

**"Sharing information and stimulating dissemination and exchange of good practices, aimed at improving information and consultation process among social partners in Metal sector in Bulgaria, Germany, Portugal and Macedonia"**

## **FINAL PROJECT REPORT**

**Period covered: December 2007 – August 2008**

**Applicant organization: TRADE UNION "METALICY"KNSB**

**BUDGET HEADIND – 04.03.03.03**

**Information, consultation and participation of representatives of undertakings  
VS/2007/0590**



СФ "МЕТАЛИЦИ"



БАМИ



IG METALL



Sindicato das  
Indústrias  
Metalúrgicas e  
Afins- SIMA



Trade Union of  
Industry, Energy  
and Mines of  
Macedonia



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## **Project Vision**

This project was implemented with wide international participation as the active participation of the management, trade unions and information and consultation representatives from Bulgaria, Portugal, Germany and Macedonia had determining importance for its realization.

As a tradition the information and consultation process in Bulgarian undertakings is being carried out between the employer and employees' trade union organizations. In 2006 legal regulation has been given to a new figure - representatives of employees and attendants who carry out the informing and consulting.

This new reality in the inside-firm relations and in particular in the undertakings from sector Metallurgy sets new challenges and responsibilities connected with the information and consultation process.

The task of the project team in the framework of the project activities implementation was to give adequate, well-timed and comprehensible information to the direct users of the information and consultation process.

The project had a key role for defining of the existing problems accompanying the enforcement of Directive 14/2002/EC and for provoking of the active participation of the management and workers in the process.

The project concerned the concrete enforcement of Directive 14/2002/EC and mechanisms for effective influence of the recommendations for adoption and sanction of the information and consultation process in undertakings regulated by it.

The sequence for implementation of the project activities given was conformed to the necessity of profound research of the points of view of all main participants in the information and consultation process; presentation of the needs and necessities of all parties-management-employees; defining of the function of the trade unions in this process; recommendations, anticipated commitments and decisions which will lead to real using of the process, not only to fictitious establishment of channels for inside firm relations.

### **Project structure:**

- **4 Workshops**
- **Survey**
- **Conference**
- **Trainings in 6 metallurgical plants in Bulgaria**
- **Following actions**

**The partners** who was involved in the implementation of the project activities-Bulgarian association of metal industry BAMI-Bulgaria, Federation of Portuguese trade unions SIMA-Portugal, German trade unions IG METALL –Germany, Trade union of workers in Industry, Energetic and mines SIER-Macedonia, contributed to the successful realization of the separate stages of the project.

### ***Field of joint actions and management of the project***

#### **Activity 1 - Research – Working out and dissemination of a questionnaire –Summary of the results – Publication of the results.**

As logic continuation of the established long-term relations of trade union partnership and exchange of good practices, our project partners participated in the working out and selection of questions which were involved in the project questionnaire.

Questionnaire aims:

- Gathering of information for the project aims on legal regulation of the employees' right to information and consultation in the national legislation of Bulgaria, Germany, Portugal and Macedonia/ transposition of Directive 14/2002/EC.
- Gathering of information about good practices connected with the information and consultation procedures in the Metallurgy of the countries, subject of project research.

Each of the partner- organizations proposed 20 questions to be involved in the project questionnaire; the team summarized and divided the questions into two sections. The final version of the questionnaire was disseminated among a target group of 340 people /employees/attendants, employers, trade unionists/-150 people from Bulgaria, 80-Portugal, 80-Germany, and 30-Macedonia. All partners summarized the answers received and presented the situation in a summarized version for their country.

**Activity 2 – Workshops – presentation in particular of the information and consultation process in each country involved in the project-transposition of Directive 14/2002/EC-stressing on the Metal sector and connected with it sectors.**

The workshops had work-orientated character and were held in each of the countries involved in the project as they were organized and managed by each of the host organizations- TU "Metalicy" and BAMI-Bulgaria- 28/01/2008; SIMA-Portugal-03/04/2008; IG METALL-Germany-23/06/2008; SIER-Macedonia-12/08/2008.

The work groups were composed of 7-10 people-representatives of trade unions, employers, management, employees' representatives-work councils and agents, government experts.

The work groups composed presented enough information which was synthesized by the project team and was presented subsequently in presentation, training and information materials used in next project activities.

The host organizations succeeded to involve representatives of the management in active discussion on problems regarding the information and consultation process at plant level and at sector level.

Visits on spot in firms which have established and working mechanisms in the inside-firm relations and disseminated good practices in the information and consultation process were organized.

During the workshops in the project activity were involved employers from Portugal- **BARLOWORLD SET; Centre for Marine Technology and Engineering; Associação das Indústrias Marítimas AIM**; Germany- **“ECO Steel - Arcelor Mittal”**; Macedonia- **“Скопска Железарна”**.

**Activity 3** - closing conference –summaries, *experience sharing, good practices presentation- foreign experience*

The conference was organized and held in Bulgaria- Primorsko town, on 29-31/05/2008

The participants were 70, trade unionists, information and consultation representatives, managers from Bulgaria, Portugal, Germany and Macedonia.

The activity was publicized in national trade union printed and electronic publications.

The Conference was a key moment in the work of the partner organizations involved in the project.

The Conference had determining importance mainly in several directions:

- Presentation of detailed information about the development of social dialogue in the partner countries.
- Presentation of good practices in Metallurgy branch in the partner countries for:
  - Exchange of information among social partners aimed at reaching oneness, motivation and responsibility towards common problems.
  - Consultation-it gives opportunity for the participants in social dialogue to express their opinions.

In the whole conception of the project this huge undertaking preceded trainings and profound work with the information and consultation groups on spots in six Bulgarian metallurgical plants.

The information received and practices shared which had been presented in discussions and presentations during the Conference, were presented subsequently in the project activity regarding “Information and Publicity”. The foreign experience and information shared about the enforcement of Directive 14/2002/EC were used in the structuring and holding of the trainings.

In other words the Conference played its role to prepare and create favourable conditions- “bridges” for future joint work of the management and information and consultation groups.

It was also a forum where on one and the same table sat down managers and employees/attendants and trade unions and discussed the perspectives and parameters of the information and consultation process in undertakings.

**Activity 4** - *Training of the information and consultation groups in six Bulgarian metallurgic undertakings-strengthening of social dialogue- supporting the enforcement of Directive 14/2002/EC at plant level.*

In the framework of the project were planned, organized and held six trainings in the accepted as “target group” undertakings.

**Cumerio med AD**- Pirdop town- 23/02/2008; **Energia AD**- Targovishte town- 27/03/2008; **Alkomet AD**- Shumen town- 29/04/2008; **Stomana Industry AD**- Pernik town- 25/07/2008; **KCM AD**- Plovdiv - 26/08/2008; **Kremikovtzi AD**- Sofia- 29/08/2008.

This activity was held under the management of the project team and with the active participation of social partners in the sector in Bulgaria.

The trainings had practical character and were aimed at presenting real cases in which it is required the adequate participation of the information and consultation representatives.

In all undertakings from the target group before the start of the project had already been made the first step in this process and were elected on a General assembly information and consultation representatives.

- **Kremikovtzi AD**- 9 representatives elected on 06.04.2007
- **Kumerio med AD**- 9 representatives elected on 26.10.2006
- **KCM AD**- 9 representatives elected on 08.11.2006
- **Stomana industry AD**- 9 representatives elected on 14.09.2006
- **Alkomet AD**- 7 representatives elected on 30.03.2007
- **Energia AD**- 9 representatives elected on 14.06.2007

In some of the undertakings there was a signed agreement between the employer and information and consultation groups in the relevant undertaking. Examples: Cumerio med AD- Pirdop, KCM AD- Plovdiv, Energia AD-Targovishte.

In the other undertakings this agreement was in a work version and in the course of the project the project team supported through consultations the final signing of the agreement. Examples: Kremikovtzi AD- Sofia, Alkomet AD- Shumen, Stomana Industry AD- Pernik.

During the trainings were discussed the existing problems regarding the realization of the process, were emphasized the main responsibilities of each party in the process-management-employees, was determined clearly the role of the trade union in this process.

In the trainings held took part generally 120 people.

#### **Activity 5- Information and Publicity**

In the framework of this activity was prepared, printed and disseminated a news bulletin where are presented the project aims, the project structure, information about the

partner organizations and team responsible for the management and implementation of the foreseen project activities.

In the bulletin after a proposal of all partners was put detailed preliminary information about the situation in Bulgaria in the course of transposition and enforcement of Directive 14/2002/EC.

The news bulletin was disseminated among all project partners.

The information bulletin was issued in 3000 copies as thus it was responded to the proposal of all partners about wide dissemination of information regarding the project and project aims among great number of people as thus it will be created an opportunity of disseminating in future the project results in other sectors.

In the framework of this activity was prepared, printed and disseminated "Book about information and consultation".

In thus structured activity-**information and publicity**-these two printed materials had the task to announce the project /news bulletin/ and to give final and detailed information and to be a reference book about the enforcement of the information and consultation process in the undertakings /Book/.

## Project Results

The project team and all partners reported that the project was implemented responsibly and in the framework of the determined period.

The project strengthened the knowledge and capacity of the management, information and consultation representatives in the undertakings and trade unions regarding the enforcement of Directive 14/2002/EC.

The project supported the process of establishment of operating information and consultation systems in concrete undertakings in Bulgaria as thus supported the national framework of information and consultation and contributed to the strengthening of this process in sector Metallurgy.

The project results reached to all foreseen direct and indirect project beneficiaries.

The workshops held involved generally 48 participants from the four countries participating in the project activities.

The Conference held involved 70 participants from the four countries participating in the project activities.

The Research held through worked out questionnaire involved generally 340 participants from the four countries participating in the project activities.

As a printed product of the project was worked out, printed and disseminated "Book about information and consultation" which presents information gathered about the information and consultation process in Bulgaria, Portugal, Germany and Macedonia, as well as a set of models and enclosed materials which are useful for the established information and consultation groups in the undertakings and also for the groups who will be established in future.

This printed material was worked out in order to serve as a constant reference book for the direct participants in the information and consultation process in sector Metallurgy and also in other connected with it sectors.

The information campaign for popularizing the aims, tasks and results of the project reached to 3000 people who have direct benefit from strengthening of their knowledge about the enforcement of Directive 14/2002/EC.

As a result of the achieved, the project partners strengthened their capacity in the field of trade union cooperation and strengthening of the social dialogue role in sector Metallurgy.

**How has the operation met the objectives of the budget heading?**

The project achieved all its objectives. Information, knowledge and practices were exchanged among the people involved actively in the information and consultation process.

The project implementation responded to the foreseen in the programme aims which were achieved through:

- stimulating the creation of favourable conditions and mechanisms for keying up employees` and employers` knowledge in Metallurgy Branch.
  
- creation of conditions for realization of the employees` right to information through enforcement of Directive 14/2002/EC.
  
- confirmation of mechanisms within the inside company relations aimed at informing employers about the employees` goals, desires and intentions.
  
- creation of better work atmosphere in the undertakings in the branch and supporting that company policy which ensures stability, loyalty, knowledge and partnership among social partners in the undertakings.
  
- exchange of information and good practices among social partners in Europe and optimizing of the relationships between labour and capital.

### **Transnational dimension of the operation**

Through this project TU “Metalicy” had the chance to participate together with trade unions from Portugal /SIMA/, Germany /IG Metal/ and Macedonia /SIER/ in activities which stimulated transnational exchange of information, common exploring of the effect and the enforcement of Directive 14/2002/EC, holding trainings aimed at heightening the employees` capacity in the metallurgic undertakings.

In the project it was also involved a trade union from Macedonia, which applies for a membership in the European Union, because Bulgarian metal-workers face the same problems as Macedonian metal-workers.

The project stimulated lasting transnational and trade union cooperation in trainings for popularizing good practices, sharing of information, creation of favourable conditions in the undertakings in the branch for enforcement of Directive 14/2002/EC.

The active participation in the process and strengthening the relations among the trade unions in Europe contributed to presentation of common /joint/ policy and strategy aimed at defencing the interests and rights of the representatives of wage labour.

## **What contribution was made by the partners?**

All project partners participated actively in the implementation of the project aims and tasks.

The project team presented periodical information to all project partners about each stage of project implementation.

All partner organizations had a determined collaborator who was the contact person in the process of holding of correspondence and transfer of information from or to the partners.

In the framework of the project the partner organizations participated with providing of hall, equipment and interpreter during the workshops.

The participation of the project partners is not in cash because of the use of the structures which the partners have on voluntary base.

The project was implemented with the cooperation of the social partners from Bulgaria, Portugal, Germany and Macedonia, as the information and consultation process in the undertakings in Metallurgy branch requires responsible and equal participation of the employees and of the employers, too.

All 32 trade unions, which belong to the system of TU "Metalicy" and participate actively in social dialogue in the undertakings, took part in the process of project implementation.

### ***Team responsible for the project implementation:***

#### ***1. Leader***

***2. Coordinator 1-responsible for organizing of trainings in undertakings in Metallurgy branch, organizing and holding of workshops and Conference in the context of the project.***

***3. Coordinator 2-participated in the preparation of the subject part of the trainings, questionnaire and themes involved in the Conference.***

#### ***4. Technical assistant 1***

#### ***5. Accountant 1***

***6. Partner experts 6- from every partner organization-2 representatives /it was recommended to be lawyers /attorneys/ and/or training experts/.***

Bulgarian Association of Metal Industry /BAMI/ is the employers' representative in the branch and is a long social partner of TU "Metalicy" in labour and insurance relations among the hired workers and employers in the branch.

The participation of BAMI as a project partner was an opportunity for actual results in the process of informing and consulting employees and attendants, trainings connected with the enforcement of Directive 14/2002/EC in the undertakings in the branch and exercising of good European practices aimed at optimizing company relations and thus this process to be favourable for the employees and attendants, as well as for the employers.

Trade unions from Portugal, Germany and Macedonia participated in the project as our partners, with which we have built conventional relations of reciprocal cooperation and

exchange.

Employers` and government representatives from those countries were involved in the project,too.

**What added value has the project contributed?**

The project was the first one which was aimed at stimulating the exchange of information and good European practices, connected with the enforcement and effect of Directive 14/2002/EC in all undertakings in the branch.

Involving in this process all employers in the branch, this project was the first one which was aimed at holding trainings of large dimensions, connected with supporting the activity of the information and consultation groups in the undertakings in the branch. The employers' participation in the process of project implementation and of concomitant and following the project activities, consolidated their responsibility for common participation with the employees' representatives in stimulating social dialogue in the undertakings.

The project stimulated functioning of a model of social dialogue, where inside business relations and problems, concerning work atmosphere and attention of all participants in labour process are discussed or negotiated. As a result this stimulates motivation, company affiliation and culture of all participants in the process.

### How was the operation publicised and how have the results been disseminated?

The information campaign held in the framework of the project for popularizing the tasks, aims and strategy of the project reached to **over 3000 people** through the information disseminated through:

- **News bulletin** /It was stricken off in **3000** –copies /12 pages //. It informs about the project aims and tasks, the dimension of the project activities, the people responsible for the fulfillment of the project, the contact details, including the coordinators` addresses and telephones.

The news bulletin was printed in Bulgarian and in English.

- **On-line publications and information.**Periodically it was given information about the course of the project, the enforcement of Directive 14/2002 and its effect, the project team and partners, the supporting organizations and lecturers. In other words-about every stage of the project activities.

- **Main activities:**

- workshops
- questionnaire
- conference
- trainings

- **“Book about information and consultation”**- It presents detailed information about the enforcement and effect of the Directive in Member states and about the provocations to the newly approved-Bulgaria, and the potential candidates-Macedonia.

It includes comparative tables, examples for good practices, expert prognoses.

The material was printed in Bulgarian and in English-**2000** copies.

- **Presentation materials** about the held trainings in the undertakings in the branch.-**120** copies /10 pages/.

In the framework of the information campaign were included announcements which presented the work of the European Commission regarding the Directives concerning the information, consultation and participation of employees./ **Directive 2001/23/EC, Directive 98/59/EC, Directive 94/45/EC and Directive 97/74/EC.**/

In the course of the project activities implementation were presented materials which informed about the work of GD “Employment, Social affairs and Equal opportunities”, the aims and tasks which are foreseen in the programmes for financial support when such projects are being implemented.

All information materials on their front page have the logo of the European Union and information about the financial support of the European commission given for the implementation of the project.

In the framework of the project was worked out an independent section in the official website of the leading organization where was being done a constant announcement of the project.

## What lessons have been learnt from this experience?

### ***Realized necessity of information and consultation.***

Directive 14/2002/EC is transported in the Bulgarian legislation through amendments and additions in the Labour code which is put into action on 1<sup>st</sup> July 2006.

For the successful functioning of this legislation were and are still necessary actions for holding of information campaign of large dimensions.

All project partners reported that for the regular and successful functioning of this process /in the different countries it is in a different stage of implementation/ is necessary first to be determined the state of enforcement of the legislation regarding the information and consultation systems in the Bulgarian undertakings, secondly- the problems regarding their establishment and functioning to be specified and on this base possible decisions for their overcoming to be proposed.

In order the negative reactions towards the process to be overcome it is necessary to be understood properly the essence and spirit of the Directive-***the right to information and consultation is a right of all employees and attendants.***

Many other measures which present the whole vision of the possibilities which gives the enforcement of the information and consultation systems are necessary-possibilities for extension of the social dialogue with the employer in one more channel, for receiving of more detailed information which will serve for collective bargaining, for influence over the decisions of the employer on issues, subject of consultation, foreseen in the legislation regarding the enforcement of Directive 14/2002/EC.

**Are there any plans to follow up this project and if so, how?**

In the context of the project was made a strategy aimed at continuing and stimulating the cooperation among the trade union organizations-project partners and at spreading out the gained knowledge in order to promote the enforcement of Directive 14/2002 in other transnational companies in the field of Metallurgy, as well as in other branches.

It was consolidated the cooperation with employer's organizations. Favorable conditions for stimulating social dialogue in the undertakings, when joint labour contracts and other inside business agreements are signed, were created.