

MINIMUM WAGE AND COLLECTIVE BARGAINING DYNAMICS IN PORTUGAL

Wage compression and limited spillovers in low-pay sectors

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Abstract The article examines how the steady increases in the statutory minimum wage (SMW) following the end of the Troika adjustment programme in 2014 have impacted the wage distribution and collective bargaining dynamics in low-pay economic sectors in Portugal. It aims at contributing to the literature on the SMW pay equity effects by specifying the mechanisms through which SMW rises shape collective bargaining, wage compression and wage spillovers. Using a mixed-methods research design that combines statistical data from *Quadros de Pessoal* with semi-structured interviews with social actors and government officials, it shows that wage compression and spillovers are contingent on the institutional and structural features of low-pay sectors, such as exposure to price competitiveness or reliance on the state along a neo-corporatist logic. Moreover, the evidence suggests that spillovers are curtailed when SMW increases are not accompanied by the reinforcement of other labour market institutions.

Keywords: low pay, statutory minimum wage, collective bargaining, pay equity, bite and spillover effects.

Salário mínimo e a dinâmica da negociação colectiva em Portugal: compressão salarial e efeitos de arrastamento limitados em sectores de baixos salários

Resumo O artigo analisa como os sucessivos aumentos do salário mínimo nacional (SMN) após o fim do programa de ajustamento da Troika, em 2014, impactaram a distribuição salarial e a dinâmica da negociação coletiva em sectores económicos de baixos salários em Portugal. O objetivo é contribuir para a literatura sobre os efeitos do SMN na equidade salarial, especificando os mecanismos através dos quais os aumentos do SMN moldam a negociação coletiva, a compressão salarial e o arrastamento dos salários. Com base num desenho de investigação de métodos mistos, que combina dados estatísticos dos *Quadros de Pessoal* com entrevistas semiestruturadas a atores sociais e governamentais, o estudo demonstra que os efeitos de compressão salarial e de arrastamento dependem das características institucionais e estruturais dos sectores de baixos salários, como a exposição à concorrência por preços ou a dependência do estado segundo uma lógica neocorporativista. Ademais, os resultados sugerem que o efeito de arrastamento salarial é limitado quando o aumento do SMN não é acompanhado pelo reforço de outras instituições do mercado de trabalho.

Palavras-chave: baixos salários, salário mínimo, negociação coletiva, equidade salarial, efeitos de compressão e arrastamento salarial.

Salaire minimum et dynamique de la négociation collective au Portugal: compression des salaires et effets d'entraînement limités dans les secteurs à bas salaires

Résumé L'article analyse comment les augmentations successives du salaire minimum interprofessionnel de croissance (SMIC) après la fin du programme d'ajustement de la Troïka en 2014 ont impacté la répartition des salaires et la dynamique de la négociation collective dans les secteurs économiques à bas salaires au Portugal. L'objectif est de contribuer à la littérature sur les effets du SMIC sur l'équité salariale, en précisant les mécanismes par lesquels les hausses du SMIC influencent la négociation collective, la compression des salaires et les effets d'entraînement salarial. En s'appuyant sur une approche de recherche mixte, combinant des données statistiques des *Quadros de Pessoal* et des entretiens semi-structurés avec des acteurs sociaux et des responsables gouvernementaux, l'étude montre que la compression salariale et les effets d'entraînement dépendent des

caractéristiques institutionnelles et structurelles des secteurs à bas salaires, telles que l'exposition à la concurrence par les prix ou la dépendance à l'État selon une logique néo-corporatiste. De plus, les résultats suggèrent que les effets d'entraînement salarial sont limités lorsque les augmentations du SMIC ne s'accompagnent pas du renforcement d'autres institutions du marché du travail.

Mots-clés: bas salaires, salaire minimum interprofessionnel de croissance, négociation collective, équité salariale, effets de morsure et d'entraînement.

Salario mínimo y dinámicas de negociación colectiva en Portugal: compresión salarial y efectos de arrastre limitados en los sectores de bajos salarios

Resumen El artículo examina cómo los aumentos continuos del salario mínimo interprofesional (SMI) tras el fin del programa de ajuste de la Troika en 2014 han impactado la distribución salarial y la dinámica de la negociación colectiva en los sectores económicos de bajos salarios en Portugal. Su objetivo es contribuir a la literatura sobre los efectos del SMI en la equidad salarial, especificando los mecanismos mediante los cuales los incrementos del SMI influyen en la negociación colectiva, la compresión salarial y los efectos de arrastre salarial. A partir de un diseño de investigación de métodos mixtos, que combina datos estadísticos de los *Quadros de Pessoal* con entrevistas semiestructuradas a actores sociales y responsables gubernamentales, el estudio muestra que la compresión salarial y los efectos de arrastre dependen de las características institucionales y estructurales de los sectores de bajos salarios, como la exposición a la competitividad de precios o la dependencia del Estado según una lógica neocorporativista. Además, la evidencia sugiere que los efectos de arrastre se ven limitados cuando los aumentos del SMI no van acompañados del refuerzo de otras instituciones del mercado laboral.

Palabras-clave: bajos salarios, salario mínimo interprofesional, negociación colectiva, equidad salarial, efectos de mordida y de arrastre.

Introduction

After the wage freeze induced by the enactment of the Troika adjustment programme in Portugal, the statutory minimum wage (SMW) has been steadily increasing. Between 2015 and 2022, it rose 39.6% to 705 euros per month.¹ In theory, such sustained increases in the SMW can trigger three key effects: disemployment, bite, and spillover (Oliveira, 2023). Throughout the period of economic recovery following the crisis, there is no empirical evidence for the disemployment effect, whereby employers reduce staff in response to rising labour costs. On the contrary, between 2015 and 2022, employment grew by 11%, while the unemployment rate was halved to 6%. In contrast, the bite effect is evident: the share of workers earning the SMW rose from 17.7% to 22.4%, indicating that minimum wage adjustments directly affected wages at the bottom of the distribution, which are updated to meet the new minimum standard.²

There is also evidence of spillover effects, by which SMW increases indirectly push up wages above the minimum threshold. Such spillovers are, however,

1 Source: DATALABOR [“montante do salário mínimo nacional”]. Data retrieved on 24.06.2025.

2 Data refers to total private sector economy employees. Source: DATALABOR [“taxa de emprego”, “taxa de desemprego”, and “proporção de trabalhadores abrangidos pelo salário mínimo nacional”]. Data retrieved on 24.06.2025.

stronger at the bottom of the wage distribution. Average wages in the first two income deciles rose by 26% and 24%, respectively, compared to increases of 11% and 7% in the top two deciles between 2015 and 2020 (Cantante and Estêvão, 2022). This trend of higher wage increases around the SMW has led to a compression of the lower half of the wage distribution, as reflected in the declining P50/P10 ratio relative to a stable P90/P50 ratio since the 2008 Global Financial Crisis (Ferreira, Lopes and Tavares, 2021). Spillover effects also vary by sector. Martins (2019) has shown that such effects are more pronounced in sectors with a high share of low-paid workers. Campos Lima and co-authors (2021, 2023) argued that the reach of the pay equity effect beyond low-wage workers depends on union bargaining power capable of countering employer discretion, which, in turn, is shaped by varying levels of collective bargaining coverage and trade union density across sectors.

While the extant literature suggests that sector-level features and industrial relations shape the impact of SMW increases on the wage distribution, it lacks a detailed analysis of the causal mechanisms mediating these effects. In particular, there is a need to understand how collective bargaining operates through the strategic actions of social partners within specific institutional and structural contexts. This article addresses this gap by making two major contributions. First, it identifies the mechanisms through which SMW changes influence wage setting and collective bargaining at the sectoral level. Second, it explains how wage compression and spillover effects vary depending on the institutional and structural features of different low-pay sectors.

The article is structured as follows. The next section reviews the literature on the pay equity effects of minimum wages and introduces the actor-centred institutional approach adopted here. The subsequent section outlines the research design, data, and case selection. We then present recent trends in wages and collective bargaining in Portugal's low-pay sectors, followed by a detailed analysis of two case studies: the manufacture of food and beverages and residential and social care services. The final section discusses the empirical findings and explores the underlying drivers of the observed patterns.

Pay equity effects, minimum wages, and the role of collective bargaining

The labour economics literature has extensively examined how minimum wages influence low pay, wage inequality and employment. First, it is argued that step increases in the SMW are bound to raise wages at the bottom of the distribution — the bite effect —, pushing them closer to the median wage and thereby compressing the overall wage structure (Machin, Manning and Rahman, 2003). In turn, a recurrently debated issue is whether the pay equity effects associated with a higher SMW are offset by negative employment outcomes resulting from job losses in low-wage occupations as employers face higher labour costs. However, empirical evidence regarding this disemployment effect is mixed (Card and Krueger, 1994;

Dolado *et al.*, 1996; Lucifora, McKnight and Salverda, 2005; Neumark, 2018). A third mechanism — the spillover effect — consists of the upward ripple of wages beyond the new minimum threshold. Findings suggest that spillovers are highly variable but tend to be stronger for wages closer to the bottom (Fortin, Lemieux and Lloyd, 2021; Stewart, 2012).

The employment relations and political economy literatures emphasize how institutional settings shape both the type and magnitude of pay equity effects. Some scholars argue that sectorally bargained minimum wages, combined with high collective bargaining coverage, can work as a functional equivalent for a SMW, raising wage floors through the bite effect (Garnero, Kampelmann and Rycx, 2015; Kampelmann, Garnero and Rycx, 2013). This perspective highlights how extensive collective bargaining can generate outcomes that are similar to, or even exceed, those achieved in systems with SMWs. Other scholars suggest that SMWs and collective bargaining operate complementarily, with spillover effects helping to secure wages above the statutory minimum (Besamusca, Guzi and Tijdens, 2023; Haapanala, Marx and Parolin, 2023; Zwysen, 2024). Comparative studies supporting these conclusions typically measure collective bargaining outcomes using coverage and union associational power, often proxied by union density. However, this approach risks oversimplification. As Haapanala, Marx and Parolin (2023: 433) caution, such analyses frequently “abstract from details of industrial relations which are often difficult to capture in statistical indicators”, including changes in the tripartite balance of power among employers, unions, and governments.

These shortcomings have prompted alternative views that emphasize the dynamic and context-specific nature of institutions, rather than assuming fixed roles or uniform effects. Scholarship in this vein calls for understanding minimum wage impacts through country- and sector-specific trajectories that reflect broader social, political, and economic conditions. It also underscores the role of agency in shaping pay equity outcomes (Dingeldey, Grimshaw and Schulten, 2021; Grimshaw, 2013; Grimshaw, Bosch and Rubery, 2014). To this end, such studies adopt an actor-centred institutional perspective to explain how intersections between the SMW, collectively agreed wages, and collective bargaining coverage shape social partners’ strategies and generate diverse pay equity outcomes — including high wage floors, wage compression, and both limited and extensive spillover effects (Grimshaw, 2013: 249). For example, in countries like Portugal — characterized by a “direct” (Grimshaw, 2013) or “close” interaction (Dingeldey, Grimshaw and Schulten, 2021) between the SMW and collective bargaining — the SMW is more likely to raise wage floors by influencing collectively agreed wages and triggering spillovers across wage levels. These effects, however, remain contingent on union strategies and power resources, which shape sector-specific interactions and collective agreements.

Data, methods and case selection

This article's account of the influence of the SMW on wage developments and collective bargaining dynamics in low-pay sectors is informed by the actor-centred institutionalist tradition (Scharpf, 1997; Streeck and Thelen, 2005). This framework understands social phenomena and political processes as outcomes of actors' behaviour, which are shaped — but not fully determined — by their institutional context. Applied here, it conceptualizes the intersection between the SMW and collective bargaining as a set of scope conditions for different pay equity effects, such as wage compression and wage spillovers, while allowing for actor agency in shaping these outcomes through union strategies and power resources.

In doing so, we deploy a mixed-methods research design that triangulates different data sources. First, we provide descriptive statistics on the evolution of wages and collective bargaining in a sample of low-pay sectors between 2015 and 2022. For that we use data from the *Quadros de Pessoal*, an annual mandatory survey covering the private sector economy provided by the Ministry of Labour, Solidarity and Social Security. Second, we conduct nine semi-structured interviews with social partners, a government official and an expert in industrial relations. This is complemented by in-depth qualitative analysis of secondary data, such as collective bargaining agreements published in the *Boletim do Trabalho e Emprego*, the official outlet of the Ministry of Labour on matters pertaining to labour market regulation.

We have followed two criteria for identifying low-pay economic sectors. First, the severity of low pay. Accordingly, we discriminated between severe low pay (less than 80% of the total economy average) and somewhat low pay (between 80% and 95% of the total economy average). Second, the incidence of low pay, discriminating between larger and smaller sectors (drawing the line at 3% of private sector employees). Based on these criteria, figure 1 displays ten sectors, with varying degrees of intensity and incidence of low pay, in two moments in time, at the start and at the conclusion of our period of analysis, in order to assess dynamical variation.

From the set of low-pay sectors, we selected two for an in-depth paired comparison: the manufacturing of food and beverage products (C10/11/12) and residential and social care services (Q87/88). This case selection allows us to identify different mechanisms through which the SMW influences broader wage developments and collective bargaining dynamics. These mechanisms include variation in exposure to cost-competitiveness pressures and occupational structures (Eichorst and Marx, 2015), reliance on state intervention in wage formation (Molina, 2021), and sectoral characteristics in industrial relations (Bechter, Brandl and Meardi, 2012), all of which shape trade unions' power resources (Refslund and Arnholtz, 2022). The residential and social care sector exhibits considerable fragmentation in social partner representation, reflecting the split between public and private provision, the predominance of part-time, female, and immigrant employment, as well as informality and under-representation in collective bargaining (Eurofound, 2022b). Similarly, the food and beverage sector shows fragmentation along product

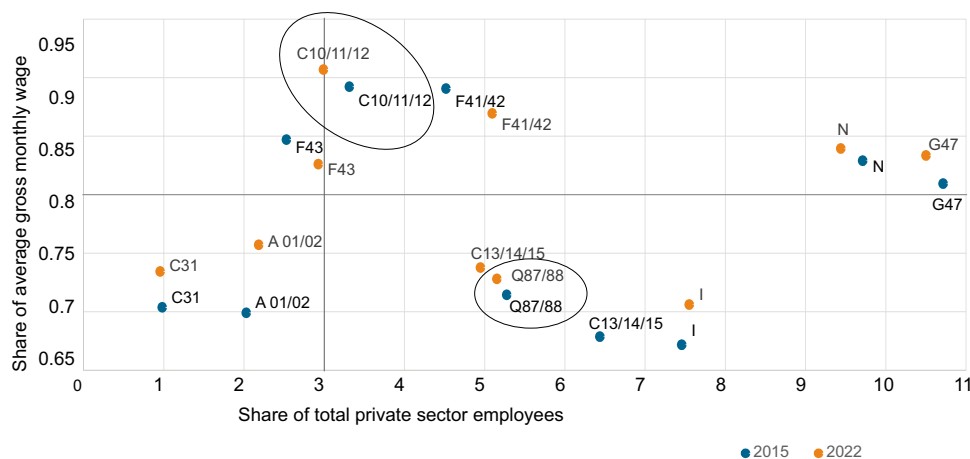


Figure 1 Selection of low-pay economic sectors in 2015 and 2022

Note: 3% of total private sector employees = ca. 100.000 workers (in 2022). Sector keys: A01/02: agriculture; crop & animal production; forestry & logging. C10/11/12: manufacture of foods & beverages. C13/14/15: manufacture of textiles; wearing apparel; leather & related products. C31: manufacture of furniture & mattresses. F41/42: construction of residential & non-residential buildings; civil engineering. F43: specialised construction activities. G47: retail trade (except motor vehicles). I: accommodation & food services. N: administrative & support services. Q87/88: residential & social care services

Source: Own elaboration from *Quadros de Pessoal*.

sub-sectors, the proliferation of micro and small firms, and a high prevalence of temporary and seasonal employment (Eurofound, 2022a).

Minimum wages and collective bargaining in the Portuguese low-pay sectors

The internal devaluation strategy pursued during the Eurozone sovereign debt crisis impacted industrial relations in three major ways: direct state intervention froze the SMW and cut public sector wages and career progressions; the weakening of employment protections facilitated dismissals; and the disorganized decentralization of collective bargaining eroded its protective capacity and skewed power relations in favour of employers (Campos Lima *et al.*, 2021; Branco and Cardoso, 2022). With resumed growth and better labour market performance, waning pressure from financial markets, and a social turn in European governance, the centre-left PS (Partido Socialista) minority government took office in 2015, with the support in parliament of the radical left parties PCP (Partido Comunista Português) and BE (Bloco de Esquerda) and had the opportunity to reverse Troika-era austerity measures.

One such important measure was the steep increase in the SMW backed up by tripartite social agreements, through which employers received compensation on

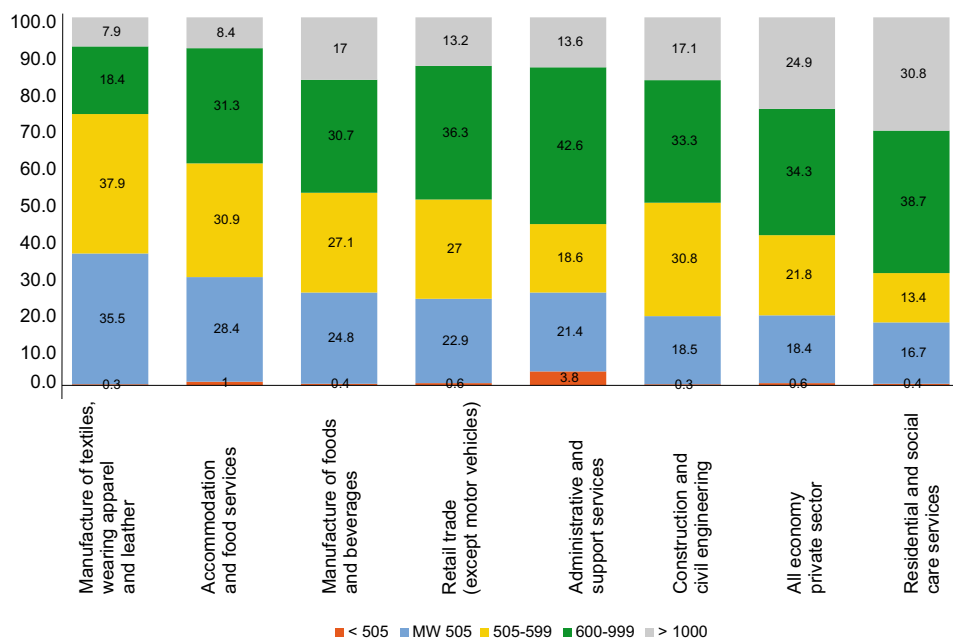


Figure 2 Earning profiles in low-pay economic sectors (2015)

Note: The analysis refers to gross nominal monthly wages (base remuneration plus regular bonuses and subsidies, and overtime payments) of employees working full-time.

Source: Own elaboration from *Quadros de Pessoal* (2015).

the fiscal side. The political exchange pursued by the centre-left executive was cautious not to overcurb employers' crucial institutional advantages in collective bargaining, which also favour the smaller, social-partnership-oriented ally UGT (União Geral de Trabalhadores) against the larger, anti-capitalist CGTP (Confederação Geral dos Trabalhadores Portugueses) aligned with radical left parties, which did not sign the 2018 and 2022 social concertation agreements. These agreements implied the continuity of some crucial measures from the 2003, 2009 and 2012 labour market reforms, namely the end of the ultra-activity of collective agreements, the non-reinstatement in full of the *favor laboratoris* principle, and the flexibilization of employment protections for standard workers (Branco, Miró and Natili, 2024).

In Portugal, the government sets the SMW by ministerial decree to take effect on January 1st of the following year. However, the policy-making process is not unilateral, for it follows a cycle of institutional consultation with social partners, leading often, but not always, to a tripartite agreement in social concertation, which is then approved by a recommendation in parliament (Molina, 2021). Following the freeze from 2011 to 2014, the SMW was updated to 505 euros in 2015, ca. 46% of the average gross monthly wage of 1097 euros in the private sector (*Quadros de Pessoal*, 2015). In the following years, the centre-left government steadily increased the

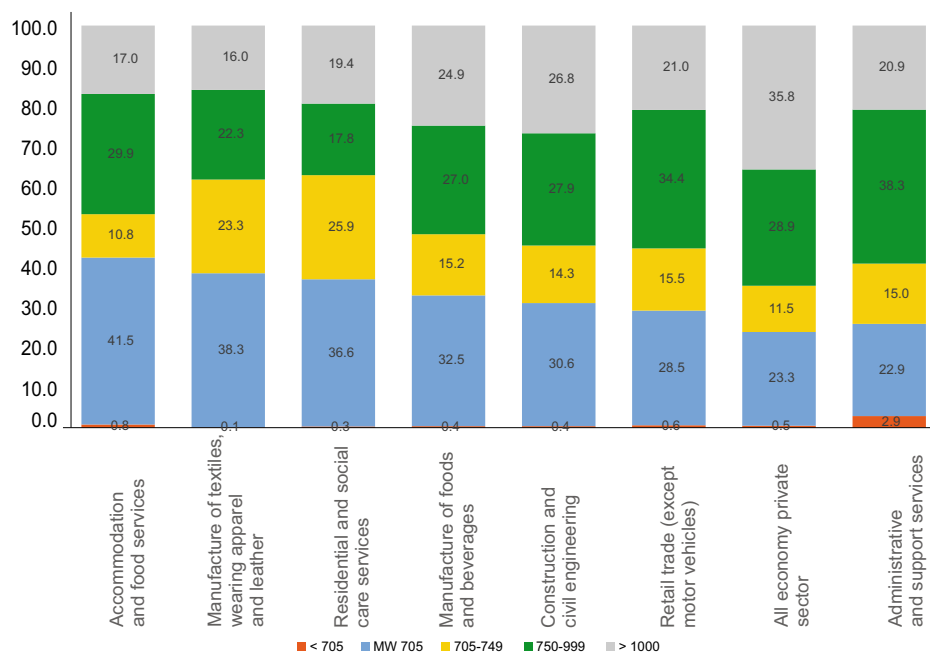


Figure 3 Earning profiles in low-pay economic sectors (2022)

Note: The analysis considers the gross nominal monthly wages (base remuneration plus regular bonuses and subsidies, and overtime payments) of employees working full-time.

Source: Own elaboration from *Quadros de Pessoal* (2022).

MW, reaching 705 euros by 2022, or 51.5% of the average gross monthly wage of 1368 euros in that year (*Quadros de Pessoal*, 2022).

During this period, the trajectory of the SMW outpaced average wage growth, resulting in an increasing share of SMW earners. Figures 2 and 3 illustrate the earnings profile in Portuguese low-pay sectors, alongside the private sector average, for 2015 and 2022. Overall, the share of SMW earners rose from 18% to 23%, though with notable cross-sector variation. As expected, minimum wage earners are over-represented in low-pay sectors compared to the private sector average, while workers in higher wage brackets are under-represented. Within low-pay sectors, the highest concentrations of minimum wage workers are found in the manufacture of textiles, accommodation and food services, the manufacture of foods and beverages, and retail trade. The residential and social care services sector was an outlier in 2015 but subsequently aligned more closely with the other low-pay sectors.

Turning to collective bargaining developments, we consider the type of collective bargaining instrument and the coverage by collective bargaining. In Portugal, collective bargaining takes place mostly at the sector level (Campos Lima, 2019), either via collective labour contracts (CLCs), signed by one or more employers' associations and unions; or collective labour agreement (CLA), multi-employer

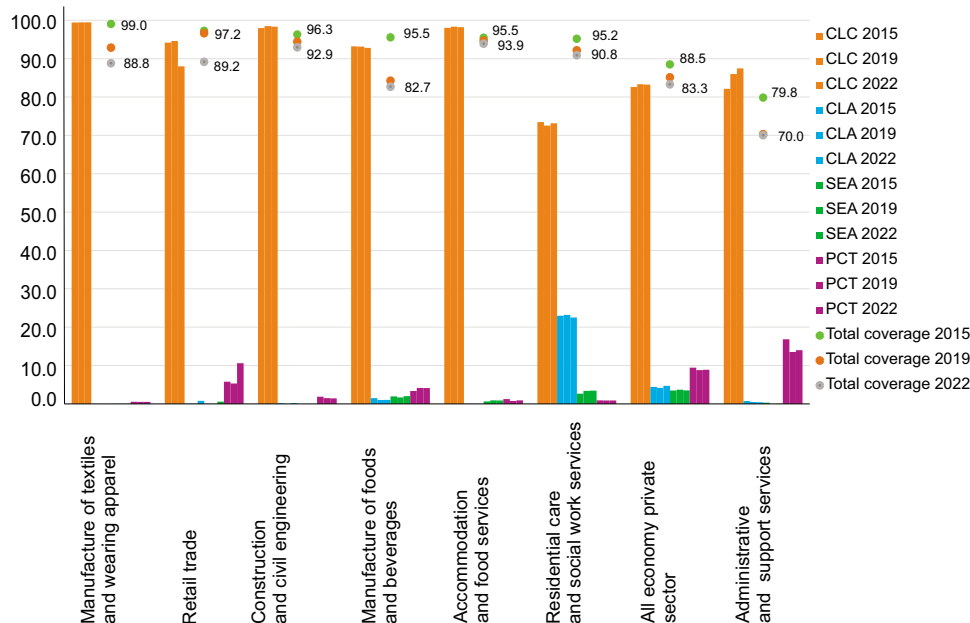


Figure 4 Collective bargaining coverage and type of collective bargaining agreement (2015, 2019 and 2022)

Source: Own elaboration from *Quadros de Pessoal* (2015, 2019 and 2022).

agreements signed by unions and several firms not organised in an employer association. At the firm level, there are single-employer agreements (SEA). *Portarias de Condições de Trabalho* (PCTs) are administrative extensions enforcing wage updates according to the SMW in sectors in which there are no employer's associations with whom unions can bargain.

Industry-level agreements (CLC and CLA) are predominant, while company-level agreements (and PCTs) remain residual (figure 4), both across low-pay sectors and in the private sector economy as a whole. We also find a still high but declining collective bargaining coverage across the economy, from 88,5% to 83,3%, albeit with important variation across low-pay sectors. The drop in coverage was steeper than the average in the sectors of manufacture of foods and beverages (13 p.p.), manufacture of textiles (11 p.p.), administrative services (9 p.p.), and retail trade (8 p.p.).

The sector of manufacturing of food and beverage products

In 2015, the sector of manufacturing of food and beverages had the third-largest concentration of SMW earners amongst the low-pay sectors: roughly one in every

four employees; by 2022, that share had increased to one-third. Conversely, the highest remuneration class is under-represented: in 2022, one in four sector employees earned above 1000 euros, against 35.8% of the private sector economy's average (figures 2 and 3, above). This employment spike at the bottom of the wage distribution is an indicator of a robust bite effect of the SMW.

As regards collective bargaining patterns, the sector witnessed a considerable decline in collective bargaining coverage, outpacing the economy's average and exhibiting the steepest drop of all low-pay sectors (figure 4). Between 2015 and 2022, coverage fell by 13 percentage points down to 82.7%. Most workers are covered by CLC signed by one or more employers' associations and unions, in line with the rest of the economy.

The social partner landscape is fragmented on both sides of the bargaining table, according to sub-sector and ideological lines. On the union side, the sectoral federations are split between competing CGTP and UGT confederations.³ As for the employers, there are several sector-level associations affiliated with different peak-level confederations, the affiliates of CIP (Confederação Empresarial de Portugal) being the most representative.⁴ As of 2022, the set of social partners had signed 63 collective agreements: 56 CLCs, 6 SEAs, and a single CLA (*Quadros de Pessoal*, 2022).

Unions and employers engage annually in a cycle of wage updating triggered by SMW increases. The largest employer association, the CIP-affiliated ANCIPA, follows closely the developments set by the government in the national Standing Committee for Social Concertation (Comissão Permanente de Concertação Social). ANCIPA reports that the government convenes social partners mostly to inform them about the updated value of the SMW, rather than to substantively engage in negotiations (interview 3). In this sense, ANCIPA laments a lack of capacity to influence

3 Union federations in the sector: FEPCES — Federação Portuguesa dos Sindicatos do Comércio, Escritórios e Serviços; FESAHT — Federação dos Sindicatos de Agricultura, Alimentação, Bebidas, Hotelaria e Turismo de Portugal; FETESE — Federação dos Sindicatos da Indústria e Serviços; FETICEQ — Federação dos Trabalhadores das Indústrias Cerâmica Vidreira Extractiva Energia e Química; FSTIEP — Federação dos Sindicatos dos Trabalhadores das Indústrias Eléctricas Portuguesas; SETAAB — Sindicato Nacional dos Trabalhadores da Agricultura, Floresta, Pesca, Turismo, Indústria Alimentar, Bebidas e Afins; SIFOMATE — Sindicato dos Fogueiros, Energia e Indústrias Transformadoras; SIMA — Sindicato das Indústrias Metalúrgicas e Afins; SINCESAHT — Sindicato do Comércio, Escritórios, Serviços, Alimentação, Hotelaria e Turismo; SINDEPESCAS — Sindicato Democrático das Pescas; SINTICABA — Sindicato Nacional dos Trabalhadores da Indústria e Comércio de Alimentação, Bebidas e Afins; SITESC — Sindicato de Quadros, Técnicos Administrativos, Serviços e Novas Tecnologias.

4 Employer associations in the sector: ALIF — Associação Nacional da Indústria pelo Frio e Comércio de Produtos Alimentares; ACIP — Associação do Comércio e da Indústria de Panificação; ADCP — Associação das Adegas Cooperativas de Portugal; ANCAVE — Associação Nacional dos Centros de Abate e Indústrias Transformadoras de Carne de Aves; ANCIPA — Associação Nacional de Comerciantes e Industriais de Produtos Alimentares; ANIA — Associação Nacional dos Industriais de Arroz; ANICP — Associação Nacional dos Industriais de Conservas de Peixe; ANIL — Associação Nacional dos Industriais de Laticínios; ANIM — Associação Nacional dos Industriais de Moagem, Produção e Comércio de Cereais, Leguminosas, Massas e Derivados; APIAM — Associação Portuguesa dos Industriais de Águas Minerais Naturais e de Nascente; APIM — Associação Portuguesa de Indústria de Moagem; ITA — Associação Portuguesa dos Industriais de Tripas e Afins.

SMW setting, with the new SMW coming from above and employers being required to implement it by kick-starting the ordinary collective bargaining negotiations in the sector, usually in the first trimester of the new year. Decrying the unilateral setting of the SMW, the employers' official would rather engage in a meaningful consultation anchored "in the reality of different sectors and companies". For them, "there should be at least a gathering of information from employers' associations and unions [...], but that is not done". At the level of sectoral bargaining, there is a measure of horizontal coordination between employers' associations: "we have the frozen fish sector, for example, but we pay attention to what goes on with the canned sauce sector. If they reached an agreement, or not, and why not" (interview 3).

Union sectoral federations, of which FESAHT (affiliated with CGTP) and SETAAB (with UGT) are the most representative, also seek to influence the policy direction at social concertation through their respective peak national confederations. The FESAHT representative said that "every year, CGTP makes public its demands on wages for all workers and on the evolution of the SMW, to be presented and discussed in social concertation" (Interview 4). The SETAAB official elaborated a bit more on the process of wage coordination: "After the summer vacations, every federation in our sector affiliated with UGT makes their proposals and agrees on what should be the minimum raise [...] that then becomes the minimum that each union affiliate presents as its wage bargaining proposal for the following year. [...] And then we have at the peak level [...] a meeting every two weeks with the more dynamic unions in terms of collective bargaining, of which SETAAB is a part, where we discuss and listen to the main hurdles each one of us faces when bargaining" (interview 2). Sectoral coordination takes place between unions within each confederation, but no coordination is held across competing confederations.

The positioning of social partners and the government relative to the SMW reflects different understandings about how to address the phenomenon of low pay more broadly. FESAHT frames SMW increases in the context of declining regulatory capacity of collective bargaining and the move towards an individualistic approach to industrial relations. For the union, "as collective agreements stop being an instrument to ensure wage differentials, everyone is treated according to the SMW increase" (interview 4). From this perspective, wage growth through SMW increases is not possible without strong collective bargaining. What lies behind the reduction in wages nowadays, the FESAHT official said, "is the valorisation of the SMW rather than overall wage growth". To that end, "the SMW is relatively irrelevant". The way to "secure wages in this sector, or any other sector, is the right to collective bargaining" (interview 4). On a different note, and despite the weakening of collective bargaining over the last decades, FESAHT acknowledges that the SMW has helped to re-focus political attention on the revalorisation of salaried work after the Troika period (interview 4). Indeed, the Secretary of State for Labor of the centre-left cabinet in office since 2015 unpacked the political strategy of bringing the public debate to bear on "the theme of wage valorisation", starting "with the lowest salaries" expecting that it would push "all the others to move up, even if only a little" (interview 6). With the 2023 "Decent Work Agenda" labour reform, the government sought to promote collective bargaining, including via positive discrimination through corporate tax

deductions conditional on wage increases, wage compression and securing collective agreements every three years (interview 6). For the government, the parallel discussion of the EU Directive on Adequate Minimum Wages “strengthens this shift in policy direction” and is “important to accrue legitimacy gains at the national level”. Nonetheless, for ANCIPA there needs to “be a slowdown” in SMW increases given “the predominance of small size companies in the sector” which lack the capacity to comply with all the labour market and social security legal requirements. For the employers, the prevalence of low wages is due to the proliferation of small enterprises and to “professional categories being accessible to most people without requiring special skills or certification” (interview 3). Indeed, the industrial relations expert argues that it will not be feasible to continue with the SMW increases without combining them with a more holistic strategy aimed at average wage increases that addresses employment protection legislation, unemployment protection, and collective bargaining (interview 7).

The pressure exerted by SMW increases on negotiated wages has implications for the duration of collective agreements in a bargaining environment shaped by the threat of employer exit following the derogation of the principle of ultra-activity of collective agreements dating back to 2003. FESAHT argues that “from the moment employers’ associations refuse to bargain and want to move forward with the expiry of collective agreements, we cannot update wage grids, which implies that the SMW wage is both the minimum and the maximum” (interview 4). Wage concessions are not the issue for employers, ANCIPA argues, but rather FESAHT’s unwillingness to offer something in return, leading to outdated agreements and, ultimately, to their termination: “It is not because of the wage grids that we do not sign collective agreements. It is not for 8 euros or 10 euros above base rates [...] above the SMW [...] that negotiation is blocked [...]. What prevents the negotiations are certain clauses that cannot be touched”, such as extraordinary compensation for extra hours or supplements to social insurance (interview 3). Differently, SETAAB is more open to concession bargain, accepting, or even inviting, “the expiry of collective agreements” to overcome the blockage of bargaining when FESAHT unions are adamant on keeping clauses “from the past century” that employers want to change. It is not bargaining over wages that leads “to the expiry of agreements” (interview 2). Indeed, the Secretary of State acknowledged that the expiry of collective agreements has not triggered a renewal of effective social dialogue (interview 6).

In this way, the approach to wage bargaining in reaction to SMW increases seems to have an indirect influence on collective bargaining coverage. As aforementioned, SETAAB goes as far as inviting the expiry of collective agreements to unblock negotiations and restore wage differentials. Given limited representativeness, SETAAB usually requests the administrative extension of the newly signed collective agreement to the entire sector (interview 2). However, FESAHT opposes such an extension to its affiliated members, which, together with the bargaining stalemate and the consequential expiry of agreements, leads to a decline in collective bargaining coverage. This is the explanation offered by ANCIPA, arguing that despite the drop in coverage that may sometimes result from the dissolution of

Table 1 Collectively agreed wages for the subsector of manufacturing and conservation of fruits and vegetable products

Subsector	Manufacturing and conservation of fruits and vegetable products					
Signatories	ANCIPA/FESAHT			ANCIPA/SETAAB		
BTE publication date	22.06.2022	22.11.2021	29.10.2016	29.06.2022	15.06.2021	15.08.2015
Wage levels	12	12	13	13	13	13
Base rate	710 euros (12)	670 euros (12)	530 euros (13)	705 euros (13)	665 euros (13)	505 euros (13)
Middle rate	770 euros (6)	735 euros (6)	560 euros (7)	760 euros (7)	720 euros (7)	540 euros (7)
Top rate	1.250 euros (0)	1.210 euros (0)	1.120 euros (0)	1.250 euros (1)	1.210 euros (0)	1.100 euros (0)
SMW	705 euros	665 euros	530 euros	705 euros	665 euros	505 euros

Note: wage grid remuneration level in parenthesis; SMW of the correspondent year included

Source: Own elaboration from *Boletim do Trabalho e Emprego* (several years).

employer's associations, the main cause is FESAHT's unwillingness to engage in trade-offs, their opposition to extensions, and SETAAB not being sufficiently representative to carry the sector (interview 3). The more general point being that the fragmentation and competition between unions, low union density, and the lack of a collective action tradition from social partnership-oriented unions account for SMW increases inducing wage compression and the drop in collective bargaining coverage (interview 7).

The trend of wage compression is understood by unions as resulting from the combined effect of SMW increases and the weakened capacity to use collective bargaining to restore wage differentials through updating pay scales or wage premiums, compensations, and supplements. Taking the SMW as the floor for negotiations, SETAAB finds it difficult to restore pay differentials because the six lowest wage levels "are eaten up by the SMW" (interview 2). Wage differentials, albeit minimal, FESAHT argues, are restored via performance bonuses rather than meaningful and predictable wage increases. Indeed, these bonuses, including food subsidies, are a preferable solution to the employer organization ANCIPA as they encourage productivity and are tax-deductible (interview 3). On the other hand, seniority-related wage premiums, compensation for overtime work, and supplements to social insurance are not acceptable to employers — a sign of the increased capacity of employer discretion over working conditions when SMW increases are not linked with the re-regulation of other labour market institutions with a view to wage valorisation.

To assess the impact of the SMW on collectively agreed wages, we look at the evolution of pay scales contained in CLC between ANCIPA and both SETAAB and FESAHT. In doing so, we consider two of the most representative subsectors: manufacturing and conservation of fruits and vegetable products (table 1) and manufacturing and conservation of fries and snacks (table 2). The tables display the two

Table 2 Collectively agreed wages for the subsector of manufacturing and conservation of fries and snacks

Subsector	Manufacturing and conservation of fries and snacks					
Signatories	ANCIPA/FESAHT			ANCIPA/SETAAB		
BTE publication date	15.07.2022	22.10.2016	08.05.2010	22.07.2022	15.06.2021	15.08.2015
Wage levels	11	11	12	11	11	11
Base rate	705 euros (11)	530 euros (11)	475 euros (12)	705 euros (11)	665 euros (11)	505 euros (11)
Middle rate	800 euros (5)	628 euros (5)	573,5 euros (6)	755 euros (5)	715 euros (5)	628 euros (5)
Top rate	1.300 euros (0)	1.114 euros (0)	1.107,5 euros (0)	1.225 euros (0)	1.185 euros (0)	1.114 euros (0)
SMW	705 euros	530 euros	475 euros	705 euros	665 euros	505 euros

Note: wage grid remuneration level in parenthesis; SMW of the correspondent year included.

Source: Own elaboration from *Boletim do Trabalho e Emprego* (several years).

most recent CLC and, to the extent possible, the first CLC following the Troika intervention.

We first find that base rates are updated to match the SMW in the same year, with many wage levels being overtaken by the steep SMW increase between years, evincing a sizeable bite effect and direct interaction between the minimum wage and collectively agreed wages (table 1). Second, we find that spillover effects vary across sub-sectors. In fruits and vegetables, FESAHT agreements from 2016 to 2021 show that the middle rate rose 31% while the bottom rate grew 26%, in line with the SMW. At the same time, bargained wages at the top grew much more slowly (8%), begetting the compression of the pay grid. The bottom rate went from 47% to 55% of the top rate. From 2021 to 2022, however, middle rates no longer outpaced the bottom rate, as they grew 5% and 6%, respectively, while the bottom rate inched to 57% of the top rate (the same pattern holds for SETAAB agreements). Turning to the subsector of conservation of fries and snacks (table 2), SETAAB collective agreements from 2015 to 2021 show the bottom rate growing at a much faster pace (32%, the same as the SMW) than the middle (14%) or the top rate (6%). In that period, the bottom rate went from 45% to 56% of the top rate. Thus, middle rates have struggled to secure spillover effects in line with the SMW developments, leading to an overall wage compression throughout the period (FESAHT's agreement shows the same pattern, albeit less dynamic, from 2010 to 2022). When collective bargaining hardly improves on the SMW floor, this can trigger a crowding-out effect, reducing the space or effectiveness of collective bargaining in securing wage growth and setting working conditions beyond wages.

The sector of residential and social care services

In 2015, the sector of residential and social care services' earnings profile was an outlier amongst low-pay sectors for displaying the smallest share of SMW earners, smaller even than the private sector economy's average, and a somewhat large concentration in the better-off wage classes (figure 2). However, by 2022 the sector had more than doubled the share of SMW earners and already displayed the largest share of earners below 750 euros: *circa* two in every three employees (figure 3). Such developments convey a robust bite effect of the SMW and suggest a relative freeze at 2015 levels, while all other low-pay sectors moved nominally ahead in tandem with the rising SMW from 505 euros to 750 euros.

The general trend of declining collective bargaining coverage is present also in the sector, albeit at a slower rate than elsewhere: coverage dropped 4 p.p. to a still high 91% from 2015 to 2022 (figure 4). The likelier explanation for the ongoing high coverage is that no employer in the sector has ever required the expiration of any extant collective agreement (interview 8). As for the prevailing type of collective agreement, despite the predominance of CLCs, the sector stands out in that CLAs (i.e., agreements signed between unions and firms not organized in employers' associations) are much more frequent than elsewhere. This pattern results from the institutional makeup of employers in the Portuguese social sector, with deep historical roots (Branco, 2017). Until March 2023, the 376 municipality-based *misericórdias*,⁵ despite formally organized in a national peak-level union (União das Misericórdias Portuguesas, UMP), were not represented as a single employer entity for collective bargaining purposes. In turn, the largest employer in the sector, the network of about 5500 non-profit private institutions of social solidarity (*instituições particulares de solidariedade social*, IPSS), many of which Catholic civil society organizations, were organized in a powerful peak-level confederation (Confederação Nacional das Instituições de Solidariedade, CNIS), accounting for three-quarters of the collective bargaining coverage.

The sectoral social partner landscape is fragmented, more on the union side than on the employer side, albeit less so than in the sector of foods and beverages. As regards employers, by 2022, there was the a peak-level confederation representing non-profit private institutions of social solidarity, CNIS (signatory to four CLCs covering 128.279 workers); the more than 300 Catholic *misericórdias* (signatory to two CLAs, covering 36.965 workers⁶); the Santa Casa da Misericórdia de Lisboa, enjoying a separate statute as the oldest, largest and para-public organization charged by the state with catering to social assistance within the Lisbon region (signatory to five SEAs covering 6041 workers); and 91 Mutuality Associations, represented by the

5 *Misericórdias* are long-standing charitable institutions with religious origins that play an important role in healthcare and social support (Manuel and Glatzer, 2018).

6 This situation changed in 16.3.2023 when the *misericórdias*, represented by the UMP, signed the first collective labour contract with the UGT-affiliated FNE and its affiliates, followed some CGTP unions, though not FEPCES that advocated the extension to the *misericórdias* of the IPSS collective labour contract (which the government refused).

peak-level confederation União das Mutualidades (UM) (one CLC covering just 714 workers). On the other side of the bargaining table, we find the customary split between CGTP-affiliated federations, FEPCES⁷ and FNSTFPS, and UGT-affiliated federations, such as FETESE and FNE.⁸

The social sector has long been organized according to a neo-corporatist policy regime (Ferreira, 2013). Ever since 1996 there are in place formal Pacts for Cooperation and Social Solidarity (Pactos de Cooperação para a Solidariedade Social) signed between the government and employers peak-level confederations: CNIS (private institutions of social solidarity), UMP (*misericórdias*), UM (mutuality associations) and CONFECOOP (cooperatives). In addition, there is a small but fast-growing for-profit private sector, mostly composed of senior rest homes, assisted living facilities, and long-term care institutions, in which there is no collective agreement of any sort and thus regulated only by the labour law. The situation in this sub-sector is “chaotic from the point of view of overtime work, working hours, and shift work”, according to a CNIS official (interview 1).

The aforementioned Pacts for Solidarity work as a peculiar form of social concertation between government and social sector employers, one in which trade unions are absent. In this way, the welfare state provides social services by subsidizing employers with cash outlays assigned by per capita end-user of services, such as long-term and palliative care, social care, and early childhood education and care. Each pact is negotiated in a neo-corporatist fashion with the representatives of third sector institutions, which are the strongest and better-organized sections of the Portuguese civil society (Branco, 2017). From these follow thousands of cooperation agreements signed by the government and each solidarity institution, which require the enactment of minimum wage increases and the renewal of sectoral collective agreements. However, unions forcefully point out that the government does not monitor the implementation of the clauses related to collective bargaining (interviews 5 and 8).

The government prioritizes keeping prices low for the end-consumers of social services. Doing so indirectly favours the bargaining position of employers vis-à-vis trade unions, which helps explain the prevalence of low pay in the sector. Repeatedly, CNIS claims that low pay is due to “not-enough government subsidies”, pointing out that wages on average represent 77% of total costs and that higher wage costs cannot be passed along to the end-consumer (interview 1). In turn, FNSTFPS reckons that low pay is due to “employers not passing the increase in government subsidies along to workers’ wages” and to the government not monitoring the enforcement of collective agreements (interview 5).

In a neo-corporatist logic, the reliance on state outlays to subsidize the cost of services provided by third parties is key to explain the interaction between the SMW and

7 Please note that that FEPCES is the federation and that actually signs agreements on behalf of the union CESP.

8 Union federations in the sector: FEPCES — Federação Portuguesa dos Sindicatos do Comércio, Escritórios e Serviços; FETESE — Federação dos Sindicatos da Indústria e Serviços; FNSTFPS — Federação Nacional dos Sindicatos dos Trabalhadores em Funções Públicas e Sociais; FNE — Federação Nacional da Educação.

collective bargaining. For employers, the social sector is unlike other economic sectors: “Here there is no class struggle, for the time being. Here there is inter-classism.” (interview 1). After all, the sector does not produce goods and services to be sold at market value; rather, it performs a social function in which prices for end users are determined conjointly with the government and thus are politically regulated. Employer negotiation strategies unfold simultaneously over two tables. With the government, CNIS negotiates over subsidies, with unions CNIS bargains over wages and working conditions. Since the “State is unable to provide what the social economy provides”, it is argued, the government ought to increase subsidies paid to service providers (employers). Turning around to bargaining with unions, CNIS claims that higher costs cannot be passed along to end-consumers for political and social reasons. CNIS instructs its affiliates to approach bargaining by “offering the minimum wage grid, and those that can afford it, pay a little bit more” (interview 1).

On the union side, bargaining strategies vary from sector-specific approaches to wider ideological stances. FNSTFPS seeks to supplement the base increase with items such as seniority pay, food allowances, and extra pay for shift work, but admittedly has not been successful at that (interview 5). FEPCES follows two lanes. A first sector-specific approach focuses on demanding from the government that it inspects employers’ compliance with the clauses of cooperation agreements that require updating collective wage bargaining on the penalty of employers not getting the increase in subsidies from the government. The other follows a broader ideological stance regarding the role of the public and private sectors in the provision of social services. From the union perspective, “the social sector [...] ought to be provided a public function and not handed over to private actors”. Thus “it is incumbent upon unions to make sure that workers get wage increases independently of public subsidies” (interview 8).

The trajectory of wages set in collective labour contracts in the subsector of non-profit Private Institutions of Social Solidarity negotiated between CNIS and the union federations FEPCES, FNSTFPS, FETESE, and FNE are displayed in table 3.⁹ Similar to the manufacture of food and beverages, base wages are updated to match SMW increases. However, middle and upper rates did not keep up with such increases, and spillovers are consistently below the relative SMW increase. While wage differentials are negotiated in percentage step increases on top of the base wage update according to the SMW, the effect tapers off throughout the scale, but without completely disappearing (interviews 1 and 5). From 2017 to 2021, the base rate grew 19%, whereas both the middle and top rates increased 4%. This then translates in the compression of the wage distribution: while in 2017 the base rate represented 73% of the middle rate and 47% of the top rate, in 2021 it represents 85% and 53%, respectively.

In effect, the yearly SMW increase became the going rate for updates across the pay scale, rather than a starting point upon which collective bargaining then improves. Such dynamics have created a situation of wage convergence at the

9 This sector has separate pay scales for educational and non-educational occupations. Given the fact that the former follows the pay scales negotiated by unions for the public education sector, the table refers exclusively to non-educational occupations.

Table 3 Collectively agreed wages for the subsector of Non-profit Private Institutions of Social Solidarity

Subsector	Non-profit Private Institutions of Social Solidarity (IPSS)											
	CNIS/FEPCES (CGTP)					CNIS/FNSTFPS (CGTP)					CNIS/FNE (UGT)	
Publication BTE	22.10.2021	15.01.2021	22.10.2017	29.11.2021	08.01.2021	28.06.2018	15.11.2021	22.11.2020	29.09.2017	15.02.2012		
Wage levels	18	18	18	18	18	18	18	18	18	18		18
Base rate	665 euros (18)	635 euros (18)	557 euros (18)	665 euros (18)	635 euros (18)	557 euros (18)	665 euros (18)	635 euros (18)	557 euros (18)	475 euros (18)		
Middle rate	785 euros (9)	777 euros (9)	755 euros (9)	785 euros (9)	777 euros (9)	755 euros (9)	785 euros (9)	777 euros (9)	755 euros (9)	726 euros (9)		
Top rate	1.244 euros (1)	1.231 euros (0)	1.191 euros (1)	1.244 euros (1)	1.231 euros (0)	1.191 euros (1)	1.244 euros (1)	1.231 euros (0)	1.191 euros (1)	1.157 euros (1)		
SMW	665 euros *	635 euros **	557 euros	665 euros *	635 euros **	557 euros	665 euros *	635 euros **	557 euros	485 euros		

Note: wage grid remuneration level in parenthesis; SMW of the correspondent year included.

Key: * 2021; ** 2022

Source: Own elaboration from *Boletim do Trabalho e Emprego* (several years).

bottom and reduced returns to skills, seniority, and responsibility. This has driven the exit from the sector of the more qualified cadres and has been a disincentive for entry-level careers, so that the sector is already having recruitment problems, not just for higher, more skilled positions, but even for entry-level, less qualified ones, which has then led employers to subcontracting and externalization to temporary work agencies (interview 5). Moreover, it brews a subjective discontent over educational qualifications no longer being a bargaining asset (interview 7).

Discussion and concluding remarks

This article has examined the impact of sustained increases in the statutory minimum wage over the past decade on wage developments and collective bargaining dynamics in low-pay sectors. The analysis of the sector of manufacturing of food and beverage products and the sector of residential and social care services revealed both commonalities and sector-specific differences.

Our findings show that the steep increases in the SMW between 2015 and 2022 influenced wage developments in low-pay sectors through both bite effects, leading to wage compression at the bottom, and spillover effects, though with notable cross-sector variation. Our first contribution lies in providing a fine-grained empirical analysis that highlights the sector-level differences in how these effects materialize. In social care services, wage spillovers consistently lagged behind SMW increases, resulting in persistent wage compression. In contrast, the food and beverage manufacturing sector presents a more varied picture, both over time and across sub-sectors. While the fries and snacks sub-sector mirrors the social care pattern with limited spillovers, the fruits and vegetables sub-sector initially experienced strong wage growth in the middle wage brackets. However, this momentum has slowed, suggesting weakening spillover effects over time and a potential crowding out of collective bargaining by the SMW.

We also explored the causal mechanisms through which the SMW shapes wage-setting and collective bargaining. Portugal combines one of Europe's highest Kaitz indices in Europe (68.2% in 2023) with high collective bargaining coverage, largely sustained through state-supported extensions, resulting in significant overlap between the SMW and collectively agreed minimum wages. Yet, in purchasing power standard (PPS) terms, the Portuguese SMW ranks only 13th (Luebker and Schulten, 2025: 9). The point being that the SMW's closeness to the median wage is more the expression of a comparatively low median than of a generous minimum wage.¹⁰ This

10 The Kaitz Index assesses the closeness between the minimum and the median wage, typically expressed as a ratio of the two. In low-pay sectors, in which wages cluster near the minimum, a high Index indicates that the minimum wage directly impacts a large share of workers, shapes wage compression and influences collective bargaining dynamics. When the Index rises over time, as is the case in Portugal, it means that national minimum wages have grown more than median wages. See Eurofound (2025), *Minimum Wages in 2025: Annual Review*, Luxembourg: Publications Office of the European Union, p. 12.

pattern of close or direct interaction between minimum wage and collective bargaining varies according to the specific institutional and structural characteristics of different low-pay sectors. In social care services, state intervention is key, and not just by setting the SMW and supporting the extension of collective bargaining agreements. Following a neo-corporatist logic, the government provides subsidies to employers for a range of services so that they can uprate wages according to the SMW. Unions bargain wages with employers but are absent from the negotiating table with the government over subsidies. The political priority to keep prices low for users of social services keeps wage costs down. In the manufacture of foods and beverages, the proliferation of small enterprises, price-led product competition, coupled with simple, Taylorist forms of work organization, generates a significant overlap between the SMW and collectively agreed wages.

What do the large wage compression and muted spillovers tell us about the limitations of the political strategy of wage valorisation through SMW increases? Why has the rising minimum wage not been able to more forcefully carry average wages upwards? The major constraint upon long-reaching spillover effects in low-pay sectors is the fact that SMW increases have not been accompanied by the re-regulation of other labour market institutions. Over the last two decades, neither the derogation of the *favor laboratoris* principle, nor the end of ultra-activity, have been fully reversed, while weakened employment protections for permanent contracts have skewed the balance of power towards employers (Branco and Cardoso, 2022; Campos Lima *et al.*, 2021). Moreover, the internal fragmentation and competition between CGTP and UGT-affiliated unions, low union density, and a lack of industrial conflict tradition by the social-partnership-oriented UGT all work against the union confederations' capacity to secure robust and far-reaching spillovers.

If the narrow minimum wage strategy has shown its limitations in this regard, and governments have not pursued a broader re-regulation in both the 2019 and 2023 labour market reforms (except in the case of temporary, platform, and bogus self-employed workers), then alternative strategies should be considered. In some cases, unions may be able to increase membership by offering incentives to workers, such as a range of services or by taking on governance roles in unemployment benefit systems (Clegg, Heins and Rathgeb, 2022). The government could also enhance collective bargaining coverage by more actively applying PCTs when employer associations are absent. However, we have seen how governments have been reluctant to pressure the Union of *misericórdias* to take on a bargaining employer role or to push PCTs extensions to the private for-profit social sector. Third, differentiated minimum wages could be set up, either via sectoral minimum wages with a view to combat low pay, such as in Germany (Bosch, Schulten and Weinkopf, 2021) or Brazil (Souza, 2012), or skill-linked minima comprising tiered wage floors based on educational qualifications or certifiable skills, such as with the 2025 reform in the Republic of Bosnia and Herzegovina (IMF, 2025).

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List of interviews

Interview 1: Confederação Nacional das Instituições de Solidariedade (CNIS).

Date: 15/04/2024. Site: Zoom.

Interview 2: Sindicato Nacional dos Trabalhadores da Agricultura, Floresta, Pesca, Turismo, Indústria Alimentar, Bebidas e Afins (SETAAB). Date: 16/04/2024.

Site: Zoom.

Interview 3: Associação Nacional de Comerciantes e Industriais de Produtos Alimentares (ANCIPA). Date: 18/04/2024. Site: Lisbon.

Interview 4: Federação dos Sindicatos de Agricultura, Alimentação, Bebidas, Hotelaria e Turismo de Portugal (FESAHT). Date: 22/04/2024. Site: Lisbon.

Interview 5: Federação Nacional dos Sindicatos dos Trabalhadores em Funções Públicas e Sociais (FNSTFPS). Date: 23/04/2024. Site: Lisbon.

Interview 6: Secretary of State for Labor of the Portuguese Socialist government. Date: 24/04/2024. Site: Lisbon.

Interview 7: Expert in Industrial Relations and Collective Bargaining. Date: 29/04/2024. Site: Lisbon.

Interview 8: Sindicato dos Trabalhadores do Comércio, Escritórios e Serviços de Portugal (CESP). Date: 08/05/2024. Site: Zoom

Interview 9: Federação Nacional da Educação (FNE). Written reply to interview questionnaire.

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