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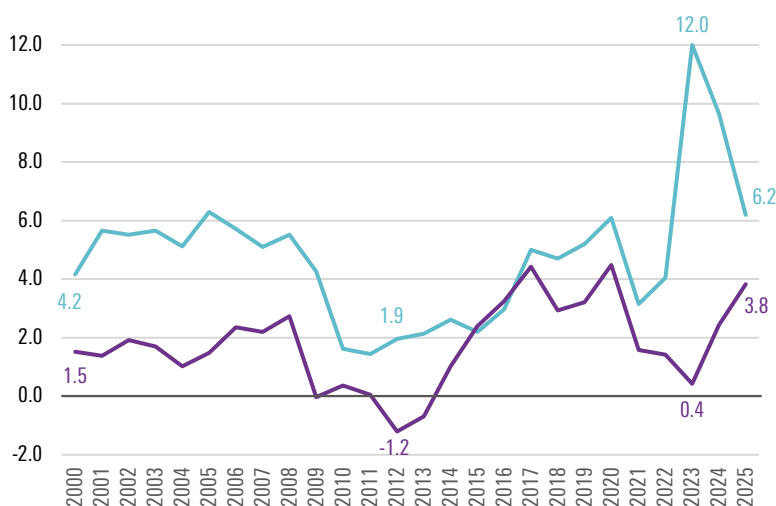
Reorientation of minimum wage policy leads to real increases

Malte Luebker, Thorsten Schulten

SUMMARY

The trend towards significant nominal minimum wage increases is continuing this year. In view of falling inflation rates, this translates into a sizeable increase in purchasing power for minimum wage earners in most European countries. The background to this is the implementation of the European Minimum Wage Directive, which has led to a reorientation of minimum wage policy in many countries and is thus boosting the dynamics of minimum wages. Most EU countries are now following the reference values for adequate minimum wages enshrined in the directive, which are 60% of the median wage or 50% of the average wage. However, for Germany, a structural increase is still necessary to make progress towards an adequate minimum wage.

Minimum wage developments in the European Union, 2000 – 2025
 Compared with 1 January of the preceding year (in %, median values)



Source: WSI Minimum Wage Database; Eurostat

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1 INTRODUCTION

Ten years ago, on January 1, 2015, the general minimum wage was introduced in Germany. The justification with which the then federal government introduced its bill into Parliament was essentially short and clear: “The introduction of a nationwide statutory minimum wage will protect employees from unreasonably low wages” (German Bundestag 2014, p.2). But the question of which wage is adequate and which would be considered unreasonable was not answered by this. Instead, the future decision on “which level of the minimum wage is suitable to contribute to an adequate minimum protection of employees” was placed in the hands of the newly created Minimum Wage Commission (Minimum Wage Act, §9 [2]). The European legislator has also wrestled with the question of the adequacy of wages in the formulation of the Directive on Adequate Minimum Wages in the European Union – and arrived at a much more tangible answer: “Minimum wages are considered to be adequate if they are fair in relation to the wage distribution in the relevant Member State and if they provide a decent standard of living for workers based on a full-time employment relationship.” (European Parliament/Council 2022, recital 28)

The reference of the minimum wage level to the national wage scale is also anchored in the European Minimum Wage Directive itself: Article 5 (4) states that “Member States shall use indicative reference values to guide their assessment of adequacy of statutory minimum wages” and refers to the “reference values commonly used at international level such as 60% of the gross median wage and 50% of the gross average wage”. This double threshold has now become the de facto standard in Europe and is reflected in many national minimum wage laws and policies, as shown in **Section 2**. Subsequently, this year’s WSI Minimum Wage Report presents the current level of minimum wages in euros (**Section 3**) and purchasing power standards (**Section 4**)¹ and discusses the level of minimum wages within the national wage structure, using the Kaitz Index (**Section 5**). The objective of achieving adequate protection is also a reason for the significant, real minimum wage increases that have taken place in the majority of European countries compared to the previous year (**Section 6**). The importance of long-term targets for minimum wage development is also evident from **Section 7**, which takes stock of the past ten years for selected countries. **Section 8** summarises the cur-

rent development in Europe and refers to Germany, whose minimum wage is still well below the reference value of 60% of the median wage and therefore needs structural adjustment.

2 THE STATE OF MINIMUM WAGE LEGISLATION IN EUROPE

With the “Directive 2022/2041 on adequate minimum wages in the European Union”, the European Parliament and the European Council (2022) have created a Europe-wide framework for national minimum wage policies (Lübker/Schulten 2023, p.112; Müller/Schulten 2022).² In the meantime, a majority of EU member states have transposed the European Minimum Wage Directive into national law and adapted their national minimum wage laws accordingly.³ In particular, the criteria to be applied under Article 5 to assess the adequacy of minimum wages have played a prominent role in this regard. These include the purchasing power of statutory minimum wages and the rate of growth of wages (ibid.), but in particular the reference values of 60% of the median wage and 50% of the average wage enshrined in Article 5 (4) for the assessment of the adequacy of minimum wage levels.

In a number of EU Member States, such benchmarks have been incorporated into national law (**Overview 1**). This is especially true for numerous Central and Eastern European countries, where the European Minimum Wage Directive has had a major impact on minimum wage legislation (Leitner 2023). Bulgaria was one of the first EU states to transpose the European Minimum Wage Directive into national law and stipulated in the Bulgarian Labour Code that the minimum wage should be at least 50% of the gross average wage in the future. Similar legal regulations can now be found in Latvia, Romania, Slovakia and the Czech Republic, where reference values between 46% and 60% of the average wage have been set. In addition, a draft law is currently being discussed in Poland, according to which the Polish minimum wage should be at least 55% of the average wage from 2026 onwards. In addition to legal regulations, Estonia, Croatia, Lithuania and Hungary have more or less binding agreements between employers’ associations and trade unions, as well as declara-

1 The analyses are mainly based on the evaluation of the WSI minimum wage database, which currently contains minimum wage data from a total of 38 countries, including all 22 EU states with statutory minimum wages as well as numerous other countries within and outside Europe. The data can be downloaded from <https://www.wsi.de/de/wsi-mindestlohn-datenbank-international-15339.htm>.

2 In addition to statutory minimum wages, the European Minimum Wage Directive is also about strengthening collectively agreed minimum wages by increasing collective bargaining coverage. According to this, all EU states whose collective bargaining coverage is below 80% are to present a concrete action plan to strengthen collective bargaining systems (Schulten/Müller 2024).

3 According to Article 17 of the Directive, the deadline for transposition expired on 15 November 2024.

tions by national governments, that future setting of national minimum wages will be based on reference values between 45% and 50% of the gross average wage.

Overall, it is striking that across Central and Eastern Europe, the reference values for adequate minimum wages are based on the respective national average wage, and not on the median wage. The same applies to Spain, where a reference value of 60% of the average net wage has been used as a basis for national minimum wage policy for some time now, with reference to the European Social Charter of the Council of Europe. Since 2020, a commission of experts has issued a recommendation for the annual adjustment of the Spanish minimum wage on the basis of this reference value (Comisión Asesora para el Análisis del SMI 2025). The average wage is mainly used as a reference value when the country has a large low-wage sector and the median wage is relatively low, and therefore not suitable as a reference value for an adequate minimum wage.

The situation is different in most Western European countries, where the median wage as a reference value dominates the debates on an adequate minimum wages. This is most evident in Ireland, where the implementation of the European Minimum Wage Directive has led to the minimum wage being raised to a Living Wage level of 60% of the median wage by 2026 under the Irish Minimum Wage Act. In addition, the Irish Low Pay Commission (2022, p.X) will consider whether a further gradual increase to 66% of the median wage is possible once this target has been achieved. This is also the path taken by the United Kingdom, where the government initially set 60% of the median wage as the target for the minimum wage. In the meantime, it has called on the UK's Low Pay Commission to take into account a "genuine living wage" that is not less than 66% of the median wage in future minimum wage adjustments (UK Government, Department for Business & Trade 2024).

In France, which already has one of the highest minimum wages in Europe according to the Kaitz index (cf. Section 5), the implementation of the European Minimum Wage Directive provides for the minimum wage to be reviewed every four years with regard to its adequacy, based on the reference values of 60% of the monthly net median wage and 50% of the monthly net average wage in full-time equivalents of employees. The implementation of the European Minimum Wage Directive was extremely controversial in the Netherlands, where trade unions are demanding an increase in the minimum wage to €16 per hour, citing the reference value of 60% of the median wage.⁴ A motion by

the left-wing opposition parties in the Dutch Parliament to include the reference value of 60% of the median wage in the Dutch minimum wage law was rejected by the conservative-liberal majority. Instead, according to a decree of the Ministry of Labour, only a reference value of 50% of the median wage is now considered a criterion for an adequate minimum wage level (Ministerie van Sociale Zaken en Werkgelegenheid 2024).

In Germany, the European Minimum Wage Directive was only implemented with the note in the Federal Gazette (dated 23.10.2024). It simply stated that the German Minimum Wage Act already meets the requirements of the Directive (see also Schulten 2024). In doing so, the SPD-led federal government refrained from adopting the European reference values in the Minimum Wage Act, although Olaf Scholz and Hubertus Heil (both SPD) had already called in a joint key issues paper in 2021 for the German minimum wage to be "further developed in the direction of a genuine, participatory 'living wage'". To this end, they had explicitly called for the reference value of 60% of the median wage to be included as an additional adjustment criterion in the Minimum Wage Act (Federal Ministry of Labour and Social Affairs/Federal Ministry of Finance 2021, p.2). Finally, in January 2025, the German Minimum Wage Commission (2025) adopted new rules of procedure, according to which future adjustments to the German minimum wage should be based on the development of collective wages in accordance with the Minimum Wage Act and on the reference value of 60% of the gross median wage of full-time workers in accordance with the European Minimum Wage Directive.

In sum, most EU countries have implemented the European Minimum Wage Directive with regard to the criteria for adequate minimum wages. Clearly defined reference values, which are used to express the minimum wage as a percentage of the median or average wage, play an essential role in this regard. The latter were either anchored as binding benchmarks in national minimum wage laws or agreed as political targets between trade unions, employers and the respective governments.

In view of the advanced implementation process of the European Minimum Wage Directive, it was all the more surprising that in January 2025, the responsible Advocate General at the European Court of Justice (ECJ) pleaded in an opinion for the entire directive to be annulled (Emiliou 2025). The statement referred to a lawsuit by the Kingdom of Denmark (2023), which doubts the conformity of the European Minimum Wage Directive with European law. Specifically, Denmark argues that the EU has no competences to adopt the Directive due to the regulatory block on pay issues in Article 153 (5) of the Treaty on the Functioning of the European Union (TFEU). The Advocate General at the ECJ essentially agreed with Denmark's arguments.

⁴ See the corresponding campaign page of the Dutch Trade Union Confederation FNV for a minimum wage of €16: <https://www.fnv.nl/acties/voor-16>

EU Member States using indicative reference values to guide their assessment of adequacy of statutory minimum wages

Selected countries

National Minimum Wage Laws with indicative reference values	National Minimum Wage Policies which take indicative reference values as an orientation
<p>Bulgaria</p> <p>According to the Bulgarian Labour Code (§ 244, 2), the Bulgarian minimum wage is set by 1 September of the current year at 50 % of the gross average wage for a period of twelve months, which includes the last two quarters of the previous year and the first two quarters of the current year</p>	<p>Belgium</p> <p>According to the Flemish government's decree to guarantee adequate statutory minimum wages for employees in the Flemish education sector, the minimum wage should be at least 50% of the gross average wage.</p>
<p>Czech Republic</p> <p>According to the Czech Labour Code (§ 111, 3), a reference value of 47% of the gross average wage is used to assess the adequateness of the minimum wage.</p>	<p>Croatia</p> <p>The government decree for the increase of the Croatian minimum wage from 1 January 2025 explicitly refers to the reference values of the European Minimum Wage Directive of 60% of the gross median wage and 50% of the gross average wage.</p>
<p>France</p> <p>According to the French Labour Code (Code du Travail, Article D. 3231-2-2), the Minister of Labour must present an analysis of the minimum wage at least every 4 years, which is carried out using the following reference values: "60% of the net monthly median wage of full-time equivalent employees; 50% of the net monthly average wage of full-time equivalent employees."</p>	<p>Estonia</p> <p>In May 2023, trade unions, employers and the Estonian government reached a tripartite 'goodwill agreement' to gradually raise the statutory minimum wage to 50% of the gross average wage by 2027.</p>
<p>Ireland</p> <p>According to the Irish National Minimum Wage Act (Section 10C 3(j)), the Low Pay Commission takes into account the reference value of 60% of the gross median wage in its annual recommendations.</p>	<p>Germany</p> <p>According to the new internal rules of procedure of the Minimum Wage Commission, in future it will base its determination of the minimum wage in accordance with Section 9 (2) of the Minimum Wage Act on the development of collective agreements and the reference value of 60% of the gross median wage of full-time employees as part of an overall assessment, referring to Article 5 (4) of the European Minimum Wage Directive.</p>
<p>Latvia</p> <p>In November 2024, the Latvian government passed a decree on 'Procedures for determining and reviewing the monthly minimum wage', according to which the minimum wage is to be set at 46% of the gross average wage in future.</p>	<p>Hungary</p> <p>The government decree of October 2024 explicitly refers to the reference value of 50% of the gross average wage as the target to be achieved. Trade unions and employers' associations have concluded a three-year agreement on a gradual increase in the statutory minimum wage in order to reach 50% of the average wage by 2027.</p>
<p>Poland</p> <p>From 2026, a new minimum wage law is to apply in Poland, according to which the minimum wage is to be 55% of the gross average wage in future.</p>	<p>Ireland</p> <p>The Irish government had already announced in 2022 that it would raise the statutory minimum wage to the level of a living wage, which is at least 60% of the gross median wage in accordance with the European Minimum Wage Directive, within four years by 2026. Once the Irish minimum wage has reached the level of 60% of the median wage, the Irish Low Pay Commission is to review whether a gradual increase to 66% of the gross median wage is possible.</p>
<p>Romania</p> <p>According to the Romanian minimum wage law, a minimum wage is considered adequate if it is between 47% and 52% of the gross average wage.</p>	<p>Lithuania</p> <p>In Lithuania, there has been a tripartite agreement between the government, employers and trade unions since 2017, according to which the minimum wage should be between 45% and 50% of the gross average wage.</p>
<p>Slovakia</p> <p>According to the Slovak Minimum Wage Act (Section 8), the minimum wage is set at 60 % of the gross average wage, unless employers' organisations and trade unions agree on a different amount.</p>	<p>Netherlands</p> <p>The Dutch Minister of Labour has proposed the following reference values for reviewing an appropriate minimum wage in the Netherlands: The net disposable income of full-time minimum wage earners should be 128% of the average necessary cost of living; 50 % of the gross median wage The Dutch trade unions and the left-wing opposition parties are in favour of a reference value of 60% of the gross median wage.</p>
	<p>Spain</p> <p>In 2020, the Spanish government set up a commission of experts whose task is to determine a minimum wage that should be 60% of the average (net) wage in accordance with the Council of Europe's European Social Charter.</p>

In contrast, the legal services of the Commission, Council and Parliament have taken the view that there is indeed a competence to regulate wages policy at EU level, as long as it does not directly stipulate a certain wage level (Müller/Schulten 2022). In the meantime, the opinion of the Advocate General has also been criticized in this sense (Brameshuber 2025; Kilpatrick/Steiert 2025).

At the moment, it is completely unclear which reasoning the ECJ will follow in its ruling, which is expected in early May 2025. If the court were to annul the European Minimum Wage Directive, this would certainly be a serious blow to the idea of a social Europe (Schulten/Müller 2025). Nevertheless, it can be said that the Minimum Wage Directive – as shown above – has already shaped the discourse on the adequacy of minimum wages in many European countries and initiated changes in national minimum wage legislation and policy. Even if the directive were to be annulled by the ECJ, the 24 EU member states that supported the European Minimum Wage Directive would have sent an important political signal. Regardless of the ruling, they remain free to incorporate the main provisions of the Directive into their national minimum wage laws, as many EU Member States have already done.

3 MINIMUM WAGES IN EUROS AS OF 1 JANUARY 2025

In the overview of minimum wages valid as of 1 January 2025, six Western European EU countries once again occupy the top ranks within the EU this year (Figure 1). They are led by Luxembourg (€15.25), followed by the Netherlands (€14.06) and Ireland (€13.50). Germany, which had briefly moved up to 2nd place after the increase in the minimum wage to €12 (Lübker/Schulten 2023, p. 114f.), ranked 4th with €12.82 on the cut-off date, ahead of Belgium (€12.57) and France (€11.88). However, since the latter two countries also adjust their minimum wages during the year, the ranking has already changed again. For example, the minimum wage in Belgium was raised to €12.83 on February 1, 2025, so that Germany has now fallen from 4th to 5th place by the slightest of margins.

In the group of ten EU countries with minimum wages between €5 and €9.99, Eastern and Southern European countries are now represented in equal numbers. From Eastern Europe, these are Slovenia (€7.39), Poland (€7.08) and Lithuania (€6.35) as well as Croatia (€5.61) and Estonia (€5.31), and from Southern Europe, among others, the two small economies of Cyprus (€6.06) and Malta (€5.54). For the three more populous countries Spain (€8.37), Portugal (€6.01) and Greece (€5.60), a methodological change should be point-

ed out this year: In all three countries, minimum wages are set on a monthly basis, so that they have to be converted into hourly rates to facilitate international comparison. For this purpose, an hourly divider is used in the WSI minimum wage database, which is based on the usual monthly full-time working hours in the respective country. For Spain, Portugal and Greece, there is a special feature that workers there are entitled to 14 months' salary per year.⁵ Eurostat (2024) therefore applies an additional correction factor for these three countries (monthly wage × 14 / 12). This procedure is also used for the first time in this report, so that the minimum wages are correspondingly higher than in previous years' publications.⁶

Minimum wages below €5 still exist in many Eastern European EU countries. These include the Czech Republic (€4.95), Romania (€4.87), Slovakia (€4.69) as well as Latvia (€4.38) and Hungary (€4.23). Bulgaria continues to bring up the rear (€3.32). The gap to the front-runner Luxembourg – where the minimum wage is currently almost five times as high as in Bulgaria – is thus still considerable. Nevertheless, minimum wage levels have converged significantly in recent years. In the year of its accession to the Union (2007), the minimum wages in Bulgaria (€0.55) and Romania (€0.66) – converted at the exchange rate at the time – were still significantly less than a tenth of the minimum wage in Luxembourg at the time (€9.08). The convergence of minimum wages can also be seen in other statistical measures: for example, the coefficient of variation fell⁷ from 0.832 to 0.484 between 2007 and 2025 and the decile ratio D9/D1 from 9.89 to currently 3.08.

There is a clear geographical gap among the EU's direct neighbours: In the United Kingdom (€13.51), the minimum wage is currently at the level of Western European EU countries. The so-called National Living Wage for employees aged 21 and over will increase to £12.21 or the equivalent of €14.42 on 1 April 2025. In Turkey (€3.75) and the Balkan countries of Serbia (€3.55), North Macedonia (€3.13) and, to a limited extent, Albania (€2.28), the respective minimum wages are close to the Bulgarian level. Further east, the minimum wages in Moldova (€1.69), Russia (€1.29) and Ukraine (€1.10) are even lower.

The WSI minimum wage database also contains data for eight industrialised and emerging countries outside Europe. In Australia (€14.70), New

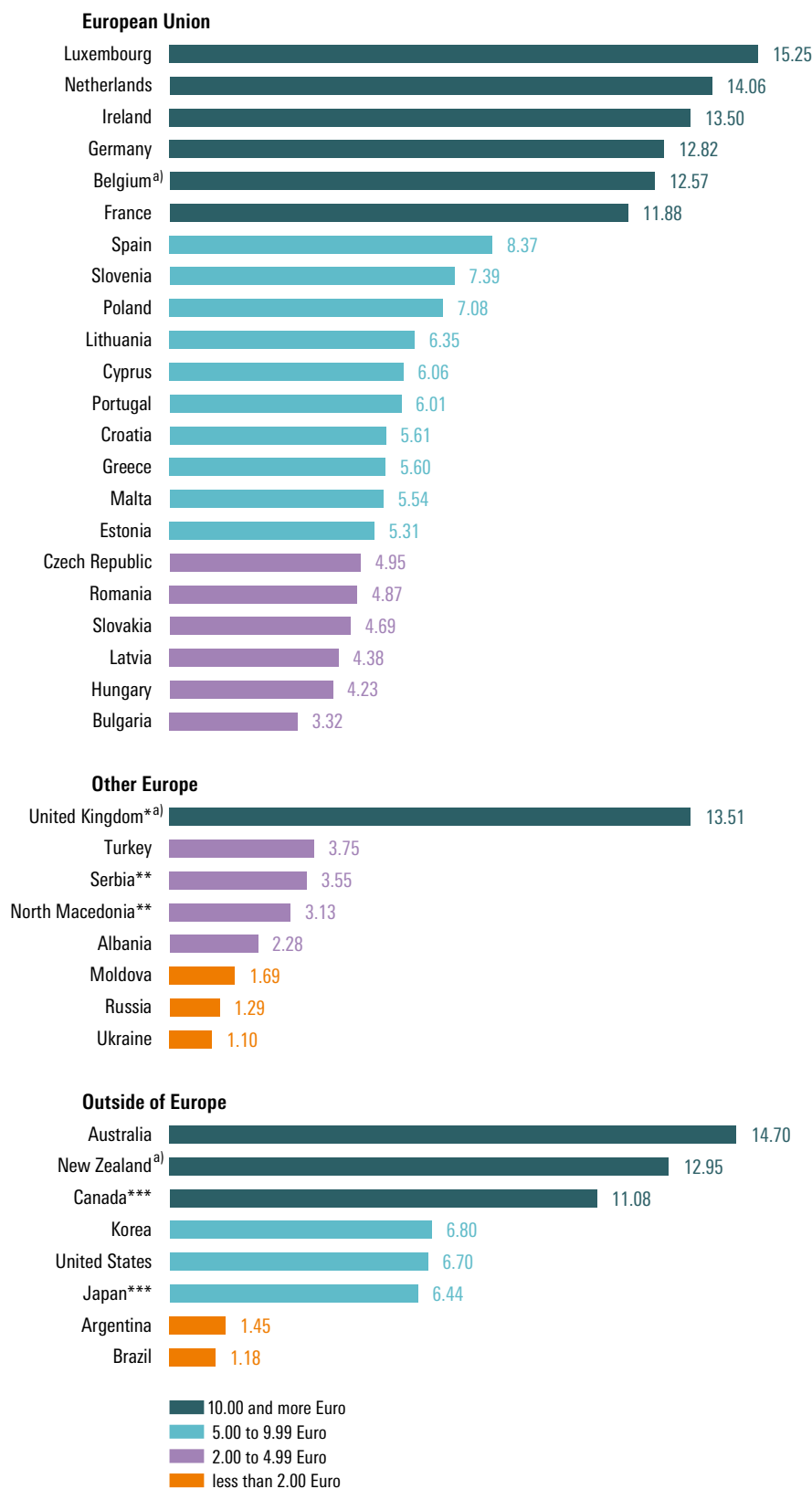
5 For Portugal, see Decree-Law No. 158/2006 of 8 August 2006.

6 In the WSI minimum wage database, both methods will continue to be used in parallel. Since the correction factor was applied retroactively to the entire time series, the change has no effect on growth rates.

7 The coefficient of variation measures the dispersion of the data relative to the mean and is calculated as a standard deviation/mean.

Statutory minimum wages, as at 1 January 2025

In € per hour



Notes: * National Living Wage for employees aged 23 and above.
 ** Estimated, as the minimum wage is specified as a net wage.
 *** Weighted average of regional minimum wages; in some instances, adjustments take place during the course of the year.
 a) From 1 February 2025 onwards: Belgium 12.83 €; from 1 April 2025 onwards: United Kingdom: 14.42 €; New Zealand: 13.14 €.

Zealand (€12.95) and Canada (€11.08), minimum wages are comparable to those in Western Europe, while Korea (€6.80), the United States (€6.70) and Japan (€6.44) follow at a considerable distance. In the United States, the federal minimum wage has become largely obsolete due to its low level, so that minimum wages at the state level are now of decisive importance. Currently, 30 states and Washington D.C. (€16.17) set their own minimum wage. In 15 of them, it is at least twice as high as the nationwide rate. These include the populous states of Washington (€15.39), California (€15.24), New York (€14.32), New Jersey (€14.31) and Illinois (€13.86). The minimum wage is lower in the Republican-governed states of Florida (€12.01) and Texas (no separate minimum wage). From Latin America, Argentina (€1.45) and Brazil (€1.18) are two emerging economies with significantly lower minimum wages in the WSI minimum wage database.

4 MINIMUM WAGES IN PURCHASING POWER STANDARDS AS OF 1 JANUARY 2025

The comparison of national minimum wages in the previous section only allows limited conclusions as to the standard of living that can be achieved with the minimum wage. In addition to the different tax and social contribution systems, differences in the cost of living are decisive for this. The WSI minimum wage report therefore also converts the minimum wages into purchasing power standards (PPS). This is based on data on the respective national price levels, which have been collected by the International Comparison Program (ICP) since the late 1960s. The ICP is under the auspices of the United Nations Statistical Commission (UNSC) and coordinated by the World Bank. For Europe, Eurostat and the OECD are participating in the ICP in the form of a joint project (Blades et al. 2020).

In previous years, the WSI minimum wage report used the PPS rates published by the World Bank for conversion purposes. At the time of going to press, the most recent data available from this source were for 2023, and in the case of Argentina and Russia, for 2021. The delay is particularly problematic for countries with high inflation rates, as PPS rates in these cases are based on a long-obsolete price level and the purchasing power of the minimum wage is accordingly overestimated. For this reason, the WSI Minimum Wage Report 2024 did not show a minimum wage in PPS for Argentina and Turkey (Lübker/Schulten 2024, p. 111). This year, we are countering the problem with another methodological change: PPS rates are now based on calculations by the International Monetary Fund (IMF 2024, p. 111ff.), which updates the ICP data

and regularly publishes them in the World Economic Outlook database. As a result, PPS rates for 2025 are already available, in which the IMF takes into account the expected price developments for the current year.⁸ Although these are necessarily estimates, this approach avoids systematic bias caused by outdated data.

By adjusting for differences in purchasing power, the minimum wages within the EU are converging significantly. Within the Western European group, Luxembourg (PPS €12.29), the Netherlands (PPS €12.26) and Ireland (PPS €12.16) are almost on a par, followed by France and Belgium (both PPS €11.92). Germany (PPS €11.81) is in 6th place by a small margin (Figure 2). While minimum wages tend to be lower in Western European countries with their comparatively high cost of living when expressed in PPS, the opposite effect occurs in Southern and Eastern Europe. Poland (PPS €10.36), Spain (PPS €9.32) and Slovenia (PPS €8.64) are catching up with Western Europe, and the minimum wage in Bulgaria (PPS €5.48) is also significantly higher after taking into account the lower cost of living. The spread of minimum wages in the EU is thus significantly reduced, so that the Luxembourg minimum wage is now only 2.2 times the Bulgarian minimum wage (and no longer 4.6 times).

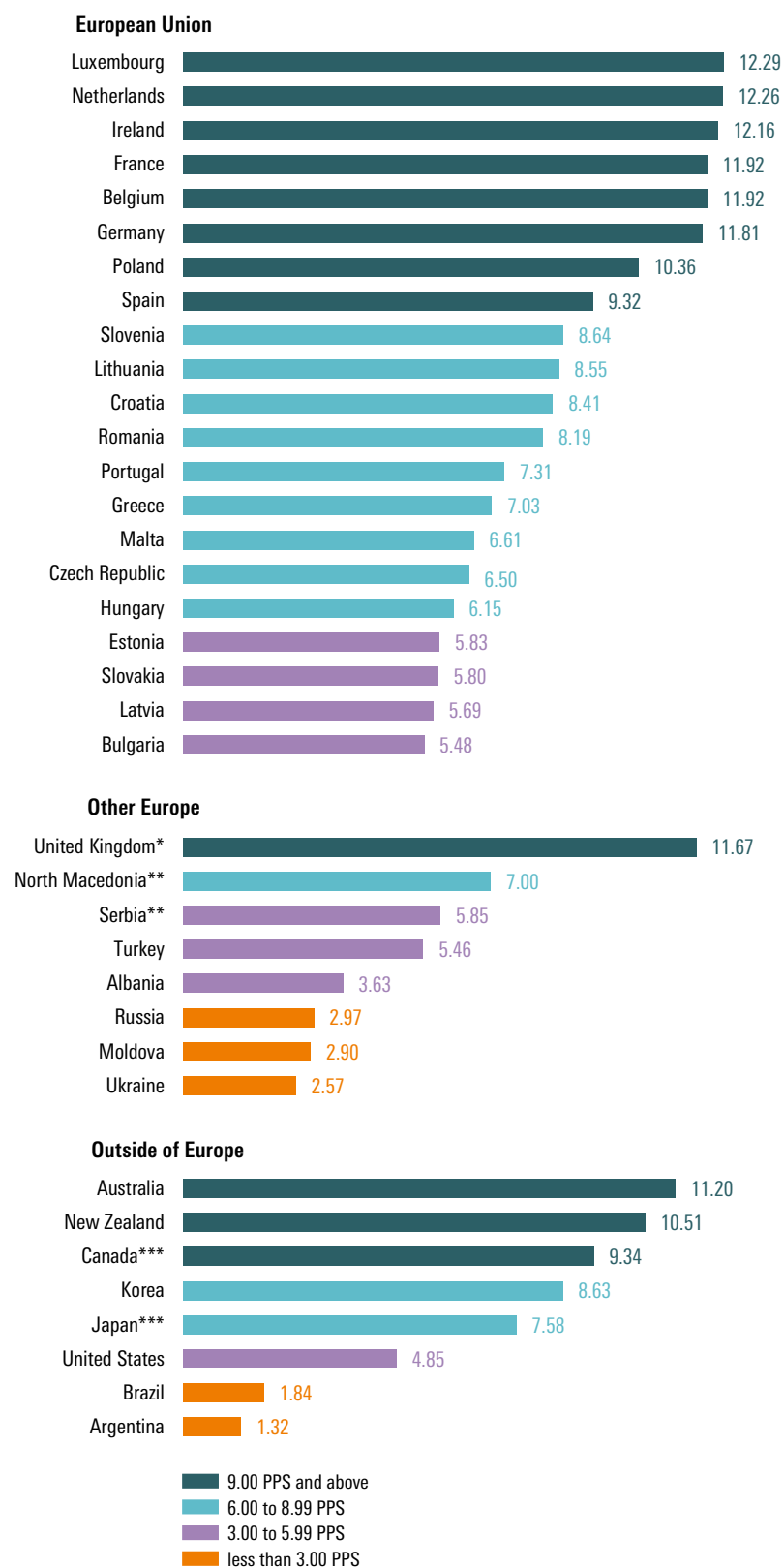
In the countries bordering the EU, the adjustment of purchasing power leads to a similar result: in the United Kingdom (PPS €11.67), the value of the minimum wage is falling, while it increases in Serbia (PPS €5.85) and Turkey (PPS €5.46), for example. Overseas, the high cost of living is reflected in lower values in Australia (PPS €11.20), New Zealand (PPS €10.51), and Canada (PPS €9.34). In particular, the low value for the United States (PPS €4.85 PPS) once again shows the anachronism of the minimum wage level there. In the emerging economies of Brazil (PPS €1.84) and Argentina (PPS €1.32), minimum wages remain low even after adjusting for the cost of living.⁹

⁸ As is customary in the ICP, the IMF also uses the United States as a reference, i. e. the purchasing power of national currencies is expressed in relation to the purchasing power of the US dollar in the US. In a second step, we therefore convert the minimum wages expressed in PPS in dollar terms into PPS in euro terms, using the average exchange rate of the euro area countries to the PPS \$ (weighted as a share of GDP).

⁹ For Argentina, it should be taken into account that the minimum wage refers to the cut-off date of January 1, 2025, but is usually adjusted during the year – sometimes monthly. By contrast, as in all countries, the PPS conversion is based on the price level forecast for 2025 as a whole.

Purchasing power of statutory minimum wages, as at 1 January 2025

In PPS**** (€ basis) per hour



Notes: * National Living Wage for employees aged 23 and above.
 ** Estimated, as the minimum wage is specified as a net wage.
 *** Weighted average of regional minimum wages.
 **** Converted to PPS on a euro basis using the IMF's 2025 purchasing powers parities.

5 THE KAITZ INDEX AS A ROUGH GUIDELINE FOR ADEQUATE MINIMUM WAGES

The Kaitz Index has gained new relevance for national minimum wage policies, not least due to the European Minimum Wage Directive (see Section 2). It sets the respective minimum wage in relation to the national wage level, whereby both the average and the median wage can be used for this purpose (Kaitz 1970). The median wage – i.e. the wage that divides the wage distribution into two halves – is the more robust measure and is usually not affected by minimum wage increases. The median-based Kaitz index has therefore become widely established in the social sciences. Nevertheless, in some cases, especially if a large proportion of workers receive the minimum wage, the average wage offers itself as a benchmark (see Section 2, more detailed Lübker/Schulten 2024, p. 113).

The data compiled by the OECD on national wage levels are available with some delay, and the Kaitz indices shown in Figure 3 also refer to 2023. Most recently, three EU countries reached the threshold of 60% of the median wage of full-time workers, which is found in the EU Minimum Wage Directive as a reference value for adequate minimum wages. These are Portugal (68.2%), Slovenia (63.0%) and France (62.2%). Luxembourg (56.7%) and Romania (56.2%) miss it by a few percentage points (Figure 3a). When the Kaitz index is calculated on the basis of average wages, Slovenia (52.6%), France (50.2%) and Portugal (48.0%) are the three EU countries that already exceed or are in close proximity to the 50% threshold (Figure 3b). In all other EU countries, according to OECD data, minimum wage increases – some of them significant – are necessary to reach the reference values.

This is also the case in Germany, where the minimum wage of €12 was 51.7% of the median wage of full-time employees in 2023. Compared to the introductory value in 2015 (Kaitz Index: 48.2%), this is only a small increase of 3.5 percentage points. Furthermore, this increase can in its entirety be attributed to the intervention of Parliament in 2022: Under the aegis of the Minimum Wage Commission, the German Kaitz Index had fallen by 3.4 percentage points to only 44.8% of the median wage by 2021. According to OECD data, other countries have implemented much stronger structural increases since 2015. In Europe, these include the United Kingdom (+10.9 percentage points), Portugal (+11.8) and Spain (+15.1) and overseas New Zealand (+6.5) and Korea (+12.4) (not shown in tabular form; see also Lübker/Schulten 2024, p. 115).¹⁰

6 CURRENT DEVELOPMENTS: REAL GROWTH OF THE MINIMUM WAGE IN MANY EUROPEAN COUNTRIES

Two favourable developments for minimum wage earners are currently converging in the European Union: After the high inflation rates of 2022 (EU average: 9.2%) and 2023 (6.4%), inflation in the EU-27 has slowed down significantly, with consumer prices rising by only 2.6% in 2024 on a year-on-year basis. With the exception of Romania (inflation rate in 2024: 5.8%), all member states are now recording inflation rates below 5%. At the same time, the momentum for minimum wages continues. Of the 22 EU countries with a general statutory minimum wage, 18 countries have increased it on 1 January 2025, and three others (Belgium, France and Greece) have already increased it in the course of 2024. The only exception is Cyprus, which adjusts its minimum wage every two years.

Minimum wages have again grown particularly strongly in many Eastern European countries this year: Led by Romania (22.7%), Bulgaria (16.3%), Croatia (15.5%), Lithuania (12.4%) and the Czech Republic (10.6%), the nine countries with the highest nominal growth rates all come from the east of the EU. When the minimum wages are deflated based on the Harmonised Index of Consumer Prices (HICP), a real increase of more than five percent remains in these nine countries.¹¹ Only in Latvia (nominal increase: 5.7%, real increase: 4.3%) and Slovenia (nominal increase: 1.9%; real change: -0.1%) divert from this pattern (Table 1).

In Western and Southern Europe, Greece (6.4%), Ireland (6.3%), Portugal (6.1%) and the Netherlands (6.0%) have significantly increased their minimum wages compared to the previous year. Even after inflation is taken into account, minimum wage earners in these four countries are left with real increases of between 2.7% (Netherlands) and 4.9% (Ireland). Germany, where the minimum wage was raised from €12.41 to €12.82 on 1 January 2025, ranks only 18th in an EU-wide comparison with a nominal increase rate of 3.3%. As prices in Germany rose by 2.5% in 2024 as measured by the HICP, this corresponds to an increase of only 0.8% in real terms. Real minimum wages fell in only three Western and Southern European countries: Cyprus (-2.2%), where there was no regular minimum wage increase this year, as well as Belgium (-0.5%) and France (-0.3%). However, since in the latter two countries the minimum wage is automatically adjusted to price developments (see Lübker/Schulten 2023, p. 119), this is only a purely arithmetical decline that can be attributed to differences in the price indices used and the periods

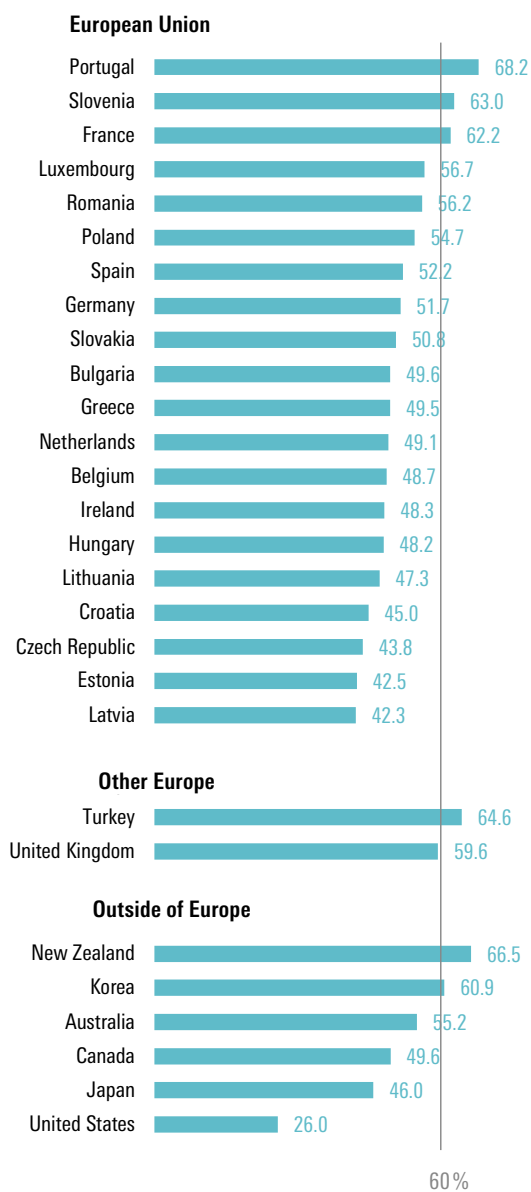
¹⁰ All figures are based on OECD data (<https://data-explorer.oecd.org/>, last access: 21.01.2025)

¹¹ The WSI minimum wage report uses the rate of increase of the HICP in the previous year for price adjustment.

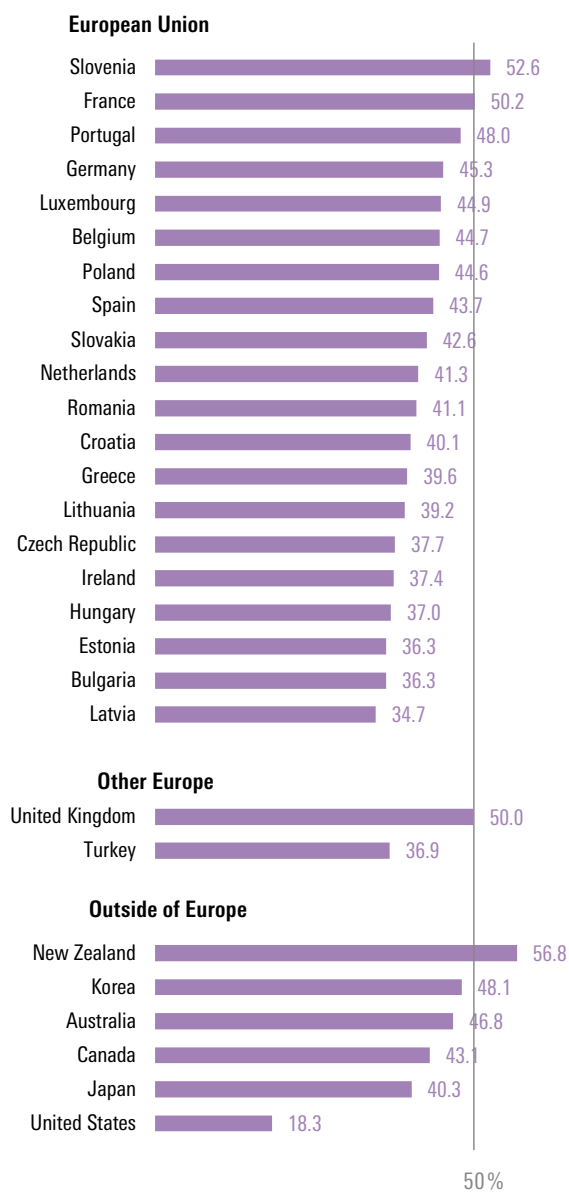
Relative value of the minimum wage (Kaitz index, 2023)

In per cent

a) Minimum wage as %-tage of the median wage



b) Minimum wage as %-tage of the average wage



Notes: The OECD calculates the Kaitz index on the basis of the median and average wage of full-time employees.

No data was available for the following countries: Albania, Argentina, Brazil, Malta, Moldova, North Macedonia, Russia, Serbia, Ukraine and Cyprus. All values are rounded.

Development of statutory minimum wages, 2025

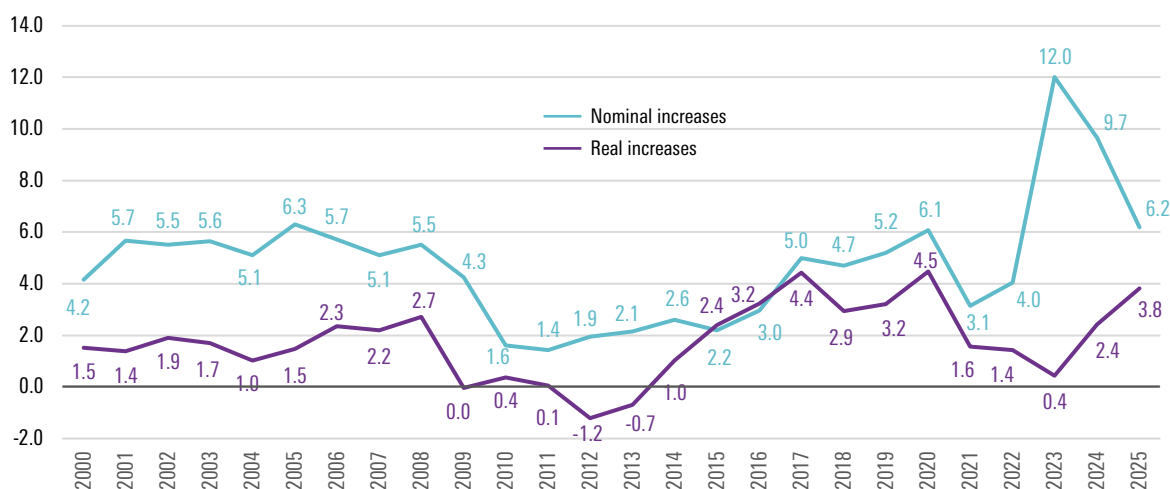
Change on 1 January 2025 compared to the previous year and 1 January 2015, Figures in per cent

	Change compared to January 1, 2024		Change compared to January 1, 2015		Last modified
	Nominal	Real	Nominal	Real	
European Union					
Romania	22.7	16.0	315.4	178.2	01.01.2025
Bulgaria	16.3	13.4	195.0	116.7	01.01.2025
Croatia	15.5	11.0	143.6	85.0	01.01.2025
Lithuania	12.4	11.4	248.9	133.0	01.01.2025
Czech Republic	10.6	7.7	126.2	48.6	01.01.2025
Poland	10.1	6.3	168.4	81.8	01.01.2025
Estonia	9.3	5.3	126.9	46.2	01.01.2025
Hungary	9.0	5.1	176.8	66.1	01.01.2025
Slovakia	8.8	5.5	115.1	50.8	01.01.2025
Greece	6.4	3.3	41.6	20.0	01.04.2024
Ireland	6.3	4.9	56.1	30.7	01.01.2025
Portugal	6.1	3.3	72.3	40.3	01.01.2025
Netherlands	6.0	2.7	54.2	16.6	01.01.2025
Latvia	5.7	4.3	105.6	41.2	01.01.2025
Spain	4.4	1.5	82.5	48.9	01.01.2025
Malta	3.9	1.4	33.4	7.2	01.01.2025
Belgium	3.8	-0.5	37.9	4.2	01.05.2024
Germany	3.3	0.8	50.8	16.1	01.01.2025
Slovenia	1.9	-0.1	61.9	27.6	01.01.2025
Luxembourg	2.6	0.4	37.2	9.9	01.01.2025
France	2.0	-0.3	23.6	0.2	01.11.2024
Cyprus	0.0	-2.2		a)	01.01.2024
Other Europe					
Turkey	30.0	-18.0	1942.0	109.4	01.01.2025
Russia	16.6	8.1	276.2	90.4	01.01.2025
Serbia**	13.7	8.5	151.9	64.2	01.01.2025
Ukraine	12.7	6.5	556.8	75.6	01.04.2024
North Macedonia**	12.1	7.6	153.8	77.3	01.03.2024
Moldova	10.0	4.8	233.3	48.0	01.01.2025
United Kingdom	9.8	7.0	76.0	31.3	01.04.2024
Albania	0.0	-2.2	81.8	41.0	01.04.2023
Outside of Europe					
Argentina	83.8	-44.3	5981.4	-47.5	01.01.2025
Brazil	7.5	3.0	92.2	9.4	01.01.2025
Japan***	5.1	2.8	35.3	21.9	01.01.2024
Australia	3.7	0.4	42.9	9.1	01.07.2024
Canada***	3.4	1.0	55.2	20.8	01.01.2024
New Zealand	2.0	-0.7	62.5	24.5	01.04.2024

Notes: * National Living Wage for employees aged 23 and over.
 ** Estimated as minimum wage is set as net wage.
 *** Weighted average of regional minimum wages; partly adjusted during the year.
 a) No rate of change compared to 1 January 2015 can be calculated for Cyprus, as the country did not introduce a general statutory minimum wage until 1 January 2023.

Minimum wage developments in the European Union, 2000–2025

Compared with 1 January of the preceding year (in %, median values)



Note: The median of the national growth rates for the countries of the European Union is shown (territorial status as of January 1, 2021, that is, excluding the United Kingdom). For the real development, the national rates of increase were adjusted using the HICP.

Source: WSI Minimum Wage Database; Eurostat



under consideration. For example, Belgium has already raised its minimum wage by 2.0% again on 1 February 2025.

In the median of the 22 EU countries with a general minimum wage, it increases by 6.2% in nominal terms in 2025, and even after taking into account the price development of the previous year, there is still a comparatively strong increase of 3.8% (Figure 4). The nominal rates of increase are thus lower than in the inflation years 2023 (12.0%) and 2024 (9.7%), but at the same time, minimum wage earners will have a greater boost to their purchasing power on account of falling inflation. However, it should be noted that the minimum wage in the two most populous EU countries, Germany and France, has risen only slightly or not at all. As a result, around 256 million people live in the eleven countries with real gains below the median, while the countries with growth rates above the median account for only 103 million inhabitants.¹²

In most of the EU's neighbouring countries included in the WSI minimum wage database, minimum wages were also raised at the beginning of

the year or in the course of 2024 (Table 1). In Turkey, the 30% increase on 1 January 2025 was not enough to compensate for continued high inflation, causing the minimum wage to fall in real terms (-18.0%). In the Eastern European EU neighbouring countries, on the other hand, real minimum wages rose by 4.8% (Moldova) and 8.5% (Serbia), while the minimum wage in Albania is not to be raised until March 2025, and purchasing power fell by 2.2% as a result of the cut-off date of 1 January. In the United Kingdom, the minimum wage already rose by 9.8% as of 1 April 2024 and there is also a year-on-year increase of 7.0% in real terms. Overseas, minor negative and positive changes are roughly balanced. The only country that stands out here is Argentina, where, due to high inflation, the purchasing power of the minimum wage fell significantly according to the calculation method used here (-44.3%).

¹² Population data for 2024 based on Eurostat (indicator: demo_gind), last access: 24.01.2025.

7 LONG-TERM TRENDS: DIFFERENT MINIMUM WAGE POLICIES HAVE SHAPED THE PAST DECADE

A long-term comparison also shows that the purchasing power of the minimum wage has increased sharply, especially in many Eastern European EU countries. For example, real minimum wages have more than doubled since 1 January 2015 in Romania (total growth: 178.2%), Lithuania (133%) and Bulgaria (116.7%); in Croatia (85.0%), Poland (81.8%), Hungary (66.1%) and Slovakia (50.8%), they increased by more than half (Table 1). In Western Europe, there was significant real growth in Spain (48.9%), Portugal (40.3%) and Ireland (30.7%), while real minimum wages were broadly stagnant in Belgium (4.2%) and France (0.2%). This is due to the fact that minimum wage increases in both countries are largely linked to inflation and that price and nominal wage increases therefore balance each other out in the long term.

The development over the past ten years is shown in more detail in Figure 5 for selected countries. In order to show the individual increase steps, some of which occur during the year, monthly data from the WSI minimum wage database are used (and not only on the reference date of 1 January, as is usually the case in the WSI minimum wage report).¹³ Likewise, the monthly HICP is also used to calculate real minimum wages. For better comparability, both the nominal and the real minimum wage are indexed for all countries (January 2015 = 100). The methodological differences result in slight deviations from the calculations in Table 1, in which the annual inflation rate of the previous year is used for price adjustment.

The country comparison shows how different institutions and minimum wage policies shape long-term trajectories. Belgium and France, where the minimum wage is linked to changes in consumer prices, form a well-defined regime type (Lübker/Schulten 2023, p. 19). In Belgium, the so-called “health index” is used for adjustments; it excludes harmful products such as tobacco and alcohol. In France, the national consumer price index for households in the bottom fifth of the income distribution is the bases for the indexation.¹⁴ In both countries, the result is that nominal minimum wages and consumer prices develop largely in parallel (see Panels a and c). In addition to indexing, further increases are possible in both countries.

In France, the government has made use of this discretionary power by bringing forward the latest minimum wage increase by two months to 1 November 2024 (Groupe d’experts sur le SMIC 2024).

However, the group of experts, which has been advising the government on this since 2009, has regularly advised against a surcharge (“coup de pouce”) to the index-based adjustment in recent years (ibid., see also Askenazy 2018). The French trade unions, on the other hand, have sharply criticised the recommendations of the expert group and are calling for an increase in the minimum wage to €2000 gross per month, which would correspond to an hourly wage of €13.19 (CGT 2024). In Belgium, where the minimum wage is based on a universally binding collective agreement, the National Labour Council has decided on three extraordinary increases since 2021, most recently effective on 1 April 2024.¹⁵ Measured against the HICP, however, these have only compensated for a gradual loss in purchasing power. As a result, the real value of the minimum wage has not changed substantially in either country since 2015.

Other countries, on the other hand, have taken the approach of structurally increasing their minimum wage. This has been done through gradual, real increases over the past ten years. In Portugal (Panel f), there is a basic agreement on this between the government and the social partners, who play an advisory role in the Standing Committee on Social Dialogue (CPCS) in setting the minimum wage and are guided by a long-term target (Oliveira 2023). In the UK (Panel d), in 2016, the government under Conservative Prime Minister David Cameron set a remit for the Low Pay Commission to gradually raise the National Living Wage to 60% of the median wage. In the meantime, the target has been raised to two-thirds of the median wage (Lübker/Schulten 2022, p. 155). In Ireland (Panel e), the Low Pay Commission, which was set up in 2015, is also currently guided by the goal of gradually increasing the minimum wage to 60% of the median by 2026 and then aiming for 66% of the median as a new target (Low Pay Commission 2022, p. X). However, due to the economic consequences of the Corona pandemic and Brexit, the recent adjustments were very moderate, resulting the minimum wage to fall behind inflation at times (Low Pay Commission 2023, p. 23). In the UK and Portugal, too, the hikes in the years 2021 to 2023 were partially offset by high inflation rates. Nevertheless, the established institutions in all three countries have, over the ten-year period, produced a substantial increase in real minimum wages of around 30% (Ireland, Great Britain) and around 40% (Portugal).

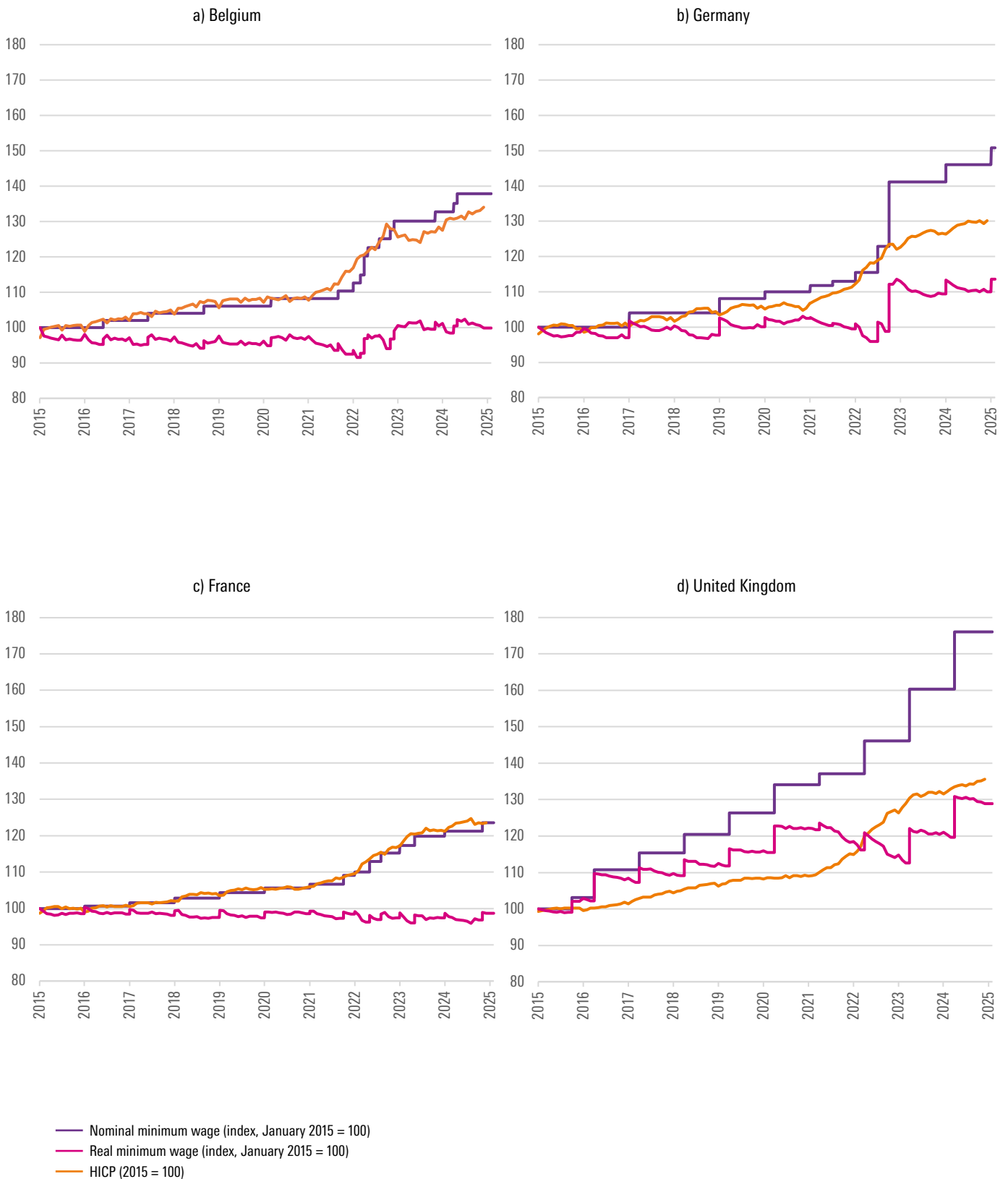
From the comparison, a third ideal type can be formed, exemplified by Spain and Germany: stagnation of the real minimum wage over long periods of time, interrupted by a sudden, politically initiated

¹³ The measurement concept continues to be hourly wages.

¹⁴ Here, too, tobacco is not taken into account. In addition, half of the real wage increases are taken into account.

¹⁵ See the overview on <https://www.salairesminimums.be/history.html?jclid=cf2e07ee4e76fa89014e7734edb3052c> (last access: 04.02.2025)

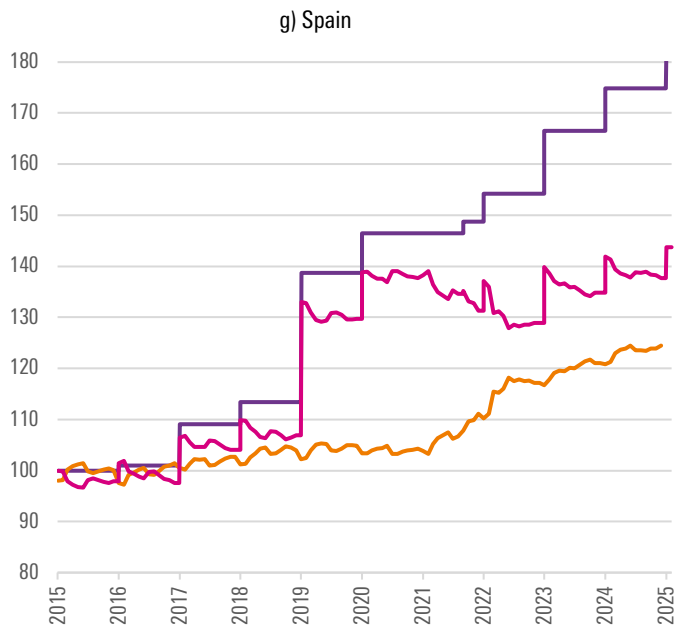
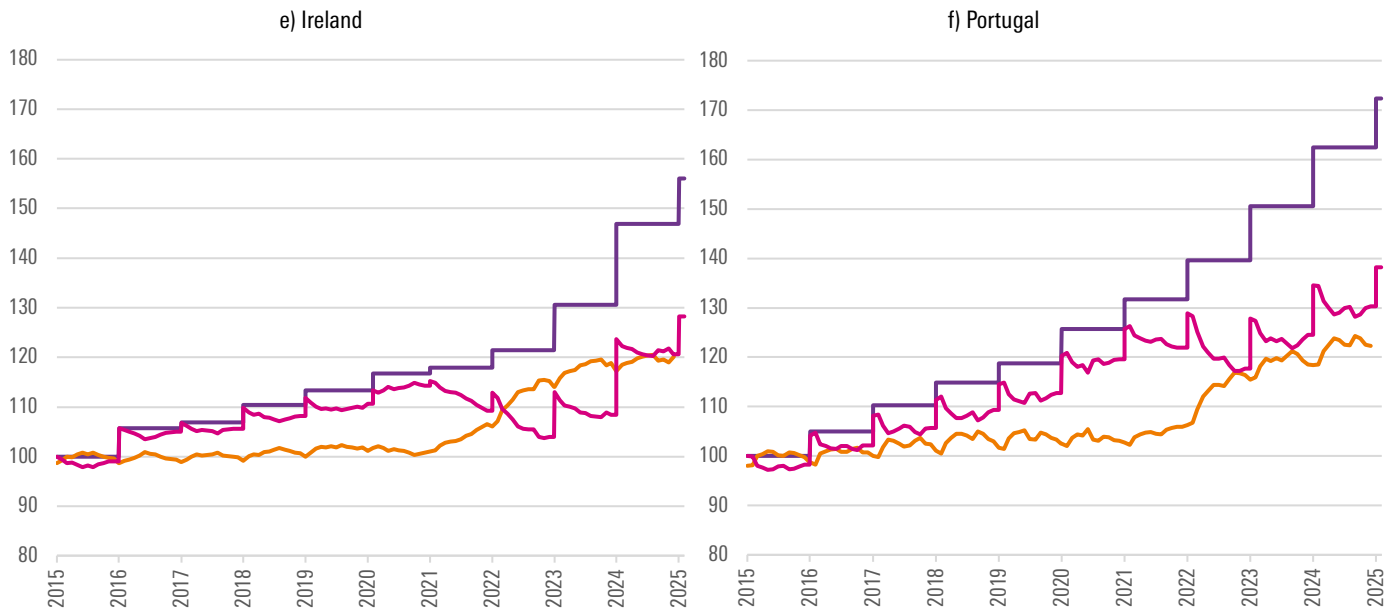
Development of statutory minimum wages and consumer prices in selected countries, 2015 – 2025
 Index, January 2015 = 100



Source: WSI Minimum Wage Database 2025; Eurostat (HICP, indicator: prc_hicp_mindx); Office for National Statistics (CPI for the UK).

Development of statutory minimum wages and consumer prices in selected countries, 2015 – 2025

Index, January 2015 = 100



— Nominal minimum wage (index, January 2015 = 100)
 — Real minimum wage (index, January 2015 = 100)
 — HICP (2015 = 100)

Source: WSI Minimum Wage Database 2025; Eurostat (HICP, indicator: prc_hicp_mindx); Office for National Statistics (CPI for the UK).

ed hikes. In Spain (Panel g), the purchasing power of the minimum wage had increased by only 4.4% between 2000 and 2015. According to OECD calculations, the Kaitz index was also only 37.1% on a median basis in 2015. There were only noticeable real increases at the beginning of 2017 (4.9%) and at the beginning of 2018 (3.3%), but especially after the change of government in June 2018. The new government of Pedro Sánchez set itself the goal of increasing the minimum wage to 60% of the average wage in the medium term (Lübker/Schulten 2019, p.141; see also Section 2). This was followed by two significant increases: by 22.3% on 1 January 2019 and by a further 5.6% on 1 January 2020, which increased the purchasing power of the minimum wage by more than a quarter within a short period of time; the Kaitz index rose to 51.5% of the median in 2020.¹⁶ However, due to the subdued increases during the Corona pandemic and high inflation, the real minimum wage has only increased slightly since then.

In Germany (Panel b), the Minimum Wage Commission decides on the regular adjustment of the minimum wage, which was introduced on 1 January 2015 at the level of €8.50. After a total of seven adjustment steps, the minimum wage was €10.45 in the 3rd quarter of 2022. Seven years after its introduction, when adjusted for inflation, it stood unchanged from its starting level of January 2015. A significant increase in real terms only occurred with the increase by the German Bundestag to €12, which took effect on 1 October 2022 (or by 14.8%). With the votes of the government's parliamentary majority, this step implemented a central announcement by the SPD and Greens from the federal election campaign in autumn 2021. The two subsequent increases were again decided by the Minimum Wage Commission, albeit against the votes of the trade union representatives, and thus deviating from previous practice (Lübker/Schulten 2024). Depending on the method of calculation, the minimum wage in Germany has risen by 16.1% in real terms (annual analysis, Table 1) or by 13.6% (monthly analysis, Figure 5, Panel b) over the ten years since its introduction. This roughly corresponds to the extraordinary increase by Parliament. On balance, the adjustments under the aegis of the Minimum Wage Commission have not led to any significant real increase, but have only compensated for inflation-related losses in purchasing power—a similar result to what is achieved in France and Belgium by indexing the minimum wage.

8 CONCLUSION: EUROPEAN MINIMUM WAGE DIRECTIVE PROMOTES DYNAMIC MINIMUM WAGE DEVELOPMENT

In most EU Member States, statutory minimum wages continue to record very high nominal increases. As inflation rates have fallen across Europe, real minimum wages have also risen in large parts of Europe, significantly improving the purchasing power of minimum wage earners. Reference values for adequate minimum wages were, in many countries, anchored in national minimum wage laws in the course of the implementation of the European Minimum Wage Directive. They are now creating a pull towards structural minimum wage increases that go beyond the regular, gradual adjustments. As a result, the European Minimum Wage Directive has created pressure to adapt in many EU countries and further promoted the dynamic development of minimum wages (see also Aumayr-Pintar/Vacas-Soriano 2025). Overall, this continues a trend that has been observed for several years to significantly upgrade minimum wages and convert them into adequate living wages.

Only two years after its adoption, the European Minimum Wage Directive has therefore already had a significant impact. This momentum is likely to continue even if the European Court of Justice (ECJ) were to annuls the Directive in the case brought by Denmark, arguing that the EU lacks the regulatory competence to do so. Given its importance, the 24 member states that originally voted in favour of the Directive would have the option of renewing it under an intergovernmental treaty outside EU law. Even more important, however, would be that as many states as possible to enshrine the core criteria of the Directive in their national minimum wage laws. This also applies to Germany. In its new rules of procedure, the Minimum Wage Commission has already committed itself to also base its future decisions on the adjustment of the minimum wage on the value of 60% of the gross median wage of full-time employees. In order to become independent of the ECJ's decision, Germany should adopt this reference value in the German minimum wage law.

Compared to most other EU countries, Germany's minimum wage has grown only modestly over the past decade. On balance, the adjustments made by the Minimum Wage Commission have, to date, only compensated for the loss of purchasing power due to inflation (see Section 7). Compared to the level when it was introduced, the

¹⁶ The impact on employment remained small (see Hijzen et al. 2023).

minimum wage in Germany has therefore only risen by around 15% in real terms over the past ten years – which is solely due to the extraordinary increase in the minimum wage in 2022 to €12. The Minimum Wage Commission could prove its own ability to act by reorienting itself towards the goal, which is now also anchored in its rules of procedure, of achieving the reference value of 60% of

the median wage in Germany as well. Measured against this reference value, the German minimum wage is still about €2 too low and should already be roughly €15 per hour in the current year (Schulten 2024). The implementation of the European Minimum Wage Directive therefore offers Germany the opportunity to adjust the minimum wage to a structurally adequate level.

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