



Industrial relations and social dialogue

**Hungary: Metadata for the
Eurofound database of collective
agreements for low-paid workers**

Minimum wages for low-paid workers
in collective agreements

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This report documents the selection of collective agreements in the Eurofound database of collective agreements for low-paid workers. The database includes a sample of collective agreements for each of the selected low-paid sectors of interest. The documentation summarises how the task of identifying relevant agreements was approached, if and to what extent full registers of collective agreements with the required meta-data were available or, in their absence, which other approaches had to be taken. In addition, the documentation includes background information on the relevant member state's sectoral collective bargaining, its actors and functioning, and a description of the sampling approach, as well as basic information on the collective agreements proposed to be included in the database for each of the ten low paid sectors of interest.

Detailed information related to each collective agreement can be found online in the visual dashboard with a live connection to the database.

General information

In Hungary, there is in principle a register of collective agreements (www.mkir.hu), but it is in fact rarely updated: terminated contracts are not deleted and new contracts are only sporadically registered. Despite this incompleteness, NACE codes, period of validity, and signatory social partners are normally available. In contrast, the number of workers covered is not provided.

Another way of identifying valid collective agreements is through the trade union confederations and their member unions. However, this way they can only be identified one by one, especially in case of company-level agreements (that are, moreover, not always made available to the public).

Some of the collective agreements applicable to state-owned companies, such as the Hungarian State Railways and the Post Office, are publicly available.

1 - Agriculture

Background information

According to the tax register, there were 5,700 legal entities (firms) in the NACE-2 sector of interest A-01 (crop and animal production, hunting and related service activities) in 2020. More than three quarters of them had fewer than 10 employees, with only 10 farms employing more than 250 employees.

The share of workers earning the minimum wage is around 25 percent.

Employers are represented by MOSZ (Mezőgazdasági Szövetkezetek és Termelők Országos Szövetsége) and employees by MÉDOSZ (Mezőgazdasági, Erdészeti, Élelmiszeripari és Vízügyi Dolgozók Szakszervezete).

In agriculture, there is a sectoral level extended collective agreement, signed by these two organisations (in 1997) which was reinforced in 2013. However, the agreement is not widely applied by agricultural firms. The parties are now working on renewing the agreement.

According to data of MEDOSZ, there are 33 company-level collective agreements in NACE-2 sector of interest A-01 (crop and animal production, hunting and related service activities). This is a fairly reliable figure as there are no other unions in the sector (unless there are collective agreements with independent company unions, which is unlikely).

Sampling information

In the official register of collective agreements (www.mkir.gov.hu) there is only 1 agreement in agriculture registered after 2015, the Pálhalmi Agrospeciál Kft. This is a penitentiary organisation.

However, according to MÉDOSZ, major trade union of the sector, there are 33 agreements in agriculture: although the number of agreements and the number of covered employees is available, the name of the companies is not always available.

The agreement of the agricultural firm "Tedej", which is one of the biggest firms in animal husbandry in Hungary, with over €18 million net revenue and 215 employees.

The sectoral agreement was undersigned in 2012 between MOSZ (employers) and MÉDOSZ (employees). It provides only the framework conditions (e.g. working time, occupational safety, conditions of dismissal, e.t.c.) which are then customised and implemented by company-level agreements. Therefore, it does not set any wage levels.

The aggregate data of company-level agreements (number of companies and employees) might be quite accurate, but the list of companies is missing. The major trade union in the sector states that it is not authorized to provide the names of the companies, although, in theory, all collective agreements should be registered on the open webpage mkir.gov.hu.

Company-level agreements in agriculture (and generally in other sectors as well) do not set wages since most of them are for an indefinite period. They only refer to the prevailing statutory minimum wage as lowest wage. The wages are then set annually during the wage negotiations.

Table 1: Estimates on sector related bargaining coverage

	From	To	Source
A. Total number of employees within the sampled sectors of interest, which are not excluded from collective bargaining	170,000	190,000	Eurostat employment data (except for fishing) domestic concept
B. Total number of employees in the sampled sectors of interest, estimated to be covered by collective bargaining	4,000	4,200	Incomplete collection of data

Sector related agreements listed and coded in the database

In the first stage correspondents were asked to list sector related collective agreements with basic information. In some cases, only a selection of the listed agreements was then ‘fully coded’ and included in the database.

In case of 1 - Agriculture 1 collective agreements were listed, and out of these 1 were approved for coding and fully included in the database.

Tedej Zrt

Eurofound identifier	CA-HU-2343
Title (native language)	Tedej Zrt
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	250
Quality of the figure	Numbers are best estimates
Number of workers covered by the agreement in the low paid sector of interest	220
Quality of the figure	Numbers are best estimates

Self-assessed proportion of included agreements

Based on all available figures, and to their best knowledge, the author assesses that the listed collective agreements are likely to cover:

- A small fraction of all agreements related to 1 - Agriculture (as defined in the project)

- A small sample (less than 20%) of those workers in 1 - Agriculture (as defined in the project), which are covered by a collective agreement.

2 - Manufacture of food, leather, textiles, and clothes

Background information

In 2020, the number of companies, their structure, and the employment levels (according to the tax register) in each of the NACE-2 sectors of interest C-10 (manufacture of food products), C-13 (manufacture of textiles), C-14 (manufacture of wearing apparel), and C-15 (manufacture of leather and related products) was the following:

- C-10: 2,000 firms, of which 47 employ over 250 workers.
- C-13: 342 firms, of which five employ over 250 workers.
- C-14: 539 firms, of which five employ over 250 workers.
- C-15: 156 firms, of which six employ over 250 workers.

The share of workers earning the statutory minimum wage is around 27-30% in C-10 and around 50-55% in C-13, C-14 and C-15.

There are no sector-level collective agreements.

In NACE-2 sector of interest C-10 there are five trade unions:

- Three of them belong to the MASZSZ (Hungarian Trade Union Confederation): EDSZ (Food Industry Workers' Union), HDSZ (Trade Union of Meat Industry Workers), and GMDSZ (Grain and Mill Workers' Union).
- Two of them belong to the League of Independent Trade Union (LIGA): EMFSZ (Food Industry Workers) and MÉDOSZ (Union of Agricultural Forestry, Food, Water and Catering Workers).

In NACE-2 sectors of interest C-13, C-14 and C-15, trade unions merged in 2009-2011 with BDSZ (Trade Union of Mine, Energy and Industrial Workers).

With regards to employers' organisations, the following should be mentioned:

- FÉSZ (Független Élelmiszergyártók Szövetsége: Association of Independent Food Manufacturers), active in NACE-2 sector of interest C-10.
- MKSZ (Magyar Könnyűipari Szövetség Hungarian Light Industry Association), active in NACE-2 sectors of interest C-13, C-14 and C-15.
- A VOSZ (Textil és Ruháipari Szekciója, Textile and Clothing Industry Section of VOSZ). VOSZ is one of the biggest employers' organisations, and this section is active in both NACE-2 sectors of interest C-13 and C-14.
- Hungarian Fur and Leather Industry Association, active in NACE-2 sector of interest C-15.

With regards to the number of company-level agreements, the number of covered employees and their share is the following:

- C-10: ten agreements covering 3,720 employees in total; their share is 3,0%.
- C-13: five agreements covering 3,221 employees in total; their share is 32%.

- C-14: two agreements covering 499 employees in total; their share is 2,2%.
- C-15: five agreements covering 2,981 employees in total; their share is 26%.

Sampling information

In the official register of collective agreements (www.mkir.gov.hu) there are three company-level agreements in NACE-2 sector of interest C-10 (manufacture of food products) signed after 2015, no agreement in C-13 (manufacture of textiles) and in C-15 (manufacture of leather and related products), and only one agreement in C-14 (manufacture of wearing apparel).

Information has been provided by the trade unions in the sectors concerned.

In C-13, C-14 and C-15 a list of companies was made available, while in C-10 only the number of firms and the number of employees covered was disclosed.

We have obtained verbal information about the content of the agreements of the largest firms, with the possibility to get access to the selected ones.

- In C-10: the two largest firms with collective bargaining are: Pick Szeged Szalámi (1,934 employees) and Kométa-99 (939 employees).
- In C-13: the largest firm with collective bargaining is: Unicon Ruházati Zrt.(222 employees).
- In C-14: the largest firm with collective bargaining is: Calida Magyarország Kötőipari Zrt. (335 employees);
- In C-15: the largest firm with collective bargaining is: Eagle Ottawa Hungária (1,771 employees).

The collective agreements of the companies Eagle Ottawa Hungaria (C-15) and Pick Szeged Salami (C-10) have been selected for inclusion in the sample.

No sector-level collective agreements exist in the NACE-2 sectors of interest C-10, C-13, C-14 and C-15.

Many agreements in NACE-2 sector of interest C-10 may be missing from the sample since there might be several agreements which were signed by independent firm level trade unions.

Company-level agreements in manufacturing (as generally in other sectors as well) do not set wage levels, since most of them are for an indefinite period. They usually only refer to the prevailing minimum wage as lowest wage. Wages are set annually during the wage negotiations.

Table 2: Estimates on sector related bargaining coverage

	From	To	Source
A. Total number of employees within the sampled sectors of interest, which are not excluded from collective bargaining	160,000	165,000	Eurostat, Total Employment data domestic concept
B. Total number of employees in the	10,500	15,000	Trade Unions

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sampled sectors of interest, estimated to be covered by collective bargaining			
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Sector related agreements listed and coded in the database

In the first stage correspondents were asked to list sector related collective agreements with basic information. In some cases, only a selection of the listed agreements was then ‘fully coded’ and included in the database.

In case of 2 - Manufacture of food, leather, textiles, and clothes 2 collective agreements were listed, and out of these 2 were approved for coding and fully included in the database.

Pick Szeged Salami Zrt

Eurofound identifier	CA-HU-2265
Title (native language)	Pick Szeged Szalámi Zrt
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	1,934
Quality of the figure	Numbers are (relatively) precise and reliable
Number of workers covered by the agreement in the low paid sector of interest	1,934
Quality of the figure	Numbers are (relatively) precise and reliable

Eagle Ottawa Hungaria

Eurofound identifier	CA-HU-2301
Title (native language)	Eagle Ottawa Hungaria
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	1,750
Quality of the figure	Numbers are (relatively) precise and reliable
Number of workers covered by the agreement in the low paid sector of interest	1,750
Quality of the figure	Numbers are (relatively) precise and reliable

Self-assessed proportion of included agreements

Based on all available figures, and to their best knowledge, the author assesses that the listed collective agreements are likely to cover:

- A small fraction of all agreements related to 2 - Manufacture of food, leather, textiles, and clothes (as defined in the project)
- A small sample (less than 20%) of those workers in 2 - Manufacture of food, leather, textiles, and clothes (as defined in the project), which are covered by a collective agreement.

3 - Construction excl. civil engineering

Background information

According to information from experts and the sectoral trade union EFEDOSZSZ, large construction firms in Hungary, which may typically have a company-level agreement, cannot be strictly classified in NACE-2 sectors of interest F-41 (construction of buildings) or F-43 (specialised construction activities).

There are no collective agreements at companies classified in F-43, and only three companies in F-41. Most construction companies with a company-level agreement are rather classified in F-42 (civil engineering, not a sector of interest for the purposes of this database), although they also carry out other construction activities.

With regard to the number of companies and their employees in the NACE-2 sectors of interest:

- F-41: 8,514 companies, of which only three are over 250 persons.
- F-43: 12,323 companies, of which only three are over 250 persons.

The share of workers earning the statutory minimum wage is about 45% in the construction sector, according to the official data of the Statistical Office. However, the trade unions' leaders of contacted companies state that they typically do not apply the statutory minimum wage, as their minimum wages are above this rate. This implies that mainly smaller companies, without trade unions, apply the statutory minimum wage.

No sectoral collective agreement has been identified in NACE-2 sectors of interest F-41 and F-43 in the relevant period 2015-2022.

The formal signature of a sector-level collective agreement took place on 16 November 2005; the Minister of Economics extended it to the whole sector on 19 March 2006. The agreement was amended several times. The last amendment took place in 2013 based on the new Labour Code, Act I of 2012. The amended sectoral agreement was signed on 27 February 2013 by EVOSZ (employer's side) and ÉFÉDOSZSZ (union). However, it (the amended parts) could not be extended, as the conditions for extension had changed in the meantime: in 2012 the ÉVOSZ lost its representativeness (the signatory employers' association or associations together must employ more than half of the total number of workers covered by the extension). The new collective agreement is under preparation.

In the two NACE-2 sectors of interest the largest TU is EFEDOSZSZ (Federation of Building, Wood, and Building Materials Workers' Unions).

There are at least 11 company-level collective agreements in the NACE-2 sectors of interest F-41 and F-43.

Sampling information

In the official register of collective agreements (www.mkir.gov.hu) there is no collective agreement in construction industry registered after 2015. We have received information on collective agreements and the list of firms from the trade union operating in the sector.

- In F-41 (construction of buildings): the largest firms with CA is ZÁÉV Építőipari Zrt, with 323 employees.
- In F-43 (specialised construction activities): no collective agreement has been identified.
- The other listed agreement refers to a company operating in NACE-1 sector, including the two sectors of interest F-41 and F-43.

There may be other collective agreements concluded by other unions or by independent firm level trade unions, but there is no access to this information.

Company-level collective agreements in construction (as generally in other sectors as well) do not set wages since most of them are for an indefinite period. They usually only refer to the statutory minimum wage as lowest wage. Wages are set annually during the wage negotiations.

Table 11: Estimates on sector related bargaining coverage

	From	To	Source
A. Total number of employees within the sampled sectors of interest, which are not excluded from collective bargaining	116,000	116,000	Eurostat, total employment data, domestic concept
B. Total number of employees in the sampled sectors of interest, estimated to be covered by collective bargaining	15,000	25,000	Sectoral trade Union: EFEDOSZSZ

Sector related agreements listed and coded in the database

In the first stage correspondents were asked to list sector related collective agreements with basic information. In some cases, only a selection of the listed agreements was then ‘fully coded’ and included in the database.

In case of 3 - Construction excl. civil engineering 2 collective agreements were listed, and out of these 2 were approved for coding and fully included in the database.

Confidential agreement

Eurofound identifier	CA-HU-2253
Title (native language)	Confidential agreement
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	

Quality of the figure	
Number of workers covered by the agreement in the low paid sector of interest	
Quality of the figure	

ZÁÉV

Eurofound identifier	CA-HU-2254
Title (native language)	ZÁÉV Kollektív Szerződés
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	320
Quality of the figure	Numbers are (relatively) precise and reliable
Number of workers covered by the agreement in the low paid sector of interest	320
Quality of the figure	Numbers are (relatively) precise and reliable

Self-assessed proportion of included agreements

Based on all available figures, and to their best knowledge, the author assesses that the listed collective agreements are likely to cover:

- A small fraction of all agreements related to 3 - Construction excl. civil engineering (as defined in the project)
- A good fraction (20% to 49%) of those workers in 3 - Construction excl. civil engineering (as defined in the project), which are covered by a collective agreement.

4 - Retail

Background information

The number of companies, their structure and employment, according to the tax register, in NACE-2 sector of interest G-47 (retail trade, except of motor vehicles and motorcycles), is the following: 20,730 companies, of which 41 employ over 250 persons.

The share of workers earning the minimum wage is about 30 percent.

No sector-level collective agreement has been identified in the NACE-2 sector of interest G-47.

Employers' organizations: OKSZ, Országos Kereskedelmi Szövetség, (National Trade Association) and MNKSZ, Magyar Nemzeti Kereskedelmi szövetség (Hungarian National Trade Association)

The largest trade union in retail trade is KASZ (Trade Union of Commercial Employees). The second largest trade union is HKDSZ (Hazai Kereskedelemben Dolgozók Szakszervezete), which is largely made up of COOP retail trading companies.

According to KASZ, they are involved in collective bargaining at 25 companies, employing about 24,000 employees in total. There are further agreements in the register (www.mkir.gov.hu), signed in 2021: seven COOP firms' agreements with about 3,700 employees in total, signed by the HKDSZ.

The estimated number of employees covered by collective bargaining is around 10%.

Sampling information

In the official register of collective agreements (www.mkir.gov.hu) there are 7 collective agreements in retail trade, registered after 2015. According to the information of KASZ, they signed 25 agreements in retail trade, even if they are not captured by the register, with the possibility to get access to them for research purposes.

The two listed agreements are confidential and not in the official register. No further information can be disclosed about the companies that provided them.

Furthermore, there may be other collective agreements concluded by other unions or by independent company-level trade unions, but access to them is not available.

No sector-level collective agreement has been identified in the NACE-2 sector of interest G-47 (retail trade, except of motor vehicles and motorcycles).

Company-level agreements in retail trade (as generally in other sectors as well) do not set wage levels, since most of them are for an indefinite period. They usually only refer to the statutory minimum wage as lowest wage. Wages are set annually during the wage negotiations.

Table 3: Estimates on sector related bargaining coverage

	From	To	Source
A. Total number of employees within the sampled sectors of interest, which are not	280,000	300,000	Eurostatat total employment data, domestic concept

excluded from collective bargaining			
B. Total number of employees in the sampled sectors of interest, estimated to be covered by collective bargaining	27,000	30,000	Trade Unions

Sector related agreements listed and coded in the database

In the first stage correspondents were asked to list sector related collective agreements with basic information. In some cases, only a selection of the listed agreements was then 'fully coded' and included in the database.

In case of 4 - Retail 2 collective agreements were listed, and out of these 2 were approved for coding and fully included in the database.

Confidential agreement

Eurofound identifier	CA-HU-2309
Title (native language)	Confidential agreement
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	
Quality of the figure	
Number of workers covered by the agreement in the low paid sector of interest	
Quality of the figure	

Confidential agreement

Eurofound identifier	CA-HU-2310
Title (native language)	Confidential agreement
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	
Quality of the figure	
Number of workers covered by the agreement in the low paid sector of interest	

Quality of the figure

Self-assessed proportion of included agreements

Based on all available figures, and to their best knowledge, the author assesses that the listed collective agreements are likely to cover:

- Some of all agreements related to 4 - Retail (as defined in the project)
- Most (more than 50% to 89%) of those workers in 4 - Retail (as defined in the project), which are covered by a collective agreement.

5 - Postal, courier, land transport and warehouses

Background information

With regards to the NACE-2 sectors of interest's landscape (according to the Tax Register):

- H-49 (land transport and transport via pipelines): 5,180 firms, of which 21 employ over 250 persons; the total number of employees is about 110,000'
- H-52 (warehousing and support activities for transport): 1,791 firms, of which 25 employ over 250 persons; the total number of employees is about 60,000.
- H-53 (postal and courier activities): 288 firms, of which 23 employ over 250 persons; the total number of employees is about 32,000.

The share of workers earning the statutory minimum wage is around 25%.

No sectoral collective agreements exist in the NACE-2 sectors of interest H-49, H-52, and H-53.

There are several trade unions active in the sector, at different levels. Some firm-level trade unions belong to a certain confederation and some others (as the railway company or the intercity bus company) are independent. Among them, the following trade unions should be mentioned:

- TESZ: Teherfuvarozók Európai Szakszervezete (European Trade Union of Freight Transporters).
- KKSZ: Közúti Közlekedési Szakszervezet (Road Transport Trade Union).
- KMSZ: Közlekedési Munkástanácsok Szövetsége (Association of Transport Workers' Councils).
- KDSZSZ: Közlekedési Dolgozók Szakszervezeteinek Szövetsége (Federation of Transport Workers' Unions).

Most of the largest companies in the sector are state or municipality-owned, with a broad application of collective agreements. But there are also many agreements in large private companies, mainly in freight transport.

The estimated coverage in the three NACE-2 sectors of interest considered together is at least 55%; in H-49 at least 64%, in H-52 at least 25% and in H-53 over 80%.

Sampling information

In the official register of collective agreements (www.mkir.gov.hu) there are 29 agreements in H-49 (land transport and transport via pipelines) registered not earlier than 2015. All are in the freight transport subsector. Passenger transport agreements are missing.

The largest firm with collective bargaining in the sector is the Hungarian Railways Co., with about 35.000 employees. The inter-city bus transport company (Volán) has about 20,000 employees. In order to better coordinate rail and road transport, Volán was merged into the railway company in 2022.

The four listed collective agreements have been selected on the basis of accessibility and coverage.

There is only one level of collective bargaining: no sectoral collective agreement has been identified in NACE-2 sectors of interest H-49, H-52 and H-53.

Company-level agreements in transportation and storage (as generally in other sectors as well) do not set wages since most of them are for an indefinite period. They usually only refer to the statutory minimum wage as lowest wage. Wages are set annually during the wage negotiations.

Table 4: Estimates on sector related bargaining coverage

	From	To	Source
A. Total number of employees within the sampled sectors of interest, which are not excluded from collective bargaining	270,000	280,000	Statistical Office
B. Total number of employees in the sampled sectors of interest, estimated to be covered by collective bargaining	150,000	160,000	Trade Unions and interviews

Sector related agreements listed and coded in the database

In the first stage correspondents were asked to list sector related collective agreements with basic information. In some cases, only a selection of the listed agreements was then ‘fully coded’ and included in the database.

In case of 5 - Postal, courier, land transport and warehouses 4 collective agreements were listed, and out of these 4 were approved for coding and fully included in the database.

MÁV Zrt. (HU Railway Co.)

Eurofound identifier	CA-HU-2247
Title (native language)	A MÁV Zrt. Kollektív Szerződése
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	30,000
Quality of the figure	Numbers are (relatively) precise and reliable
Number of workers covered by the agreement in the low paid sector of interest	30,000
Quality of the figure	Numbers are best estimates

Budapest public transport

Eurofound identifier	CA-HU-2266
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Title (native language)	BKV Budapesti Közlekedési Vállalat
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	10,345
Quality of the figure	Numbers are (relatively) precise and reliable
Number of workers covered by the agreement in the low paid sector of interest	10,345
Quality of the figure	Numbers are (relatively) precise and reliable

Volánbusz Transport Ltd

Eurofound identifier	CA-HU-2267
Title (native language)	Volánbusz Közlekedési rt
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	18,234
Quality of the figure	Numbers are (relatively) precise and reliable
Number of workers covered by the agreement in the low paid sector of interest	18,234
Quality of the figure	Numbers are (relatively) precise and reliable

Waberer's International Nyrt

Eurofound identifier	CA-HU-2272
Title (native language)	Waberer's International Nyrt.
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	5,900
Quality of the figure	Numbers are (relatively) precise and reliable
Number of workers covered by the agreement in the low paid sector of interest	5,900
Quality of the figure	Numbers are (relatively) precise and reliable

Self-assessed proportion of included agreements

Based on all available figures, and to their best knowledge, the author assesses that the listed collective agreements are likely to cover:

- A good selection of the most important agreements related to 5 - Postal, courier, land transport and warehouses (as defined in the project)
- Most (more than 50% to 89%) of those workers in 5 - Postal, courier, land transport and warehouses (as defined in the project), which are covered by a collective agreement.

6 - Hospitality

Background information

As for the landscape (data drawn from the Tax Register) of NACE-2 sectors of interest I-55 (accommodation) and I-56 (food and beverage service activities):

- I-55: 1,900 firms, of which six employ over 250 persons; the total number of employees is about 22,000.
- I-56: 8,700 firms, of which ten employ over 250 persons; the total number of employees is about 83,000.

The share of workers earning the statutory minimum wage in the NACE-1 sector I as a whole is around 56%.

The employers are represented mainly by two organizations, the MSZÉSZ, Magyar Szállodák és Éttermek Szövetsége (only I-55) and VIMOSZ, Turisztikai és Vendéglátó Munkaadók Országos Szövetsége. The employees are represented by MÉDOSZ, (Mezőgazdasági, Erdészeti, Élelmiszeripari és Vízügyi Dolgozók Szakszervezete).

In 1997, employers' and workers' representatives signed a sectoral collective agreement, which in principle is still in force. This agreement set the minimum wage in the sector at 10% higher than the actual minimum wage for the whole economy. However, the wage section of the agreement has not been extended to the whole sector.

The trade union VISZ, Vendéglátó és Idegenforgalmi Szakszervezet, which signed this sectoral collective agreement, was later merged into MÉDOSZ.

Sampling information

In the official register of collective agreements (www.mkir.gov.hu), there are three agreements in NACE-2 sector of interest I-55, all linked to the Balatontourist, with 56 employees in total (according to the business register). In sector I-56, there are no agreements registered after 2015.

No agreement has been included in the sample, given their very low coverage.

Table 5: Estimates on sector related bargaining coverage

	From	To	Source
A. Total number of employees within the sampled sectors of interest, which are not excluded from collective bargaining	100,000	140,000	CSO
B. Total number of employees in the sampled sectors of interest, estimated to			n.a.

be covered by collective bargaining			
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7 - Business support services

Background information

As for the landscape (data drawn from the Tax Register) of NACE-2 sectors of interest N-78, N-80, N-81 and N-82:

- N-78 (employment activities): 565 firms, of which 40 employ over 250 persons.
- N-80 (security and investigation activities): about 1.000 firms, of which 18 are over 250 persons.
- N-81 (services to buildings and landscape activities): 2,700 firms, of which 18 employ over 250 persons.
- N-82 (office administrative, office support and other business support activities): 2,650 firms, of which 15 employ over 250 persons.

The share of workers earning the minimum wage in the NACE-2 sectors of interest is around 30-35% on average.

No sectoral level agreement has been identified in any of the NACE-2 sectors of interest.

Due to their heterogeneity, these sectors are not a traditional terrain for trade unionization.

Sampling information

In the official register of Collective Agreements (www.mkir.gov.hu), there are no collective agreements registered in sectors N-78 (employment activities), N-80 (security and investigation activities) and N-81 (services to buildings and landscape activities) in the relevant period 2015-2022. In N-82 (office administrative, office support and other business support activities) there are three collective agreements, all related to customer service companies of public energy suppliers.

One of these three agreements has been included in the sample: this is the NKM Ügyfélszolgálati Kft (National Utility Customer Relation Ltd). Due to a reorganisation in 2021, several customer relation firms in energy supply have been merged, and the name of the company changed from NKM Customer Relationship Ltd to MVM Customer Relationship Ltd.

Since the merger, wages have been fixed in the annual wage agreement for the entire MVM group.

Table 6: Estimates on sector related bargaining coverage

	From	To	Source
A. Total number of employees within the sampled sectors of interest, which are not excluded from collective bargaining	125,000	130,000	Eurostat total employment data, domestic concept
B. Total number of employees in the sampled sectors of	2,000	2,000	Trade unions

interest, estimated to be covered by collective bargaining			
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Sector related agreements listed and coded in the database

In the first stage correspondents were asked to list sector related collective agreements with basic information. In some cases, only a selection of the listed agreements was then 'fully coded' and included in the database.

In case of 7 - Business support services 1 collective agreements were listed, and out of these 1 were approved for coding and fully included in the database.

NKM Customer Relationship Ltd

Eurofound identifier	CA-HU-2362
Title (native language)	NKM Ügyfélkapcsolati KFT
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	1,340
Quality of the figure	Numbers are (relatively) precise and reliable
Number of workers covered by the agreement in the low paid sector of interest	1,340
Quality of the figure	Numbers are (relatively) precise and reliable

Self-assessed proportion of included agreements

Based on all available figures, and to their best knowledge, the author assesses that the listed collective agreements are likely to cover:

- A small fraction of all agreements related to 7 - Business support services (as defined in the project)
- A small sample (less than 20%) of those workers in 7 - Business support services (as defined in the project), which are covered by a collective agreement.

8 - Residential and social care

Background information

Although in 2020 there were still a number of collective agreements in force in the health sector, the Government Decree 530/2020 (28.11.20) "On certain issues related to the legal status of health workers and health care workers", based on the Parliamentary mandate on the protection against the second wave of the coronavirus pandemic, stated in § 6 that collective agreements in the sector will expire on 1 January 2021.

This has not changed since then, since the "state of emergency" referred to has been extended as a result of the military conflict following the Russian military offensive against Ukraine.

Therefore, there are currently no active collective agreements in the public health sector.

The government decree does not apply to private health care providers, which is a rapidly expanding subsector in Hungary because of the shortages in public health services. However, the role of trade unions is rather limited (near to zero) and there are no collective agreements. This information is based on the opinion of several health trade union experts.

However, NACE-2 sectors of interest Q-87 (residential care activities) and Q-88 (social work activities without accommodation) cover together more than 60 (primary and specialised) services; it is highly fragmented and characterised by a complex system of relationships and complicated and detailed regulation. These sectors are highly underfinanced, generally low paid, and affected by labour shortages.

Sampling information

As explained in the background section, no collective agreement has been identified in the sector.

Table 7: Estimates on sector related bargaining coverage

	From	To	Source
A. Total number of employees within the sampled sectors of interest, which are not excluded from collective bargaining	125,000	130,000	CSO Eurostat Total employment data, domestic concept
B. Total number of employees in the sampled sectors of interest, estimated to be covered by collective bargaining	0	0	government decree

9 - Arts, gambling and sports

Background information

The rate of statutory minimum wage earners in NACE-1 sector R (arts, entertainment and recreation) is around 20-22%.

No sectoral collective agreements have been identified in the sector.

The main TU in the sector is MSZSZ (Művészeti Szakszervezetek szövetsége), which belongs to SZEF (Szakszervezetek Együtműködési Fóruma). It consists of five affiliated trade unions representing different professions in the arts, creative and entertainment subsectors.

With regards to the number of identified collective agreements:

- R-90 (creative, arts and entertainment activities): at least 25 agreements, with about 3.500 employees, covering around 25% of employees in the sector.
- R-92 (gambling and betting activities): at least one agreement with 1925 employees (the Szerencsejatek Zrt - Gambling Ltd, which is a state-owned company), covering around 57% of workers in the sector.
- R-93 (sports activities and amusement and recreation activities): based on a wide-ranging survey, interviews with sports lawyers and HR managers, it can be assumed that there are no collective agreements existing in the sports sector.

Sampling information

The collective agreement of Vígszínház Zrt (one of the most popular theatres in Budapest) has been included in the sample, due to accessibility reasons.

No sector-level agreement has been identified in the three NACE-2 sectors of interest R-90 (creative, arts and entertainment activities), R-92 (gambling and betting activities), and R-93 (sports activities and amusement and recreation activities).

Some major collective agreements are missing from the sample due to accessibility reasons.

Company-level agreements in these NACE-2 sectors of interest (as generally in other sectors as well) do not set on wages since most of them are for an indefinite period. They usually only refer to the statutory minimum wage as lowest wage. Wages are set annually during the wage negotiations.

Table 8: Estimates on sector related bargaining coverage

	From	To	Source
A. Total number of employees within the sampled sectors of interest, which are not excluded from collective bargaining	30,000	35,000	CSO
B. Total number of employees in the	5,500	6,000	estimate (minimum)

sampled sectors of interest, estimated to be covered by collective bargaining			
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Sector related agreements listed and coded in the database

In the first stage correspondents were asked to list sector related collective agreements with basic information. In some cases, only a selection of the listed agreements was then ‘fully coded’ and included in the database.

In case of 9 - Arts, gambling and sports 1 collective agreements were listed, and out of these 1 were approved for coding and fully included in the database.

Vígszínház Nonprofit Ltf.

Eurofound identifier	CA-HU-2264
Title (native language)	Vígszínház Nonprofit Zrt.
Bargaining level	Enterprise/company or establishment level agreement
Number of workers covered by the agreement in total	264
Quality of the figure	Numbers are (relatively) precise and reliable
Number of workers covered by the agreement in the low paid sector of interest	264
Quality of the figure	Numbers are (relatively) precise and reliable

Self-assessed proportion of included agreements

Based on all available figures, and to their best knowledge, the author assesses that the listed collective agreements are likely to cover:

- A small fraction of all agreements related to 9 - Arts, gambling and sports (as defined in the project)
- A small sample (less than 20%) of those workers in 9 - Arts, gambling and sports (as defined in the project), which are covered by a collective agreement.

10 - Personal services

Background information

According to the Tax Register, there are around 2,000 companies operating in NACE-2 sector of interest S-96 (other personal service activities), of which only five employ over 250 persons. More than 94% of them only employ less than ten workers.

Based on the Eurostat Total employment data, the number of employees is around 65,000.

There is no information on the existence of industrial relations actors of collective bargaining: unionization in the sector is traditionally inexistent.

Sampling information

As explained in the Background section, no collective agreements have been identified in NACE-2 sector of interest S-96 (other personal service activities).

Table 9: Estimates on sector related bargaining coverage

	From	To	Source
A. Total number of employees within the sampled sectors of interest, which are not excluded from collective bargaining	65,000	66,000	Eurostat Total employment data, domestic concept
B. Total number of employees in the sampled sectors of interest, estimated to be covered by collective bargaining			n.a.

11 - Domestic personnel

Background information

There is no information about the existence of industrial relations actors of collective bargaining: unionization in the sector is traditionally inexistent.

Sampling information

As explained in the Background section, no collective agreements have been identified in NACE-2 sector of interest T-97 (activities of households as employers of domestic personnel).

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