	MEB	MEB
Netherlands	81.8	76.7	MEB	MEB
Portugal	87.7	77.2	MEB	MEB
Romania	100	15	MEB	MEB/SEB
Slovenia	100	78.6	MEB	MEB
Spain	80.3	80.1	MEB	MEB
Sweden	88.9	88	MEB	MEB
Cyprus	57.2	43.3	MEB/SEB	MEB/SEB
Czechia	38.2	34.2	MEB/SEB	MEB/SEB
Croatia	61	52.7	MEB/SEB	MEB/SEB
Lithuania	17.6	14.1	SEB	SEB
Luxemburg	59	56.9	MEB/SEB	MEB/SEB
Slovak Republic	40	24.4	MEB/SEB	MEB/SEB
Estonia	32.5	18.6	SEB	SEB
Hungary	22.8	21.1	SEB	SEB
Latvia	34.2	27.1	SEB	SEB
Malta	52.4	50.1	SEB	SEB
Poland	18.7	17.3	SEB	SEB
United Kingdom	33.7	26	SEB	SEB
Average	64.64	53.36	-	-

Source: [OECD and AIAS \(2023\)](#), adapted by the authors. Note: For the classification of countries in MEB (multi-employer bargaining), SEB (single-employer bargaining) and MEB/SEB (mixed or alternating dominant level) the “Level” variable has been used; the variable “AdjCov_hist” has been used for the depiction of collective bargaining coverage rate. * Or the nearest available year.

Similarly, in Greece during the memoranda period, a series of legislative interventions took place which led to the disorganized decentralization of the collective bargaining system ([Kornelakis and Voskeritsian 2014](#); [Koukiadaki and Kokkinou 2016](#); [Yannakourou and Tsimpoukis 2014](#); [Economakis et al. 2016](#); [Zisimopoulos 2019](#); [Koutroukis 2025](#)), a reduction in sectoral/occupational collective agreements ([Ioannou 2019](#); [Zisimopoulos et al. 2019](#)), and a drastic reduction in the CBC rate.

The legislative interventions adopted during the memoranda period directly affected several of the crucial variables shaping the structure of the collective bargaining system. Among the most important measures were the suspension of both the favourability principle and the legal extension of collective agreements (until 20 August 2018; Laws 3845/2010 and 4024/2011), the abolition of trade unions’ right to unilaterally resort to the arbitration services (until 14 June 2014; Law 4046/2012), and the tightening of the requirements for declaring strike by trade unions (Law 4512/2018).

As regards the post-memoranda period, although the favourability principle was subsequently reinstated, it was partially weakened by the introduction of opt-out clauses allowing sectoral and occupational collective agreements to provide for exceptions to their application (Article 53, Law 4635/2019). Likewise, the extension mechanism was weakened by allowing the Minister of Labour to exempt specific categories of enterprises from the application of the legally extended sectoral agreements (Article 56, Law 4635/2019). The

possibility of unilateral recourse to arbitration was again restricted in a manner that, in practice, makes its use difficult for the majority of trade unions (Article 57, Law 4635/2019). Protection of trade union activity was further undermined through provisions facilitating the dismissal of trade union representatives (Article 88, Law 4808/2021). Finally, additional restrictions were introduced on the exercise of the right to strike. In particular, the law indirectly treats strike action as an obstacle to the “negative freedom” of workers not to participate in a strike, thereby allowing courts to order the suspension of industrial action and impose sanctions on trade union representatives where such freedom is deemed to have been violated (Article 93, Law 4808/2021; Article 31, Law 5053/2023).

Taken together, the reforms adopted during both the memoranda and post-memoranda periods eroded the crucial variables of the collective bargaining system. This erosion contributed to the decentralization of the collective bargaining system and to the decline in the CBC rate, leaving a substantial share of wage earners outside the scope of collective bargaining.

At the end of the memoranda period, the CBC rate in Greece was among the lowest in the EU, as it is estimated to have dropped from 100% in 2008 to 14.2% in 2017. This shift indicates that the broad-coverage, mandatory sectoral/occupational collective agreements of the pre-memoranda period were substituted during this period by limited-coverage enterprise-level agreements and, primarily, by individual employment contracts (Zisimopoulos 2019).

The government policies during the post-memoranda period have validated the decentralization of the collective bargaining system by legislating new restrictions on extension mechanisms (Law 4635/2019), recourse to arbitration (Law 4635/2019), and strike action, as well as on the protection of unionists (Laws 4808/2021, 5053/2023).

2.2. Methodological Issues in Calculating the Collective Bargaining Coverage Rate

According to Traxler (1994, p. 171), the CBC rate is the indicator that shows the extent to which the terms of employment for a country’s wage earners are determined by collective bargaining, “i.e., [is] the number of employees covered by a collective agreement divided by the total number of wage- and salary-earners”. Furthermore, according to the definitions of the OECD and AIAS (2023), an employee (or a job position) is covered by a collective agreement during the reference period when the latter regulates his/her terms of employment, even if the agreement in question was concluded in previous years but remains in force. Collective bargaining coverage also applies to employees covered by a collective agreement through a mandatory legal extension mechanism.

The data sources from which the CBC rate can be derived directly or estimated are primarily four (ILO 2020; Traxler 1994): (a) labour force or household surveys, (b) administrative registers maintained by the Ministries of Labour, trade unions, and employers’ organizations, (c) establishment surveys, and (d) surveys of national experts.

Data collection and the estimation of the CBC rate face several methodological difficulties and limitations, as pointed out by Traxler (1994). First, employees may be covered simultaneously by multiple collective agreements operating at different bargaining levels, which creates a risk of double counting.

Second, it is often difficult to determine the exact duration of agreements, as available information typically reflects the date of signing and initial implementation rather than the stock of agreements in force.

Third, when extension mechanisms are applied, bargaining parties may not be able to precisely identify the number of employees covered by a given agreement.

Fourth, classification by economic activity can be complex, as some agreements span multiple subsectors or industries.

Fifth, when survey data are used, multiple jobholding may lead to discrepancies between individuals and job positions, since coverage is measured at the individual level rather than that of the job position, although the CBC rate conceptually refers to the latter (Traxler 1994).

Additional issues include the treatment of expired agreements that remain temporarily in force under statutory extension rules (OECD and AIAS 2023), as well as potential respondent (including proxy respondents) errors in household surveys, where individuals may be unaware of their actual coverage status (ILO 2020).

In several countries, certain categories of employees—typically civil servants, members of the armed forces and police, and judicial officials—are legally excluded from collective bargaining. This exclusion necessitates the calculation of two distinct coverage rate indicators (Traxler 1994; OECD and AIAS 2021, 2023; ILO 2018).

The first indicator is the unadjusted collective bargaining coverage rate (UnadjCov). This is a broader indicator, defined as the ratio of employees covered by a collective agreement (WCB) to the total number of employees (WSEE), including those who are legally excluded from the right to collective bargaining.

$$UnadjCov = \frac{WCB}{WSEE} \quad (1)$$

The second indicator is the adjusted collective bargaining coverage rate (AdjCov). This constitutes a narrower indicator, defined as the ratio of employees covered by a collective agreement (WCB) to the total number of potentially covered employees ($WSEE - Wstat$). In other words, it is calculated by subtracting those employees who are excluded from the right to collective bargaining ($Wstat$) from the total number of employees ($WSEE$).

$$AdjCov = \frac{WCB}{WSEE - Wstat} \quad (2)$$

The AdjCov indicator serves as a measure of the relative importance of collective agreements compared with the alternative of individual employment contracts (Traxler 1994).

In addition to the two aforementioned indicators, the ILO (2018) refers to a less commonly used CBC rate. This indicator is calculated as the percentage of employed persons covered by a collective agreement—including both employees and the self-employed—out of the total number of employed persons. According to the ILO, the utility of this indicator lies in its ability to better capture the CBC rate in countries with a high prevalence of vulnerable and non-standard forms of employment, particularly among dependent self-employed persons. A similar concern is raised by Yannakourou (2024), in the context of implementing Directive 2022/2041 and measuring the CBC rate in Greece. The author points out the need to include dependent self-employed and platform workers in the calculation, as in Greece, they (legally) hold the right to collective bargaining. This line of reasoning is fruitful and could contribute to a more accurate calculation of the CBC rate within the de facto dependent employment. In this direction, the results of surveys such as those of the European Labour Authority (ELA 2023), which estimated the percentage of dependent self-employed workers in total self-employment, could be used. However, as Yannakourou (2024) points out, no collective agreements have been concluded that cover this particular category of workers in Greece, although this remains a possibility for the future.

A final issue, no less important than the others, is the question of what constitutes coverage by a collective agreement for the purpose of calculating the CBC indicator. Does it refer to coverage by any collective agreement, irrespective of its content, or specifically to an agreement that determines, among other terms, wages? Should collective agreements that regulate other terms—such as working time and leave—but do not set wages be included

in the calculation of the CBC rate? Recent definitions from international organizations are more general, referring to coverage by one or more collective agreements which determine wages and/or conditions of employment or the employment relationship (ILO 2018; OECD and AIAS 2021, 2023). Earlier definitions either took for granted that the primary subject of a collective agreement is wage determination, or were more specific, referring explicitly to agreements resulting from wage bargaining (See Visser 2011, 2015, 2019). In our view, a broad definition of what constitutes collective bargaining coverage is justified when the purpose of calculating the coverage rate is to capture the general bargaining activity between capital and labour. Conversely, when the purpose is to measure the extent of collective agreements that specifically set wages, a narrower definition and the calculation of the adjusted coverage rate are required.

2.3. Review of Recent Studies on the Collective Bargaining Coverage Rate in Greece

The Labour Institute of Greek General Confederation of Labour INE-GSEE (2025) estimates the CBC rate in Greece at 28% of all employees. The data on the number of employees covered by collective agreements (711,500), i.e., the numerator of the indicator, are provided by trade union officials and refer to workers covered by 47 sectoral and occupational collective agreements that were in force in 2024. As for the number of employees potentially covered by collective agreements (2,519,726), i.e., the denominator of the indicator, the data are drawn from administrative records of the Ministry of Labour, derived from the ERGANI Information System and reported in its special annual publication (Ministry of Labour 2024).

We argue that this estimate deviates significantly from the actual collective bargaining coverage rate for the following reasons:

(a) The calculation is based solely on sectoral and occupational agreements in force in 2024 and does not take into account enterprise-level collective agreements.

(b) In 2024, there were 52 (rather than 47) sectoral/occupational collective agreements in force.

(c) Trade union data that could be used to estimate the number of covered employees mainly consists of membership figures drawn from union registers; however, these data tend to be overestimated.²

(d) The ERGANI data on the number of employees do not capture seasonal fluctuations in employment during 2024, as they refer to the number of employees in the period from 1 October to 6 December 2024 (see Ministry of Labour 2024).

In a quantitative survey conducted by ALCO (2025) on behalf of INE-GSEE, the CBC rate at the beginning of 2025 was estimated at 29% (margin of error $\pm 2.6\%$, 95% confidence interval). The survey was carried out in February 2025 using telephone interviews, with a sample of 1500 private-sector employees aged 17 and over. This estimate is based on responses to the question: “Is your job covered by any type of collective agreement?” We consider that the main advantage of this survey is that this question avoids double counting of employees who are simultaneously covered for the same job position, by both sectoral/occupational and enterprise-level collective agreements. However, a key limitation is that the calculation of CBC rate does not appear to account for multiple jobholding (at least based on how the survey is presented), which may lead to an underestimation of CBC rate (see Traxler 1994). This is because, in practice, CBC rate is more meaningfully defined in terms of job positions covered rather than individuals covered (OECD and AIAS 2023). Moreover, another limitation—potentially leading to either overestimation or underestimation—is that in surveys conducted directly with employees (labour force and household surveys), respondents may not know whether they are covered by a collective agreement (Traxler 1994; ILO 2020). In addition, responses may be provided by another

household member on behalf of the respondent (proxy respondents), potentially resulting in inaccurate answers (OECD and AIAS 2023).

Another estimation of the CBC rate derived from the European Central Bank (ECB n.d.). Within the framework of the ECB Wage Tracker-EWT, four indicators are calculated, one of which measures employee coverage by collective agreements that set wages, expressed as a percentage of total employees in the reference area. Based on this indicator, the CBC rate for Greece was estimated at 15.5% for the fourth quarter of 2024 (ECB 2024). However, it should be noted that the ECB Wage Tracker and its indicators are based on active collective agreements recorded in its database (Bates et al. 2024). In the case of Greece, the focus is specifically on agreements concluded at the sectoral and occupational levels (Górnicka and Koester 2024). Therefore, it can be concluded that the CBC rate reported by the ECB for Greece is limited to sectoral and occupational agreements related to wages and does not incorporate collective agreements concluded at the enterprise-level.

The OECD publishes CBC rates for Greece in the ICTWSS database. In the latest available year (2017), the reported CBC rate is 14.2%. According to the methodological notes of the database (OECD and AIAS 2023), the number of employees covered by collective agreements is based on estimates provided by recognized national experts. These estimates refer to the limited sectors where active collective agreements exist, as well as to certain former public enterprises. Public sector employees are excluded from the calculation of the CBC rate, while public employment is estimated on the basis of its distribution by economic activity, as reported in OECD national accounts (OECD and AIAS 2023, p. 17).

The ILO publishes country-level CBC rates (ILOSTAT Data Explorer n.d.). The data underlying these estimates are derived from administrative records provided by trade unions or government agencies (Industrial Relations Data (IRdata) n.d.). The reported CBC rate by the ILO for Greece in 2018 is 25.8% (ILOSTAT Data Explorer n.d.). It is noteworthy that the Greek General Confederation of Labour (GSEE), in its responses to the ILO Committee of Experts on the Application of Conventions and Recommendations (CEACR) in September 2021 and September 2023, reported a coverage rate of approximately 14% for Greece (NORMLEX 2025). Given the absence of an official national mechanism for measuring collective bargaining coverage, as well as the lack of relevant data from the Labour Force Survey, it can be inferred that ILO estimates for Greece are largely based on information provided by trade unions.

2.4. Methodology

The main research question of this study is to determine the CBC rate of employees in Greece in 2024, with a specific focus on coverage by collective agreements that set wages. An employee may be covered by a sectoral/occupational collective agreement and/or an enterprise-level collective agreement. Consequently, to avoid an overestimation of the coverage rate, the main research question is broken down into three specific sub-questions: (1) the identification of employees covered by sectoral/occupational collective agreements, (2) the identification of employees covered by enterprise-level collective agreements, and (3) the identification of employees covered simultaneously by both sectoral/occupational and enterprise-level collective agreements. Based on the above, to answer the main research question—namely, to determine the CBC rate for all employees in Greece—we will sum the number of employees covered by sectoral/occupational collective agreements (sub-question 1) and the number of employees covered by enterprise-level collective agreements (sub-question 2). From this sum, we will then subtract the number of employees covered simultaneously by both types of collective agreements (sub-question 3).

These research sub-questions must be investigated at three distinct levels, which correspond to the main stages of empirical analysis. First, the collective agreements that

were in force during 2024 are identified. Second, the number of employees covered by each type of collective agreement is determined. Finally, the number of potentially covered employees is estimated.

The identification of collective agreements in force during 2024 was conducted by using qualitative content analysis. The data sources used were the public databases of the Organization for Mediation and Arbitration (OMED), the Ministry of Labour and Social Security, and the Ministry of Maritime Affairs and Insular Policy, where the texts of the collective agreements are published. The dataset consists of 120 sectoral/occupational and 998 enterprise-level collective agreement texts (including arbitral awards that are equated with collective agreements according to Article 16, Paragraph 8 of Law 1876/1990) that were concluded between 2020 and 2024. The agreements were classified into four categories based on: (a) whether or not they were in force during 2024, (b) whether or not they were re-concluded in 2024, (c) the economic activities covered, according to one-digit NACE Rev. 2 classification (see Appendix A), and (d) whether or not they include terms that set wages.

Several clarifications are necessary regarding the classification procedure. First, due to statutory provisions on duration and time extension, collective agreements may remain in force beyond their formal expiration. Since agreements cannot have a duration shorter than one year or longer than three years, and their normative provisions—including wage terms—remain in force for three months after expiration or denunciation (Article 402, Presidential Decree 62/2025; Leventis 2023), an agreement may still be considered in force during 2024 even if its formal end date falls early in the year (e.g., validity from 2 October 2020 to 1 January 2024). For this reason, the analysis covers the period 2020–2024 and is based on the stock of agreements in force rather than annual flows. An exception applies to collective agreements covering seafarers, which are governed by Legislative Decree 3276/1944 rather than Law 1876/1990. For these agreements, only the explicitly stated validity period is considered.

Second, in cases where multiple agreements may apply within the same sector, occupation, or enterprise, the second classification category allows for the identification of the exact number of employees covered in 2024. This prevents double counting and avoids upward bias in the estimation of the CBC rate.

Third, classification by economic activity enables the precise determination of employees covered simultaneously by both sectoral/occupational and enterprise-level agreements. This further reduces the risk of overestimation of the CBC rate. In addition, it allows the identification of the main contributing sectors to overall coverage and, in specific cases such as maritime transport, enables analysis at the subsector level.

Finally, as the debate on Directive (EU) 2022/2041 focuses on increasing collective bargaining coverage as a means to raise minimum wages, the investigation of the CBC rate concentrates on those collective agreements whose purpose is wage determination. Classifying agreements based on whether or not they include wage-setting provisions serves this purpose. Furthermore, it enables the measurement of the CBC rate in a manner that is comparable with coverage rates across countries. Given that the subject matter of collective bargaining may include wages, other wage-related terms (e.g., allowances), other non-wage terms (e.g., leave), or a company's work regulations, this classification category allows the isolation of those collective agreements whose provisions (also) concern wage determination for employees in the sectors/occupations and enterprises within their scope. Concurrently, all agreements that do not contain wage-related terms, either because the bargaining parties chose to do so or because this is not permitted by legal constraints (e.g., employees remunerated on the basis of a unified wage scale set by the state, such as those in the public sector, legal entities of municipal and regional authorities, other

public sector legal entities under private or public law, and certain public enterprises), are categorized separately.

The determination of the number of employees covered by each type of collective agreement was conducted separately for sectoral/occupational and enterprise-level agreements.

Various sources were employed to determine the number of employees covered by sectoral/occupational collective agreements. For agreements that were not extended to all employees in the sector/occupation, data from employers' organizations were used to estimate the number of covered employees. This included published data from employers' organizations concerning the number of enterprises in the sector/occupation (e.g., in the case of the collective agreement for bakery employees), as well as published data or information provided by unionists regarding the number of members of the signatory trade unions covered by a specific agreement. Published data from trade unions tend to overestimate coverage (see also note 2 in Section 2.3). A similar tendency is assumed to apply to data provided by employers' organizations. However, the potential overestimation arising from these sources cannot be quantified. For sectoral collective agreements that are mandatorily extended to all employees in the sector, data from the Hellenic Statistical Authority's (ELSTAT n.d.) Labour Force Survey (LFS) regarding the number of employees in the respective sectors were utilized (e.g., in sectors such as accommodation and food service activities and financial and insurance activities). For strictly occupational collective agreements, published data from trade unions were used, enabling precise determination of covered employees (e.g., the tour guides' collective agreement). In cases where precise determination of covered employees was not feasible, coverage was estimated using ELSTAT's LFS data on employment by occupation. In the latter case, the maximum number of employees in the respective occupation was used, which may lead to an upward bias in the estimates. However, the magnitude of this potential overestimation cannot be quantified.

For the determination of employees covered by sectoral/occupational collective agreements in maritime transport, data from the 3rd Seafarers' Pension Fund (N.A.T. 2025) report on maritime employment were utilized. This report provides detailed employment figures by vessel category. It should be noted that collective agreements for seafarers are concluded for distinct vessel categories and are mandatorily applicable to their respective crews. Consequently, the N.A.T. report data enable precise identification of seafarers covered by collective agreements.

To determine the total number of employees covered by enterprise-level collective agreements, it was necessary to identify the number of employees in each enterprise/organization with a collective agreement in force in 2024. For this purpose, the sources used consist mainly of administrative data, supplemented by alternative sources when the number of employees could not be determined from administrative data. Specifically, the sources used for this determination were as follows:

(1) The published financial statements of enterprises in the General Commercial Register (General Commercial Register (GEMI) of the Ministry of Development n.d.) of the Ministry of Development, which allow for the precise determination of the number of employees in each enterprise (247 cases). The financial statements utilized primarily pertained to the year 2023 and reported the average number of employees per enterprise during the period from 1 January 2023 to 31 December 2023. It should be noted that public limited companies are required to publish their financial statements by the end of September of the year following the reporting year (Laws 4308/2014 and 4585/2018). Consequently, corresponding data for 2024 were unavailable during the conduct of this research. We consider this source for determining the number of employees by enterprise

to be the most reliable, as it reflects the average number of employees and incorporates seasonal fluctuations.

(2) The publicly available data from the “findbiz” website of the company ICAP CRIF (which provides sector studies) regarding the classification of enterprises by size class. In these cases, the enterprise size was determined using the midpoint of the size class to which it was assigned by the ICAP CRIF (22 cases). This methodological choice may introduce both upward and downward bias in the estimation of enterprise-level collective bargaining coverage: upward bias if the actual number of employees in an enterprise is below the class midpoint, and downward bias if it is above the midpoint. However, it should be noted that these 22 enterprises, out of a total of 349 enterprises in which employees are covered by any type of collective agreement (see Section 3), account for 2492 employees (of whom 861 are covered by agreements that set wages) out of a total of 222,789 employees when the class midpoint is used. When the lower bound of the class is applied, they account for 1182 employees (of whom 457 are covered by agreements that set wages) out of 221,479 employees, whereas when the upper bound is used, they account for 3822 employees (of whom 1271 are covered by agreements that set wages) out of 224,119 employees. Consequently, any potential over- or underestimation of collective bargaining coverage indicators resulting from the use of the class midpoint is negligible.³

(3) The ICAP CRIF database (12 cases).

(4) The texts of collective agreements that specify the number of workers covered by them (12 cases).

(5) Enterprise websites that provide information regarding the number of employees (10 cases).

(6) Data obtained from other sources, such as public documents posted online that either report or enable the estimation of the number of employees (7 cases).

It should be noted that the number of employees could not be determined for 15 enterprises covered by an enterprise-level collective agreement in 2024. This lack of data leads to an underestimation of the number of employees covered by enterprise-level collective agreements, the magnitude of which cannot be quantified.

Although the main objective of this research is to identify employees covered by collective agreements that set wages, we also calculate the number of employees covered by all types of collective agreements that do not set wages. This category includes not only private sector enterprises but also entities belonging to the public sector (general government, public sector legal entities under private and under public law, and public enterprises). To determine the number of employees in organizations related to the public sector, we used administrative data provided by the Ministry of the Interior, specifically from the Human Resources Register of the Greek State (24 cases). The number of employees in these organizations was estimated on the basis of the number of filled job positions within their organizational charts.

The limitations of this study include the following:

(a) The necessary use of alternative data sources, supplementing the core administrative data, to determine the number of employees covered by collective agreements, which may introduce both underestimation and overestimation of the relevant indicators, as discussed above.

(b) Enterprise-level collective agreements were classified by economic activity based on the principal economic activity described in the agreement text. For enterprises engaged in multiple economic activities, classification followed the primary NACE code reported in the General Commercial Registry ([General Commercial Register \(GEMI\) of the Ministry of Development n.d.](#)).

(c) Some enterprise-level collective agreements cover all employees within the enterprise, while others cover only employees with open-ended private-law employment contracts. The financial statements and other sources used do not always distinguish between these two categories of employees, potentially leading to an overestimation of the coverage by enterprise-level collective agreements.

(d) The use of 2023 financial statements (which were available when this research was conducted) rather than those of 2024 financial statements (which were unavailable when this research was conducted) may lead to a slight underestimation of coverage by enterprise-level collective agreements. However, this underestimation is likely to be marginal, given that, according to ELSTAT data, wage employment increased by 2.32% between 2023 and 2024 (from 2,895,482 to 2,962,630). On this basis, and under the assumption that employment in enterprises covered by collective agreements follows the same trend as aggregate wage employment over the 2023–2024 period, the potential underestimation of coverage by enterprise-level collective agreements does not exceed 2.32%. Consequently, any bias in the estimation of collective bargaining coverage indicators arising from this limitation is considered negligible.

In light of the above limitations and the potential underestimation and overestimation arising from the use of multiple data sources, a sensitivity analysis was conducted. The analysis takes into consideration those sources for which potential measurement error can be quantified (namely, data derived from the ICAP findbiz website for 22 enterprises and from 2023 financial statements for 247 enterprises). The sensitivity analysis indicates that, for all indicators, the estimates deviate within the range of -0.05 to $+0.23$. The corresponding sensitivity bounds for each indicator are presented in Table 4 of Section 3.

To determine the number of potentially covered employees (WSEE), data from ELSTAT's LFS on the distribution of employed persons by professional status in 2024 were utilized (see Table 2).

Table 2. Employed persons by professional status in Greece, 2024.

Professional Status	Employed Persons
Self-employed	1,160,565
Employees	2,962,630
Contributing family workers	152,758
Total	4,275,953

Source: (ELSTAT n.d.).

Furthermore, to identify the employees who are excluded from the right to wage bargaining and are therefore not covered by collective agreements setting wages, the following clarifications are necessary. Law 1876/1990 established the right to collective bargaining, including wage bargaining, and the conclusion of collective agreements for employees with private-law employment contracts in both the private and the public sector. According to Law 2738/1999, it is possible to conclude collective agreements for civil servants of the public administration, which also apply to the employees of legal entities under the public law of municipal and regional authorities. However, according to Article 3(2) of the aforementioned law, collective agreements concluded within the Public Administration are prohibited from containing wage-related terms (Leventis 2023), as wages are determined by legislative regulations. It must be emphasized that the aforementioned laws do not provide for the possibility of collective bargaining and the conclusion of collective agreements for employees in the armed forces, public order and safety activities, and judicial officials. Indeed, for these categories of employees, the Constitution (article 23, paragraph 2) provides for a restriction of their trade union freedom, as the exercise of the right to strike—which is inherently linked to collective bargaining—is prohibited. It should also be noted that, under

the implementation of the economic adjustment programs (memoranda), Law 4024/2011 introduced a legislative framework for the uniform determination of wages in the public sector (uniform pay scale), applicable comprehensively to all public sector employees, whether under public or private law employment contracts. By the explicit provision of Article 29 of Law 4024/2011, wages determined by this law cannot be an issue of collective bargaining. Thus, the right to wage bargaining provided by Law 1876/1990 was abandoned for private-law employees working in the public sector. Law 4354/2015, which is still in force, redefined wages in the public sector, repealing Article 29 of Law 4024/2011. Due to the repeal of Article 29 of Law 4024/2011, the view has been put forth (see [Yannakourou 2024](#); [Goulas 2024](#)) that private-law employees in the broader public sector and public enterprises are no longer excluded from the right to wage bargaining. This is because the right to wage bargaining provided by Law 1876/1990 is considered to be revived for these employees (even if not explicitly stated), and they should therefore be included among those potentially covered by wage negotiations. In practice, however, the provisions of Law 4354/2015 (which preclude wage bargaining) continue to be applied to these categories of employees, as evidenced by our content analysis of collective agreement texts in relevant entities during 2024 (e.g., Municipal Water and Sewerage Companies, Port Authorities, etc.). Consequently, from our point of view, they should be excluded from the counted number of employees potentially covered by wage bargaining when calculating the CBC rate.

Based on the above clarifications, the Annual Statistical Data provided by the Human Resources Register of the Greek State ([Ministry of the Interior n.d.](#)) for the year 2024 were used for the calculation of employees excluded from the right to wage bargaining. According to these data, public sector employees—civil servants, employees under private law open ended and fixed-term contracts—who are excluded from wage bargaining as their salaries are determined by law (uniform pay scale), numbered 791,467 in 2024. Furthermore, to calculate the number of employees excluded from any kind of bargaining and from concluding collective agreements—namely, personnel in armed forces, in public order and safety activities, and judicial officials—data from the “2024 Performance Budget” (part of the State Budget) of the [Ministry of Economy and Finance \(2023\)](#) were used. The number of these employees was estimated at 172,566. Specifically for estimating judicial officials, the budget data were combined with data provided by the European Commission for the Efficiency of Justice (CEPEJ), according to which prosecutors and judges constitute 42% of the workforce in the judicial system ([CEPEJ 2024](#)). Thus, the number of judicial officials was estimated at 4313.

Finally, the extent of dependent self-employment was estimated on the basis of data provided by [ELA \(2023\)](#) for 2023, as no more recent studies are available. Specifically, in 2023 dependent self-employment in Greece accounted for 0.8% of total self-employed persons ([ELA 2023](#), p. 20). Assuming that the share of dependent self-employment among total self-employed persons remains constant, it is estimated that in 2024 dependent self-employment amounted to 9285 individuals (0.8% of the total self-employed persons reported in Table 2).

3. Results

In Greece, in 2024, 52 sectoral/occupational collective agreements were in force. Of these agreements, 49 set wages. Among them, seven were binding for seafarers across different vessel categories, while four were legally extended in the accommodation and food service activities sector. Additionally, 349 enterprises had enterprise-level collective agreements in force, 214 of which included wage terms.

Table 3 presents the variables used to calculate the basic CBC rate indicators, along with the values these variables obtained following data processing. The variable values clearly show that the primary source of the coverage by collective agreements that set

wages is the sectoral/occupational level (403,625 employees or job positions), while the coverage by enterprise-level collective agreements is slightly less than half of the coverage at the sectoral/occupational level (165,614 employees or job positions). The actual coverage, after subtracting the number of employees/job positions covered simultaneously by both sectoral/occupational and enterprise-level collective agreements (33,529 employees or job positions), amounts to 535,710 employees or job positions.

Table 3. Variables for calculating the collective bargaining coverage rate in Greece, 2024.

Variable	Variable Description	Number of Employees/Job Positions Covered
WCB (sec-occ) (1)	Employees covered by sectoral/occupational collective agreements that set wages	403,625
WCB (ent) (2)	Employees covered by enterprise-level collective agreements that set wages	165,614
WCB (ent_dc) (3)	Employees covered simultaneously by sectoral/occupational and enterprise-level collective agreements that set wages	33,529
WCB (1 + 2 − 3)	Employees covered by one or more collective agreements that set wages	535,710
WSEE	Total employees	2,962,630
Wstat	Employees excluded from the right to collective bargaining for the determination of wages	791,467
DSE	Dependent self-employed	9285
ig_WCB (sec-occ) (4)	Employees covered by sectoral/occupational collective agreements, regardless of whether they set wages or not	412,138
ig_WCB (ent) (5)	Employees covered by enterprise-level collective agreements, regardless of whether they set wages or not	222,789
ig_WCB (ent_dc) (6)	Employees covered simultaneously by sectoral/occupational and enterprise-level collective agreements, regardless of whether they set wages or not	57,669
ig_WCB (4 + 5 − 6)	Employees covered by one or more collective agreements, regardless of whether they set wages or not	577,258
ig_Wstat	Employees who are generally excluded from the right to collective bargaining and from concluding collective agreements	172,566

Note: The notation “sec-occ” indicates the coverage by sectoral/occupational collective agreements; “ent” indicates the coverage by enterprise-level collective agreements; “ent_dc” indicates the coverage simultaneously by enterprise-level and sectoral/occupational collective agreements; “ig” indicates the coverage generally by collective agreements, regardless of whether they determine wages or not. Authors’ calculations based on the data described in Section 2.4.

It should be noted that sectoral/occupational collective agreements account for 70.91% of the total coverage by collective agreements that set wages, while enterprise-level agreements account for the remaining 29.09%. Consequently, in 2024, multi-employer bargaining emerged as the dominant level at which collective bargaining takes place.

When examining the variables related to coverage by one or more collective agreements, regardless of whether they set wages or not, the primary source of the coverage also stems from sectoral/occupational agreements (412,138 employees or job positions), while the coverage by enterprise-level collective agreements is slightly more than half of the coverage at the sectoral/occupational level (222,789 employees or job positions). The actual coverage, after subtracting the number of employees/job positions covered simultaneously

by both sectoral/occupational and enterprise-level collective agreements (57,669), amounts to 577,258 employees or job positions.

Table 4 presents the values of the CBC rate indicators for employees covered by collective agreements that set wages, as well as the values of the CBC rates indicators for employees covered by collective agreements regardless of whether they set wages or not. The formulas used for calculating the indicators are presented in detail in the Appendix B.

Table 4. Indicators of unadjusted and adjusted collective bargaining coverage rates in Greece, 2024.

CBC Rate for Employees Covered by Collective Agreements That Set Wages			CBC Rate for Employees Covered by Collective Agreements Regardless of Whether They Set Wages or Not		
		Sensitivity Bounds			Sensitivity Bounds
UnadjCov	18.08%	−0.01/+0.12	ig_UnadjCov	19.48%	−0.02/+0.16
AdjCov	24.67%	−0.02/+0.16	ig_AdjCov	20.69%	−0.03/+0.16
UnadjCov_ + dse	18.03%	−0.01/+0.12	ig_UnadjCov_ + dse	19.42%	−0.02/+0.15
AdjCov_ + dse	24.57%	−0.02/+0.16	ig_AdjCov_ + dse	20.62%	−0.03/+0.16
UnadjCov (sec-occ)	13.62%	0.00/0.00	ig_UnadjCov (sec-occ)	13.91%	0.00/0.00
AdjCov (sec-occ)	18.59%	0.00/0.00	ig_AdjCov (sec-occ)	14.77%	0.00/0.00
UnadjCov_ + dse(sec-occ)	13.58%	0.00/0.00	ig_UnadjCov_ + dse(sec-occ)	13.87%	0.00/0.00
AdjCov_ + dse (sec-occ)	18.51%	0.00/0.00	ig_AdjCov_ + dse (sec-occ)	14.72%	0.00/0.00
UnadjCov (ent)	5.59%	−0.01/+0.14	ig_UnadjCov (ent)	7.52%	−0.04/+0.22
AdjCov (ent)	7.63%	−0.02/+0.20	ig_AdjCov (ent)	7.99%	−0.05/+0.23
UnadjCov_ + dse (ent)	5.57%	−0.01/+0.14	ig_UnadjCov_ + dse (ent)	7.50%	−0.04/+0.22
AdjCov_ + dse (ent)	7.60%	−0.02/+0.20	ig_AdjCov_ + dse (ent)	7.96%	−0.05/+0.23
UnadjCov (ent_dc)	1.132%	0.000/+0.026	ig_UnadjCov (ent_dc)	1.947%	−0.019/+0.065
AdjCov (ent_dc)	1.544%	0.000/+0.036	ig_AdjCov (ent_dc)	2.067%	−0.021/+0.069
UnadjCov_ + dse (ent_dc)	1.128%	0.000/+0.026	ig_UnadjCov_ + dse (ent_dc)	1.940%	−0.019/+0.065
AdjCov_ + dse (ent_dc)	1.538%	0.000/+0.036	ig_AdjCov_ + dse (ent_dc)	2.060%	−0.021/+0.069

Note: The notation “+dse” indicates that dependent self-employed persons are included in the total count of employees; “sec-occ” indicates the coverage by sectoral/occupational collective agreements; “ent” indicates the coverage by enterprise-level collective agreements; “ent_dc” indicates the coverage simultaneously by enterprise-level and sectoral/occupational collective agreements; “ig” indicates the coverage generally by collective agreements, regardless of whether they determine wages or not. The formulas used for calculating the indicators are presented in the Appendix B. Authors’ calculations based on the data described in the Section 2.4.

The results indicate that the CBC rate among all employees with the right to wage bargaining (AdjCov)—namely, the primary indicator related to the implementation of Directive 2022/2041 and Law 5163/2024, by which the Directive was transposed into Greek Law—stands at 24.67%. When examining the overall bargaining activity, the CBC rate among all employees with the general right to bargain over wages and/or other conditions of employment (ig_AdjCov) is 20.69%.

3.1. Collective Bargaining Coverage Rate by Economic Activity Sector

The results of the CBC rate calculation by economic activity sector are presented in Table 5. It should be noted that, due to the inability to determine dependent self-employed persons and employees excluded from the right to collective bargaining (for setting wages and/or other conditions of employment) by economic activity sector, we calculate only the unadjusted CBC rate (UnadjCov) for employees covered by collective agreements that set wages.

Table 5. Collective bargaining coverage rate by economic activity sector.

Sector *	WCB (sec-occ)	WCB (ent)	WCB (ent-dc)	WCB	WSEE	UnadjCov
A	0	224	0	224	46,025	0.49%
B	0	1017	0	1017	7675	13.25%
C	21,513	23,959	6144	39,328	330,525	11.90%
D	0	13,084	692	12,392	42,075	29.45%
E	0	2678	0	2678	38,925	6.88%
F	13,500	107	0	13,607	107,275	12.68%

Table 5. *Cont.*

Sector *	WCB (sec-occ)	WCB (ent)	WCB (ent-dc)	WCB	WSEE	UnadjCov
G	0	48,144	1430	46,714	482,350	9.68%
H	14,179	14,844	593	28,430	183,375	15.50%
I	288,525	4117	4117	288,525	288,525	100.00%
J	1150	9764	0	10,914	95,350	11.45%
K	54,384	21,719	20,343	55,760	72,000	77.44%
L	0	0	0	0	4725	0.00%
M	0	363	210	153	157,700	0.10%
N	1120	17,476	0	18,596	88,025	21.13%
O	0	0	0	0	351,925	0.00%
P	0	1412	0	1412	302,025	0.47%
Q	0	2464	0	2464	244,125	1.01%
R	2977	4242	0	7219	46,600	15.49%
S	0	0	0	0	52,875	0.00%
T	0	0	0	0	16,975	0.00%
U	0	0	0	0	1225	0.00%
H & N	1553	-	-	-	-	-
G & I	400	-	-	-	-	-
C & F	3115	-	-	-	-	-
C & G	1209	-	-	-	-	-

* Economic activities according to the NACE Rev. 2 classification (see Appendix A). Authors' calculations based on the data described in Section 2.4.

Table 5 clearly shows that 13 out of the 21 economic activity sectors have no coverage by sectoral/occupational collective agreements. In sectors with predominantly public servant employment (O, P, Q) who are excluded from wage bargaining rights, the CBC rate is zero or marginal. The marginal CBC rates in the sectors of “education” (P) and “human health and social work activities” (Q) are due to a limited number of enterprise-level agreements in private education and private clinics. In the “manufacturing” (C) and “transportation and storage” (H) sectors, a balance is observed between the volume of coverage provided by sectoral/occupational and enterprise-level collective agreements. Focusing specifically on the “transportation and storage” sector (H), it is worth noting that the seven collective agreements for crews of passenger ships and tugboats/rescue vessels cover 12,410 of a total of 26,332 seafarers (N.A.T. 2025), resulting in a coverage rate of 47.31% for seafarers.

Furthermore, Table 5 reveals that the “accommodation and food service activities” (I) sector exhibits the highest CBC rate (100%). The absolute coverage of this sector is explained by the fact that the four sectoral collective agreements for hotel employees and food service employees were legally extended to all employees of the sector. The coverage rate in the “finance and insurance activities” (K) sector is also notable (77.44%), driven primarily by the banking subsector. Finally, the CBC rate in the “electricity, gas, steam and air conditioning supply” (D) sector stands at 29.45%, fueled mainly by the electricity subsector, an industry with a longstanding tradition of collective bargaining.

It is also notable that in the “administrative and support service activities” (N) sector, there is a disproportionately lower coverage by sectoral/occupational collective agreements (in absolute numbers) compared to the coverage by enterprise-level collective agreements.

3.2. Collective Bargaining Coverage Rate by Enterprise Size Class

Table 6 clearly demonstrates that enterprise-level bargaining occurs primarily in medium and large enterprises (86.6%). Furthermore, Table 6 shows that at the enterprise-level trade unions constitute the predominant form of employee representation in collective bargaining. The role of associations of persons appears to be limited to participation in collective bargaining in a few small and medium-sized enterprises.

Table 6. Distribution of enterprise-level collective agreements that set wages by form of signatory union organization and enterprise size class.

Enterprise Size Class (Number of Employees)	Enterprise Trade Union	Association of Persons	Sectoral Trade Union	Occupational Trade Union	Federation of Trade Unions	Total Number of Collective Agreements	% of the Total Number of Collective Agreements
1–10	1	5	0	0	0	6	2.87%
11–50	3	17	2	0	0	22	10.53%
51–250	50	19	8	0	1	78	37.32%
251+	91	3	4	0	5	103	49.28%
Total number of collective agreements	145	44	14	0	6	209 *	100.00%
% of the total number of collective agreements	69.38%	21.05%	6.70%	0.00%	2.87%	100.00%	

* The total number of enterprise-level collective agreements in force that set wages is 214. For 5 of these, it was not possible to determine the number of employees. Authors' calculations based on the data described in Section 2.4.

Table 7 depicts the distribution of enterprise-level collective agreements by enterprise size class. The table shows that most of these agreements are concentrated in large enterprises. Furthermore, collective bargaining remains limited at the enterprise level when the total number of Greek enterprises is considered.

Table 7. Distribution of enterprises with (enterprise-level) collective agreements that set wages, by size class.

Enterprise Size Class (Number of Employees)	Enterprises with Collective Agreements	Total Number of Enterprises *	Enterprises with Collective Agreements as % of the Total Number of Enterprises
1–10	6	264,440	0.00%
11–50	22	31,320	0.07%
51–250	78	4472	1.74%
251+	103	882	11.68%
Total	209	301,114	0.07%

* Data on the number of enterprises were sourced from the Ministry of Labour (2024). Authors' calculations based on the data described in Section 2.4.

The data in Table 8 reveal that employees in large enterprises have a significantly higher CBC rate compared to other wage earners. Furthermore, coverage in large enterprises accounts for 93.58% of the total coverage by enterprise-level collective

Focusing on large enterprises, Table 9 shows that enterprises employing between 2501 and 3000 employees, along with those employing over 4000 employees, demonstrate higher rates of coverage by enterprise-level collective agreements compared to other categories of large enterprises. greements.

Table 8. Distribution of employees covered by enterprise-level collective agreements that set wages, by size class.

Enterprise Size Class (Number of Employees)	Covered Employees	Total Number of Employees *	Covered Employees as % of the Total Number of Employees
1–10	40	675,917	0.01%
11–50	639	673,001	0.09%
51–250	9944	456,727	2.18%
251+	154,991	714,081	21.70%
Total	165,614	2,519,726	6.57%

* Data on the number of employees were sourced from the [Ministry of Labour \(2024\)](#). Authors' calculations based on the data described in Section 2.4.

Table 9. Distribution of large enterprises with (enterprise-level) collective agreements that set wages, by size class.

Enterprise Size Class (Number of Employees)	Enterprises with Collective Agreements	Total Number of Enterprises *	Enterprises with Collective Agreements as % of the Total Number of Enterprises
251–500	42	499	8.42%
501–1000	24	233	10.30%
1001–1500	19	66	28.79%
1501–2000	2	38	5.26%
2001–2500	4	13	30.77%
2501–3000	2	5	40.00%
3001–4000	3	9	33.33%
4001+	7	19	36.84%
Total	103	882	11.68%

* Data on the number of enterprises were sourced from the [Ministry of Labour \(2024\)](#). Authors' calculations based on the data described in Section 2.4.

Table 10 demonstrates that coverage by enterprise-level collective agreements within large enterprises is predominantly concentrated in those employing over 4000 workers, specifically in seven enterprises (see Table 9). A comparison between the number of employees covered in these specific enterprises (74,497, according to Table 10) and the total number of employees covered by enterprise-level agreements (165,614, according to Table 8), reveals that 44.98% of the total coverage by enterprise-level collective agreements is concentrated in just these seven enterprises.

Table 10. Distribution of employees in large enterprises covered by enterprise-level collective agreements that set wages, by size class.

Enterprise Size Class (Number of Employees)	Covered Employees	Covered Employees as % of the Total Coverage
251–500	14,068	9.08%
501–1000	16,924	10.92%
1001–1500	22,367	14.43%
1501–2000	3356	2.17%
2001–2500	8877	5.73%
2501–3000	5433	3.51%
3001–4000	9469	6.11%
4001+	74,497	48.07%
Total	154,991	100.00%

Authors' calculations based on the data described in Section 2.4.

4. Discussion

The present study concludes that the adjusted CBC rate for wage-setting in Greece in 2024 was 24.67%. This estimate differs from those reported in other studies in Greece due to methodological differences in its calculation, as discussed in Sections 2.4 and 3. Differences

between this calculation and those reported by international organizations are also largely attributable to differences in data sources and measurement approaches. The CBC rate calculated in this study is based primarily on administrative data and only secondarily on complementary sources where administrative information was unavailable. By contrast, the estimates reported by the ILO and the OECD rely mainly on information provided by national experts, trade unions, and other institutional sources. Furthermore, the ECB estimate appears to focus primarily on coverage generated by sectoral collective agreements, whereas the estimate of the present study incorporates coverage arising from all levels of collective bargaining, including sectoral/occupational and enterprise-level agreements.

The CBC rate in Greece, irrespective of the indicator employed (unadjusted or adjusted), falls considerably short of the at least 80% coverage target proclaimed by Directive (EU) 2022/2041 for EU member states. Although sectoral/occupational agreements account for 70.91% and enterprise-level agreements account for 29.09% of the total coverage by agreements that set wages, the low overall CBC rate (24.67%) leads to the conclusion that the dominance of multi-employer bargaining is fragile, reflecting only a marginal quantitative predominance. Considering that the sectoral collective agreement for food service employees, which had been extended to all 246,957 employees in the sector ([Ministry of Labour 2024](#)), expired in May 2025 without renewal—and assuming stable coverage in all other sectors—it is estimated that the coverage by sectoral/occupational collective agreements that set wages amounted to approximately 157,000 employees or job positions by the end of September 2025. This means that employees covered by sectoral/occupational agreements represented less than 50% of all employees covered by collective agreements, while the overall CBC rate marginally exceeded 13%. If this is the case, then in 2025—the year immediately following the reference year of our empirical analysis—Greece would move from the group of EU countries in which multi-employer bargaining (MEB) is the dominant bargaining level to the group of countries with no dominant bargaining level (MEB/SEB). Within the latter group, it would be positioned among the countries with the lowest collective bargaining coverage rates, alongside Bulgaria, Romania, and the Slovak Republic (see Table 1).

What factors, however, explain the fragility of the dominance of multi-employer bargaining in 2024, as suggested by the findings of this study? A first (structural) factor is the high dispersion of employment across micro and small enterprises. In enterprises of this size, the presence of trade unions and the capacity for collective bargaining are objectively limited. As a result, coverage for the vast majority of employees depends on collective bargaining at sectoral and occupational levels. Consequently, fluctuations in coverage by sectoral/occupational collective agreements (rather than enterprise-level agreements) are decisive for whether multi-employer bargaining remains dominant.

A second factor behind the fragility of multi-employer bargaining dominance is its borderline nature. The share of coverage by sectoral/occupational collective agreements in total coverage, which amounts to 70.91%, lies slightly above the two-thirds threshold proposed by [Visser \(2016, 2021\)](#) for identifying a bargaining level as dominant.

A third factor is the dependence of sectoral coverage on a single economic activity sector, namely Accommodation and Food Service Activities, coverage in which represents 71.48% of total sectoral coverage. Consequently, when collective agreements in this sector are not extended to all employees, both the sectoral and overall CBC rate decline sharply.

Finally, the fragility of multi-employer bargaining dominance is shaped by the broader erosion of the crucial variables of the collective bargaining system brought about by the legislative reforms of the memoranda and post-memoranda periods. This erosion does not favour centralized bargaining structures and, consequently, undermines the stable flow of conclusion and re-conclusion of sectoral/occupational collective agreements.

This study has further demonstrated that while certain sectors or industries exhibit particularly high coverage rates, this should not be construed as evidence of better employment conditions compared to sectors or industries with lower collective bargaining coverage. A case in point is the food service industry: despite achieving universal coverage in 2024 due to the legal extension of the collective agreement to all employees, it remains one of the industries with the highest incidence of labour law violations, where a significant proportion of employees are unaware of either the collective agreement's terms or its very existence (Kapsalis et al. 2020).

An additional conclusion of this study is that in the “administrative and support service activities” sector (N), there is a disproportionately lower coverage by sectoral/occupational collective agreements (in absolute numbers) compared to the coverage by enterprise-level collective agreements. Enterprise-level coverage is primarily concentrated in one subsector, namely “security and investigation activities”, indicating a potential opportunity for trade unions in this subsector to encourage sectoral bargaining and improve their position in the correlation of power in the collective bargaining arena.

The analysis of the results reveals that coverage by enterprise-level collective agreements remains marginal for micro, small, and medium-sized enterprises. Prior to the economic crisis and the memoranda, the extensive coverage by sectoral/occupational collective agreements, combined with the dispersion of employment across small and micro enterprises, did not encourage the development of enterprise-level collective bargaining. The disorganized decentralization and weakening of all crucial variables of the collective bargaining system during the memoranda period and beyond (see Section 2.1), led to the substitution of sectoral/occupational agreements by individual employment contracts, rather than by enterprise-level collective agreements. The findings of this study confirm that a large share of employees in Greece falls outside the scope of collective regulation of working conditions through collective bargaining. In other words, 1,635,453 employees (75.33% of employees entitled to collective bargaining over wage determination) work under individual employment contracts. In addition, the low level of collective bargaining coverage in 2024 points to a widening of inequalities (both in terms of functional income distribution and wage disparities among employees) compared to the pre-crisis period. The precise extent of these inequalities in Greece and their relationship with collective bargaining coverage could constitute a field for future research.

Is there any prospect for recovery in CBC rates in Greece? Directive (EU) 2022/2041 places the issue of increasing CBC rates on the agenda of Member States that have transposed it into national law. However, as a form of soft law, the Directive establishes an obligation of effort rather than an obligation of result with regard to strengthening collective bargaining (Directive 2022/2041, Recital 25). In Greece, the transposition of the Directive (Law 5163/2024) and the recent “National Social Agreement for the Strengthening of Collective Bargaining Agreements” (Law 5278/2026) have primarily focused on reducing the threshold required for extending a sectoral collective agreement to all employees in a sector, from 50% to 40%. These two laws do not address in a comprehensive manner the broader erosion of the crucial variables of the collective bargaining system that have led to the decline in CBC rates. At a minimum, achieving high levels of CBC would require the repeal of the legislative measures adopted during the memoranda and post-memoranda periods that remain in force and have contributed to the decentralization of the collective bargaining system, as presented in Section 2.1.

5. Conclusions

The findings of this study demonstrate the low level of collective bargaining coverage in Greece compared to the average rate of EU countries, with the adjusted CBC rate for

2024 estimated at 24.67%. Even though sectoral/occupational collective agreements appear to dominate over enterprise-level agreements in relative terms, their overall reach remains limited. This reveals a structurally fragile system of multi-employer bargaining, positioning Greece in 2025 within the group of EU countries characterized by an alternating dominant level between MEB and SEB. Thus, the dominance of multi-employer bargaining in 2024, as identified in this study, appears fragile.

Overall, collective bargaining in Greece remains highly fragmented and concentrated in larger enterprises and specific sectors, leaving micro, small, and medium-sized enterprises largely outside its scope.

The weakening of all crucial variables of the collective bargaining system has led to the disorganized decentralization of collective bargaining and to the proliferation of individual employment contracts. The restoration of CBC rate, as well as of the content of collective agreements that secure better employment conditions, requires a comprehensive restoration of the crucial variables of the bargaining system.

Author Contributions: Conceptualization: I.Z. and K.K.; Methodology, I.Z. and K.K.; Formal analysis: I.Z. and K.K.; Writing—original draft, I.Z. and K.K.; Writing—review and editing, I.Z. and K.K. All authors have read and agreed to the published version of the manuscript.

Funding: This research received no external funding.

Institutional Review Board Statement: Not applicable.

Informed Consent Statement: Not applicable.

Data Availability Statement: The original contributions presented in this study are included in the article. Further inquiries can be directed to the corresponding author.

Acknowledgments: Kostas Kappos would like to acknowledge the Andreas Mentzelopoulos Foundation for its financial support of his doctoral studies.

Conflicts of Interest: The authors declare no conflicts of interest.

Appendix A. Economic Activities According to the NACE Rev. 2 Classification

- A—Agriculture, forestry and fishing
- B—Mining and quarrying
- C—Manufacturing
- D—Electricity, gas, steam and air conditioning supply
- E—Water supply; sewerage; waste management and remediation activities
- F—Construction
- G—Wholesale and retail trade; repair of motor vehicles and motorcycles
- H—Transportation and storage
- I—Accommodation and food service activities
- J—Information and communication
- K—Financial and insurance activities
- L—Real estate activities
- M—Professional, scientific and technical activities
- N—Administrative and support service activities
- O—Public administration and defence; compulsory social security
- P—Education
- Q—Human health and social work activities
- R—Arts, entertainment and recreation
- S—Other services activities

T—Activities of households as employers; undifferentiated goods—and services—producing activities of households for own use

U—Activities of extraterritorial organizations and bodies.

Appendix B

Appendix B.1. Indicators of the Collective Bargaining Coverage Rate for Employees Covered by Collective Agreements That Set Wages

$$UnadjCov = \frac{WCB}{WSEE}$$

$$AdjCov = \frac{WCB}{WSEE - Wstat}$$

$$UnadjCov_{-} + dse = \frac{WCB}{WSEE + DSE}$$

$$AdjCov_{-} + dse = \frac{WCB}{WSEE + DSE - Wstat}$$

$$UnadjCov(sec - occ) = \frac{WCB(sec - occ)}{WSEE}$$

$$AdjCov(sec - occ) = \frac{WCB(sec - occ)}{WSEE - Wstat}$$

$$UnadjCov_{-} + dse(sec - occ) = \frac{WCB(sec - occ)}{WSEE + DSE}$$

$$AdjCov_{-} + dse(sec - occ) = \frac{WCB(sec - occ)}{WSEE + DSE - Wstat}$$

$$UnadjCov(ent) = \frac{WCB(ent)}{WSEE}$$

$$AdjCov(ent) = \frac{WCB(ent)}{WSEE - Wstat}$$

$$UnadjCov_{-} + dse(ent) = \frac{WCB(ent)}{WSEE + DSE}$$

$$AdjCov_{-} + dse(ent) = \frac{WCB(ent)}{WSEE + DSE - Wstat}$$

$$UnadjCov(ent_dc) = \frac{WCB(ent_dc)}{WSEE}$$

$$AdjCov(ent_dc) = \frac{WCB(ent_dc)}{WSEE - Wstat}$$

$$UnadjCov_{-} + dse(ent_dc) = \frac{WCB(ent_dc)}{WSEE + DSE}$$

$$AdjCov_{-} + dse(ent_dc) = \frac{WCB(ent_dc)}{WSEE + DSE - Wstat}$$

Appendix B.2. Indicators of the Collective Bargaining Coverage Rate the Employees Covered by Any Collective Agreements Regardless of Whether They Set Wages or Not

$$ig_UnadjCov = \frac{ig_WCB}{WSEE}$$

$$ig_AdjCov = \frac{ig_WCB}{WSEE - ig_Wstat}$$

$$ig_UnadjCov_ + dse = \frac{ig_WCB}{WSEE + DSE}$$

$$ig_AdjCov_ + dse = \frac{ig_WCB}{WSEE + DSE - ig_Wstat}$$

$$ig_UnadjCov (sec - occ) = \frac{ig_WCB (sec - occ)}{WSEE}$$

$$ig_AdjCov (sec - occ) = \frac{ig_WCB (sec - occ)}{WSEE - ig_Wstat}$$

$$ig_UnadjCov_ + dse(sec - occ) = \frac{ig_WCB (sec - occ)}{WSEE + DSE}$$

$$ig_AdjCov_ + dse (sec - occ) = \frac{ig_WCB (sec - occ)}{WSEE + DSE - ig_Wstat}$$

$$ig_UnadjCov (ent) = \frac{ig_WCB (ent)}{WSEE}$$

$$ig_AdjCov (ent) = \frac{ig_WCB (ent)}{WSEE - ig_Wstat}$$

$$ig_UnadjCov_ + dse (ent) = \frac{ig_WCB (ent)}{WSEE + DSE}$$

$$ig_AdjCov_ + dse (ent) = \frac{ig_WCB (ent)}{WSEE + DSE - ig_Wstat}$$

$$ig_UnadjCov (ent_dc) = \frac{ig_WCB (ent_dc)}{WSEE}$$

$$ig_AdjCov (ent_dc) = \frac{ig_WCB (ent_dc)}{WSEE - ig_Wstat}$$

$$ig_UnadjCov_ + dse (ent_dc) = \frac{ig_WCB (ent_dc)}{WSEE + DSE}$$

$$ig_AdjCov_ + dse (ent_dc) = \frac{ig_WCB (ent_dc)}{WSEE + DSE - ig_Wstat}$$

Notes

- ¹ The minimum required representation threshold refers to the minimum percentage of employees covered by a collective agreement that is required for that agreement to be legally extended. In Greece, the minimum required representation threshold is 50% (Leventis 2023).
- ² Data derived from trade unions tend to overestimate membership figures, as union membership often includes non-wage earners (such as retirees, unemployed individuals, and students), union registers may not be regularly updated, and/or membership figures may be inflated for reasons of prestige (Visser 2006; Chang and Sorrentino 1991).
- ³ Two of these 22 enterprises are classified in the size class “251 employees or more”. Since this size class has no upper bound, the lower bound of the class (i.e., 251 employees) was used as the number of covered employees.

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