SHIELD

Social Dialogue for Crisis Management and Resilience in Strategic Industrial Sectors

BULGARIA | NATIONAL REPORT — KEY FINDINGS

Bulgarian Chamber of Commerce and Industry • October 2026

Co-funded by the European Union

Purpose and research approach

OBJECTIVE

Assess social dialogue capacity to anticipate, manage and recover from industrial crises.

EVIDENCE BASE

Desk research and regulatory review, stakeholder interviews, and an online survey of 50 respondents.

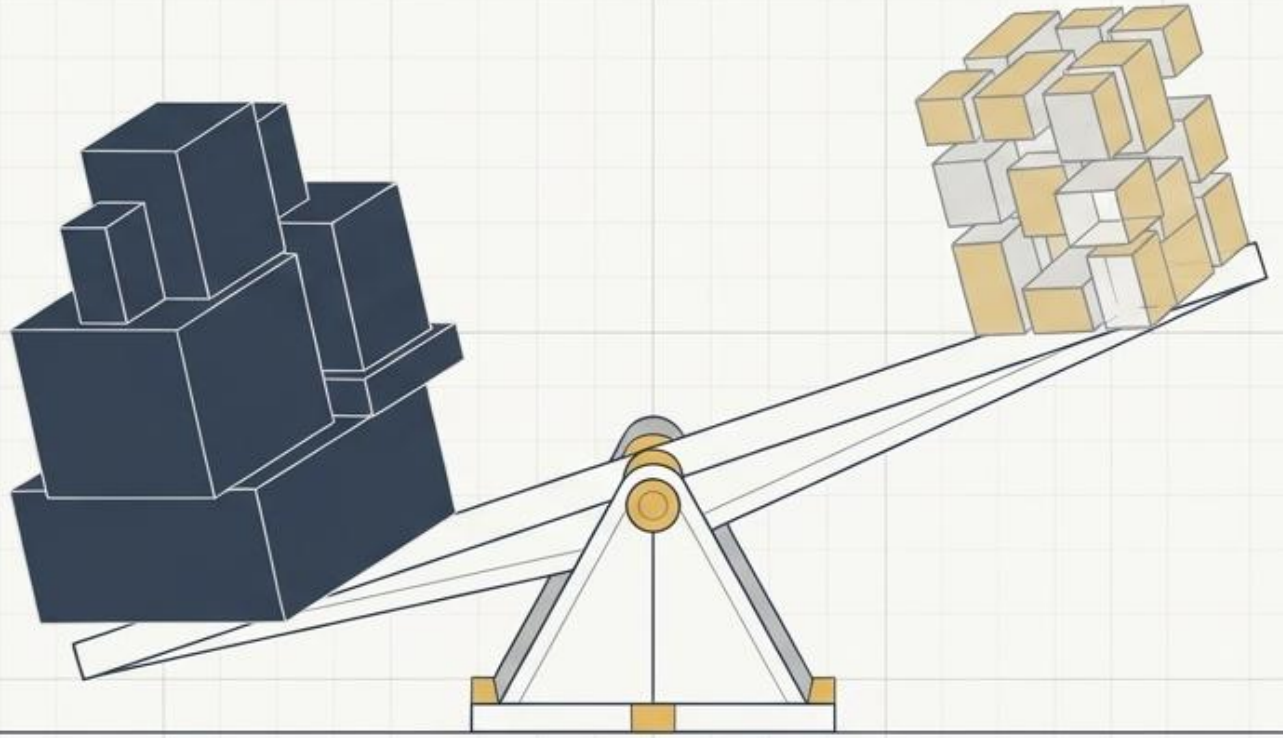
Scope: COVID-19, war in Ukraine, energy and inflation shocks, supply chains, green and digital transitions, and defence industry.

The Bulgarian Social Dialogue Paradox

Heavy Infrastructure

High Institutional Legitimacy

- National Council for Tripartite Cooperation (NCTC)
- Economic and Social Council (ESC)
- Over 50 functioning sector councils



Fragmented Reach

Low Operational Coverage

- Union density at only ~11%
- Collective bargaining covers <30% of the workforce
- Highly decentralized: 1,135 enterprise agreements cover just 248,516 workers

Bulgaria possesses the formal institutional architecture for crisis response, but its decentralized nature limits widespread implementation.

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A “permanent crisis” environment

GEOPOLITICAL

War in Ukraine, trade restrictions, energy security and disruption of international supply routes.

ECONOMIC

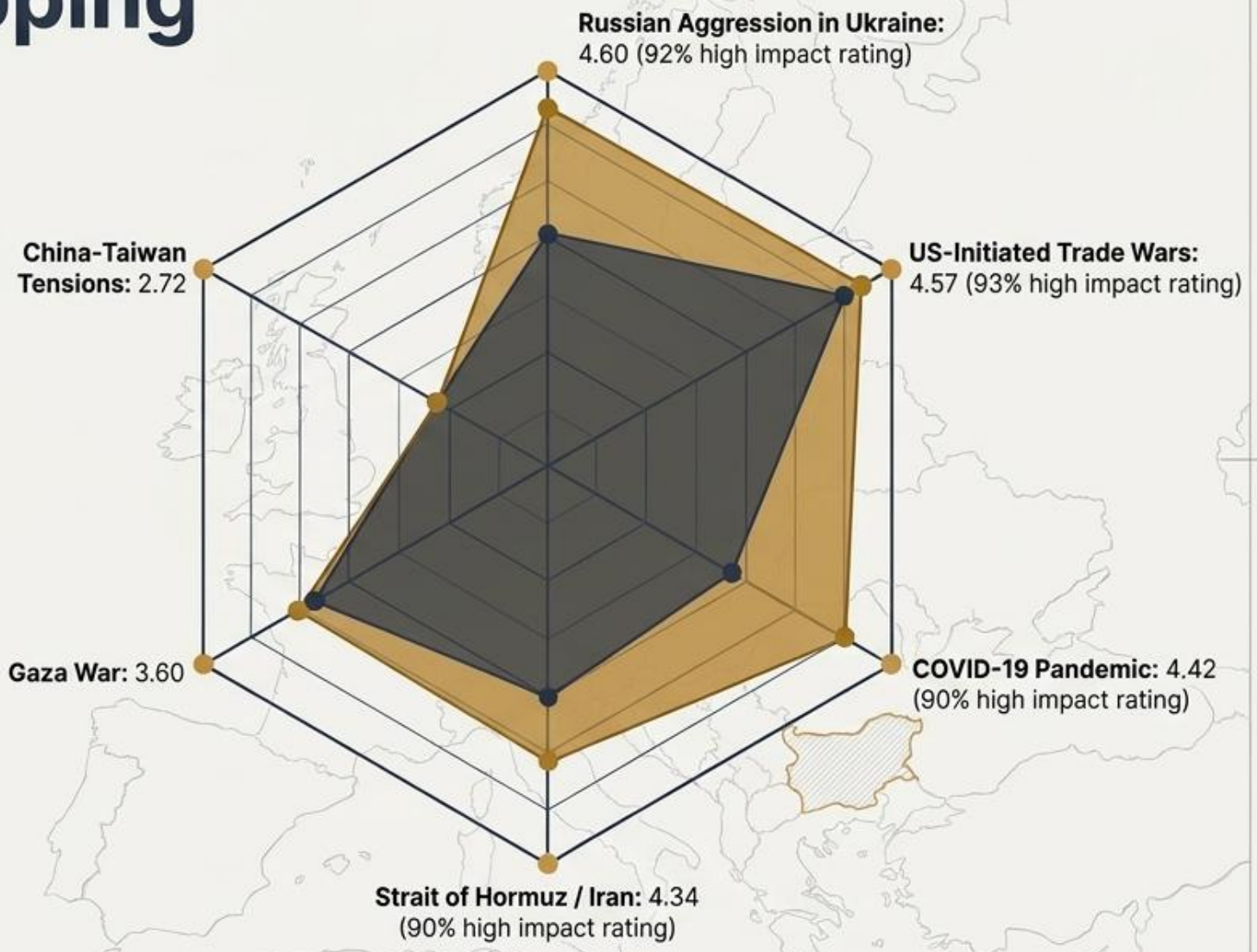
Inflation, energy and raw material costs, financing pressure and supply-chain disruption.

STRUCTURAL

Decarbonisation, digitalisation, automation, skills shortages and cyber risks.

Core finding: Bulgaria has demonstrated crisis-response capacity, but prevention and scenario planning remain less systematic.

The Era of Overlapping Global Shocks



Key Insight

Sectoral resilience cannot be viewed solely through internal economic factors; global geopolitical and trade shifts instantly threaten local production and energy security.

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Four strategic sectors in focus

ENERGY

Coal transition, grid modernisation, renewable integration and regional employment.

METALS

Energy intensity, decarbonisation, international competition and skills.

MINING & CRITICAL RAW MATERIALS

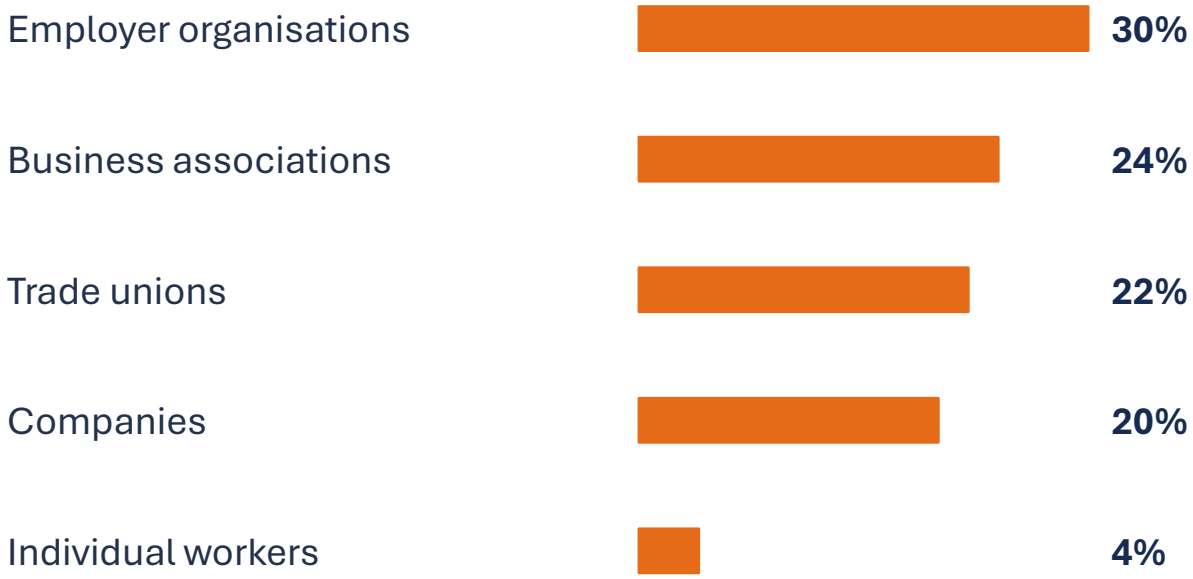
Commodity prices, investment, occupational safety and restructuring.

DEFENCE

Capacity expansion, technology upgrades, skilled labour and safe working conditions.

Survey profile: 50 respondents

Respondents by organisation type

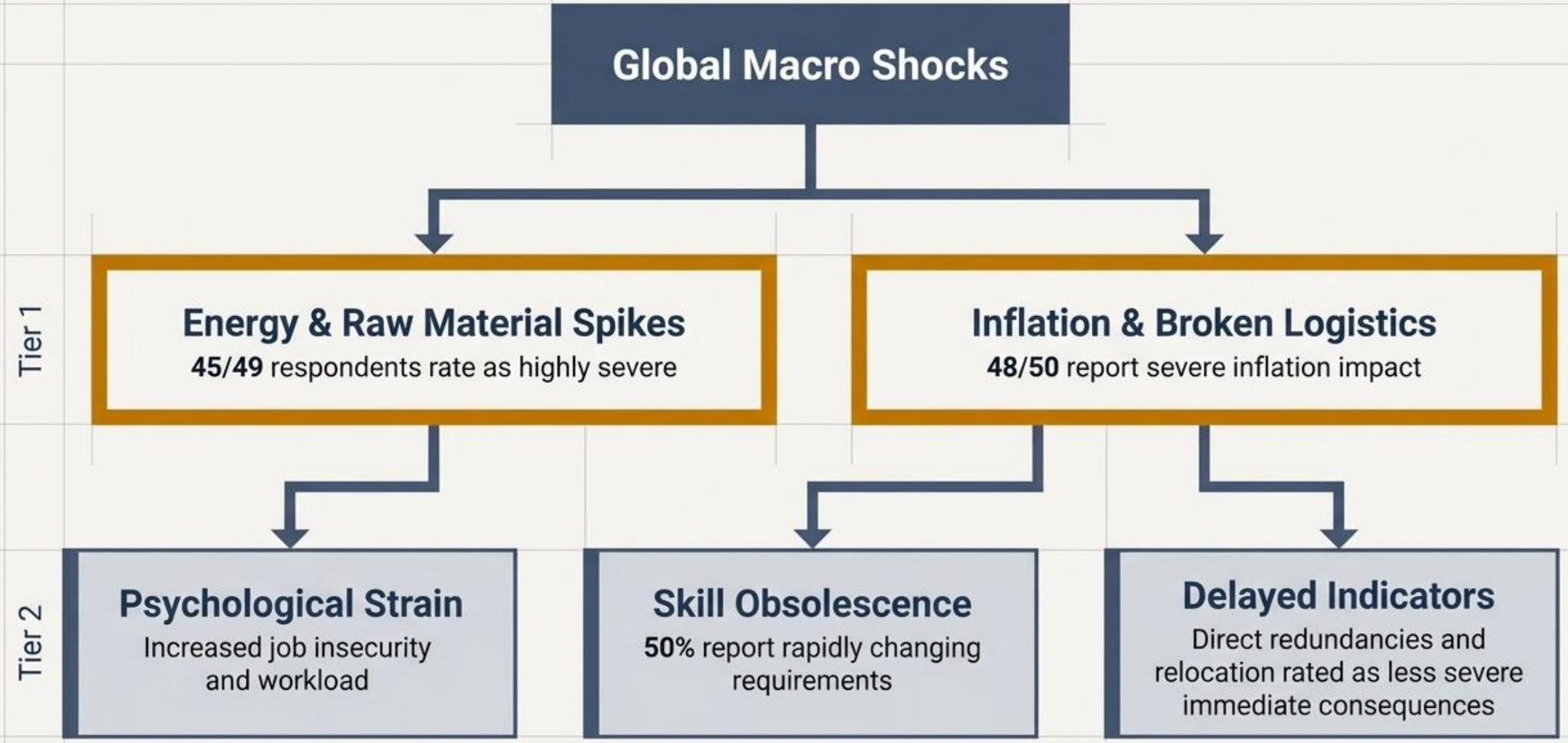


SECTOR REPRESENTATION

Energy 26% • Mining 18% • Metals 18% • Defence 14% • Multisector 14% • Other sectors 10%

Descriptive survey findings; not a nationally representative sample.

The Cascade Effect: How Macro Crises Hit the Factory Floor



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People and institutional resilience

IMPACT ON WORKERS

Greater job insecurity, heavier workloads and stress; changing skills requirements (50%) and reskilling needs (49%).

PERCEIVED CRISIS CAPACITY

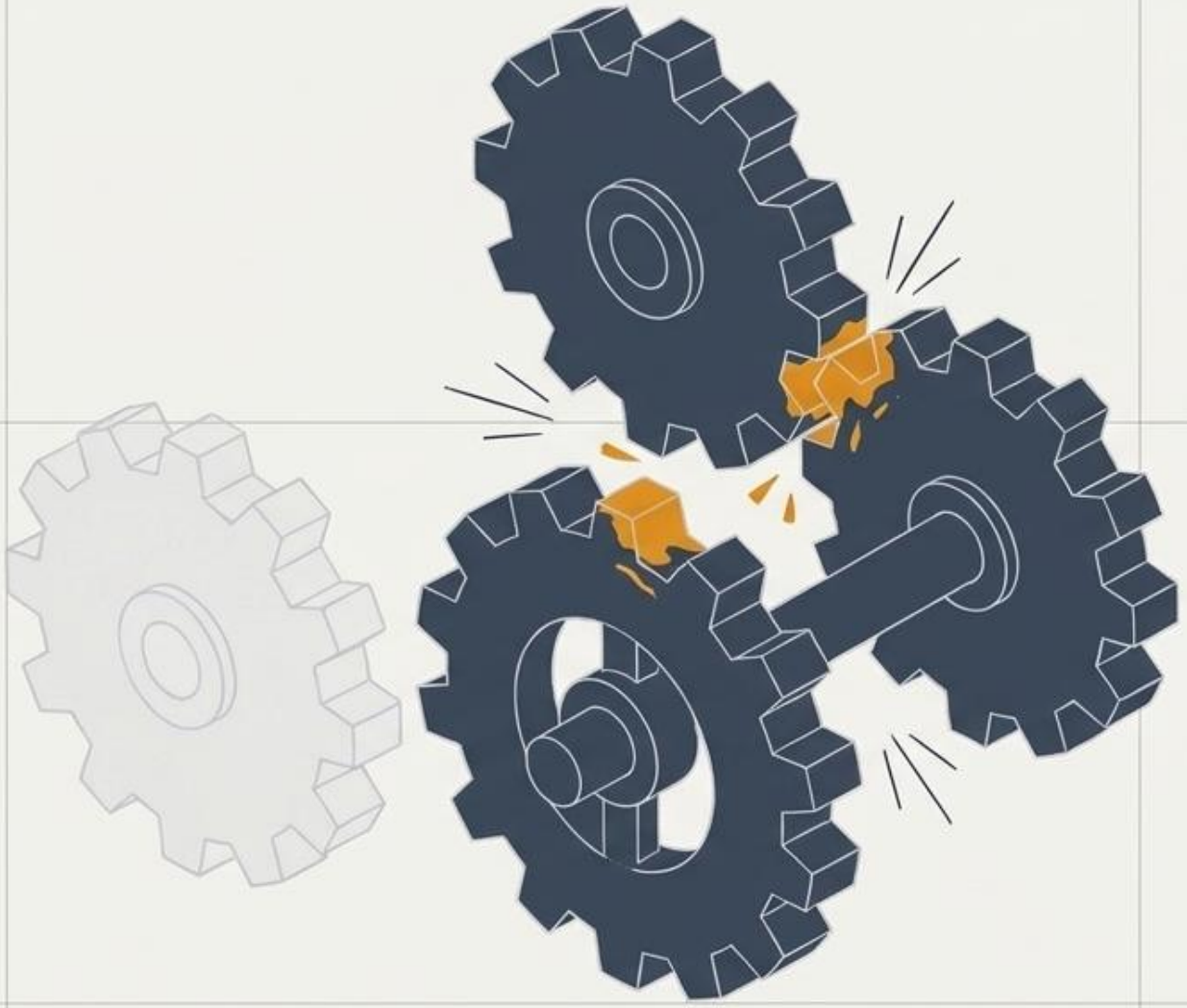
Respondents gave critical average ratings: civil society 3.30; trade unions 3.38; government 3.66 (1 = best, 5 = worst).

Resilience must protect both industrial continuity and quality of employment.

Barriers to effective crisis dialogue

- Social partners are often consulted too late to shape strategic decisions.
- Legal and institutional constraints, limited specialist expertise and insufficient mutual trust.
- Weak integration of risk forecasting, scenario planning and industrial dependencies.
- Need stronger coordination across national, sectoral and regional levels.

Core Barriers to Effective Crisis Management



1. Unfavorable Legal Framework

19/50 high rating. Social dialogue is not structurally integrated into strategic planning.

2. Technical Capacity Deficits

16/50 high rating. Traditional labor law expertise is insufficient for assessing cyber, AI, and complex energy risks.

3. Trust & Mutual Recognition

16/50 high rating. Late inclusion breeds mistrust and limits consultation effectiveness.

Myth: Lack of Interest

Unions and employers are highly interested (Avg score 3.0); blocked by structural constraints, not apathy.

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The Blueprint for Proactive Tripartite Institutions

1. Risk Assessment Mechanisms

Moving beyond reacting to inflation by establishing joint foresight committees to model supply chain and energy risks.

2. Skill Forecasting

Transitioning to precise mapping of AI, cyber, and green technology skill requirements.

Modern Collective Bargaining

3. Early Warning Systems

Implementing mandatory crisis clauses to ensure rapid information sharing before mass redundancies.

4. Regional Transformation Plans

Co-designing territorial transition mechanisms prior to plant closures, especially in coal/mining regions.

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Transnational Integration: The EU Resilience Network



EU Crisis Toolkits

Developing common methodologies for risk assessment and supply chain interruption checklists.

Transnational Partnerships

Direct structured exchanges between Bulgarian sectoral unions/employers and EU counterparts in Energy and Defense.

Pilot Evaluations

Jointly testing early warning systems and measuring speed of information exchange.

Collective Bargaining Integration

Ensuring EU best practices are directly embedded into national sectoral agreements, not just project reports.

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Thank you!