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Supporting the Implementation of the
European Industrial Deal with Strengthened
Social Dialogue in European Metal Sector.



Summative report

27 March 2026

Political and sectoral context

- analysed countries - Bulgaria, France, Serbia, Poland and North Macedonia
- the metal sector is a **core pillar of industrial production and exports**
- undergoing **significant restructuring and transformation** driven by green and digital transitions
- existing **global competition and demographic change.**



Common trends

- Structural transformation and decline of traditional metallurgy
- Diversification towards metal processing, automotive components and electromechanical products.
- Growing role of recycling, circular economy and energy efficiency.
- Export-oriented production and dependence on foreign markets.

Shared challenges



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- High energy costs and pressure from cheap imports
- Skills shortages and ageing workforce
- Uneven working conditions within the sector
- Labour migration and brain drain

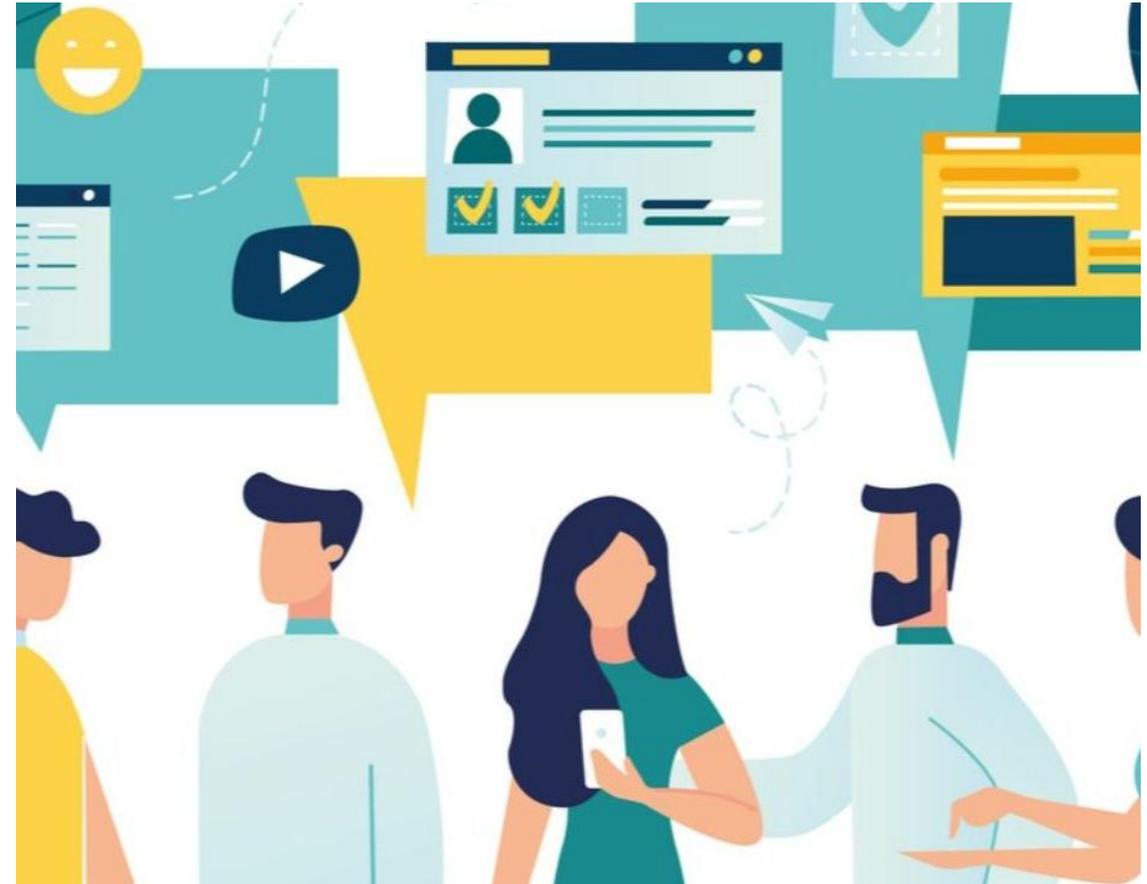


Social dialogue in employment policy frameworks

- formal legal frameworks for social dialogue
- practical implementation and effectiveness vary significantly

Common features

- Tripartite systems and sectoral collective bargaining frameworks
- Declining trade union density, especially in SMEs and newly privatized companies.
- Limited information and consultation mechanisms
- focus on occupational health and safety



Recurrent challenges



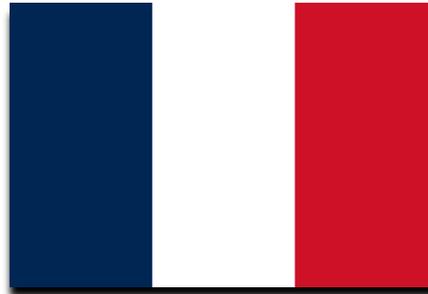
- Selective or weak enforcement of labour legislation
- Fear of retaliation and anti-union practices
- Formal dialogue without substantive influence on decision-making
- Limited consultation beyond Occupational Safety and Health issues

Positive practices

- **Existence of branch-level collective agreements**
(North Macedonia, France, Poland, Bulgaria – in large enterprises)
- **Improved labour inspection activity**
(North Macedonia, Serbia), albeit with constrained capacity
- **Strong union presence in large industrial plants**
(Poland, France, North Macedonia)



Key findings in each country



Social Dialogue Mechanisms

- **Formal social dialogue frameworks with high variations in substantive functioning**
Bulgaria - collective bargaining is combined with extensive informal communication. The dialogue effectiveness depends heavily on employer engagement rather than institutional design.
France - the social dialogue is **highly regulated and formalized**, yet largely **procedural and top-down**.
North Macedonia - **informal dialogue**, especially in SMEs and micro-enterprises is most common, with weak union presence and limited sectoral structures.
Poland - strongly institutionalized tripartite system (Social Dialogue Council and regional councils), with **consultative role**, weak influence on strategic decisions, particularly in energy and industrial policy.
Serbia - the strongest **company-level collective bargaining** coverage (100% of surveyed companies), but sectoral and local dialogue are underdeveloped, and formal mechanisms are often inactive.
- Across all countries, **company-level dialogue functions better than sectoral or national dialogue**, but strategic issues are rarely addressed through social dialogue.

Social Dialogue Mechanisms - 2

- **Perceived effectiveness across stakeholder groups -**
Perceptions range from moderate to low, with strong polarization in France.
- **Dialogue** is widely perceived as **insufficiently influential**, especially regarding strategic decisions.
- **Gaps and barriers -** Barriers are **structural and relational**, not primarily legal.
- **Common pattern -** legal frameworks exist, but **trust, capacity, resources and real power-sharing** are missing.



Capacity Building Needs



- Skill and knowledge gaps

All countries report **significant capacity gaps**, though with different nuances.

- Training and support needs

Remarkable convergence across countries:

- **Training workshops** are the top priority everywhere.
- **Exchange of experience / mentoring** ranks second.
- **Joint trainings** of employers and unions are explicitly demanded in France, Serbia and Poland.
- Digital tools and e-learning are supportive but secondary.

- Access to tools, platforms and institutional support

Differs across countries. Access to EU and national funding is perceived as **complex and inflexible** in all countries.

- Stakeholder readiness

Despite weaknesses, **readiness to engage is high everywhere.**



Impact of Green and Digital Transitions

- Transitions are perceived as **both threat and opportunity in all countries**, with reskilling as the key condition for positive outcomes.
- **Sector readiness for transitions - generally insufficient**
- **Role of social dialogue in managing change - potential shock absorber**, underused. Only **20–30% of organizations** have initiated dialogue on green or digital transitions.
- **Common patterns**
 - Skills shortages and need for mass retraining
 - Weak strategic planning
 - Limited integration of dialogue into transition governance
- **Some countries specifics**

Employment Quality

- **Working conditions, job security, wages and upskilling**
- **Influence of social dialogue on employment outcomes**
- Across all countries, **strong social dialogue correlates with:**
 - Better wages
 - Safer working conditions
 - More predictable restructuring
 - Higher trust

- **Workers' and employers' perspectives**

Workers increasingly priorities job security, health, working conditions and work–life balance.

Employers often priorities flexibility and competitiveness; in France and Serbia, dialogue is sometimes perceived as an obstacle rather than a resource.



Cross-Cutting Themes

- Trust and Cooperation Between Stakeholders
- Gender Equality and Diversity
- Regional Differences and Company Size
- Sector-Specific Challenges Within and Beyond the Metal Sector



Recommendations

- Capacity Building
- Strengthening Social Dialogue
- Policy and Funding Support





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