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***New Horizons in Social Policy?
Changing German Trade Union Influence
on Social Policy Reform Process***

Summary

Whereas the strong role of German trade unions influence in social policy during the expansion of the German welfare state is uncontested, its impact on the so called retrenchment-period since the 1990s is doubtful. Several experts even predict the end of corporatism. Nevertheless, in this study we assume an expansion of social policy programs. The influence of unions rises simultaneously because of their growing power resources and other circumstances, which are analyzed systematically.

Key words: unions, social policy, welfare state, pension policy, labour market policy, trade union influence, power resources model.

Introduction

German unions have played a pivotal role during the expansion of the welfare state (e. g. Ritter 1991). The “golden age of the welfare state” (Flora 1986) is characterized by economic growth, full employment and moderate welfare needs, union strength and their ability to influence the social political (Esser & Schroeder 1999). However, in times of welfare state retrenchment their role is increasingly questioned. Research shows that

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unions have lost their importance in times of welfare state retrenchment (e.g. decreasing organizational power, inner union conflicts, loosed ties to social democrats) (Wiß 2011; Schulze 2012; Trampusch 2009). This paper takes these results as a starting point and asks for the role of German unions in newer labour market and pension reforms. While scientists have predicted the comedown of the unions (e. g. Urban 2010), we want to draw a different picture of growing union influence. We hypothesize that there is potentially a new period of revitalization of union influence in current social policy reforms (“clientelistic expansion”). The main questions can be summarized as follows: Is there a comeback of German unions as central social policy actors? What are the main reasons and pre-requisites for this development? We want to argue that newer social policy reforms (minimum wage, mothers’ pension and the reduction of the retirement age to 63) show an expansion of social policy benefits. The main findings can be summarized as follows: Our analysis shows that it is easier for unions to support the newer reforms as they show an expansion of the welfare state for minor groups. We further show that a rising influence of unions goes hand in hand with increasing power resources of unions. First, we want to discuss the appropriateness of our theoretical model (chapter 2). Afterwards in part 3, we look for social policy goals of the unions and classify our results in terms of decommmodification. In chapter 4 we will discuss the organizational power and the ability to deal with conflicts. Finally, we examine the unions’ role in the political arena.

Theoretical Approach: The Power Resources Model

According to the power resources model, organized interests play a pivotal role in the political process. “Arbeit” (labour) and “Kapital” (capital) are two contrasting ideas and are thus the basis for the mobilization of power resources. Walter Korpi (1978, 1983) emphasized the strength of social forces and the resulting social conflicts. Policy is determined by the conflicts (i.e. class struggle) between labour and capital (Korpi 1983). The more power resources one group (capital or labour) can unite the more influential this group will be. As a consequence, strong unions and left parties will be conducive to extensive social rights and better social protection. Power resources will be high if unions are unified, highly organized, the percentage of social democratic votes is high and if unions are looking for close cooperation with social democratic parties (Korpi 1983, p. 39ff.; Olsen & O’Connor 1998, p. 7).

Many scientists have criticized the power resources model: Paul Pierson argues that the new politics (retrenchment) is characterized by a smaller dependence on power resources. He refutes a correlation between left power resources and results of social policy reforms (Pierson 1996, p. 147). We want to show that this approach is still useful (Schroeder 2014; Schulze 2012). Asking for union influence in social policy we include the following criteria: First, unions’ *social policy goals* are important to contrast their positions to the reforms. We use a huge variety of union documents (e.g. interviews, statements, proceedings of union congresses, annual reports) to show the positions of the actors. We mainly focus on the German Federation of Unions (Deutscher Gewerkschaftsbund (DGB)). However, we will

also consider the four biggest unions organized under the federation: the industrial unions (Industrial Union of Metalworkers (IG Metall); Industrial Mining, Chemistry, Energy Union (IG BCE); Industrial Union Construction-Agriculture-Environment (IG BAU) and the service workers union (United Services Union (ver.di)). Second, *organizational power* has to be considered. Unions will be more influential in social policy reform processes if their organizational power and ability to assert their claims is high. Therefore, we include membership figures of the union federation DGB from the 1950s to 2012. Third, we utilize *unions' ability to deal with conflicts* to analyze internal conflicts between the federation and its unions. Different positions can be ascribed to the different sectoral and members' interests. Fourth, *the ties between unions and the political parties* have to be observed. Here, we can use results from the existing literature and add our own observations of the current legislative period. Fifth, *parliamentary and non-parliamentary presence* is an important factor to explain unions influence in social policy reforms. Therefore, we look at the institutional involvement of unions in commissions and look for union campaigns as a part of non-parliamentary presence. Sixth, *decommodification* as a frame for the development of social policy is included.

Unions' Social Policy Goals and Decommodification during Welfare State Retrenchment and Clientelistic Expansion

Unions in Welfare State Retrenchment

Since the 1990s unions' role has been questioned (Schulze 2012, p. 18). Unions have lost members, and political power. Unions did not manage to adjust their political aims to the new challenges of retrenchment. So they have been characterized as reform blockers (Wiesenthal & Clasen 2003). We have selected two pension reforms and one labour market reform to show unions' role in times of retrenchment.

Pension Reforms in 2001 and 2007: The Riester Reform and Pension with 67

In 2001, the pension system was transformed from an annuity insurance system to a partly private system. Since then, there are three financing pillars: a (retrenched) pension insurance, a private system which is partly financed by the government and the insured; and a company pension scheme (Hinrichs 2003, p. 13). With the pension reform in 2007 the retirement age was increased from 65 to 67 years. All in all, the reforms show a cutback in benefits.

Both reforms were heavily criticized by unions. Union documents show that they neither agreed with the reform in 2001 (ver.di 2004, p. 213; IG Metall 2003, p. 149) nor with that in 2007 (IG BAU 2010, p. 96; ver.di 2007, p. 51, IG BCE 2009, p. 48; DGB 2010a, p. 46; IG Metall 2007, p. 151). Unions heavily criticized the transformation to the partly private system and the reduction of benefits. They preferred the first pillar of the pension

scheme (IG Metall 2003, p. 148f.; DGB 2010B, p. 7f.), that ensures the living standard (DGB 2010b, p. 7). However, unions were not able to impede the reform. The unions' influence had only been strong during the final phase of the policy-making process. Here, they have achieved minor improvements (i.e. company pension scheme). Overall, the influence of German unions in the pension reform 2001 is described as weak (Hegelich 2006, p. 212). Due to the achieved improvements in the self-regulation of the company pension scheme, their influence in the policy-implementation — however — is rather strong. This fits with the assumption that union's influence is shrinking in policy-making processes, but growing in implementation (e.g. own pension funds) (Wiß 2011, p. 256f.; IG Metall 2003, p. 89, Rehder 2009).

Unions have argued that raising the retirement age would lead to old-age poverty, could worsen the employment opportunities of the young and must be seen as latent benefit cuts (Schroeder 2010, p. 195). Krause (2012, p. 178) implicates a weak position of the unions in this policy-making process, too. Unions prefer a retirement age between 60 and 65. Pension system should not depend on a fixed retirement age, but should be guided by the years of contribution (Krause 2012, p. 177f.). The pension concept of the federation was adopted in 2007 and thus too late (Krause 2012, p. 207).

Labour Market Reform since 2003: The Hartz Reforms

The enactment of the Hartz reforms (with the emphasis on activation) was the most far-reaching change of the German labour market policy since German reunification. Carrots and sticks (*fördern und fordern*) is a key element of bringing the unemployed into work. The most important change was the combination of social assistance and unemployment assistance.

Many scientists have observed a decreasing influence of German unions in the Hartz reform process (e. g. Schulze 2012, p. 268). The federation had not pursued a consistent strategy which is seen as the key explanation of their shrinking influence (Schulze 2012). On the one hand, they supported the social democratic election campaign in 1998. On the other hand, they had heavily criticized social democratic proposals (e.g. activation) published in the Schröder-Blair paper in 1999 (Schulze 2012, p. 51). Despite the support of the social democratic election campaign, the DGB criticized Chancellor Schröder's concept of activation (Schulze 2012, p. 129). Apart from that, in 1998, the DGB published a paper that shows the acceptance of the principals of the new welfare-to-work-paradigm (DGB Bundesvorstand 1998). Because of the different social policy goals and strategies unions were not able to use the favorable conditions of the red-green government (Schulze 2012, p. 134). Union members had seats in the Hartz Commission and were thus able to influence the political process; however, Schröder did not implement the commissions' proposals. The union federation was disappointed, because the chancellor had even changed major parts of the proposal (Schulze 2012, p. 53).

Unions' Social Policy Goals in Times of Clientelistic Expansion

After the discussed reforms no major changes in German pension or labour market policy were made. There were only minor adjustments. With the new government elected in 2013 the German political landscape changed to a more union friendly surrounding/environment. In 2014, two pension reforms (the change of retirement age to 63 and mothers' pension) and a minimum wage were introduced. These reforms show a different picture of German social policy because all reforms indicate an expansion of social policy for several groups (clientelistic expansion). *First*, the *retirement age* was changed from the age of 65 to 63 (Bundestag Drucksache 18/909). This reform can be seen as a new way in pension policy. Prior to that reform, Germany (as other countries) had followed the retrenchment path. However, the latest reforms show an expansion of benefits. Nevertheless, only minor groups will benefit. Persons can retire at the age of 63 if they fulfill the following requirements: They have to be born before 1952 and must have paid pension contributions for 45 years. Unions generally welcomed the reform as it brings relief to long-working people (ver.di 2011; IG Metall 2000, p. 286; Hoffmann 2014 a; Ausschussdrucksache 18(11)73). Unions criticized the reform as insufficient. On the one hand, they argue that only few workers will benefit. On the other hand, they criticize that in case of unemployment before retirement the last two years are not counted as a qualification period for benefits. *Second*, a special pension for mothers was implemented in 2014 (Bundestag Drucksache 18/1489). Mothers with children born before 1992 are eligible for additional pension benefits (28, 14 € in West, 25, 74 € per month in East Germany). It takes into account that many mothers (esp. in West Germany) stayed at home and cared for the children and the household (dominance of the male-breadwinner model). These times had not been counted as qualification period for pension benefits. As a consequence, women were notable to collect pension entitlements and were mostly dependent on their husbands. Unions were in favor of the reform (Ausschussdrucksache 18(11)73, p. 9; DGB 2014a; 2014b). The most important point of criticism is the way of financing. They postulate that benefits should not be financed out of social security contributions but out of taxes. Besides, they want to equalize times raising children in East and West Germany (Ausschussdrucksache 18(11)73, p. 9; DGB 2014a; 2014b; Hoffmann 2014b; 2014c; Bsirske 2014a, 2014b).

The third social policy reform that shows an expansion of social policy is the minimum wage (Bundestag Drucksache 18/1558). This is a major step and the first central labour market reform since the enactment of the Hartz reforms. Since 2015, every German worker is eligible to get a minimum wage of 8, 50 €. Unions have long criticized the minimum wage, because they were frightened of their own responsibility for wage policy. Especially unions with a strong competence for collective bargaining policy (metal and chemical unions) refused it. Since the federation's congress in 2006, unions have agreed with the minimum wage as a political goal (Schroeder 2010, p. 193). In sum, unions welcome this reform (Vassiliadis 2014; Bsirske 2014a). However, there are some exceptions on which unions do not agree: First, people under 18 are not entitled. Second, long-term unemployed are

not eligible in the first sixth months of a new job (DGB 2014a). In sum, unions were not only in favor of the reforms but most of their central claims have been implemented (e.g. minimum wage). We argue that it is easy for the German unions to support the reforms out of two reasons. First, the implementation marks a benefit improvement. Second, the reforms are coming up to meet union clienteles' interests. According to our theoretical argument, these reforms had been more likely under a government with an involvement of the social democrats.

Decommodification

Decommodification is a central element of an analysis inspired by the power resource model. It is mainly measured by spending and the degree of coverage in the fields of old-age pensions, sickness benefits and unemployment insurance (Esping-Andersen 1990, p. 50ff.). In 1990, Germany had a decommodification index of 27.7 (Esping-Andersen 1990, p. 52). The Esping-Andersens definition is rather limited which is why we have modified the understanding of the term. We use the structure of the benefits here to show major social policy shifts. All reforms discussed as retrenchment indicate a clear cutback. Labour market policy was changed to a system of activation with control and work requirements. Besides, unemployment assistance had been eliminated completely. In pension policy, cutbacks have been implemented, too. The system was changed to an emphasis on private provision and the retirement age was changed. In sum, we want to argue that retrenchment reforms show a cutback of benefits. That is why — using the term of Esping-Andersen in our sense — decommodification is declining during this period.

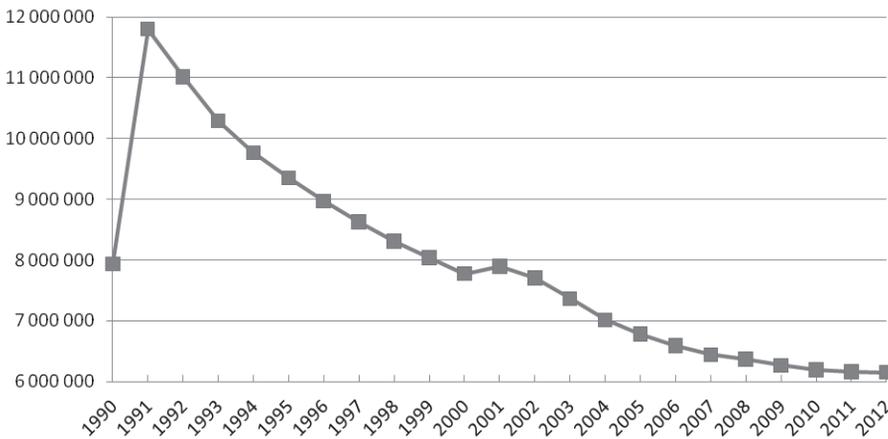
The three reforms passed in 2014, however, show a different picture. *First*, the *group of eligible people* has to be considered. We argue that, the larger the group of eligible persons the higher is the degree of decommodification. As shown above, a relatively small group will benefit from the pension reforms. Only older workers (born before 1952) and older mothers (with children born before 1992) are eligible. In contrast to that, the minimum wage can be classified as a rather universal benefit because all workers will be eligible by the end 2016. We argue that this reform will contribute to a higher decommodification. Taken as a whole we argue that the degree of decommodification (understood as the protection against the loss of income) might rise with the enactment of the reforms. *As the second criteria for decommodification* we analyze the amount of benefits. The reforms show a clear reversal of German social policy as there are no cutbacks. On the contrary, women will get higher pensions and low-income workers will benefit as well (e.g. workers in security companies, haircutter, marginally employed) (DGB 2014b). In conclusion, the degree of decommodification might be higher if reforms with a wider range and social significance are passed.

Organizational Power and Unions and Unions' Ability to Deal With Conflicts

Organizational Power

The influence of unions in the political arena depends heavily on their organizational power. The membership statistics show a clear decrease in union membership in times of welfare state retrenchment. As illustration 1 shows, this development is a continuous development.

Illustration 1. Union Federation Membership (1990–2012)



Source: Own compilation based on DGB (2014e).

In 1991, about 11.8 million union members were organized under the federation DGB. In 1996, only 9 million union members were organized. In times of the millennium, 8 million and in 2006 6.5 million members were organized. In 2012, about 6.2 million union members mark the lowest ebb. This declining membership is not only obvious in the federation but can be seen in all unions organized under the federation. This is evidence for the shrinking assertiveness of unions' political positions and a result of their decreasing power in the policy-making process.

In times of clientelistic expansion the number of union members (federation) is declining. However, metal and service unions show rising membership numbers. While service union was able to raise their numbers in 2013 from 2.061.198 to 2.064.541 (ver. di 2014), the metal union was able to raise their members in three consecutive years from 2.264.000 in 2012 to 2.266.000 in 2014 (IG Metall 2013; 2014). These results point to a rising organizational power of the unions. They are more aware of the necessity to win members and gain importance again. This might result in an increasing political pressure capability, assertiveness, and influence. However, most recent figures are not

completely promising because membership is rather stable and — at the moment — not rising anymore. However, it is not an irreversible development. It is possible that union membership will decline. However, German unions invest in their internal organizational structures to prevent a decline.

Unions' Ability To Deal With Conflicts

Pension Policy (Retrenchment)

Industrial unions were closer to the interests of employers and their preferences for a supplementary pension system than others (Wiß 2011, p. 165). These conflicts resulted from the different clienteles of the unions. Industrial unions have more members in safe employment circumstances and they are used to bargain company pension schemes. Service unions are more interested in the conservation of the first pillar of the pension system and thus against benefit cuts (Wiß 2011, p. 99f.). Comparable to the social democrats, unions have divided into the traditionalists and the modernizers.

Labour Market Policy (Retrenchment)

As shown above the union federation DGB had no clear attitude towards the new activation paradigms. Besides, the federation and the unions did not agree on the role of the unions in the field of social policy. Service union Ver.di saw itself as the defender of the welfare state and the metal union IG Metall saw labour market policy as their major field of influence. During the early 2000s there was a conflict on the future of social policy and the power of the federation (Sommer & Hemmer 2002, p. 371f.). The president of the DGB Michael Sommer opposed the labour market reform and wanted to act as a spokesman for the whole union movement. However, some union leaders (e.g. Hubertus Schmoldt, president of the chemical union) advocated the reform (Weßels 2007, p. 159; Schulze 2012, p. 227f.). The controversies have contributed to a weaker position in the policy-making process.

Ability to Deal with Conflicts in Times of Clientelistic Expansion

Unions' ability to deal with newer social policy conflicts can be used to explain their strength. All three reforms show no disagreement between the unions and the federation. Surely, the reason is that reforms imply an improvement of benefits. Only some unions had claimed a higher minimum wage (e.g. service union) or earlier retirement (e.g. industrial unions) (Bsirske 2014a; IG BAU 2006, p. 116).

We conclude that in times of retrenchment unions were not unified on their aims and social policy directions because reforms were accompanied by cutbacks. In times of clientelistic expansion union movement was mostly unified.

Unions and the Political Arena

The Ties Between The Unions and the Political Parties

The unions' ability to influence the policy-making processes depend on their relation to the decision makers in the government and the ties to the social democrats (von Winter 2007, p. 227). Several case studies witnessed a decreased influence in times of *retrenchment* as a result of the changed relation to the parties (e.g. Wiß 2011; Schulze 2012). Until the end of 1990s, the traditionally close relationship had shaped the German model. However, social democratic policy ideas have changed dramatically since 1999. The Schröder-Blair paper and the idea of activation are only two variables. As defenders of an expanded welfare state unions were not willing to support the new paradigms. This was the beginning of a creeping disengagement of unions from the social democrats (Neusser 2013, p. 298). In 2006, the relation between trade unions and the social democrats was shattered again because of the change of retirement age to 67 years (Neusser 2013, p. 78). Retrenchment shows dissolution of ties.

In times of *clientelistic expansion* unions tend to be more open to other parties (Neusser 2013). During the economic crisis of 2008 unions were able to renew their political influence on policy processes (Schroeder 2010). They were reincorporated in the political processes and also in the implementation process (e.g. short-time work). Since then a change in the relation between unions and political parties can be observed. Unions still emphasize their political independence; however, the social democrats are still their closest ally. Unions also try to develop more flexible coalitions with others parties in order to initiate policy changes. Neusser (2013, p. 19f., 112) has recently called it "a dynamic system of pluralized partnerships" and "situational lobbying". Furthermore, in 2013, unions were more integrated in the coalition negotiations than in former periods and are thus able to shape the political landscape. Nevertheless, it has to be said, that this way was easy for them because the government is more aware of the unions' interests than former governments (even than former grand coalitions).

Parliamentary and Non-Parliamentary Presence

The parliamentary presence of unions is here measured by the participation in commissions. In times of expansion, commissions and networks had existed, in which unions were incorporated automatically (e.g. the circle of "Rentenmänner") (Nullmeier & Rüb 1993). However, in times of *retrenchment*, unions were only weakly represented in the latest pension reform commission (Rürup Commission: two members out of 26) in 2002 and also in the labour market commission in 2002 (Hartz Commission: two members out of 15). All other members were mostly economists and scientists. Besides, research has shown that union representation in parliament is declining continuously (Hönisgberger/Osterberg 2014). The non-parliamentary presence can be measured by various lobbying activities of the unions (e.g. campaigns, initiatives and networks in pension and labour

market policy). During the times of the reforms (2001 - 2003) no campaigns had been implemented by the unions. After the enactment of the reforms, unions started a lot of campaigns on working conditions and social policy, initiatives and networks with other social interest groups (Krause 2012, p. 213). This is an expression for their decreasing influence in the political arena, too. It is obvious that unions concentrate more on lobbying and alternative influence strategies to expand their power resources.

In times of clientelistic expansion the picture changed. A minimum wage commission was established to negotiate the cornerstones. The commission consists of three unionists and three employers only. This development can be interpreted as a rising political influence of the unions as this is the first important commission after the Hartz reforms. The pension reforms in 2014 were passed without any commission. That is why it is difficult to refer to this as a complete victory. Besides, union members in parliament are further declining. In 2014, unions had a huge minimum wage campaign and also a campaign against the retirement age of 67. It is obvious that German unions favor the reforms because all reforms will result in benefit improvements. As a consequence there was no big social resistance against the reforms in or outside the parliament, even though reforms will lead to improvements only for some groups. Our analysis shows that unions are able to become — again — more influential in the field of social policy.

New Horizons in Social Policy? Reasons and Conditions for Rising Union Influence

The story of union influence is not a linear line one. In the golden age of the welfare state unions were able to play an important role. In times of welfare state retrenchment, unions have lost influence due to several reasons. The loss of membership contributed to a decreasing organizational power and thus to a shrinking assertiveness, power and influence in the policy-making process. Furthermore, there was a change in the relation between unions and political parties (esp. the social democrats). Besides, we found conflicts about the future political direction of the federation. This also contributed to decreasing assertiveness. The latest reforms in 2014 draw a different picture. We have observed a new period of social policy expansion (for special groups) and the growing influence of unions. We have found several reasons for this: The stable union membership numbers, the decreasing conflicts within the unions about the future direction of social policy, the renewed and closer ties to the social democrats, a rising participation in commissions and political bargaining processes. These conditions might lead to a rising importance of unions as social policy actors. As the contents of the reforms (a partial backsliding form retrenchment) are closely linked to the unions' interests it is easier for them to act as a defender of the welfare state again. Furthermore, the current coalition contributes to a better relationship between the parties and the unions. Especially chancellor Angela Merkel (CDU) favored a renewed inclusion of unions. In sum, we want to argue that we have entered new horizons in social policy and in the understanding of unions as political actors. However, it is not clear whether this development will survive.

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Streszczenie

W okresie powojennego tworzenia państwa opiekuńczego rola związków zawodowych w niemieckiej polityce społecznej nie budziła wątpliwości, o tyle ich znaczenie w czasie retrechmentu lat 90. XX w jest przedmiotem wątpliwości formułowanych w literaturze przedmiotu. Niemała grupa badaczy przewiduje nawet kres niemieckiego korporacjonizmu. Przedmiotem niniejszego artykułu jest analiza roli niemieckich związków zawodowych w polityce społecznej tego kraju. Autorki przewidują wzrost ich roli i dalszy rozwój polityki społecznej. Wyjaśnięń tego procesu upatruje się w artykule w zasobach władzy (*power resources*) posiadanej przez niemieckie związki zawodowe oraz innych czynnikach, które są szczegółowo analizowane w niniejszym artykule.

Słowa kluczowe: związki zawodowe, polityka społeczna, welfare state, polityka emerytalna, polityka rynku pracy, wpływ związków zawodowych, power resources model

Cytowanie

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