DIRECT WORKER PARTICIPATION AND INDUSTRIAL RELATIONS IN WORKPLACE INNOVATION: COMPARATIVE PERSPECTIVES ACROSS EU COUNTRIES

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Introduction and Methodology

by Vassil Kirov

In the context of a growing emphasis on direct employee voice in workplace innovation, the traditional role of trade unionists and worker representatives, as well as tools such as collective bargaining and consultation, is being questioned. This is because they now compete with employer-led participation channels. However, these views often oversimplify the diverse strategies worker representatives may adopt, which are influenced by institutional and power dynamics, and overlook their potential role in expanding workplace democracy and evolving industrial relations.

BroadVoice (Broadening the Spectrum of Employee Voice in Workplace Innovation) aims to address this gap by exploring how worker representatives and industrial relations mechanisms can actively promote and regulate workplace innovation through direct employee voice. The project brings together research institutes from six EU countries[1] and involves 14 national and EU-level social partners. It combines qualitative research with stakeholder engagement and the development of practical tools. The project also aligns with key EU priorities, including the Green Deal, digital transformation, Industry 5.0, and a people-centred economy.

[1] The BroadVoice international consortium comprises the Italian trade union Cisl and its affiliated entity Fondazione Tarantelli, the Institute of Philosophy and Sociology of the Bulgarian Academy of Sciences (IPS-BAS), the Luleå University of Technology (LTU), the University of Amsterdam (UvA), the University of Ljubljana (UL), and the Irish institute Workplace Innovation Europe (WIE). The consortium is coordinated by the Italian research centre, ADAPT, and its affiliated entity, Fondazione ADAPT.

This report has been edited by ADAPT and the Institute of Philosophy and Sociology of the Bulgarian Academy of Sciences (IPS-BAS), and it was developed in the framework of Work Package No. 3, *Workplace-level experiences in six EU Member States and comparative insights at the EU level*, of the BroadVoice project. Under WP3, six national reports were produced in March 2025, each focusing on one of the participating countries: Bulgaria, Ireland, Italy, the Netherlands, Slovenia, and Sweden. Each report comprises the review of the national literature on the interplay between direct and indirect worker participation, the illustration of the institutional framework and the analysis of 4 company case studies (the total is 24, of which 14 are in the manufacturing sector). All of these case studies are characterised by the concurrent presence of labour representative bodies (either union- or non-union-led) and direct participation practices. The national reports were produced through documentary research and one to seven semi-structured interviews at each company, as well as a national workshop with key company and national stakeholders in each country to validate preliminary findings.

This report builds on the national studies mentioned above, comparing their results and complementing them with the findings from 31 interviews with social partners from 11 other EU Member States (Belgium, Czech Republic, Denmark, Finland, France, Germany, Hungary, Lithuania, Poland, Slovakia and Spain). The objective is to highlight possible similarities and differences (and related determinants) in the attitudes and practices of industrial relations actors with regard to workplace innovation, in different national institutional contexts.

The report includes an introduction, a glossary of essential terms, four chapters and a conclusion. Bibliographical references are at the end of each section.

Chapter 1, *Direct Worker Participation for Workplace Innovation in the Manufacturing Industry Across Different EU Countries*, written by Luciano Pero, Ilaria Carlino and Francesco Lauria on behalf of Cisl, compares the 14 manufacturing company cases studied by the BroadVoice project, as presented in the national reports. Comparison is only carried out for the manufacturing cases, since those from the service sector and public administration present too many significant differences in culture, trade union practices and legislative frameworks, making a meaningful comparison difficult.

The manufacturing cases, on the other hand, share a common characteristic that facilitates comparison: workplace innovation, from technological and organisational perspectives, is an objective of direct participation in all cases. Furthermore, focusing on manufacturing companies allows for a clearer insight into the relationship between technological innovation, new organisational forms, and direct participation in various industrial relations contexts. This relationship is a significant topic for both academic discussion and managerial decision-making.

Chapter 2, *The Trade Unions and Worker Representatives' Approach to Direct Worker Participation Across Different EU Countries*, written by Jan Johansson and Kenneth Abrahamsson from the Luleå University of Technology, explores the evolving landscape of European industrial relations. In this landscape, trade unions and worker representatives are facing a growing shift towards direct forms of employee participation, which are often initiated by employers and shaped outside the traditional structures of collective representation. The chapter explores how trade unions in six EU countries – Bulgaria, Ireland, Italy, the Netherlands, Slovenia and Sweden – respond to this shift and whether they perceive direct participation as a threat or an opportunity. Drawing on the BroadVoice research, the analysis is based on all 6 national reports as well as 24 case studies.

Chapter 3, *Embedding Direct Participation into Labour Representation: Enabling Conditions Across European Workplaces*, Ilaria Armaroli (ADAPT) and Federica Chirico (Fondazione ADAPT) explore the complex relationship between direct and indirect forms of employee participation. These two forms of worker participation are often viewed as ideologically opposed, partly due to concerns about their potential incompatibility. However, a developing body of literature has investigated the circumstances under which an integration between these two forms of worker participation can take place. Building on this body of work and drawing on the BroadVoice empirical research, the present research aims to investigate the conditions under which direct participation can become integrated, or 'embedded', in the logic and field of action of labour representation and industrial relations in European workplaces, moving beyond managerial initiative. The chapter is integrated with 2 appendixes summarising the findings of the 24 company case studies in the 6 BroadVoice project countries and the

interviews with national social partners in the remaining 11 EU Member States, respectively.

Chapter 4, *Direct Worker Participation and Industrial Relations in Eastern European Countries*, written by Vassil Kirov, Bagryan Malamin, Dessislava Yaneva and Stefania Gergova (IPS-BAS), focuses on a specific region: Central and Eastern Europe. The chapter aims to investigate developments in direct employee participation in these countries. This region has been neglected in the literature about direct participation, and the findings from the BroadVoice research aim to shed light on the drivers and barriers.

The **Conclusions** summarise the report's main findings and formulate recommendations, targeted at different stakeholders at the European and national levels.

Glossary

by Vassil Kirov

In this report, we define **direct (non-representative) worker/employee participation** as encompassing practices and procedures which enable workers to influence decision-making about work and the conditions under which they work (see, for example, Gallie et al., 2017; Heller et al., 1998), without the mediation of representatives (Della Torre et al., 2021).

In accordance with the EU discourse and policy, **workplace innovation** is defined as "an integral set of participative mechanisms for interventions relating to structural (e.g. organisational design) and cultural aspects (e.g. leadership, coordination and organisational behaviour) of the organisation and its people with the objective to simultaneously improve the conditions for the performance (i.e. productivity, innovation, quality) and quality of working life (i.e. wellbeing at work, competence development, employee engagement)" (Oeij & Dhondt, 2017: 66).

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Della Torre, E., Gritti, A., & Salimi, M. (2021). Direct and indirect employee voice and firm innovation in small and medium firms. *British Journal of Management*, *32*(4), 760-778.

Gallie, D., Zhou, Y., Felstead, A., Green, F., & Henseke, G. (2017). The implications of direct participation for organizational commitment, job satisfaction and affective psychological wellbeing: A longitudinal analysis. *Industrial Relations Journal*, *48*(2), 174-191.

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Chapter 1.

Direct Worker Participation for Workplace Innovation in the Manufacturing Industry Across Different EU Countries

by Luciano Pero, Ilaria Carlino and Francesco Lauria

1. Introduction

The aim of Chapter 1 is to compare the 14 cases of manufacturing companies studied by the BroadVoice project, as presented in the national reports.

This comparison is only carried out for the manufacturing cases, since the cases from the service and public administration sectors present too many significant differences in culture, industrial relations and legislative frameworks to allow for a useful and meaningful comparison. On the other hand, the manufacturing cases share a common characteristic that facilitates comparison: workplace innovation, both from a technological and organisational perspectives, is a direct participation objective in all cases. Furthermore, focusing on manufacturing companies is of great interest for corporate innovation policies. In fact, it allows for better observation in the relationship between technological innovation, new organisational forms and direct participation in different industrial relations contexts. This relationship is a significant topic for both academic discussion and managerial decision-making.

Indeed, when management has to invest in new technologies, it must increasingly decide on the kind of participation and industrial relations on which to rely. Therefore, in this chapter we explore the classic theme of the joint design of technology and organisation, and its implementation

through direct participation – an approach described by the English socio-technical school as "joint and participant design" (Trist et al., 1963). This interpretative hypothesis will be discussed in the conclusions.

2. Comparison methodology

The proposed comparison method considers the three main variables identified by the project to study the manufacturing cases. Specifically, these are: the types and forms of direct participation; the type and level of technological and organisational innovation implemented; and the industrial relations approaches and models generated by the studied change processes over time. In this framework, the main difficulty in making comparisons lies both in the significant variety of regulations and industrial relations in different countries and in the complexity of individual cases. Indeed, the descriptions of each experience are very detailed and are based on the opinions of the interviewees in various roles and functions, both within corporations and unions. Consequently, these opinions often diverge and usually express diverse and divergent points of view. Furthermore, the evaluations provided by the researchers on the various topics tend to be detailed and articulated, making them difficult to reduce to a clear and unified judgment.[1]

The adopted comparison method seeks to represent this complexity using different maps that cross the aforementioned variables. We consider it appropriate to avoid a single ranking of cases, as this would result in excessive simplification. Different maps can better highlight the differences, similarities and specific features of the various countries and companies, providing a reasonable degree of approximation. In this regard, it should be noted that any comparison between such diverse business cases and national contexts inevitably involves some simplifications and approximations. Therefore, to avoid misunderstandings, we have chosen to use very general categories to describe the innovation and participation variables and to include examples of practices taken from the interviews to support

[1] To gain further insight into the interviewees' different opinions, please refer to the national reports, which provide the specific context to make them easier to understand. These are available here: https://workplaceinnovation.eu/broadvoice-publications/.

understanding. Further details can be found in the legends accompanying the maps below.

The following chapter is composed of two sections. The first section (paragraph 3) presents the structural and objective data of the 14 cases, with commentary on Tables 1 and 2. These tables summarise preliminary information on company size, sectors, and levels of unionisation. The second section develops the comparison between cases. First, Figure 1 identifies the objectives that initiated the participation process. Then, Figure 2 summarises the change path in various phases.

Finally, the direct comparison is made through a commentary on the maps shown in Figures 3 and 4. These two-dimensional maps are constructed by crossing the aforementioned variables: direct participation, types of innovation, industrial relations and change. It should be noted that, when constructing the maps, a two-level classification of the three variables was necessary. The first level identifies two general modes in a simplified way (e.g. weak/strong, initial/evolved, radical/incremental). The second level specifies the first one in more detail using the specific forms of technology, innovation, and approaches to industrial relations. These specific forms are derived partly from the narrative of the cases and partly from the project's analytical framework (Armaroli et al., 2024). The two levels are presented in the 'legend' boxes preceding each map.

3. The companies analysed: structural data

Tables 1 and 2 present structural data from a sample of the 14 analysed companies, taken from national reports. In terms of industrial sectors and products, most companies belong to the metallurgical and mechanical sectors (e.g. mining, automotive, machinery and appliances) and to the chemical-pharmaceutical sector (e.g. chemistry, tyres, pharmaceuticals and painting)[2]. No companies were found in the agri-food, fashion, furniture or energy sectors. In terms of company size, large companies (with over

[2] Note that we have included two companies operating in the mining industry, which is usually classified as part of the extractive and non-manufacturing industries sector. However, these two companies also engage in refining and metallurgical processing activities, leading the authors to consider them manufacturing in a broad sense.

500 employees) account for half of the sample. The other half are small and medium-sized companies with up to 500 employees. In summary, large and medium-sized companies are more represented than the European average.

Table 1. Structural data of manufacturing cases

Country		Case	Sector	Employees	% Women	Type of rep.	% Union density
Bulgaria (BG)	1	Copper company	Mining	1004	25%	2	70%
	2	Mechanical engineering	Machines	720	9%	2	-
Ireland (IE)	3	Kirchhoff Automotive	Automotive	42		1	100%
	4	FSW Coatings	Painting	160		1	25
	5	Aughinish Alumina	Metallurgical	475		1	78
	6	Saica Pack	Paper industry	92		1	80
Italy (it)	7	Electrolux	Appliance	600	40%	1	35
	8	Components for household appliances	Appliance	229		1	15
Netherland (NL)	9	Solvay	Chemical	85		2	38
	10	Pharma	Pharmaceutical	1400		2	10
Slovenia (SLO)	11	Tire	Tyres	1800		2	67
	12	Slovenia pharma	Pharmaceutical	3500		2	-!
Sweden (SE)	13	Workshop company	Metallurgical	110		1	60
	14	Mine company	Mining	900		1	90

Type of Representation: 1 Single Channel; 2 Double Channel (Works Council + Union)

With regard to unionisation, the most unionised companies are also predominant. In 6 out of 14 cases, union membership exceeds 50%; in the others, it ranges between 30 and 40%. These figures are higher than the European averages. This is linked to the project's choice to study cases where consolidated industrial relations are more prominent. Another interesting finding is that six companies have a dual channel of representation (works council and union), while eight have only one channel (union), which is sometimes national only, and sometimes both local and national.

Overall, the sample appears to reflect a greater presence of innovation and forms of direct participation in larger companies, and in the mechanical, chemical and pharmaceutical sectors. This finding is consistent with European literature and research (Eurofound & Cedefop, 2020).

Table 2. Characteristics of the 14 manufacturing cases (sectors, number of employees and number of representation channels)

Sectors	N°	%	Employees	N°	%	Type of representation	N.
Mining/metallurgical	4	29	Up to 100	3	21	1 Channel (Union)	8
Car/automotive	2	14	100-500	4	29	2 Channels (Union + Works Council)	6
Appliance	2	14	500-1000	3	21	TOT.	14
Pharmaceutical/ chemistry	3	21	More than 1000	4	29		
Painting	1	7		14	100		
Tyres	1	7					
Packaging	1	7					
	14	100					

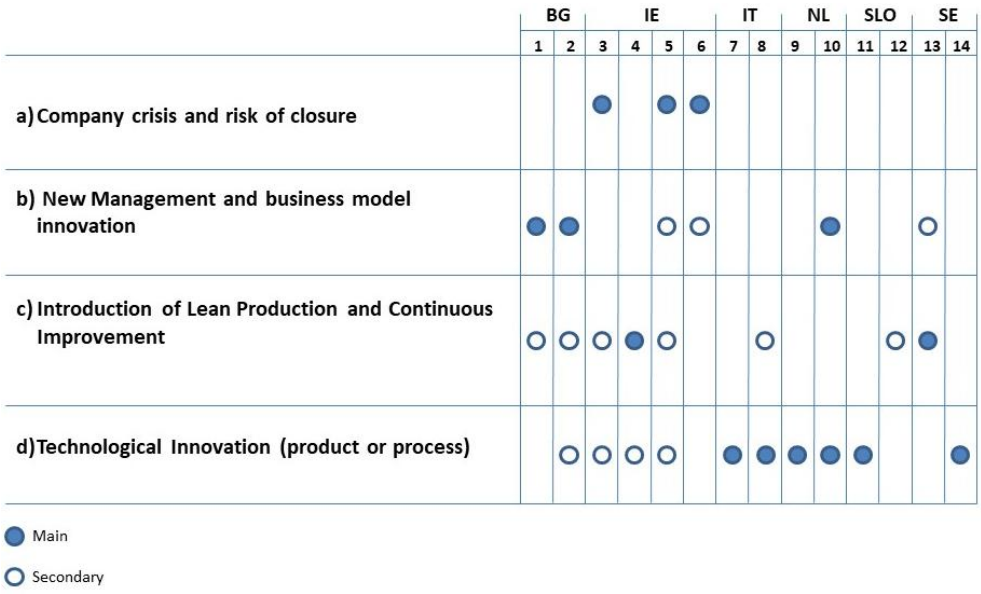
4. Origins of the direct participation process

In all the cases studied, direct participation emerged as part of a change process aimed at improving production performance and technological and organisational innovation. However, the studies reveal many differences in the actors involved, in the phases and activities, the outcomes, and the future prospects. Figure 1 shows the main aims and objectives at

the origin of the change and innovation processes, which can be summarised in four clusters:

- Three cases in which a market crisis was leading to the possible closure of the company. In these situations, ownership decided to attempt a radical change. A turnaround was initiated, starting a process of profound technological and organisational change and, consequently, a change in the business model (Campagna & Pero, 2022).
- Three cases in which a change of ownership brought in new management with challenging objectives and a drive to change corporate culture and business model. This represents a long and complex transformation requiring time and commitment (De Waal, 2012).
- Six cases in which technological innovation – either in product or process – was the main goal to be achieved through direct participation and some form of lean production.
- Two cases in which the choice of innovation favoured an organisational change centred on lean production.

Figure 1. Direct worker participation according to its scope



In summary, Figure 1 shows that, in eight cases, innovation in a broad sense was the primary driver of direct participation. In some cases, technological development was predominant, in others, management pursued a new business model. Lean production played a central role in only one case, although it was often present as a secondary form of organisational support. Ultimately, Figure 1 confirms the project's core hypothesis that the main purpose of introducing direct participation in the manufacturing sector is to foster innovation, consequently enhancing productivity, quality of work and competitiveness. This goal can be pursued by focusing on different, though interconnected, specific objectives. In particular, new technologies, a lean organisation or the business model itself can play pivotal roles (Danford et al., 2008). These findings are also supported by a literature review (Franca et al., 2024)[3] and an analytical framework (Armaroli et al., 2024) [4] developed within the BroadVoice project.

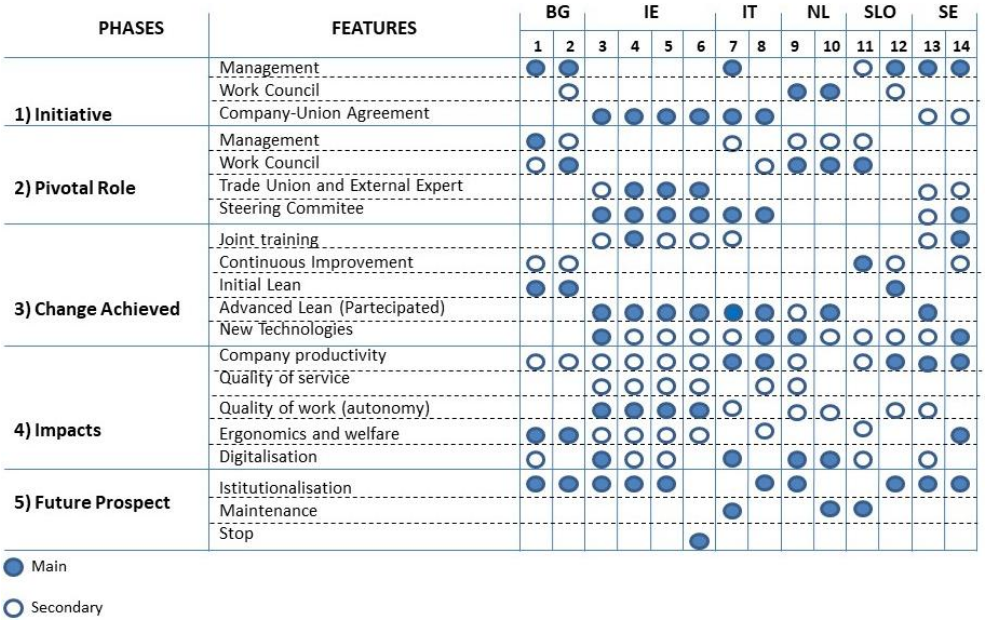
5. The development of the project path

Figure 2 provides a comprehensive yet detailed representation of the diverse paths developed by the 14 companies' projects for direct participation. The different case histories are grouped into six successive phases: from the start-up, to development, to final impact, and to future prospects. As the actual paths were very complex and lengthy, it was necessary to indicate the main aspects as well as the secondary and supporting ones, for each phase or actor (represented in the figure by black and white dots). It should be noted that the studied paths range from a minimum of 3 to 4 years to a maximum of 25 to 30 years. The most important aspects that emerge from Figure 2 are as follows:

[3] https://workplaceinnovation.eu/wp-content/uploads/2024/08/BroadVoice-Literature-review-on-direct-worker-participation.pdf.

[4] https://workplaceinnovation.eu/wp-content/uploads/2024/07/BroadVoice-deliverable-2-2_analytical-framework.pdf.

Figure 2. Development of the direct participation process: Phases, Actors, Impacts, Future Prospect



- The initiative very often began with management, although in two cases it originated with the works council, who were concerned about the effects of new artificial intelligence technologies. However, in eight cases, an agreement with the unions was deemed necessary to initiate the process.
- The driving role was mainly played by management in parallel with the works council. However, in eight cases the steering committees played a notable role, as did external experts close to or indicated by the unions in four cases. This confirms the need for a collective structure to promote the change process in order to be successful.
- This variety of initiatives and pivotal roles also demonstrates the importance of the institutional context of industrial relations in influencing participatory innovation. Where there is a cohesive and determined workplace union representation, the initial agreement to start the process is crucial. Where the union is weaker or fragmented, management's role prevails, even if sometimes supported by the works council.

- The most substantial changes to production systems are the widespread adoption of lean production, although to varying degrees of evolution (initial, weak or advanced). Lean production is always accompanied by new technologies (in 12 cases) and is preceded by targeted training for key actors (in 5 cases).
- The impact on company performance includes an increase in productivity (in 13 cases) and improved service quality (in 6 cases), as well as significant improvements in work quality, in various areas (autonomy, ergonomics, welfare and safety).
- Digitalisation is widespread in all cases, although to varying degrees.
- In the majority of cases, the implemented change is eventually consolidated and institutionalised. In three cases there are still problems with fine-tuning and maintaining the changes. In only one case was there a stop and regression of the change due to the departure of the management that had initiated it. This management was replaced by one opposed to participation.

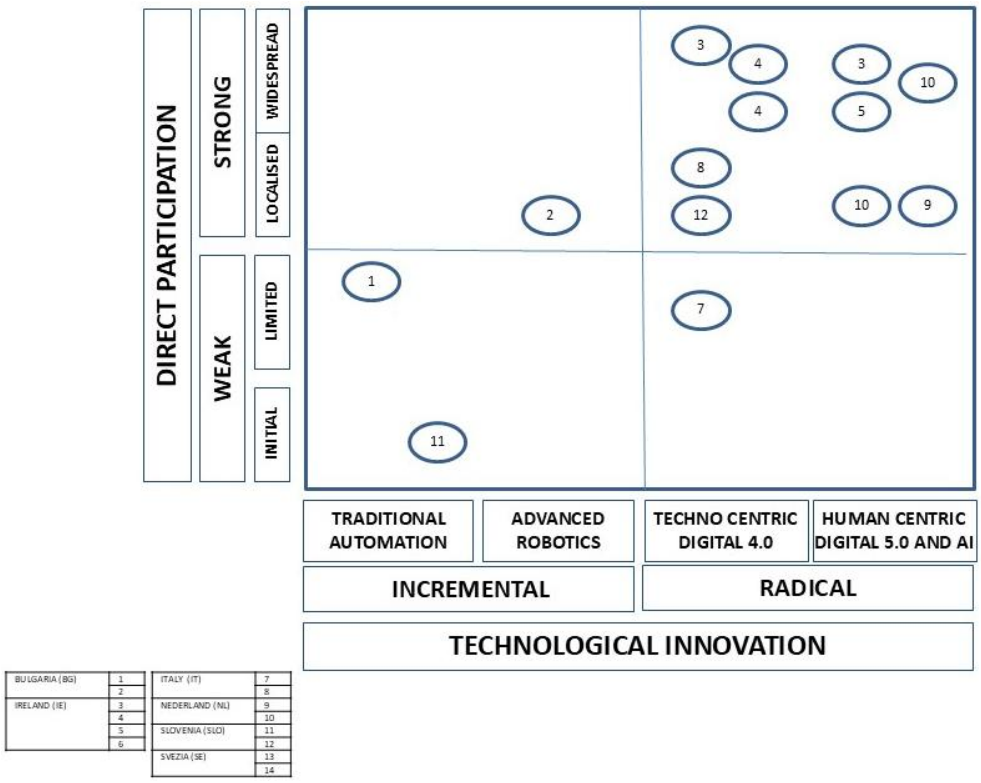
In summary, Figure 2 confirms the central role of management in initiating and implementing change. However, management is almost always supported and influenced by collective agreements, and very often by the active involvement of the works councils. It is important to note that the institutional context and the type of industrial relations strongly influence direct participation and the final results. Technological and organisational innovation – particularly lean innovation – is the main type of change implemented. Company productivity, both in terms of efficiency and effectiveness, as well as quality, is the primary result achieved, along with improvements in the quality of work. The main improvements to work concern safety, autonomy and ergonomics.

All cases tend to stabilise and become permanent. Some cases are still in the consolidation or maintenance phase. Only one case involved the abrupt introduction of a new management team opposed to direct participation, resulting in the project being halted.

6. Direct participation and technological and organisational innovation

The main finding from Figures 1 and 2 is that, broadly speaking, innovation is fundamental to change in manufacturing, which is achieved through the development of direct participation.

Figure 3. Direct participation and type of technological innovation implemented



The map in Figure 3 therefore explores the relationship between technological-organisational innovation and direct participation. Figure 3 is constructed with direct participation on the vertical axis and technological-organisational innovation on the horizontal axis. Initial general categorisation of these variables assumes progression from weak to strong participation and from traditional automation to artificial intelligence applications in technological innovation. These subdivisions are commonly used

in managerial literature and socio-economic studies (Tushman & O'Reilly, 1996). While they are useful for the preliminary positioning of companies, they tend to be too general and imprecise, and are challenging to apply due to the variety of contexts. To enable more accurate placement of the cases on the map, two additional subdivisions were developed for each variable, resulting in four levels along each axis. These were constructed using examples of operational practices drawn from the project's company case studies. These practices are listed in the Legends 1 and 2 below. Notably, to better represent technological-organisational innovation, examples of new technologies and new organisational forms – largely linked to lean practices – have been placed alongside one another within the same gradient. This parallelism is evident not only in the company accounts of the project (see Figures 1 and 2) but is also widely acknowledged in the literature and in empirical research (Wilkinson et al., 2010). Naturally, these legends entail a significant degree of approximation. However, they appear to adequately reflect the experiences described in the project.

Legend 1. Gradation of types of technological and organisational innovation

Incremental Traditional Automation	1	Traditional automation and early-stage digital technologies (2.0 and 3.0). Initial lean as a toolkit (quality, inventory reduction, make to order).
Incremental Advanced Robotics	2	Automation and advanced robotics, recent digital technologies (4.0), initial lean (toolkit) but accompanied by initiatives for direct involvement of workers.
Radical tecno-centric Digital 4.0	3	Digital technologies 4.0 are spreading alongside advanced robotics and evolved lean practices (autonomous teams, structured suggestion systems and total quality).
Radical human-centric Digital 5.0 and artificial intelligence	4	Digital technologies 5.0, with a human-centric approach, application of artificial intelligence, advanced lean practices, encouraging widespread participation.

Legend 2. Degree of direct participation

Weak Initial	1	Very limited breadth and depth. For example, top-down information, surveys, unilateral initiatives and top-down welfare. There is a lack of dialogue between HR and workers.
Weak Limited	2	Limited breadth and depth. For example, occasional and feedback-free reporting, limited job autonomy, infrequent and one-sided meetings between managers and workers and top-down corporate information.
Strong Localised	3	High depth, but limited breadth. For example, cross-functional improvement groups on the topic as well as suggestions with feedback, but with a poorly structured system, many reports on safety and missing, autonomy at work, quality and safety, and occasional co-design.
Strong Widespread	4	High breadth and depth. For example, suggestions for structured and widespread feedback, widespread formal teamwork, high autonomy in the workplace, systematic co-design and a community of practices.

Figure 3 shows the 14 manufacturing cases positioned on a two-dimensional map, based on the data from the business cases. The result is particularly interesting, as it enables the observation of a general correlation between the intensity of participation and the degree of technological and organisational innovation. Notably, the concentration of cases in the top right quadrant, featuring advanced technologies and strong participation, indicates a general synergy between the two phenomena. However, variations and specific solutions also emerge, which can be interpreted as follows:

- In most cases (10), radical innovation is accompanied by forms of strong participation. However, within this group, there are significant differences.
- The five most advanced cases (the first column on the right) manage to combine Digital 5.0 and artificial intelligence with the strongest and most widespread forms of direct participation.
- Instead, the five cases involving technological innovations more typical of Digital 4.0 type (the second column from the left), display both widespread direct participation and more localised participation in specific areas or departments. This suggests that different paths and combinations of innovation and participation are possible.

- In the remaining three cases (upper-left quadrant), radical technology does not appear to be a prerequisite for to strong direct participation. Participation can also develop along independent and separate lines.
- Finally, there is just one case in which the process has remained at an initial stage.

In summary, it can be concluded that, in most cases, there is a close relationship between innovation-driven change and widespread, robust forms of direct participation. This relationship confirms a strong synergy in the change processes between the introduction of new technologies and organisational forms and the activation of robust direct participation models. However, widespread and strong forms of direct participation can also be developed without the introduction of advanced technologies or substantial investments. Conversely, the cases suggest that weak forms of direct participation rarely support the implementation of contemporary technological innovations.

7. The relationship between industrial relations and direct participation

The BroadVoice project primarily focused on examining the relationship between industrial relations and direct participation, and the approach to both. This theme is explored in depth across all cases in Chapter 2. In this chapter, however, we analyse the relationship developed throughout the project based on the degree of integration and connection (embeddedness) between participation and industrial relations – ranging from co-existence without interaction to limited, medium or strong integration. By contrast, this chapter aims to examine where each case began and where it ultimately ended up on its journey. This choice reflects the fact that the observed change processes were very lengthy – ranging from 2 to 3 years to as long as 20 to 25 years – and therefore highlighting the 'before' and 'after' is of interest, even though this is not a simple task. Figure 4 uses a matrix structured along the two axes of direct participation (vertical axis) and the characteristics of industrial relations (horizontal axis) to represent the starting and ending points of each case. The latter were identified using the project's analytical framework and integrated with the practices described in the company case studies (Armaroli et al., 2024). To understand

the two axes in Figure 4, refer to Legends 2 and 3. Please note that the starting point is marked with a white dot and the ending point with a grey dot.

Legend 3. Approaches to Representation and Industrial Relations

Bipartite (Adversarial)	1	Weak role of representation. Information and defensive agreements prevail in times of crisis. Weak union initiative in contexts of opposition.
HRM (promoted and shaped by management)	2	Innovative personnel policies focused on worker involvement, even outside of the union. Agreements made on wages, hours and welfare. Representation is not directly involved in direct participation, the two lines are separate.
Hybrid (cooperative)	3	Favourable personnel policies encourage the involvement of the labour representation in direct participation. The agreements provide for joint commissions and other forms to share participation practices. Traditional agreements are enriched by the theme of participation.
Democratic (participatory)	4	Agreements provide for the systematic participation of the representation in the management and direct participation practices. In some cases, this also applies to strategic company choices.

The change processes in Figure 4 appear quite different but are also particularly interesting and worthy of further investigation. Generally speaking, there appears to be a close connection between the growth of direct participation in the strong phase and the evolution of industrial relations towards more participatory or cooperative approaches. In other words, it seems that, in the long term, direct participation has had a positive influence on the development of industrial relations towards a problem-solving and contractual participation culture. This connection is also apparent in some research and literature, but it is sometimes questioned by many authors and seems to contradict certain experiences. Nevertheless, alternative paths exist. In particular, three different groups can be observed, which differ in the following aspects:

- A first group (the 'radical leap' cluster), consisting of cases 3, 4, 5, 6, 8 and 13 started from the lowest left quadrant but then reached the top right quadrant. This is the group where the investment was strongest, and the change was the most radical. Interestingly, the radical leap

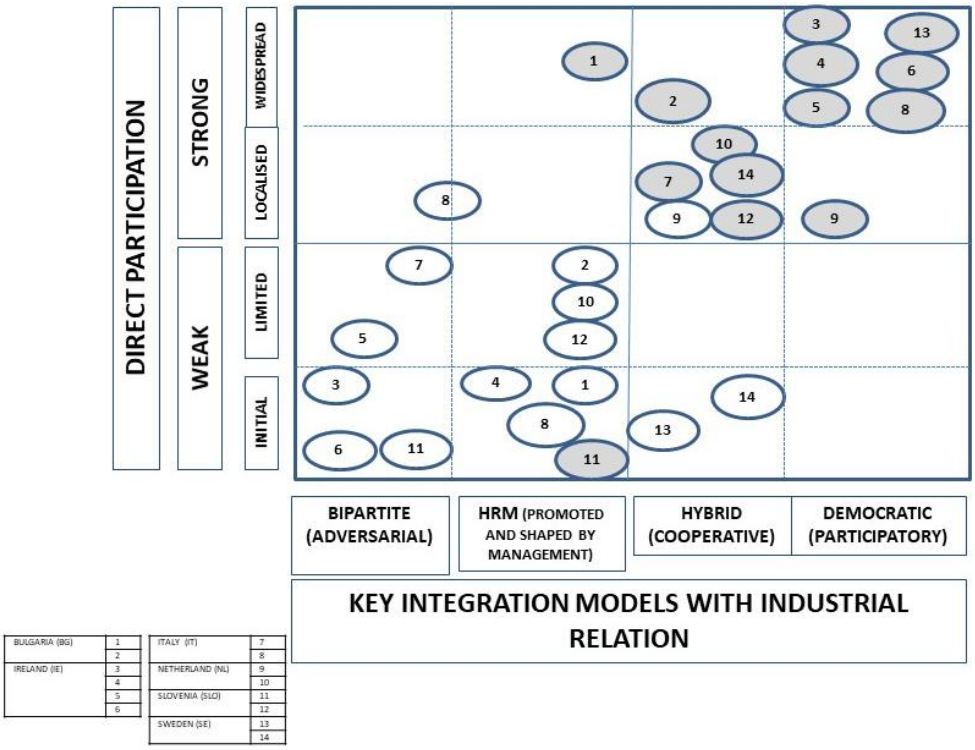
was favoured in cases with strong participatory commitment from the company union (e.g. cases 3, 4, 5 and 6) and in cases with strong convergence on innovation from management and the union (e.g. cases 8 and 13).

- A second group (incremental leap cluster) consists of cases 7, 10, 12 and 14. This group started from intermediate quadrants and reached higher, yet still intermediate, quadrants. This group had good investment, but the objectives and the change were closer to continuous improvement and innovation managed by the company, with poor integration between the different levers. In some cases, the two paths seem to remain separate. Note that in these cases the commitment of the union (case 7) or of the works council was limited compared to management (cases 12 and 14) or fragmented (case 10).
- There are also two smaller groups (the linear growth cluster) that have grown in only one dimension: case 9 has grown only in the technological dimension and cases 1 and 2 have grown only in the participatory dimension. These demonstrate that change achieves greater results if there is close synergy between technology and organisation. While it is certainly possible to proceed separately, the results in terms of competitiveness and better working conditions are inferior. This fact is also present in Figure 2 and in the national reports. It should be noted that, in these cases, the change limited to single dimensions is partly also attributable to a lack of commitment from the company union or to an unfavourable institutional context of industrial relations.

In summary, Figure 4 seems to confirm the possibility of two different paths. In some cases, the evolution of industrial relations and direct participation can remain separate and unconnected. In these scenarios, management handles direct participation according to its own objectives, while the union representation enacts safeguards as it deems most appropriate. However, the improvement results obtainable by the two actors seem very limited in these cases. In contrast, our research shows that in many cases, the development of participation influences the approaches to industrial relations towards a more participatory and cooperative approach in the long term. In these cases, the synergy between these factors seems to pos-

itively favour the changes that lead to excellent results in terms of productivity and quality. The actors seem to have significant mutual advantages from this synergy.

Figure 4. Direct participation and industrial relations: changes driven by direct participation (beginning to end)



8. Summary

While analytical, this comparison is also quite approximate, due to the great diversity of business contexts. It seems to confirm some hypotheses of the BroadVoice project and other studies. In fact, for the topics being compared, prevailing trends emerge that allow for synergies and good results for both companies and workers. However, different paths are always possible, with variants or alternatives in which the links and synergies between the factors are much more limited or difficult to achieve. In these

cases, the potential improvements are smaller, and the risk of halving success or stopping innovation is always present. In any case, the path to change seems challenging and requires considerable commitment, time and investment.

In particular:

- The relationship between technological innovation and organisational innovation: analyses largely confirm that integrating and connecting management (joint design) of the two processes certainly improves final results and facilitates the success of both investments. In our cases, organisational innovation was predominantly of the lean type. However, the literature also mentions it in relation to other organisational approaches, such as AGILE (Aghina et al., 2015). Instead, the technologies adopted in the cases are different and connected to different production technologies.
- Regarding a parallel growth between technological and organisational innovation and direct participation, the comparison seems to confirm notable positive synergies. Indeed, it appears that if connections between processes are activated and adequate participatory practices are adopted, notable successes can be achieved, both in terms of company productivity and improving working conditions. In our cases, work improves especially in terms of safety, ergonomics, job autonomy and teamwork. While this correlation seems robust, it requires a strong commitment from management and a positive response from workers. The greatest difficulty lies, perhaps, in changing company culture and management.
- The relationship between approaches to industrial relations and technological and organisational innovation, is more complex and difficult to establish. The cases suggest that, in the long term, the success of direct participation may lead to an evolution of industrial relations towards a more cooperative culture, or even one inspired by industrial democracy. However, different and sometimes opposing practices are still very widespread. In these cases, separate paths are followed, and communication is limited. Indeed, setbacks, failures and blocks in social dialogue are always possible. Even a change in management can hinder the evolution and dialogue between HR and representatives

due to cultural reasons or leadership style. Furthermore, new industrial relations do not seem to move towards a unitary imprint aiming at predefined models but rather have a high degree of experimentation.

In conclusion, two types of consideration can be made with respect to the variables identified by the project. Regarding the relationship between direct participation and industrial relations, the cases show that the institutional context and the approach to industrial relations are very important factors. On the one hand, they support the participatory process; on the other, they condition it. In particular, the commitment of company union representatives in seeking an agreement with management for innovation driven by direct participation seems decisive. When local representatives are strongly committed, the cases exhibit considerable success in both situations involving a double channel (works council and union) and those involving a single channel. Where, on the other hand, industrial relations are very fragmented among different actors and there is no strong commitment to participatory innovation, the change is modest, and the innovations are not significant.

With regard to the relationship between innovation and direct participation, the importance of joint and participatory design proposals emerges from the cases. Perhaps it is necessary to review and apply the classic proposals of the English socio-technical school in the current context. These proposals have recently been re-proposed by some researchers (Davis, 2020). These 'joint and participant design' hypotheses (Cherns, 1987) seem to explain the greater success of some corporate change paths as well as the fact that this approach enables important objectives advantageous for all the actors to be reached (Bartezzaghi, 2020). However, these successes are very constrained by a large number of other corporate and contextual factors, including technical, cultural, economic and social factors. These factors are difficult to control and can introduce many risks to the change process. Therefore, the adoption of joint and participatory design models can be considered a recommendation in the management of change, although it does not guarantee the success of innovation.

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Chapter 2.

The Trade Unions and Worker Representatives' Approach to Direct Worker Participation Across Different EU Countries

by Jan Johansson and Kenneth Abrahamsson

1. Introduction

Trade unions and worker representatives are facing a new context of industrial relations, where it is becoming increasingly common for companies to offer more direct forms of participation in the planning and management of their operations and future plans. Previously, employees were represented by unions and their officials. Nowadays, dialogue more often takes place directly with the employer.

In this review, we analyse and discuss how the trade unions and worker representatives respond to this development. What attitudes and strategies do the trade unions and worker representatives have to direct participation? Are there any possible reasons behind the different attitudes and strategies adopted by trade unions and worker representatives in different countries? The European industrial relations map and labour market regimes comprise both major variations and similarities, which are represented in various dimensions from North to South and from East to West. The interface and interaction between the state and the social dialogue exhibit various patterns, e.g. between a strong legislation and a weak social dialogue or vice versa. Furthermore, EU legislation and formal regulations must also be considered in a comparative context.

BroadVoice is an EU collaborative project, where we investigate these issues, highlighting the nuances in the approach of European trade unions

to this development and showing concrete opportunities to develop the role of trade unions in giving voice to the needs and desires of employees.

2. Methodology

This paper is based on six national reports describing the state of the art in Bulgaria, Ireland, Italy, the Netherlands, Slovenia and Sweden. Each report consists of three sections:

- A national literature review on direct worker participation and the role of industrial relations.
- A description of the national institutional framework on direct worker participation and the role of industrial relations.
- Four case studies from each country illustrating the approaches and actions of worker representatives and trade unions placed in their national context.

The six national reports are intended to provide an overview mainly based on previously known facts. The 24 case studies were not selected to constitute a representative sample, but rather to illustrate a reasoning or to highlight interesting development opportunities.

For our analysis, we refer, as a theoretical frame, to two previous reports published within BroadVoice: a literature review (Franca et al., 2024) and an analytical framework (Armaroli et al., 2024).

Building on this extensive material, a research group from Sweden has analysed and discussed how trade unions and worker representatives are addressing this new context.

3. Attitudes of unions towards direct participation in six European countries

Below we will briefly present the national experiences of the six countries we studied.

Bulgaria

Trade union attitudes towards direct participation are generally positive in Bulgaria, where direct and indirect participation can complement each other. Some trade union voices highlight that direct and indirect participation can work together, particularly with regard to issues such as innovation and working environment. However, a structure is required to formalise, follow up on and integrate direct participation with the work of the unions, which is often lacking today. One of the case studies reveals a pronounced desire to work in 'symbiosis' between union representatives and direct employee influence. Conversely, there are also examples of a lack of trust or government structures preventing individual initiative. There are few legal or collective agreements in Bulgaria that support direct participation. The only formally recognised structure is the General Assembly, which is a remnant of the communist era and is hardly used today.

The level of involvement varies depending on the type of company. In multinational companies, direct participation is often linked to internal improvement programmes and quality development. Unions are often less active, and direct participation takes place through internal representatives or work environment committees. In the public sector, on the other hand, the unions are more involved in shaping working conditions and have a clearer role in enabling direct participation.

Usually, union representatives convey suggestions from employees regarding improvements in daily work, sometimes successfully, but they are often hindered by a lack of resources. In general, trade unions are characterised by institutional weakness and a lack of resources as well as low legitimacy in certain sectors.

The union membership rate is low and has decreased from 26 per cent in 2002 to around 14-15 per cent in 2012. Several union representatives have expressed concern about the low level of awareness, among members, of their rights and opportunities for participation. There is a lack of training in union roles and union work. Many members limit their contribution to paying the membership fee and do not actively participate.

All four Bulgarian case studies show that direct worker involvement exists, but it is usually limited to the work environment, safety and small improvements in production. In three of the cases, the presence of the trade union

is central, while the engineering company, which is part of an international group, shows an alternative system involving elected representatives and a reward system.

Ireland

Historically, trade unions in Ireland have had an ambivalent but pragmatic approach to direct participation, seeing it as a complement to, rather than a substitute for, collective representation and collective bargaining. At the same time, however, they are aware that direct participation can also be used to circumvent trade union representation, particularly in systems without strong legal frameworks.

Following the financial crisis of 2008, much of the institutional support for workplace innovation and social partnership disappeared. Collective agreements in Ireland are not legally binding, enabling employers to withdraw from them, which undermines trust between the parties. Today, the role of trade unions in direct participation depends on individual initiatives rather than national programmes, making development vulnerable. The Irish case studies show that successful direct participation requires a climate of trust among unions, management, and employees.

One interesting initiative was taken by SIPTU, Ireland's largest trade union, when they created the Institute for the Development of Employees Advancement Services (IDEAS) in 2001 to introduce new thinking into the workplace for the mutual benefit of employees and enterprises. IDEAS runs formal training programmes, in which both management and workers learn collaboration models and problem-solving tools, such as 5S, root cause analysis, lean, team leadership. These training programmes provide a common platform and language for change. Trade union representatives are often involved in change projects, from conception to implementation. They act as both elected representatives and as change leaders. Thus, the unions have gained an expert role in workplace innovation, showing a strategic shift from being a reactive to a proactive actor.

In several companies, the unions have initiated joint steering groups comprising unions, management and employees. These groups can work on continuous improvement, work environment, process innovation, or the introduction of new technologies, for example.

The Irish case studies show that unions adopt a non-confrontational approach, with the aim of enhancing the competitiveness of companies, improving the working environment, and empowering workers. Examples from three of the studied companies show that this work has resulted in self-organised teams, flatter hierarchies, higher productivity and increased job safety.

Participation is not limited to the negotiating table; it involves changing how decisions are made in everyday life. Thus, the role of the unions is both structural, through agreements and representation, and cultural, by shaping new work patterns.

Italy

Traditionally, Italian trade unions have focused on representative participation through collective bargaining and agreements. Direct participation has sometimes been seen as a threat because it could undermine union representation. Two specific risks are discussed:

- unions becoming passive observers in a system where direct participation dominates,
- unions forced to become a kind of 'operational tool' for the management's goals, without influencing the overall direction. Nevertheless, studies show that trade unions are increasingly open to direct participation, particularly when it occurs through institutionalised forms, such as in the context of innovation plans, joint committees, or collective agreements.

Empirical examples from Italy show that direct and representative participation can interact positively. This is particularly evident in projects concerning working hours and work organisation. Unions can contribute by formulating goals, implementing training initiatives and following up on how direct participation affects working conditions and workers' influence. While the unions often play an active role in implementing and monitoring changes, their impact on designing forms of collaboration is more limited, partly due to a lack of resources and skills.

A clear weakness in the local union work is the absence of a comprehensive strategy and guidance from the national unions on how direct participation should be handled. There is no uniform approach between or within different levels of trade unions (national, regional and local). There is also a lack of reference frameworks and training models, meaning that efforts are often one-off, dependent on enthusiasts or local conditions. However, some trade union actors (e.g. Cisl and Fim-Cisl) are actively working to integrate direct participation into their strategy, often through pilot projects and training initiatives. For instance, Cisl has put forward a bill emphasising organisational participation.

In practice, trade unions carry out their work with direct participation through a combination of formal collective agreements and joint working groups. However, these efforts vary depending on the sector, the size of the company and the local union involvement. One example from our case studies is that at the Electrolux factory in Solaro, where worker representatives participated in a steering group overseeing an innovation project. They also contributed to the collection and implementation of workers' suggestions for improvement. The unions also support training efforts for technicians, managers, and workers, often collaborating with company management and external consultants. The purpose is:

- to create a common culture of participation,
- to increase understanding of organisational change,
- to prepare workers for new roles in self-managing teams.

In some cases, trade unions have negotiated collective agreements that include innovation plans, in which direct participation is a key component. Such agreements:

- stipulate the ability of workers to make suggestions for improvement,
- regulate participation in improvement groups, rotation schedules and workshops,
- often link direct participation to performance-based bonuses.

In the company Case 2M, for example, the Fim-Cisl trade union participated in a three-year innovation plan, creating five working groups to discuss quality, safety, the work environment, efficiency and other issues.

The Netherlands

Trade unions in the Netherlands, particularly the FNV, the country's largest central organisation, generally show positive but pragmatic support for direct worker participation, especially in the context of technological and organisational change. While they value dialogue, they acknowledge that direct influence can be challenging to manage and monitor. However, when it comes to collective bargaining, the unions' priorities are often based on traditional issues such as wages, working hours and pensions. Issues of direct participation and social innovation are rarely raised as central areas of negotiation.

While the unions admit that direct participation can contribute to an improved work environment and productivity, they question whether the right voices are heard and whether workers' views are truly considered. Therefore, the unions promote local communication through their workplace representatives in an attempt to bridge the gap between central union policy and workplace reality. In practice, however, the influence of trade unions on matters of direct participation is often limited. They are usually reactive rather than proactive, often only becoming involved in the final stages of change processes.

Cooperation with works councils varies. In some cases, such as in the case of Pharma 1, there is close cooperation between unions and works councils, creating good conditions for both representative and direct participation. However, in general, cooperation between unions and works councils has decreased over time.

Trade unions are sometimes involved in the development of social plans in the event of restructuring. In such cases, it is often a matter of financial compensation and support in the event of redundancies rather than early involvement in change processes. For example, it has been noted that unions are often informed late in the process and thus unable to influence its direction in time.

There are also initiatives in which trade unions collaborate with employers' organisations to promote innovation in work organisation, particularly with regard to sustainable working life. The union organises meetings with members to discuss technological change, e.g. artificial intelligence and

workload. Rather than fearing job losses, a common theme in these conversations is concerns about higher workloads, short cycle tasks and reduced autonomy.

Finally, the need to strengthen the unions' competence in issues of technology and digitalisation, including artificial intelligence, is emphasised in order to contribute more meaningfully to dialogues about workplace innovations and the future of work. The FNV has been a driving force in some successful cases and has drawn up agreements on digitalisation and the impact of technology on the work environment and job quality.

Slovenia

The Slovenian industrial relations system is characterized, to a large extent, by indirect participation through trade unions and workers' councils. While these structures are often well established in private companies, they are rarely in public institutions. Therefore, the focus has been on collective bargaining and representation rather than on direct employee involvement. While the attitude of trade unions in Slovenia towards direct participation is not hostile, they have not actively worked on or encouraged it, and the topic has been absent from both trade union practice and academic debate.

There are some concerns that direct participation could be used to circumvent unions and weaken their role. This is especially the case when management conducts dialogue directly with employees without involving work councils or union representatives. There are also concerns that direct participation will only be symbolic, having no real impact.

Some trade union voices in the report highlight that direct and indirect participation can work together, particularly with regard to issues such as innovation, the work environment and production development. However, a structure is required to formalize, follow up on and integrate direct participation with the work of the unions – something that is often lacking today. In the pharmaceutical company, works council and unions have collaborated with the employer on innovation and improvement initiatives. There, workers have been encouraged to suggest improvements; these ideas have then been reviewed by a technical team, and workers are rewarded if their ideas are implemented.

The union's role is to provide support and monitor safety as well as building trust. However, the union's hardly ever leads the innovation projects itself. In the example of elderly care, the union representative is involved in conversations, adapts to staff views and acts as a channel to management. However, direct participatory culture is based more on openness and good relationships than on formal processes, and the efforts of unions often depend on the commitment of individuals rather than on systematic models.

In the public sector, works councils are virtually non-existent (with few exceptions). Thus, the unions' participation in direct workplace influence is limited to union discussions, informal meetings and union representation in councils or committees. Often, there is a lack of a legal framework for direct participation in these activities.

Sweden

In Sweden, direct participation is not perceived as a threat to the role of trade unions, but rather as a natural complement to the established system of indirect participation through collective agreements and union representation – the so-called Nordic model. Sweden is distinguished by the fact that employers have a statutory obligation to inform and negotiate with trade unions prior to major technical and organisational changes under the so-called Co-Determination Act and the Work Environment Act, which cover occupational safety and health issues. Trade unions generally have a positive attitude towards direct participation, as long as it takes place within the current rules and agreements framework.

There is a strong tradition of collaboration between employers and trade unions, creating trust that direct participation does not undermine the voice of the trade unions. Several case studies in the national literature review show how direct participation can lead to an improved work environment, increased commitment, and greater efficiency, with the trade unions often being involved in these projects, either directly or through established structures such as safety representatives and collaboration groups. At the same time, the role of unions varies in different sectors. In industry the unions are often involved in change processes, often about

lean projects. In the public sector, the initiative usually lies with the employer, when there is a problem to solve.

Trade unions in Sweden work with participation on several functional levels, often integrated into the Swedish model, in which union representation is a natural part of workplace decision-making structures. The practical work takes place through both formal and informal channels, and direct participation is often encouraged, provided it is collaborative. Unions play a central role in collaboration groups, work environment committees, co-determination negotiations and other consultation forums. They deal with issues relating to changes in organisation, technology, the work environment and staffing.

Several programmes exist in which unions and employers collaborate to improve the work environment and productivity. One such is Produkionslyftet (The Production Leap), a lean-inspired programme aimed at the industrial sector in which IF Metall is an active party. Another one is Suntarbetsliv (Healthy Working Life), a work environment programme adapted for the public sector, in which the trade unions are co-founders and participate in governance and method development.

Union representatives in the workplace (e.g. club presidents and safety representatives) participate in change projects and work environment management. They act as a link between the members and the employer. In our case studies, safety representatives play a key role in raising work environment issues in technology transitions or new ways of working.

The trade unions are pushing for skills development as a prerequisite for participation. The right to leave for studies is set out in the Study Leave Act and the Shop Stewards Act. The content and scope are regulated by collective agreements, giving employees the opportunity to participate in training and competence development in the event of internal restructuring and redundancy. In technology-driven projects, such as the mining project and the automated warehouse, the unions proactively work to ensure the transition without redundancies and with an optimal working environment. They are involved in risk analyses, skills development and dialogue about new roles.

3.1. Differences and similarities

Below is a summary and comparative analysis of direct participation in Bulgaria, Ireland, Italy, the Netherlands, Slovenia and Sweden. The focus is on the role of trade unions, institutional conditions, and cultural attitudes.

In all countries, direct participation is generally not viewed as a threat, but rather as a complement to trade union representation. Acceptance varies from being fully integrated in Sweden to being cautiously accepted in Bulgaria and Slovenia.

The attitude of the unions is strongly influenced by trust, historical experience, and legislation. Where unions, employers and workers have mutual trust (e.g. in Sweden and Ireland), direct participation works best. Low trust (e.g. Bulgaria and Slovenia) often leads to formal but meaningless processes.

The public sector is generally more regulated but often less flexible. Industry generally has more room for innovation. Multinational companies tend to use their own models, reducing the role of trade unions (e.g. in Bulgaria).

Countries such as Italy, Bulgaria and Slovenia often lack strategies, training models and resources to enable direct participation.

The differences and similarities can be illustrated as follows.

Table 1. Comparison of institutional framework, trade union attitudes, and climate of trust

Country	Institutional framework	Trade union attitude	Climate of trust	Comments
Sweden	Strong	Supportive & proactive	High	Part of the Swedish model, integrated into collective agreements.
Ireland	Weak	Proactive via IDEAS	High	Driven by union initiatives despite weak legal protection.
Italy	Between	Ambivalent	Between	Project-based but lacks a national strategy.
Netherlands	Strong	Supportive but reactive	Between	Unions often reactive, weak influence in the early stages.
Slovenia	Weak	Cautious	Low	Indirect participation predominates, ad hoc direct participation.
Bulgaria	Weak	Cautiously positive	Low	Few structures, weak union influence.

All national reports provide good examples of direct participation. The Swedish report highlights Produktionslyftet and Suntarbetsliv as examples of unions and employers in joint development. The Irish report emphasise the IDEAS Institute, which provides union training and facilitates change work. In Italy, unions are involved in innovation plans through local projects. The Dutch report highlights the largest trade unions (FNV) agreement on artificial intelligence and digitalisation. In Slovenia, collaboration in pharmaceutical companies involves reward systems for ideas. Finally, Bulgaria has limited but growing examples in some sectors, particularly international companies.

4. Major findings – An analysis of underlying causes and hidden patterns

In this section, we will discuss five issues relating to the approach of trade unions and worker representatives towards direct worker participation in our six EU countries. These issues are:

- whether one sees direct participation as a threat or an opportunity;

- the importance of the historical context;
- the importance of the degree of trade union organisation;
- legislation or collective agreements;
- the importance of skills development.

4.1. Attitudes of unions towards direct participation

The first question that trade unions must ask is whether direct participation poses a threat or presents an opportunity. The BroadVoice literature review (Franca et al., 2024) shows both perspectives. On the one hand, direct worker participation has been used as a strategy to avoid union activity, particularly in the United States (Kochan et al., 2019). On the other hand, strong rights for trade union representation can make direct participation unnecessary (Godard, 2004). Relatively extensive empirical research also shows that direct employee participation can also be implemented in workplaces alongside employee representation bodies (Ahlstrand & Gautié, 2023; Armaroli, 2022; Cirillo et al., 2023; Tros, 2022; Wood & Fenton-O'Creevy, 2005).

In our six studies, both perspectives are illustrated as follows:

Trade unions in Bulgaria mainly view direct influence as an opportunity, particularly when it comes to improving working conditions, health and safety, and production efficiency. Several cases in the report emphasise that direct and indirect influence can complement each other. Trade unions and employers often collaborate on these issues and tend to adopt a cooperative approach rather than engage in conflict:

"These two can work together and – figuratively speaking – 'pass the ball' depending on the situation" (Kirov et al., 2025: 35).

However, in some cases, trade unions express scepticism about how engaged workers actually are in direct influence, which can create the feeling that the initiative is being left to a few.

Trade unions in Ireland view direct influence as an opportunity, particularly when it is carried out in collaboration with trade union representatives. The report highlights the IDEAS institute of SIPTU in particular as

an example of how trade unions can become active and knowledgeable actors in workplace innovation and direct employee influence.

"IDEAS represents Ireland's unique contribution to understanding how trade unions can become active and knowledgeable participants in the promotion of workplace innovation" (Totterdill & Exton, 2025: 5).

Trade unions in Italy mainly view direct influence as an opportunity, but with risks if not coordinated with the representative voice. While it can strengthen worker engagement and improve the work environment and productivity, there are concerns that unions may be marginalised or used only as a tool to achieve company goals. According to the authors of the national report, trade unions need to shift their focus from viewing direct participation as an end in itself to integrating its potential outcomes with a long-term vision of effectiveness, equity, and influence (Armaroli et al., 2025).

Trade unions in the Netherlands see direct participation as complementary to representative participation, particularly with regard to technological and organisational changes. At the same time, however, there is concern about a lack of control over the process and unclear influence from the union.

"FNV finds direct participation important […] but also knows that it doesn't always work well: Are the right people being heard? Is the right thing being done with the input of workers?" (Tros & Jansen, 2025: 15).

Trade unions in Slovenia generally view direct influence as an opportunity, which is poorly developed, with the unions mainly focusing on collective representation through workers' councils and collective agreements. Several case studies (notably those of the pharmaceutical company and the nursing home) demonstrate positive interactions between direct and indirect influence. However, there are concerns that, without structure, direct influence can become toothless. According to the national report, direct participation often occurs on an ad hoc basis, depending on the leadership style and culture, and the unions have not systematically engaged with this issue (Franca, 2025).

In Sweden, direct influence is not viewed as a threat, but rather as an opportunity that complements the indirect influence of trade unions. Trade unions are often involved in developing structures for direct participation

and usually have a positive attitude towards it. The authors of the national report found no examples of employers trying to circumvent the unions in an organised fashion to undermine their position (Johansson & Abrahamsson, 2025).

In conclusion, direct influence takes different forms in different national contexts, but, surprisingly, it often goes hand in hand with representative influence. Through collective agreements, unions can formulate an overarching framework to regulate direct participation and create transparency in the processes. This can be described as "direct participation on the unions' terms".

The various national studies provide little evidence that union representation is in opposition to direct participation; on the contrary, many examples were given of how they can exist in symbiosis. Union representation often acts as a guarantor and door opener for fair dialogue between companies and employees.

However, there are also examples where trade unions see direct participation as a threat or do not consider it their role to promote it, particularly in countries with weak participation traditions.

4.2. Various countries have different histories

The historical role of trade unions in the building of the welfare societies varies between countries and affects their position in the neoliberalisation processes that have characterised the European industry over the past decades. According to Franca et al. (2024), two main traditions have characterised this development: 'Industrial Democracy' in which employees are seen as citizens in the workplace too, with the right to influence (e.g. Strauss, 1992) and the 'Efficiency Model', in which influence is seen as a way to improve decision-making, productivity and the climate at work (Wilkinson & Dundon, 2010). These views coexist in many countries, but their dominance varies depending on historical developments.

Following World War II, Bulgaria established a communist regime with a relatively high degree of self-management in industry alongside state-controlled trade unions. Following the fall of communism between 1989 and 1990, the previous forms of self-management and direct participation

were weakened. During the 1990s, the focus was on privatisation and changes in ownership, reducing interest in direct participation in both research and practice. Although direct forms of participation, such as the General Assembly, remain in the law, they are rarely used in practice. Following the collapse of communism in 1989, there was a transition to a fragmented and weak trade union structure, with limited influence over working life (Meardi, 2007; Prouska et al., 2022).

In Ireland**,** the industrial relations system is voluntaristic, with limited state involvement in the labour market and working conditions mainly regulated through voluntary agreements (Carley & Hall, 2008). During the years of social partnership (1987-2010), a stronger institutional structure for cooperation increased both trade union and direct influence. After the 2008 financial crisis, the National Social Partnership collapsed, thereby weakening the institutional framework for direct employee participation. When implementing the EU Directive 2002/14/EC, Ireland allowed direct consultation without requiring trade union participation, thus weakening the role of trade unions.

The role of trade unions in Italy has historically been strong. In 1970, the RSA, a system of union workplace representation, was introduced, and, in 1993, this was supplemented by the RSU, where representatives can be elected by all employees, although the list of candidates must be presented by trade unions. Today, the Italian system is characterised by a single union channel of workplace labour representation.

In contrast, The Netherlands has a dual-channel system with well-developed works councils and institutionalised collaboration. Although trade unions have a relatively strong tradition, in some cases works councils have replaced unions as the primary channel for participation in the workplace. Direct participation is common, but the role of unions can be marginalised, particularly in companies where management collaborates more closely with works councils.

Slovenia has adopted the German model of works councils and a strong legal framework, since gaining independence in 1991, but in practice direct participation is poorly developed, with neither trade unions nor works councils acting as a driving force to promote it (Franca, 2009).

Sweden represents the Nordic system, with strong trade union influence through collective agreements and a tradition of collaboration that started as early as 1938, when a collective agreement was introduced to regulate the right to strike. During the 1970s, the union's influence was strengthened through extensive cooperation with the Social Democratic party, resulting in comprehensive labour legislation, including the Co-Determination Act, the Work Environment Act and the Act on Board Representation. (Alsos & Trygstad, 2023; Johansson, 1999).

In conclusion, trade unions have historically played a central role in shaping workers' indirect influence. Yet direct participation has developed as a parallel and, sometimes, competing track, often initiated by employers and operating with fewer regulations. The relationship between unions and direct participation varies between countries and over time, ranging from passive resistance to active support, depending on institutional conditions, national tradition, and the strength of the trade union organisation.

4.3. Trade union membership is decreasing in all countries

The BroadVoice literature review (Franca et al., 2024) shows that trade unions' ability to promote direct participation is strongly linked to their organisational resources and affiliation rate. A high affiliation rate strengthens the union's legitimacy in the workplace, creating the conditions for shaping direct influence in the direction of the interests of employees rather than employers. Gallie et al. (2017) show that union strength through membership is essential for developing new forms of work with a direct voice and better quality of work. However, Poutsma et al. (2003) found that union attendance did not always correlate with increased direct participation, though they suggest that the effect may be stronger at the national level.

Franca et al. (2024) point out that there are systemic differences between different countries:

- In the Nordic countries, where union membership is traditionally high, direct and representative participation often work together (Hagen & Trygstad, 2009; Alsos & Trygstad, 2023).

- In countries with dual channel systems (e.g. Germany and the Netherlands), the relationship varies, unions may compete with or cooperate with works councils to influence direct participation.
- In Eastern Europe and other regions with weak trade union traditions or low levels of membership, direct participation is often employer-driven, with little role for the union in its development (Franca, 2009; Skorupinska, 2013).

Among countries surveyed, the level of affiliation up to the last survey is shown, as well as how it has developed since 2000:

Table 2. Comparative overview of decreasing union membership and affiliation

Country	2000	2005	2010	2015	2018	2019	2020	2024	2000-*	%
Sweden	81	78	71	69	68	68	69	68	-13	-16
Italy	35	34	35	34	33	33			-2	-6
Ireland	35	32	32	25	24	25	26		-10	-28
Nederland	22	22	20	18	17	15			-7	-30
Bulgaria	27		19		15				-12	-44
Slovenia	44	38	33	24					-20	-45

Source: Kjellberg, 2025. Based on the OECD/AIAS database on Institutional Characteristics of Trade Unions, Wage Setting, State Intervention and Social Pacts (ICTWSS): https://www.oecd.org/employment/ictwss-database.htm samt OECD.Stat: https://stats.oecd.org/Index.aspx?DataSetCode=TUD

A major problem is that union membership has been steadily declining since 2000 in all six countries. In some countries, it has almost halved, reaching current levels that range from 15% to 68% of the workforce. There are also significant differences within countries between different occupational groups. The case studies analysed include companies with 0 percent affiliation as well as those with 100 percent affiliation.

The degree of union membership usually coincides with the coverage rate for collective agreements, but not always. Table 3 is based on a compilation of the table above (Kjellberg, 2025) and the report *Benchmarking Working Europe 2024* (Piasna & Theodoropoulou, 2024).

Table 3. Union density and collective bargaining coverage

Country	Trade Union Density (%)	Collective Bargaining Coverage (%)	Notes
Sweden	68	88	High coverage despite declining unionisation; strong social partnership model without legal extension.
Italy	33	100	Nearly universal coverage through practice; agreements widely applied even without legal extension.
Ireland	26	34	Low coverage; bargaining mostly at company level; no statutory right to collective bargaining.
Slovenia	24	79	Coverage through statutory extension in sectors; declining unionisation since market reforms.
Netherlands	15	76	High coverage via government extension of sectoral agreements; low union density.
Bulgaria	15	28	Low coverage and density; weak enforcement of legal extension provisions.

In Bulgaria, the union membership rate has fallen sharply from 27% in 2000 to 15% in 2018. This has reduced their influence through collective agreements, although adherence is still relatively high in some sectors, such as the public sector and the metal industry. A high degree of union affiliation correlates with greater indirect influence, particularly through collective agreements and stakeholder dialogue (e.g. in the water sector). Conversely, there are signs that direct participation is increasing in companies without union representation, where other representatives are allowed to take on this role (e.g. in the mechanical company). In Bulgaria, legal provisions exist for the extension of the collective agreements, but these are rarely invoked in practice.

Trade union membership has also declined sharply in Ireland, from 35% in 2000 to 26% in 2020. Collective agreements are often company-specific, and there is no system for legal extension. This has led to weakened influence through collective agreements and poorer collaboration model conditions in the workplace. However, in the case studies where union partic-

ipation exists (e.g. Kirchhoff and FSW), the union enables direct participation. There, direct influence, and union representation work together successfully.

The union membership rate in Italy has remained relatively stable, decreasing from 35 to 33% between 2000 and 2019. Although union affiliation rates are low in some companies (e.g. 10-15% in Case 2M), the presence of unions in the form of RSUs can have a strong impact, particularly where there is trust and cooperation with management. Where union representation is strong (e.g. at Electrolux), union and direct participation are integrated more effectively. In other companies (e.g. in Case 2M), the union contributes to monitoring and communication but is less involved in designing direct initiatives.

Although the union membership rates are consistently low in the Netherlands, they have fallen from 22 to 15% between 2000 and 2015, particularly in the private sector. This means that the unions' role in direct participation is limited to collective agreements and social plans in the event of cutbacks. Works councils are becoming increasingly important as representative bodies, despite being separate from trade unions. In sectors such as healthcare and the public sector, union membership is higher (18-26%), creating better conditions for representative and direct influence, as in the Care 3 case. In the Netherlands, the Ministry of Labour can extend the validity of agreements at the request of the parties involved.

Trade union membership in Slovenia has declined from 44% in 2000 to 24% in 2015. It is still high in certain sectors, such as the pharmaceutical industry and the public sector, but is significantly lower in others, such as tyre manufacturing, where trade union influence has declined. In sectors where unions are strong, workers' councils and collective agreements are implemented to ensure indirect participation; but the link to direct participation is weak and depends on cooperative management. In Slovenia, collective agreements are legally extended in sectors where the employer organisation is representative. However, in the absence of a strong union presence, direct participation often becomes unregulated and dependent on culture or leadership style.

Despite a decline in LO membership, union membership in Sweden remains high at an average of 68% compared with 81% in 2000, a decrease of 13 percentage points. This means that indirect influence via collective

agreements and negotiations is strong. Direct influence can be developed within the framework of collective agreements and without conflict. In cases such as the Workshop Company and Mine, direct participation works in harmony with union influence – sometimes so effectively that the need for formal representation is reduced in practice.

In conclusion, our national country descriptions strengthen the view that there is a connection between high union affiliation and the ability to engage in indirect participation in harmony with strong union influence. The fact that the covariation between union membership and collective agreement signing varies may be due to a number of reasons. Collective agreements can be given a universal role through legal extension such as in Slovenia, Bulgaria, and the Netherlands, or through practices such as in Italy. Countries with centralised negotiation structures, such as Sweden, are more likely to establish agreements than countries with mainly company-specific negotiations, such as Ireland. Another contributing factor is the organisational structure among employers. In countries where employers are highly organised and bound by industry agreements, more workers are affected, regardless of whether they are union members.

4.4. Law or collective agreement as the guardian angel of the unions

The BroadVoice literature review (Franca et al., 2024) discusses how trade unions can influence direct participation in relation to legislation and institutional models for worker representation. Without a robust legal framework, it is difficult for the unions to exert influence over direct participation (Strauss, 1992). Legislation can grant unions a recognised role in representing the workers' voices, strengthening their bargaining power and legitimacy (Gospel & Pendleton, 2005). EU Directive 2002/14/EC is central to ensuring the right to information and consultation, yet it mainly focuses on representative participation, rather than on participating directly (Eurofound, 2013). In the UK and Ireland, the EU Directive was adapted to allow employers to opt for direct consultation with employees – which in practice often excludes union participation (Carley & Hall,

2008). Eurofound & Cedefop (2020) and Van Houten et al. (2016) demonstrate that, where legislation and collective agreements interact, trade unions and direct participation can reinforce each other.

In Bulgaria, trade unions prefer to use collective agreements as tools for influence, particularly at company level. The law provides for certain possibilities, such as the General Assembly, but these are very rarely utilised. Collective agreements often include benefits that go beyond the law, such as extra vacation days, insurance, and other social benefits.

In Ireland, trade unions operate under a voluntary system with no mandatory legislation on participation or collective agreements. This is why collective and partnership agreements are crucial tools for influence. In the Kirchhoff case, for example, union-initiated agreements led to the introduction of self-organised teams, bonus models, and long-term strategies.

In Italy, the legislation contains only minimal consultation obligations, nevertheless, unions mainly use collective agreements to secure influence, particularly through local company agreements and innovation plans that provide tax benefits.

The Works Councils Act in the Netherlands gives works councils relatively strong consultation rights, particularly on issues related to new technologies, health and safety, and organisational changes. However, in practice, collective agreements rarely affect direct participation, with a few exceptions, for example, in the health sector. One such exception is Solvay, where the EWC (European Works Council), together with the trade unions took the initiative in drawing up a global agreement on digital transformation.

In Slovenia, trade unions primarily support collective agreements and regulated forms through workers' councils. While the Employee Participation Act allows for direct participation, in practice the unions' focus is usually on wage negotiations and working conditions, not on promoting direct influence.

In Sweden, the unions generally prefer collective agreement solutions to legislation. However, the Swedish model is a combination of legal support and agreements The Co-Determination Act gives the unions the right to information and negotiation, while the Development Agreement (1985)

regulates the implementation. The Work Environment Act regulates collaboration on work environment issues and The Act on Board Representation strengthens transparency in corporate governance. According to the authors of the national report, the union's strength does not lie in detailed legislation, but in their ability to negotiate locally based on central frameworks.

In conclusion, it is a balancing act between what should be regulated through law and what should be regulated through collective agreements. In general, legislation supports union representation, but a collective agreement is often required to translate it into practice. The European social model comprises major variations in state intervention and legislation, as well as agreements between the social partners.

4.5. Competences are central

The BroadVoice literature review (Franca et al., 2024) suggests that greater competence and skills lead to greater influence, autonomy, and initiative, resulting in more meaningful participation (Abildgaard et al., 2020; Gallie, 2013). Trade unions can strengthen their position by being active in skills development. An Italian study shows that union engagement at the company level is positively linked to access to education (Berton et al., 2021). Ullrich et al. (2023) and Blanka et al. (2022) highlight that employee competencies are pivotal for succeeding with digital transformation, in which context the union can become an important player in ensuring adaptation.

In some cases, trade unions (or representatives of works councils) lack the technical skills necessary to participate in the dialogue on new technologies and changes (Rego, 2022). This creates a 'skills mismatch' that can reduce the union's influence on strategic issues, particularly those linked to direct participation in change. In the Nordic countries, where a high level of education is combined with a long trade union tradition, there is often a positive synergy between competence, direct participation and robust union representation (Alsos & Trygstad, 2023).

In Bulgaria, skills development is a key component of both direct and indirect influence. Several cases illustrate that training strengthens employ-

ees' self-confidence, even if it does not always result in higher pay. Competence is viewed as a means of innovation and motivation, as well as a means of increasing direct participation by strengthening individuals' opportunities to contribute. Participation in training to improve skills is experienced very positively and contributes to a positive organisational culture.

In Ireland, skills development is described as a key factor in enabling direct participation. According to the national report, the development of soft skills within the workforce has been central to establishing a culture of collaboration.

Training is also used to manage digitalisation and automation, and is regarded as a path to employee empowerment, increased innovation and safety.

In Italy, skills development is an important aspect of direct participation, particularly in innovation projects. It prepares employees for technological and organisational change, encouraging understanding and commitment among workers and union representatives to participate meaningfully in change processes.

In the Netherlands, skills development is considered a pivotal element of direct empowerment, particularly in the context of digital and technological change. The Dutch national report underlines the need for training for union representatives, works councils and HR in artificial intelligence and technological change. Two of the case studies (Care 3 and Municipality 4) include examples of internal academies, data coaches, and digital competence programmes. Skills are viewed as a means of boosting workers' autonomy and improving job quality.

In Slovenia, skills development is highlighted as a key factor for participation and innovation, notably in the case studies of the pharmaceutical company and elderly care. The pharmaceutical company has systems in place for training, internal mobility and bonuses linked to employee suggestions. The nursing home emphasises continuing education, generational change, and informal learning as central to influence and communication. According to the authors of the national report, education and communication are essential in order to create a climate in which direct participation can be effective.

In Sweden, competence is regarded as a prerequisite for meaningful participation, both directly and indirectly. Several schemes have been established to this end, including the Act on the Right to Leave for Education and various types of support for skills development in the event of redundancy. The unions are partners in several organisations that offer or finance training and support, such as ABF, Prevent, Suntarbetsliv and Afa Insurance. Skills development is a prerequisite for participating in the dialogue with employers on equal terms.

In conclusion, skills issues are important for successful participation and the introduction of new technology further underscores the need for skills development. It will be an important role of union representatives to ensure that training keeps pace with technological developments.

4.6. Experiences from 24 case studies

The 24 case studies in BroadVoice provide many examples of how direct participation can be achieved without representative participation losing its role as the workers' voice.

Case 1M in the Italian report stands out as the clearest example where a great deal of direct influence has been achieved while the union has been actively involved in the work. The goal was to increase productivity while improving the working environment and ergonomics. Workers were directly involved in designing the production line before its implementation, and they also proposed a self-managing rotation team – a solution that proved both effective and popular quickly. The workplace trade union representation (RSU) was deeply involved from the outset, participating in the joint steering group along with management and technical staff. The results were clear, the productivity target was achieved faster than expected, the work environment improved significantly, and workers felt greater autonomy, responsibility, and commitment. At the same time, trade union influence was strengthened, and a new model of industrial relations was tested, in which direct and representative influence interacted. Despite the success, the union expressed some concern that, in the event of a market downturn, the company would return to more traditional, hierarchical ways of working.

The Swedish case study, Workshop Company, is a clear example of a project that has had a great deal of direct influence, with the union (IF Metall) actively involved during the process. The company introduced an extensive lean project with daily management, operator maintenance and deviation systems. All employees participated in daily meetings and were able to influence the organisation of work directly. The club chairperson of IF Metall quickly became part of the project's steering group. Union representatives, including safety representatives, actively participated in designing the changes and ensured that work environment perspectives were incorporated. The union saw no contradiction between lean and co-determination, describing the project as something 'we do together'.

In the Netherlands, the chemical company Solvay and the EWC signed a global framework agreement on digital transformation. This aims to ensure the socially sustainable introduction of new technologies throughout the company group. The agreement emphasises that new technologies should be discussed at an early stage with workers' representatives and that risks to the work environment, integrity, job content and workload should be assessed in advance. Solvay is a prime example of how representative and direct employee influence can be integrated to manage technological development sustainably. The company shows that it is possible to establish structures for influence that go beyond formal post-consultation, and instead create space for early dialogue, joint planning and skills development, with the union as a key player in the process.

Another interesting example is SIPTU, Ireland's largest trade union, which created IDEAS, an institute that introduces new thinking in the workplace for the mutual benefit of employees and companies. The institute is registered as a limited company and operates independently in the commercial sector.

In the Slovenian pharmaceutical company, cooperation between unions, workers' councils and management is structured and based on clear responsibilities, creating stability and trust. Direct influence is exercised through a system in which employees are encouraged to suggest improvements. These proposals are evaluated, and those that lead to positive changes are rewarded, strengthening motivation and contributing to innovation.

Even in Bulgaria, where direct influence is otherwise poorly developed, the Copper company case study provides a clear example of the successful combination of direct influence and strong union participation. The company has found a model in which productivity improvements are achieved through collaboration between management, workers and unions.

5. Implications

It is difficult to draw any general conclusions from our study. The national or local context must be respected for what it is: national or local. Each country and trade union must choose its own path in the new labour market. However, some general considerations should be taken into account.

5.1. Threat or opportunity?

In all countries in our study, direct participation is seen as an opportunity to improve the work environment, efficiency and engagement, especially when it is carried out in collaboration with trade union representatives. The most positive example comes from Sweden, where direct participation is fully integrated into the 'Swedish model' and is seen as a natural complement to collective agreements and co-determination. In comparison, Slovenia has the most hesitant attitude, with concerns that direct participation could become purely symbolic or be used to circumvent unions. However, there are still examples of its effectiveness in practice.

This predominantly positive attitude does not mean neglecting the risks associated with far-reaching direct participation. Without structure or union involvement, direct influence can undermine union representation, building on informal relationships rather than formal rights and being instrumentalised as a tool for the employer's goals only. One way to mitigate these risks is for the direct collaboration to take place within the framework of collective agreements or established cooperation models, giving the union the opportunity to be an active party rather than a spectator.

5.2. History matters

History has a clear impact on how direct participation looks in different European countries. In countries with a long tradition of collaboration and strong union support, such as Sweden, forms of direct participation are well integrated into the trade union system and are seen as a natural complement to collective agreements. In Ireland, where the state has historically played a more withdrawn role in labour market issues, it has fallen to the trade unions themselves to take the initiative. This has resulted in models based on voluntary agreements, such as the IDEAS institute. In Bulgaria and Slovenia, where trade union representation has weakened since the fall of communism or where direct participation lacks institutional support and influence, it is often ad hoc, depending on culture rather than structure. In Italy and the Netherlands, which have strong representative systems, direct participation is sometimes viewed as a risk if it does not take place in collaboration with the union.

In summary, each country's historical institutions, trade union traditions and labour market models affect the form of direct participation, ranging from fully integrated and structured to unsystematic and marginalised in relation to the union. The national or local context must be respected for what it is. Each country or trade union must choose its own path in the new labour market.

5.3. Union membership

Trade union membership is closely associated with the perception and practice of direct participation. In countries with high levels of union membership, direct participation is viewed as an opportunity and a complement to the role of the trade union. A high level of organisation lends legitimacy and bargaining power to the union, creating trust that direct influence does not threaten the representative role.

In countries with low or declining union membership, such as Bulgaria, Slovenia, Ireland and the Netherlands, there is a greater concern that direct participation will undermine the influence of unions. When the union's position is weak, direct participation risks becoming employer-driven or

purely symbolic, and the unions often become reactive rather than proactive. Often, there is a lack of resources and structures to shape direct participation in a way that benefits workers.

In countries such as Italy, where the rate of union membership is relatively stable, attitudes vary. Where direct participation is combined with a strong local union presence, it often works well; however, without a union presence, it risks being top-down and limited in terms of union influence.

The higher the union affiliation, the more opportunities there are for unions to recognise and shape direct participation as a resource rather than a threat. Where union legitimacy is lacking, direct participation tends to be weaker, less democratic, and more dependent on the employer's initiative.

The declining union membership rate must be clearly addressed if the union is to maintain its legitimacy as the voice of the workers in the long term. There are examples where a low membership rate, the Netherlands' 15%, for instance, can be combined with a strong labour market influence. The question is, however, how long one can maintain that position. We can see that legislation does not provide everlasting protection: for example, in Finland, a conservative government is trying to change labour law and restrict unions' influence.

5.4. Law or collective agreement

In countries with strong legislation guaranteeing the role of the trade unions, such as in Sweden with its Co-Determination Act, there is a basic trust in union influence. This enables direct participation to be regarded as a complement rather than a threat, particularly when it occurs within established frameworks. In the Netherlands, the Works Council Act, does not guarantee the role of unions, but of employees, while legislation on collective bargaining guarantees the role of unions.

Where legislation is weak or absent, as in Ireland and Bulgaria, collective agreements become the main tool through which unions can influence participation. In these countries, unions have a more vulnerable role, and the attitude towards direct participation is strongly influenced by the em-

ployer's willingness to cooperate. Therefore, the unions' attitudes vary depending on local relationships and agreements, meaning direct participation often becomes fragmented and dependent on individual initiatives.

In Italy and Slovenia, where legislation offers some protection but is not always concrete enough on direct participation, collective agreements are employed in an attempt to structure participation, although this is not always done systematically. Project-based solutions are more common there, and the attitude can be more ambivalent.

In summary, when legislation or collective agreements clearly regulate the role of unions in direct participation, trust and a more positive attitude are created towards such models. Without clear rights or agreements, direct participation becomes more easily an area in which unions risk being excluded, creating uncertainty and more restrictive attitudes. A strong legal or contractual basis therefore guarantees that direct participation takes place on the workers' terms.

5.5. Competence development as a union strategy

In several of the countries studied, it is emphasized that skills development strengthens both the individual's and the union's capacity to participate actively in change and innovation processes. When employees and union representatives have the right knowledge and understanding of areas such as technological change, work organisation and improvement models, their self-confidence, legitimacy and influence increase. Competence affects the union's ability to act in the following ways:

- It strengthens the union's role as an expert and partner rather than a counterparty.
- It reduces the risk of direct participation being used to circumvent the union.
- It increases understanding of complex changes, e.g. in the event of technological leaps or reorganisations.
- It promotes the long-term anchoring of participation as part of the workplace culture.

In summary, the unions' attitude towards direct participation is greatly influenced by the opportunity to engage in skills development. Where education is prioritised for both members and union representatives, there is a greater willingness to view direct participation as an opportunity rather than a threat. If the pace of change accelerates, employers might look for more direct participation to solve more acute problems, while indirect participation becomes more relevant in the context of long-term strategies.

5.6. New production concepts as potential for change

A few industrial concepts offering direct participation are currently circulating in the European industry. Most have their origins in the management-driven concepts that are, in one way or another, related to lean production. However, these concepts are now being challenged by a more engineering-driven concept, which is known as Industry 4.0, or 5.0, and which takes social aspects more into account. Trade unions have the potential to orient themselves towards these options and try to find room for representative participation as well. The national case studies provide many examples of how such an approach can be achieved.

In the Swedish case study of the Workshop Company, for instance, a lean-inspired change process was implemented in which employees participated in daily management and could influence their daily work. The union was actively involved through participation in the steering group and work environment management. The union described the project as something 'we do together', showing that direct participation and union participation can reinforce each other. In Italy, Case 1M also achieved strong direct influence through workers' participation in designing new production lines and proposing solutions, such as self-managing rotation teams. Union representation (RSU) participated actively from the outset, alongside management and technical staff. The results were clear: improved productivity, a better work environment, and increased responsibility. In the Netherlands, the chemical company Solvay signed a global framework agreement with its EWC, whereby technological changes are to be anchored with employee representatives at an early stage. Solvay is an example of how direct and representative influence can be integrated to create sustainable change processes, where both the work environment, integrity

and skills development are all secured through dialogue between the parties involved. These examples illustrate that new production concepts can be a platform for renewed labour relations, in which trade unions continue to play a pivotal role.

6. Direct participation on the unions' terms

The analysis shows that direct participation can be a powerful tool for strengthening workers' influence – but only if it takes place within structures where union representation is guaranteed. By formulating clear frameworks, getting involved in change processes, and contributing expertise, trade unions can transform their role from reactive to proactive actors in developing working life. Rather than viewing direct participation as a threat, trade unions should shape it on their own terms, thereby contributing to a better work environment, increased participation, and long-term legitimacy, i.e. "direct participation on the unions' terms".

The following are some guiding principles for such a strategy:

- Direct participation is an opportunity, not a threat – if it is carried out in the presence of a union.
- Union representatives must be involved from idea to implementation.
- Collective agreements and collaboration agreements provide structure and legitimacy.
- Skills development strengthens the role of the trade unions in technical and organisational change.
- New production concepts (e.g. lean manufacturing and Industry 4.0) are not neutral; the union must influence how they are implemented.
- Local engagement requires national support, training, and tools.
- Trust and transparency are key to sustainable participation.
- The union is not only a counterpart – but also an agent of change.
- With the right structure, direct participation can become a democratic tool in working life.

In summary, the BroadVoice project provides an overarching view of the European industrial relations map. Its comparative approach highlights the similarities and differences between the various forms of direct and indirect participation in European workplaces. Moreover, the BroadVoice project provides new learning opportunities both for social partners at European and national levels. Furthermore, it may stimulate and initiate more in-depth research efforts to analyse working life conditions and labour market transformations in times of increasing uncertainty regarding international trade, major fluctuations in economic cycles, climate change, the green transition, and geopolitical matters. In essence, forward-looking social dialogue, a sustainable working life, a focus on job quality and workplace innovation, are not only desirable, but also extremely necessary in times of profound social transformation.

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Chapter 3.

Embedding Direct Participation into Labour Representation: Enabling Conditions Across European Workplaces

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1. Introduction

Historically, worker participation in decision-making processes within organisations characterised by a division between owners/managers, who have prerogative over these processes, and workers/employees (Knudsen et al., 2011) has taken two main forms: representative and direct voice.

The concept of representative voice has been central to industrial relations since Sidney and Beatrice Webb coined the term 'industrial democracy' in 1897. Within this tradition, a pluralist perspective has prevailed, promoting collective structures such as trade unions, collective bargaining, and co-determination as essential mechanisms for balancing managerial authority and protecting workers' interests (Johnstone & Ackers, 2015). In this model, worker participation primarily operates through representation, thus institutionalising employees' influence within a framework of negotiated rules and shared power.

Over time, however, the notion of employee voice has evolved to include what is now widely referred to as 'direct voice'. This approach began to gain traction when the first inefficiencies of the Taylorist production model became apparent, and it has continued to evolve alongside a series of managerial 'fads' and 'fashions' (Strauss, 2006). These include the emergence of the Human Relations School in the mid-20th century, followed

by initiatives such as Quality of Work Life (QWL), Total Quality Management (TQM), Six Sigma, and, more recently, High Performance or High Involvement Work Practices. These models encourage direct communication and collaboration between management and employees, typically at the level of individuals or small teams, without the mediation of representatives (Dupuis & Massicotte, 2024). Rather than framing participation as a right, direct voice tends to be justified in terms of business outcomes, particularly organisational performance (Johnstone & Ackers, 2015).

Direct and representative forms of worker participation are often viewed as ideologically opposed, partly due to concerns about their potential incompatibility. In fact, their coexistence has at times been called into question in the academic literature. On the one hand, direct worker participation has been interpreted – particularly in US workplaces, – as a management-driven union avoidance strategy (Danford et al., 2008; Kochan et al., 1986). On the other hand, it has been argued that employee involvement schemes could make information- and consultation-based forms of representative participation redundant (Belfield & Heywood, 2004; Godard, 2004).

However, over time, the two channels have proven capable of coexisting and even complementing each other to expand worker voice and effectively balance the interests of businesses and workers (e.g. Cirillo et al., 2023; Pohler & Luchak, 2014; Rocha, 2010; Rutherford & Frangi, 2020; Tros, 2022; Wood & Fenton-O'Creevy, 2005). Although direct involvement has been shown through research (Bryson, 2004) to be associated with higher levels of worker satisfaction and commitment than more 'distant', indirect forms of voice, worker representation has been found to further enhance the benefits of direct participation, in both economic terms and for employees, particularly when it plays a critical role in introducing and implementing such practices (Cook et al., 2020; De Spiegelaere & Van Gyes, 2015; Gill, 2009; Looise et al., 2011; Moore & Miljus, 1989; Rolfsen & Johansen, 2014).

Yet few studies have explored the conditions under which this integration between direct and representative worker participation can take place, particularly from an international and comparative perspective (Ahlstrand & Gautié, 2023; Armaroli, 2022; Signoretti, 2019).

Drawing from this background, the present research aims to investigate why and under what conditions direct participation in European workplaces can move beyond the exclusivity of managerial initiatives, from which it is often promoted, to become integrated or 'embedded' into the logic and field of action of labour representation and industrial relations.

2. Methodology

In order to achieve this goal, this study draws on empirical research conducted between June 2024 and February 2025, as part of the EC-funded project BroadVoice (Broadening the Spectrum of Employee Voice for Workplace Innovation) covering 24 workplaces across 6 European countries (Bulgaria, Ireland, Italy, the Netherlands, Slovenia and Sweden) with very different institutional settings with regard to labour regulation and industrial relations. In each country, four companies or work sites were selected that were characterised by the concurrent presence of labour representative bodies (either union- or non-union-led) and direct participation practices. In terms of sectors, an effort was made to ensure variability in terms of structure, work organisation and industrial relations. Particular attention was paid to comparing the manufacturing sector (which accounts for 14 out of the 24 workplace cases and is the subject of Chapter 1 of this report) with sectors that are distinguished by higher labour intensity, lower levels of unionisation and labour representation coverage, and more flexible organisational structures, such as the services and care sector, public administration and the energy sector. Data and information were collected via documentary research, 78 semi-structured interviews with key workplace actors (see Appendix 1 for details) as well as a national workshop in each country under examination to validate the preliminary findings. The BroadVoice partners then described these in six national reports, which were released in March 2025 (Armaroli et al., 2025; Franca, 2025; Johansson & Abrahamsson, 2025; Kirov et al., 2025; Totterdill & Exton, 2025; Tros & Jansen, 2025).

This chapter draws on the findings from these reports, summarised in Appendix 1 and entered into Table 1. This table classifies individual case studies and their outcomes, distinguishing between:

- cases where there was mere coexistence, with no interaction, between the two participation channels, and
- cases where an interaction was detectable.

Table 1. Classification of business case studies according to the nature of the relationship between direct and representative worker participation.

Type of relationship between direct and representative worker participation		Case studies (sector – country)
Coexistence without interaction		1. Solvay (manufacturing – NL); 2. Broadcasting (manufacturing – SI); 3. Water supply and sewage company (water supply – BG); 4. Water supply company (water supply – BG); 5. Care (care sector – NL); 6. FSW Coatings (manufacturing – IE); 7. Retirement home (care sector – SI); 8. Mine (manufacturing – SE), despite strong trade union involvement in technological innovation; 9. Warehouse (tertiary sector – SE), despite intentions to involve trade unions in the planning of technological innovation; 10. Copper company (manufacturing – BG); 11. Mechanical engineering company (manufacturing – BG).
Interaction (measured by the degree to which direct participation is embedded in labour representation)	**Low degree**	1. Pharma (manufacturing – NL); 2. Municipality (public administration – NL); 3. Tire (manufacturing – SI); 4. Pharmaceutical (manufacturing – SI).
	Medium degree	1. Workshop (manufacturing – SE); 2. Components for household appliances (manufacturing – IT).
	High degree	1. Kirchhoff (manufacturing – IE); 2. Aughinish Alumina (manufacturing – IE); 3. Saica (manufacturing – IE); 4. Electrolux/Solaro plant (manufacturing – IT); 5. Training (tertiary sector – IT), limited to autonomy in the time and place of work; 6. Telecomm (tertiary sector – IT), limited to autonomy in the time and place of work; 7. Group Home for Disabled (care sector – SE), mainly manifested at the municipality level.

The latter cases were further classified in relation to the type of interaction. The degree to which direct participation is embedded in labour representation was considered, with the following categories being distinguished:

- cases in which labour representation is essentially reactive to the introduction of direct participation, being informed of decisions already made by management and only intervening to mitigate potential negative impacts on the workforce;
- cases in which labour representation is informed and consulted by management before direct participation practices are implemented, but does not influence their design. However, labour representation still plays a role in managing these practices, for example, by preparing enabling measures related to training, work organisation, remuneration, etc.;
- cases in which labour representation contributes to defining, coordinating and monitoring direct participation practices. These three different scenarios can be respectively aligned with the bipartite (or adversarial), cooperative, and democratic (or participatory) models, as described in the analytical framework of BroadVoice (Armaroli et al., 2024), which was developed from the work of Knudsen et al. (2011).

Overall, as shown in Table 1, just under half of the analysed company cases (11) demonstrate no relationship between direct and representative worker participation, despite both channels being present. Notably, two of these cases are from Sweden: Mine and Warehouse. Although there is no explicit evidence of trade union involvement in the planning and coordination of direct participation practices, union representation is either already engaged or intends to be involved in automation processes.

Conversely, 13 cases reveal some forms of interaction. Specifically, the Dutch cases Pharma and Municipality, and the Slovenian cases of Tire and Pharmaceutical, are categorised as having a low degree of embeddedness. Indeed, the works councils at Pharma and Municipality only intervened in direct participation after management had introduced innovations, by signalling a problem relating to the rollout of an app for reporting malfunctions in the former case and by suggesting additional worker training in the latter. In the Tire and Pharmaceutical cases, worker representatives supported direct participation initiatives developed by management (e.g.

taking workers to visit companies that have successfully implemented employee participation in organisational innovation).

Two cases show a medium degree of embeddedness of direct participation in labour representation. While being part of joint labour-management coordination bodies, worker representatives do not seem to influence the structuring of direct participation practices, but rather their management and monitoring. This is despite the fact that, in the Italian Components for household appliances case, worker representatives are found to be formally enabled to have a say in the design of participation practices.

Finally, in seven cases direct participation is more strongly embedded in labour representation since it contributes to both its implementation and initial definition. However, in two of these cases (Training and Telecomm in Italy), interaction was limited to working time and place only, with no interaction occurring in other affected areas. In another case (Group Home for Disabled), the trade union plays a significant role in defining participatory practices aimed at improving the work environment at the central, municipal level. However, this role does not appear to be reflected at the level of the specific small site analysed, namely the residential home for people with disabilities (see Appendix 1 for details).

Importantly, in cases where direct participation is strongly embedded in labour representation, both direct and representative channels of participation are equally developed and mutually reinforce one another through interaction, leading to positive outcomes for companies and workers alike. Indeed, worker representation was granted access to decisions concerning organisational and/or technological changes; workers gained greater voice over issues related to the management of their own work and were supported by their representatives throughout this transition (see the case of Components for household appliances, for instance). Relationships between worker representatives and management improved, positively impacting collective bargaining processes. For example, at Kirchhoff, following the dialogue initiated within the joint labour-management committee, the duration of company agreements was extended to ensure greater stability and enable longer-term planning. Furthermore, a stronger link was established between collective bargaining and participation, with the former responsible for initiating and regulating certain enabling aspects of the latter (e.g. working time, training and remuneration), and the latter devoted

to sustaining and coordinating change processes. These outcomes suggest an increase in both the *breadth* (i.e. the linkage and combination of different participation channels in the workplace) and *depth* (assessed, for instance, by the regularity and significance of participation practices and the level of influence granted to employees) of worker voice (Cox et al., 2006). This would not be possible without interaction between the two channels. Finally, improvements were recorded in organisational efficiency, productivity, and worker well-being across all cases (Appendix 1).

In line with the focus of this chapter, each company case was then analysed in detail with regard to five factors that also emerged in the BroadVoice analytical framework (Armaroli et al., 2024) as being impactful in the relationship between direct and representative participation. These factors are:

- the area of interaction;
- the business structural and environmental context;
- the institutional framework and structured policies and programmes;
- the associative and organisational characteristics of the workplace actors;
- the actors' identity and ideological orientations towards worker participation.

Looking at these elements in each case study, a high degree of heterogeneity was observed in the 11 cases characterised by the mere coexistence between the two participation channels. This coexistence resulted from very highly diverse institutional, structural, cultural and associative contexts. However, it should not be overlooked that all four cases analysed in Bulgaria share a lack of interaction between direct and representative participation (see Chapter 4 of this report for more information on this topic). Instead, greater consonance was found in the nine cases characterised by a medium or high degree of direct participation embeddedness in labour representation, notably when the 2 Italian cases (Training and Telecomm) are excluded, as the interaction between the two participation channels in these cases pertains to one domain (collective bargaining on individual autonomy in managing working time and place). This differs from the topic addressed in all the other cases, which concerns the joint design and/or

coordination of innovation projects involving direct participation practice. The Swedish case, Group Home for Disabled, is an outlier as trade union involvement is confined to the municipal level and does not extend to the specific site under analysis.

This chapter therefore analyses the contextual elements and conditions characterising these six cases of greater interaction between direct and representative participation, all of which occur within the framework of innovation projects: Workshop, Components for household appliances, Kirchhoff, Aughinish Alumina, Saica and Electrolux. These include three Irish companies, two Italian ones, and a Swedish one; all of which are in the manufacturing sector. References will also be made to the other experiences covered in the national reports of the BroadVoice project, as well as, particularly in the conclusions, to the interviews conducted between November 2024 and April 2025 with social partners and stakeholders from the other eleven EU countries (see Appendix 2). These interviews will serve as points of comparison with the most successful cases.

It should be clearly noted, however, that the aim of this chapter is not so much to predetermine the nature of the relationship between direct and representative worker participation based on the presence of specific elements and variables. The 11 cases of mere coexistence between the two participation channels include, indeed, experiences arising from contexts that are very similar to those of the best practice cases (such as Mine and FSW Coatings). This shows that the presence of favourable conditions does not necessarily lead to a single outcome. Rather, the intention is to shed light on potential enabling factors to guide policymakers and social partners who wish to promote greater interaction between direct and representative participation, thus fostering more successful and sustainable outcomes for businesses and workers alike.

3. A comparison of best practice case studies along 5 key variables

3.1. The area of interaction between direct and representative worker participation

In line with some existing literature (Abildgaard et al., 2020; Ahlstrand & Gautié, 2023; Armaroli, 2022; Cirillo et al., 2023; Haipeter, 2013; Signoretti, 2019), innovation is recognised as a key area for interaction between direct and representative participation. In five cases characterised by a high degree of direct participation embedded in labour representation, direct participation acts not only as a *vehicle* (notably through worker information and training, and 'hybrid' labour-management steering committees that include both workers and their representatives), but more importantly as an *outcome* of the innovation processes. The aim is to enhance the decision-making autonomy of individual operators and work teams on the production lines, and to increase workers' contributions and responsibilities in the day-to-day management of activities. In other words, in these situations, the projects are designed to integrate direct participation structurally into the company's work management model. For a distinction between direct participation targeted at either work management or innovation, see also Campagna & Pero (2017).

In only one case, that of Italian Components for household appliances, which is classified as having a medium level of interaction, does direct participation appear to function mainly as a *vehicle* for an innovation project aimed at integrating a new software system to connect different areas of production. Nevertheless, it is also used, under the coordination of a joint labour-management committee, to address other issues such as welfare, occupational safety, and sustainability.

Therefore, the comparison of the six best practice cases suggests that when innovation targets a flattened company hierarchies and lean models of work organisation models, there are more opportunities for direct participation to be embedded in labour representation. However, there are also promising opportunities for interaction between the two channels when direct participation is employed as a tool within innovation projects targeting other goals, whether technological, social or environmental.

Conversely, as proven by the other 11 cases, when direct participation is already systematically integrated into the company's work management model, often in relation to operational and HR issues, there are fewer opportunities for it to be embedded in labour representation (see Armaroli et al., 2024, for a classification of direct participation's *scope*).

Table 2. Overview of the areas of interaction between direct and representative worker participation in the 6 best practice cases

Case study – degree of embeddedness	Area of interaction between direct and representative participation
Workshop (SE) – medium	Following a rapid growth and efficiency problems, innovation project was launched, leading to decentralised decision-making, expansion of some operators' role and increased workers' involvement in day-to-day management. It developed via preliminary training for workers and managers, and with the coordination of a project steering group comprising worker representatives.
Components for household appliances (IT) – medium	Innovation project aimed at revising key business processes and integrating a new software system to connect the various production areas. It developed through: training initiatives; suggestion schemes; and a joint labour-management commission comprising 5 thematic groups of managers, interested workers and their representatives.
Kirchhoff (IE) – high	Innovation project aimed at the adoption of lean manufacturing throughout the company, which led to less hierarchical structure, decentralised decision-making and enhanced worker autonomy in day-to-day operations. It developed through: a steering committee comprising technical staff, production managers and a shop steward; teamwork training; and the appointment of 'lean manufacturing ambassadors' among workers.
Aughinish Alumina (IE) – high	Innovation aimed at the introduction of new forms of work organisation, by flattening the organisational structure, creating self-managed teams, encouraging workers' suggestions and initiative. They were introduced through the coordination of labour-management teams and thanks to training and development initiatives.
Saica (IE) – high	Innovation project consisting of the introduction of continuous improvement teams for the analysis of machines' performance and flattened organisational structure. It developed through a joint labour-management steering group, and training and communication plans.
Electrolux/Solaro plant (IT) – high	Innovation project aimed at the restructuring of the assembly lines, which led to self-managed rotation teams, and increased productivity. It developed through: preliminary training for workers and their representatives; a joint labour-management commission, composed of worker representatives, production managers and technical staff; communication initiatives, and focus groups for in-depth analysis, as well as a survey to detect the ergonomic effects of the pilot phase.

3.2. Business structural and environmental context

A comparison of the six best practice selected cases confirms a finding that has emerged from a large part of the existing literature (Ahlstrand & Gautié, 2023; Armaroli, 2022; Dupuis & Massicotte, 2025; Rubinstein, 2001; Rocha, 2010; Rutherford & Frangi, 2022): the manufacturing sector appears to be more fertile than other sectors (which have, however, been assessed in BroadVoice's national reports) in terms of experiences of interaction between direct and representative participation within innovation projects.

In the other sectors explored by the BroadVoice project's national reports, direct and representative participation generally seem to have fewer opportunities for interaction. In some cases, this is because only one of the two channels is more developed, as seen in at least two cases from the care sector: the Dutch Care and the Slovenian Retirement home, where direct participation appeared to be more involved in innovation plans than representative participation. In the Swedish Group Home for Disabled, however, the influence of worker representation on direct participation appears to be confined to the central municipal level. In other cases, the two channels are simply treated as complementary, yet largely parallel tracks (as in the Dutch Municipality and the Swedish Warehouse cases).

However, it is worth noting that such scenarios of limited interaction between direct and representative participation were also recorded in manufacturing companies, such as the Dutch Solvay and the Slovenian Tire. In these cases, however, unlike in the previously mentioned care sector companies, direct participation appeared to be more limited than representative participation. This was also evident in the Swedish Mine and the Bulgarian Copper cases, where both participation channels were developed albeit with no evident interaction. This is despite the strong role played by trade union representation in the technological innovation process within the Swedish company.

These findings suggest that the manufacturing sector is a particularly favourable context for the development of meaningful interactions between direct and representative participation, because of the stronger presence and influence of worker representation, as will be examined further in paragraph 3.4. This appears to be a necessary, though not sufficient, condition

for the embeddedness of direct participation. Conversely, work contexts that are open to direct participation with weaker worker representation tend to have fewer opportunities to develop strong interactions between the two channels (see, for example, De Spiegelaere & Van Gyes, 2015).

As regards their business activity, the six best practice cases are primarily manufacturing companies that either assemble the final product, as with Electrolux or, more commonly, produce and supply components for the final stage of the value chain. This positions them at the higher levels within production networks. The only case that diverges from this business type is the Irish alumina refinery Aughinish Alumina, which operates in the early stages of metal processing.

Most of these companies compete in national and international markets, where they may face competitive pressure from countries with lower labour and transportation costs. They must also meet the high quality and innovation standards demanded by their clients. Some are exclusively national businesses, while four belong to multinational groups with foreign headquarters (all European, except for Aughinish Alumina which is Russian-owned).

Finally, the size of the production sites analysed varies considerably (from 42 workers at Kirchhoff to 640 at Electrolux), suggesting that company size is not a decisive factor in shaping paths of interaction between direct and representative worker participation.

Table 3. Overview of the business structural and environmental context of the 6 best practice cases

Case study – degree of embeddedness	Business structural and environmental context
Workshop (SE) – medium	Manufacturer of entire products, subsystems, components and spare parts based on steel and aluminium. It strives for high-quality and precision of its products, and high flexibility towards customers. It mainly works regionally and nationally, but it also has some international clients. It employs 110 people.
Components for household appliances (IT) – medium	Manufacturer of household appliance components. It collaborates with major international brands and exports around 80% of its production. It follows a vertically integrated production model with a high level of automation. It invests in skills and research and development. It employs 229 people.
Kirchhoff (IE) – high	Manufacturer of metal structure parts for the automotive industry. It is part of an international group based in Germany. It strives for 'Just in Time' delivery and high standards of quality and services required by very famous international clients. It faces competition from Hungary and Poland, which have lower transportation costs. It employs 42 people.
Aughinish Alumina (IE) – high	Large alumina refinery with Russian ownership. It invests in environmental sustainability and occupational health and safety. It employs 490 people.
Saica (IE) – high	Manufacturer of paper and cardboard boxes for various industries, such as food and pharmaceuticals. It belongs to a multinational company headquartered in Spain. It employs 92 people.
Electrolux/Solaro plant (IT) – high	Manufacturer of household appliances. It operates in international markets. It belongs to a Swedish multinational group. It invests in automation technologies, and lean methods. It faces the competition with non-EU countries. It employs 640 people.

3.3. Institutional framework and structured policies and programmes

Three out of the six most interactive experiences of direct and representative participation come from contexts – Italy and Sweden – characterised by a regulatory framework, whether through legislation and/or collective bargaining, that grants labour representative bodies rights to prior information, consultation, and negotiation – as in Sweden – in cases of technological or organisational changes in the workplace.

In the other selected cases, all of which are located in Ireland, this kind of regulatory framework does not appear to exist. Nevertheless, certain decision-making processes are shared between management and worker representation, thanks to the cultural legacy of nearly 30 years of national-level 'social partnership' (which ended in 2010), from which initiatives to promote the participatory model at the workplace level also emerged.

As for the institutional framework supporting direct participation, structured programmes and policies are especially evident in the Irish and Swedish contexts. In Ireland, this takes the form of support activities for companies and worker representatives in organisational innovation plans, carried out by IDEAS (the Institute for the Development of Employees Advancement Services), which was created in 2001 by the SIPTU trade union. In Sweden, this occurs thanks to the work of institutions as well as programmes jointly managed by social partners. These programmes aim on the one hand, to inform and train managers and union delegates on work environment issues as in the cases of Afa försäkring and Prevent. On the other hand, they support companies and worker representatives in introducing lean organisational models, as in The Production Leap programme.

By contrast, the Italian context lacks comprehensive policies and programmes that foster a shared approach to implementing direct participation, even as a result of organisational innovation projects. However, since 2016, tax and social security incentives have been offered to companies that negotiate direct participation practices to be included in 'Innovation Plans'. Additionally, national or territorial collective agreements (primarily in the manufacturing sector) have supported and promoted participatory experiments at the company level in recent years (see also Armaroli et al., 2025).

The analysis of the institutional framework in exemplary cases shows the importance of a regulatory and policy environment that supports worker representation and its role in company decision-making processes, particularly with regard to technological and organisational changes (see, for example, Gill, 2009). This is particularly pertinent in the context of implementing direct participation, where the effective contribution of worker representatives is more significantly supported through training and consultancy initiatives targeted at all relevant actors within the enterprise than

through regulatory provisions (see Marchington, 2015, for more on the role of 'soft' institutional and intermediary forces).

Conversely, policy or legislative initiatives aimed solely at promoting direct participation appear to be less effective if they are not simultaneously designed to strengthen the joint involvement of worker representatives and management.

Examining only at the institutional setup, Slovenia and the Netherlands may also appear to be favourable contexts among the countries covered in the BroadVoice national reports (see Appendix 1). However, the experiences observed in these areas revealed little or no interaction between direct and representative participation indicating that other variables have undermined this relationship, as we will see in the following paragraphs.

Table 4. An overview of the institutional context, policies and programmes of the 6 best practice cases

Case study – degree of embeddedness	Institutional framework and structured policies and programmes
Workshop (SE) – medium	**With regard to representative participation**: • Co-Determination Act entailing a duty for the employer to inform, consult and negotiate before implementing any technical and organisational changes in the workplace. • Work Environment Act: obligation to appoint a safety representative in every workplace with at least 5 employees. This representative must be notified of any changes affecting safety matters and must participate in the planning of new processes, methods and organisation of work. **In relation to direct participation**: • Afa försäkring: organisation owned by the Swedish labour market parties, that finances research, development and information in the fields of work environment and health. • Prevent: organisation owned by the Swedish social partners in the private sector that provides information, training and assistance in work environment management. • The Production Leap: programme promoted by the Association of Swedish Engineering Industries and the blue-collar manufacturing union, IF Metall, to encourage the introduction of lean methods.
Components for household appliances (IT) – medium	**With regard to representative participation**: • the national collective labour agreement (NCLA) for the metal-working sector obligates employers with at least 50 employees to inform and consult with worker representatives and the local trade

	union organisations regarding «decisions likely to bring about significant changes in the organisation of work and employment contracts with reference to substantial modifications to the production system […] that decisively impact the technologies adopted or the overall organisation of work […] and significantly affect employment or have substantial consequences on working conditions». **With regard to direct participation:** • Budget Law from 2016: sets out a reduction in social security contributions applied to performance-related pay schemes, provided they are collectively agreed alongside forms of direct worker participation to be formalized in 'Innovation Plans' designed by the employer or joint labour-management committees. • the NCLA for the metalworking industry enables companies and worker representatives to sign a 'Protocol on participation', which regulates advanced forms of worker participation in work organisation. • Local collective agreement between Assolombarda and the trade unions Cgil, Cisl and Uil signed on 4 October 2019, with the aim to raise companies' and worker representatives' awareness of worker participation in organisational issues, via joint information and training initiatives, as well as exploring ways in which decentralised collective bargaining could foster worker participation.
Kirchhoff (IE) – high	**With regard to representative participation**: • around 30 years of 'social partnership', came to an end in 2010, after the conclusion of a number of tripartite programmes designed to stimulate economic stability and growth. • essential voluntarist and adversarial industrial relations system in place today. **With regard to direct participation**: • during the social partnership era, a succession of multi-stakeholder initiatives targeted at developing and disseminating new forms of work organisation based on enhanced levels of direct participation, via workplace partnerships between management and trade unions. • IDEAS Institute created by the Irish trade union SIPTU in 2001, is still in operation and aims to support workplace innovation based on direct participation at company level.
Aughinish Alumina (IE) – high	**With regard to representative participation**: • around 30 years of 'social partnership', came to an end in 2010, after the conclusion of a number of tripartite programmes designed to stimulate economic stability and growth. • essential voluntarist and adversarial industrial relations system in place today. **With regard to direct participation**: • during the social partnership era, a succession of multi-stakeholder initiatives targeted at developing and disseminating new forms of work organisation based on enhanced levels of direct participation, via workplace partnerships between management and trade unions.

	• IDEAS Institute created by the Irish trade union SIPTU in 2001, is still in operation and aims to support workplace innovation based on direct participation at company level. However, the company did not resort to the Institute for its organisational innovations.
Saica (IE) – high	**With regard to representative participation**: • around 30 years of 'social partnership', came to an end in 2010, after the conclusion of a number of tripartite programmes designed to stimulate economic stability and growth. • essential voluntarist and adversarial industrial relations system in place today. **With regard to direct participation**: • during the social partnership era, a succession of multi-stakeholder initiatives targeted at developing and disseminating new forms of work organisation based on enhanced levels of direct participation, via workplace partnerships between management and trade unions. • IDEAS Institute created by the Irish trade union SIPTU in 2001, is still in operation and aims to support workplace innovation based on direct participation at company level.
Electrolux/Solaro plant (IT) – high	**With regard to representative participation**: • NCLA for the metalworking sector obligates employers with at least 50 employees to inform and consult with worker representatives and the local trade union organisations regarding «decisions likely to bring about significant changes in the organisation of work and employment contracts with reference to substantial modifications to the production system […] that decisively impact the technologies adopted or the overall organisation of work […] and significantly affect employment or have substantial consequences on working conditions». • A participatory industrial relations model has been in place at the Electrolux for over 20 years, via joint labour-management commissions, such as Co.Te.Pa, which focuses on the micro-organisation of work. **With regard to direct participation**: • Budget Law from 2016: sets out a reduction in social security contributions applied to performance-related pay schemes, provided they are collectively agreed alongside forms of direct worker participation to be formalized in 'Innovation Plans' designed by the employer or joint labour-management committees. • the NCLA for the metalworking industry enables companies and worker representatives to sign a 'Protocol on participation', which regulates advanced forms of worker participation in work organisation.

3.4. Associative and organisational characteristics of workplace actors

All company case studies that exhibit the highest levels of interaction between direct and representative participation share a number of common associative features: they have a single, union-based channel of worker representation with rights to information, consultation, and collective bargaining; they are covered by union representatives at the company level and specifically at the sites involved in innovation projects; and they are supported by company-level collective bargaining, either as an addition to national sectoral agreements, as in the Italian and Swedish cases, or in the absence of such agreements, as in the Irish cases.

The single, union-based channel of worker representation is key in facilitating meaningful interaction between direct and representative participation. This is particularly evident when compared to other contexts examined in the BroadVoice's national reports, such as the Netherlands and Slovenia, which, despite appearing promising from an institutional standpoint, have not produced particularly effective practices in this domain. In these contexts, the division of roles between works councils (which primarily operate at company level, focusing mainly on information and consultation) and trade unions (which mainly act and bargain at the national level), along with the sometimes-difficult relationships between these bodies, can limit the role of worker representation in embedding direct participation practices.

Returning to the more successful company experiences, the level of unionisation does not appear to be a decisive factor. Among the six cases analysed, union density varies significantly – being very high in the Swedish and Irish cases, and notably lower in the Italian ones. Nonetheless, interviewees in Italy report high levels of worker engagement in assemblies and in the election of their representatives.

The number of trade unions represented within the selected contexts also varies. However, it is worth noting that the coexistence of different unions, which often follow differing ideological lines as shown in the Italian case, can make it more challenging to establish a shared company-level framework for the embeddedness of direct participation into labour representation.

Finally, the strong and productive relationship between Components for household appliances (the Italian case study) and the local employers' association, Assolombarda, appears to have played a particularly significant role in fostering the high degree of interaction between direct and representative participation that developed within the company. Following participation in a training seminar organised by Assolombarda, the management of Components for household appliances decided to formalise direct participation practices through a collective agreement, further defining and structuring them within an 'Innovation Plan' drafted with the consent and involvement of worker representatives.

Table 5. An overview of the associative and organisational characteristics of the 6 best practice cases

Case study – degree of embeddedness	Associative and organisational characteristics
Workshop (SE) – medium	Single (union-led) workplace labour representation. Unionisation rate: 82% (most of whom are workers affiliated with IF Metall). Local union club, whose board is made up of 5 members. The company is covered by both a sectoral and a company agreement. No board-level employee representation, even though the company would be entitled to it, as both the club chairman and the CEO say there is no need.
Components for household appliances (IT) – medium	Single (union-led) workplace labour representation. Unionisation rate: 10-15% (although 80% of workers participate in the elections of worker representatives). Only Fim-Cisl has members among company workers. There is an RSU (Workplace Labour Representation Body), composed of 7 members. The company is covered by both sectoral and company agreements. The company maintains good relations with the local employers' association, Assolombarda, and frequently participates in its initiatives and events.
Kirchhoff (IE) – high	Single (union-led) workplace labour representation. Unionisation rate: 100% (all workers are affiliated with SIPTU). There is a SIPTU shop steward. The company is covered by a company agreement, not a sectoral one.
Aughinish Alumina (IE) – high	Single (union-led) workplace labour representation.

	Unionisation rate: 78% (workers are affiliated with 3 organisations: SIPTU, Connect and Unite). A. 'Closed shop' model is in place for manual workers. There is 1 shop steward for each trade union. The company is covered by a company agreement, not a sectoral one.
Saica (IE) – high	Single (union-led) workplace labour representation. Unionisation rate: 80% (workers are affiliated with SIPTU and TEEU, which represent technical, electrical and engineering workers). There is 1 shop steward for each trade union. The company is covered by a company agreement, not a sectoral one.
Electrolux/Solaro plant (IT) – high	Single (union-led) workplace labour representation. Unionisation rate: 35% (though over 80% of workers participate in the elections for worker representatives). There are 3 trade unions with members at the plant: Fim-Cisl, Fiom-Cgil and Uilm-Uil. There is an RSU (Workplace Labour Representation Body), composed of 11 members. The company is covered by both sectoral and company agreements.

3.5. Identity and ideological orientations of the actors

As widely demonstrated in the literature (Ahlstrand & Gautié, 2023; Beale & Mustchin, 2014; Franca & Pahor, 2014; Gill, 2009; Helfen & Schuessler, 2009), managerial attitude is a key factor in the development of jointly implemented innovation projects. This is also confirmed by the six best practice case studies analysed, all of which feature an approach to management that is open not only to organisational innovation and direct participation, but also to collaboration with worker representation in this area. In four out of six cases, it was the management that initiated the joint innovation process – often by joining support programmes or seeking expert consultancy (as in the cases of Workshop, Kirchhoff, Saica, and Electrolux) – thus highlighting the importance of such initiatives and actors as concrete support mechanisms that help drive the shared commitment.

The importance of managerial orientation is also evident in the case of Saica in Ireland, where a change in the plant's leadership resulted in the termination of the collaboration with the IDEAS Institute, which had supported a joint innovation pathway between management and the union.

The role and orientation of the trade union is equally critical, particularly in the analysed contexts, which, as previously mentioned, are characterised by a single, union-based channel of worker representation. In these settings, the stance of the union at a national or territorial level has the potential to shape, and even support, the approach and actions of union representatives in the workplace, as seen in all the cases studied. In two of the Irish cases (Kirchhoff and Saica), local SIPTU officials initiated the organisational innovation projects after identifying specific problems within the companies and proactively seeking IDEAS' involvement. Their early engagement in the experimentation process appears to have been facilitated by the presence of IDEAS, an entity established by SIPTU to promote joint innovation processes between management and worker representatives.

Chapter 2 of this report provides a more detailed analysis of union orientation in this field. However, the distinctive position of the Italian union Fim-Cisl is worth highlighting here. Unlike the other worker organisations featured in the case studies, Fim-Cisl does not support direct participation solely, or primarily, as a tool for organisational innovation. Rather, it views direct participation as a means of fostering personal empowerment and self-determination in the workplace, which are objectives deeply rooted in the union's broader mission (see also Armaroli, 2022).

Table 6. An overview of the identity and ideological orientations of the actors in the 6 most best practice cases

Case study – degree of embeddedness	Identity and ideological orientations of the actors
Workshop (SE) – medium	Historically, IF Metall has been in favour of new organisational and technological developments, provided they are kept informed. At the workplace, IF Metall also had a positive attitude towards the innovation project and wanted to contribute. The management was keen to update its organisational model to solve inefficiencies and thus agreed to purchase The Production Leap programme. Having initially forgotten to consult IF Metall, the management then involved them in coordinating the entire project.
Components for household appliances (IT) – medium	The local branch of Fim-Cisl trade union sees worker participation as a strategic asset for the company and a central objective of its mission, since it empowers workers. The branch is therefore keen to become a partner of the company in this area. The RSU members

	are also in favour of direct participation as a means of promoting a better work environment for all. The HR management is open to organisational innovation and worker involvement and is also receptive to contributions from RSU members. The company welcomes the involvement of unions and RSU in organisational processes, as this helps to bridge the gap between managerial goals and the actual implementation of day-to-day operations, by enhancing workers' acceptance and direct contributions.
Kirchhoff (IE) – high	SIPTU has traditionally been in favour of workplace innovation and labour-management partnerships. It is therefore no surprise that it set up the IDEAS Institute in 2001 to promote lean methods through workplace partnerships. Notably, it was a local SIPTU official who identified difficulties within the company and sought a partnership with management to find solutions. Management is described as enlightened and open to workplace innovation, as well as willing to collaborate with the union.
Aughinish Alumina (IE) – high	In the early 1990s, a new managing director and a senior team were willing to seek more cooperative relations with the unions after a significant redundancy programme at containing costs and preventing closure. The unions were also keen on overcoming adversarial relations and join bilateral bodies for consultation over organisational issues. Both parties cooperated in implementing direct participation.
Saica (IE) – high	A local SIPTU official who contacted the IDEAS Institute regarding problems at the company, promoting IDEAS' involvement to improve operational performance, quality, employee engagement and morale. When the new plant manager was appointed in 2010, he wanted to open a new phase of growth for the company and was open to both IDEAS involvement and a partnership with the unions. However, a change in the plant manager in 2013 led to the end of the collaboration with IDEAS.
Electrolux/Solaro plant (IT) – high	Trade unions do not all have the same attitude towards worker participation. However, Fim-Cisl supports direct participation practices and has successfully introduced a relevant clause into the company's collective agreement. Management is open to organisational innovation and has sought the support of 2 external experts who have extensive experience of assisting companies and worker representatives with innovation projects.

4. Conclusions

The comparative analysis of the six company case studies presented in this chapter as examples of best practice provides further evidence that meaningful interaction between direct and representative worker participation

is possible and can be mutually reinforcing. However, such interaction does not automatically emerge in workplaces where both channels are present. Rather, it requires the presence of specific institutional, structural, associative, and cultural conditions to be in place (see also Ahlstrand & Gautié, 2023; Armaroli, 2022; Dupuis & Massicotte, 2024; Gill, 2009; Johansson et al., 2013; Rutherford & Frangi, 2020).

A key enabling factor is the existence of a supportive institutional and policy framework – one that promotes, on the one hand, the presence and diffusion of worker representation at the workplace, and on the other, its role in managing and negotiating organisational and technological changes. This framework should explicitly recognise the contribution of direct participation as both an *outcome* of and a *vehicle* for these processes. This support is most effective when it goes beyond formal assignments of rights and includes capacity-building initiatives, such as training, consultancy, and advisory services for management and trade union representatives (in this regard see also Marchington, 2015 and the assessment of the French context in Dupuy et al., 2024).

The importance of widespread worker representation, supported by an appropriate institutional infrastructure, appears to explain why manufacturing companies are the main sites for fruitful interactions between direct and representative participation from a structural perspective. Traditional institutions of industrial relations (e.g. trade unions and collective bargaining) have historically developed and consolidated in this sector across various European countries, where they continue to exert influence despite ongoing transformations (Haipeter et al., 2023). If we wish to extend the potential for synergy between direct and representative participation beyond the manufacturing context, it is essential to consider how to support the development of workplace labour representation in structurally different sectors. This could be achieved by addressing factors such as workforce composition, workplace size, and work organisation models.

Another critical element is the presence of a single, union-based channel for worker representation, which turns out to enhance the role of the institutional support for workplace labour representation. Essentially, this can facilitate the coordination between national-level trade union strategies and the shop-floor representative actions by enabling trade unions to guide and support their representatives in addressing issues such as direct

participation, through company-level collective bargaining. Social partners in Finland (see Appendix 2) also view the possibility of concluding agreements at this level as an enabler of direct participation, as such practices can be most effectively regulated and tailored to the specific interests of the parties involved at company level. In countries with a dual-channel system, such as the Netherlands, strengthening interaction across different levels may require reducing divisions between the existing representative bodies and fostering stronger inter-organisational relationships, as it is currently happening in Germany (Haipeter, 2013). However, the risks inherent in a single, union-based channel of worker representation should not be overlooked, particularly the greater difficulty in distinguishing between phases of conflict and negotiation, and phases of cooperation in innovation processes. Indeed, as highlighted in discussions with the social partners in Belgium (see Appendix 2), the presence of trade union representation accompanied by an essentially conflictual relationship with the company diminishes the likelihood of initiating innovation processes that integrate both direct and representative participation.

The centrality of innovation as a privileged area of interplay between direct and representative worker participation, as demonstrated by the analysed case studies, seems to stem from the institutional framework as well. This is notably due to the existence of information and consultation rights for worker representatives in organisational and technological changes, combined with the relevance attributed to direct participation in transformation pathways. For similar reasons, as highlighted in the Italian case studies of Training and Telecomm and in interviews with social partners from other European countries (see Appendix 2), individual autonomy in managing working time and place emerges as another important area of interaction between direct participation and worker representation.

Finally, the institutional context also fosters a favourable attitude towards direct participation and mutual collaboration among management and trade union actors. This may indeed increase social partners' interest in the topic and reduce trade union fears of marginalisation (as documented in contexts with weaker industrial relations systems, such as Poland – see Appendix 2), thereby facilitating greater openness to joint experimentation in this area. Notably, the Irish case features a dedicated trade union support structure for workplace innovation (the IDEAS Institute, created by

SIPTU), which enabled the union to proactively initiate participatory experiments: a reversal of the dominant pattern in the literature, where such initiatives are typically management-driven. Additionally, support programmes or even the simple availability of external consultants appear to be important in sustaining managerial interest and commitment, and in helping companies to carry forward jointly developed innovation projects. However, the role and approach of individual actors should not be underestimated. This is clearly shown by the Irish Saica case, where the workplace innovation process ended following changes in the company's top management.

In this regard, this analysis cautions against viewing enabling conditions as mechanically determinative. Several cases of the mere coexistence of direct and representative participation occurred in contexts that, at least on paper, seemed favourable to integration. No single factor is sufficient in isolation; rather, it is their alignment and mutual reinforcement – across institutional, organisational, and ideological dimensions – that fosters the embeddedness of direct participation in industrial relations, provided individuals are receptive and inclined.

5. Key policy pointers

The findings of this chapter offer guidance to policymakers and social partners who are aiming to promote a more integrated, inclusive, and sustainable model of worker participation in the workplace. This is achieved by highlighting specific factors that can be leveraged to this purpose. The ultimate goal should not only be to expand the channels of voice available to workers and ensure these channels are integrated and coordinated in a way that enhances both workplace innovation and democratic participation at work. The following are key policy pointers that can be derived from the analysis:

- Foster institutional and policy frameworks that actively promote both representative and direct participation, and their interaction, including through capacity-building (e.g. training and consultancy) for both management and worker representatives.

- Establish intermediary support structures (e.g. Ireland's IDEAS Institute or Sweden's Production Leap) to help worker representatives and employers co-develop participatory innovation, offering external guidance and stability during transitions.
- Look for strategies to ensure widespread and effective workplace representation, also in sectors beyond manufacturing, by supporting the development of labour institutions in structurally diverse contexts (e.g. services and smaller firms).
- Promote coordination between labour representation structures at different levels. Single, union-led representation channels can enhance alignment between national strategies and shop-floor actions – though safeguards are needed to manage potential conflict dynamics in the workplace. Dual-channel representation systems require clear role differentiation and coordinated strategies to avoid fragmentation.
- Leverage social dialogue at company level to tailor and regulate direct participation practices and the necessary tools (e.g. workers' rewards and training) to local needs, thereby bolstering union involvement in innovation processes.
- Promote the interaction between representative and direct participation in innovation pathways in workplaces, i.e. via the involvement of worker representatives in joint labour-management committees devoted to coordinating the overall definition, implementation and monitoring of innovation processes, as well as initiatives for directly engaging workers in driving specific changes to the organisation of work.
- Support culture change within management and worker representatives to reduce distrust and promote joint experimentation.

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Appendixes

Appendix 1

<table>
<tr><td colspan="4">BULGARIA
Copper company (interviews with 2 worker representatives and 1 manager)
Mechanical engineering company (interviews with 1 worker representative and 1 manager)
Water supply and sewage company (interviews with 1 worker representative, 1 trade union representative and 1 manager)
Water supply company (interviews with 1 worker representative and 1 trade union representative)</td></tr>
<tr><td colspan="4">Type of relationship between direct and representative worker participation</td></tr>
<tr><td>COPPER COMPANY</td><td>MECHANICAL ENGINEERING COMPANY</td><td>WATER SUPPLY AND SEWAGE COMPANY</td><td>WATER SUPPLY COMPANY</td></tr>
<tr><td>Coexistence without interaction
Direct worker participation has improved over the years (e.g. via day-to-day operations, proposals for innovation and surveys) but worker representatives do not play a role in it.</td><td>Coexistence without interaction
Direct worker participation practices are implemented (e.g. workers' suggestions for improvements and related awards, an 'open door' policy with supervisors and HR managers, and information campaigns). Worker representatives are not involved in these practices.</td><td>Coexistence without interaction
Direct participation is quite limited, and worker representatives are not involved.</td><td>Coexistence without interaction
Direct participation is quite limited, and worker representatives are not involved.</td></tr>
<tr><td colspan="4">Institutional context, structured policies and programmes</td></tr>
<tr><td>COPPER COMPANY</td><td>MECHANICAL ENGINEERING COMPANY</td><td>WATER SUPPLY AND SEWAGE COMPANY</td><td>WATER SUPPLY COMPANY</td></tr>
<tr><td colspan="4">With regard to representative participation:
• Various tripartite structures at the national level and in some municipalities.
• Collective bargaining mainly takes place at the company level and is estimated to cover less than 30%.
• Information and consultation rights for worker representatives (whether union- or non-union-led) on a number of issues, including changes to the organisation of work (e.g. the introduction of remote working) and the development of the company, particularly in cases involving threats to employment.</td></tr>
</table>

- Mixed workplace labour representation bodies, which can be union.
- Or non-union-led.

With regard to direct participation:

- Neither legal nor collective bargaining provisions at the national level nor public programmes are related to direct worker participation.

Areas for developing direct participation, specifically in interaction with worker representation, where applicable			
COPPER COMPANY	**MECHANICAL ENGINEERING COMPANY**	**WATER SUPPLY AND SEWAGE COMPANY**	**WATER SUPPLY COMPANY**
Direct worker participation has improved over the years (e.g. via day-to-day operations, proposals for innovation, notifications of safety regulation violations and surveys). **Overall impact**: Workers often suggest small changes that, when taken together, have a significant positive effect on organisational efficiency and workers' daily lives.	Direct worker participation practices are implemented (e.g. workers' suggestions for improvements and related awards, an 'open door' policy with supervisors and HR managers, information campaigns led by management. etc.). **Overall impact:** according to company management, increased motivation is the result of the programme for collecting and rewarding workers' suggestions for improvement.	Direct participation is limited to workers' suggestions for improving the work process. Trade union members are more active than others in this respect. **Overall impact**: Good cooperative climate, although there is room for improvement.	Direct participation is limited to workers' suggestions for improving the technological process and working conditions. **Overall impact**: -
Business structural and environmental context			
COPPER COMPANY	**MECHANICAL ENGINEERING COMPANY**	**WATER SUPPLY AND SEWAGE COMPANY**	**WATER SUPPLY COMPANY**
It is engaged in producing and processing copper. It is part of a German-based multinational corporation. The production process is highly integrated. Local management mostly determines HRM policies. It employs over 1,000 people.	Bulgarian branch of an Austrian company, which is a world leader in the production of hydraulic lifting, and cargo and handling solutions. It has a high level of quality and innovation. The company invests in its employees' professional development, maintaining a partnership with	The company holds a regional monopoly on water supply, draining and treatment services. It employs around 400 people.	The company is 100% state-owned and operates across a large area of Southwestern Bulgaria. Its activities include water supply, purification and repair works. It employs around 550 people.

	a technical high school and operating a training centre. It employs 720 people.		
Associative and organisational characteristics			
COPPER COMPANY	**MECHANICAL ENGINEERING COMPANY**	**WATER SUPPLY AND SEWAGE COMPANY**	**WATER SUPPLY COMPANY**
Mixed (either union- or non-union-led) workplace labour representation. Unionisation rate: 70% (workers are affiliated with CL Podkrepa and CITUB). Relationships between the 2 unions are not always good. There are union-led worker representatives. The company is covered by both sectoral and company agreements.	Mixed (union and non-union) labour representation in workplace. The company is not unionized. Non-union-led worker representatives (between 7 and 10), are elected by a general assembly of company workers. There are cooperative relationships between the management and the worker representatives.	Mixed (union and non-union) labour representation in workplace. Unionisation rate: 90% (workers are affiliated with CL Podkrepa and CITUB). There are good relationships between the 2 unions. Positive labour-management climate. The company is covered by both sectoral and company agreements.	Mixed (union and non-union) labour representation in workplace. Unionisation rate: not provided. Workers are affiliated with CL Podkrepa and CITUB. Trade union representatives, a Working Conditions Committee and a Working Conditions Group provide workplace labour representation, with most of the elected representatives being trade union activists. The company is covered by both sectoral and company agreements.
Identity and ideological orientations of the actors			
COPPER COMPANY	**MECHANICAL ENGINEERING COMPANY**	**WATER SUPPLY AND SEWAGE COMPANY**	**WATER SUPPLY COMPANY**
Both the company management and the trade union representatives support the direct involvement of workers as a means of achieving success for the company. However, worker representatives do not play an active role.	The company places emphasis on teamwork and fostering a cooperative culture.	-	-

IRELAND

Kirchhoff (interviews with 1 worker representative, 1 trade union consultant and 2 managers)
FSW Coatings (interviews with 1 trade union consultant, 4 managers and some workers)
Aughinish Alumina (interviews with 1 trade union consultant, 1 manager and 1 worker representative)
Saica (interviews with 1 trade union consultant, complemented by interviews with managers and worker representatives already conducted in the past)

Type of relationship between direct and representative worker participation

KIRCHOFF	FSW COATINGS	AUGHINISH ALUMINA	SAICA
Interaction – High degree An organisational innovation project (leading to decentralised decision-making and workers autonomy in day-to-day operations) was coordinated by a Steering Group. This group was composed of technical staff, production managers, and a shop steward. They conducted a gap analysis and outlined a plan for the future thus guiding the adoption of a lean manufacturing approach.	**Coexistence without interaction** Following targeted training courses, forms of direct participation were introduced within the company.	**Interaction – High degree** New forms of work organisation that enhance worker participation and autonomy were introduced through the coordination of joint union-management teams.	**Interaction – High degree** A joint union-management steering group was set up to oversee decision-making and consultation processes relating to the implementation of continuous improvement groups and other direct participation practices.

Institutional context, structured policies and programmes

KIRCHOFF	FSW COATINGS	AUGHINISH ALUMINA	SAICA

With regard to representative participation:

- Around 30 years of 'social partnership', with the conclusion of several tripartite programmes designed to stimulate economic stability and growth, came to an end in 2010.
- An essential voluntarist and adversarial industrial relations system in place today.

With regard to direct participation:

- During the social partnership era, a succession of multi-stakeholder initiatives targeted at developing and disseminating new forms of work organisation based on enhanced levels of direct participation, via workplace partnerships between management and trade unions.
- The IDEAS Institute, created by the Irish trade union SIPTU in 2001, is still in operation and aims to support workplace innovation based on direct participation at company level.

Areas for developing direct participation, specifically in interaction with worker representation, where applicable			
KIRCHOFF	**FSW COATINGS**	**AUGHINISH ALUMINA**	**SAICA**
Innovation project aimed to adopt lean manufacturing throughout the company, which led to less hierarchical structure, decentralised decision-making, and enhanced worker autonomy in day-to-day operations. Developed under the guidance of the IDEAS, it involved a steering committee comprising technical staff, production managers and a shop steward, as well as teamwork training and the appointment of 'lean manufacturing ambassadors' among workers. **Overall impact**: A labour-management partnership and a cultural shift (emphasising collaboration and worker involvement) emerged. Improvements in organisational efficiency and competitiveness were gained. The parties signed a new company agreement, extending its duration to 3 (and 5) years to provide a stable basis for cost planning. Furthermore, it sanctioned the abolition of the previous piece rate payment system and introduced a bonus scheme based on KPIs.	Implementation of teamwork and organisational efficiency through training courses, delivered by IDEAS experts, and targeted at managers and operators. Following the courses, new forms of dialogue were introduced, including meetings to discuss workers' proposals, problem-solving tools and innovation projects developed with the input of interested workers. **Overall impact**: A learning culture and a climate of trust and cooperation were established between the trade union and management.	Innovation aimed to introduce new forms of work organisation, by flattening the organisational structure, creating self-managed teams and encouraging workers to suggest ideas and take the initiative. These changes were introduced through the coordination of labour-management teams and thanks to training and development initiatives. **Overall impact**: Financial benefits, cost reduction, worker empowerment, and an organisational culture based on a high level of trust and co-operation were observed.	Innovation project comprised the introduction of continuous improvement teams to analyse machine performance and a flattened organisational structure. It was developed following a roadmap devised by an IDEAS expert, who provided guidance through a joint labour-management steering group, and involved training and communication plans. **Overall impact**: There was greater employee engagement and enhanced problem-solving capabilities, resulting in improved performance and increased production volumes.
Business structural and environmental context			
KIRCHOFF	**FSW COATINGS**	**AUGHINISH ALUMINA**	**SAICA**

Manufacturer of metal structure parts for the automotive industry. It is part of an international group based in Germany. The company strives for 'Just in Time' delivery and high standards of quality and services required by its famous international clients. However, it faces competition from Hungary and Poland, which have lower transportation costs. It employs 42 people.	The company produces, develops, and sells coatings and related products to over 400 retail customers in Ireland and around the world. It has a research and development laboratory and a warehouse equipped with digital technology. It employs over 160 people. The company is also very engaged with the local community.	Large alumina refinery owned by a Russian company. The company invests in environmental sustainability and occupational health and safety. It employs 490 people.	Manufacturer of paper and cardboard boxes for various industries, such as food and pharmaceuticals. It is part of a multinational company headquartered in Spain. It employs 92 people.
Associative and organisational characteristics			
KIRCHOFF	**FSW COATINGS**	**AUGHINISH ALUMINA**	**SAICA**
Single (union-led) workplace labour representation. Unionisation rate: 100% (all workers are affiliated with SIPTU). There is a SIPTU shop steward. The company is covered by a company agreement, not a sectoral one.	Single (union-led) workplace labour representation. Unionisation rate: 25% (workers are affiliated with SIPTU). There is a SIPTU shop steward. The company is covered by a company agreement, not a sectoral one.	Single (union-led) workplace labour representation. Unionisation rate: 78% (workers are affiliated with 3 organisations: SIPTU, Connect and Unite). A 'Closed shop' model is in place for manual workers. There is one shop steward for each trade union. The company is covered by a company agreement, not a sectoral one.	Single (union-led) workplace labour representation. Unionisation rate: 80% (workers are affiliated with SIPTU and TEEU, which represent technical, electrical and engineering workers). There is one shop steward for each trade union. The company is covered by a company agreement, not a sectoral one.
Identity and ideological orientations of the actors			
KIRCHOFF	**FSW COATINGS**	**AUGHINISH ALUMINA**	**SAICA**
SIPTU has traditionally been in favour of workplace innovation and labour-management partnerships. It is no surprise that it set up the IDEAS Institute in 2001 to promote lean	SIPTU has traditionally been in favour of workplace innovation and labour-management partnerships. The company management is described as enlightened and open to workplace innovation, as well as willing to	In the early 1990s, a new managing director and a senior team were willing to seek more cooperative relations with the unions after a significant redundancy programme aimed at containing costs and preventing	A local SIPTU official contacted the IDEAS Institute regarding problems at the company, promoting IDEAS' involvement to improve operational performance and quality, as well as employee engagement and morale.

methods through workplace partnerships. Notably, it was a local SIPTU official who identified difficulties within the company and sought a partnership with management to find solutions. Management is described as enlightened, open to workplace innovation, as well as willing to collaborate with the union.	collaborate with the union. It was the plant manager who invited IDEAS to deliver the training courses.	closure. The unions were also keen to overcome adversarial relations and join bilateral bodies to consult on organisational issues. Both parties cooperated in implementing direct participation.	The new plant manager, appointed in 2010, wanted to initiate a new phase of the company growth and was open to both IDEAS' involvement and a partnership with the unions. However, a change in leadership at the plant in 2013 resulted in the collaboration with the IDEAS Institute being terminated.

ITALY

Electrolux (interviews with 1 trade union representative, 3 worker representatives and 3 managers)
Components for household appliances (interviews with 1 worker representative, 1 trade union representative and 2 managers)
Training (interviews with 1 manager and 2 worker representatives)
Telecomm (interviews with 2 managers, 1 trade union representative and 1 worker representative)

Type of relationship between direct and representative worker participation

ELECTROLUX	COMPONENTS FOR HOUSEHOLD APPLIANCED	TRAINING	TELECOMM
Interaction – High degree A collective agreement was signed in relation to the Solaro industrial development plan, which also envisaged the implementation of direct worker participation practices coordinated by joint labour-management committees.	**Interaction – Medium degree** In accordance with a collective agreement, the employer drafted an innovation plan for the improvement of key business processes, which was approved by worker representatives. It entailed the development of direct worker participation practices, under the coordination of a joint labour-management commission. Despite being formally empowered to have a say in the design of direct worker participation practices, worker representatives played a more consistent role in the implementation phase.	**Interaction – High degree** limited to autonomy in terms of time and place of work Various direct participation practices (e.g. structured work teams, cross-departmental project groups, professional communities and self-assessment procedures) are mainly shaped by management. An exception is workers' autonomy over how they organise their time, which is regulated by collective bargaining.	**Interaction – High degree** limited to autonomy in terms of time and place of work Various direct participation practices (e.g. top-down information practices, surveys on workers' wellbeing, structured work teams and cross-departmental project groups and a quality management system also via focus groups) are mainly shaped by management. In contrast, workers' autonomy over the temporal and spatial management of their work is regulated through collective bargaining and monitored by a joint labour-management commission.

Institutional context, structured policies and programmes

ELECTROLUX	COMPONENTS FOR HOUSEHOLD APPLIANCED	TRAINING	TELECOMM

- Legislative Decree No. 104/2022 (the transposition of EU Directive 2019/1152) grants workers and their representatives with information rights concerning automated decision-making or monitoring systems in the workplace.

- Article 4 of the Workers' Statute sets forth that the introduction of technologies allowing an indirect monitoring of workers' activities in the workplace is conditional upon a company-level collective agreement being reached between employers and workers' representatives. If an agreement is not reached, employers can only introduce these technologies after receiving authorisation from the Labour Inspectorate.
- Procedures for consultation and information with trade unions are required in cases of collective dismissals (Law No. 223/1991), company transfers (Article 47 of Law No. 428/1990), workplace health and safety (Law No. 626/1994, later replaced by Legislative Decree No. 81/2008) and business crises (Decree-Law No. 118/2021), and the closure of offices, branches or facilities (Law No. 234/2021).

With regard to representative participation:

- The NCLA for the metalworking sector obligates employers with at least 50 employees to inform and consult with worker representatives and the local trade union organisations regarding "decisions likely to bring about significant changes in the organisation of work and employment contracts with reference to substantial modifications to the production system […] that decisively impact the technologies adopted or the overall organisation of work […] and significantly affect employment or have substantial consequences on working conditions".

With regard to direct participation:

- Budget Law from 2016 sets out a reduction in social security contributions applied to performance-related pay schemes, provided they are collectively agreed alongside forms of direct worker participation, which are to be formalised in 'Innovation Plans' designed by the employer or joint labour-management committees.
- The NCLA for the metalworking industry enables companies and worker representatives to sign a 'Protocol on participation', which regulates advanced forms of worker participation in work organisation.

With regard to representative participation:

- Electrolux has had a participatory industrial relations model in place for over 20 years, through joint labour-management commissions such as the 'Co.Te.Pa' commission, which focuses on the micro-organisation of work.

With regard to direct participation:

- Local collective agreement between Assolombarda and the trade unions Cgil, Cisl and Uil signed on 4 October 2019. The agreement aims to raise awareness among companies and worker

With regard to representative participation:

- The NCLA for the tertiary sector establishes the right to information and consultation for worker representatives also in the event of business changes.

With regard to direct participation:

- Budget Law from 2016: sets out a reduction in social security contributions applied to performance-related pay schemes, provided they are collectively agreed alongside forms of direct worker participation, which are to be formalized in 'Innovation Plans' designed by the employer or joint labour-management committees.

	representatives about worker participation in organisational issues, via joint information and training initiatives. It also looks at ways in which decentralised collective bargaining could foster worker participation.		
Areas for developing direct participation, specifically in interaction with worker representation, where applicable			
ELECTROLUX	**COMPONENTS FOR HOUSEHOLD APPLIANCED**	**TRAINING**	**TELECOMM**
Innovation project aimed to restructure the assembly lines, which led to self-managed rotation teams, and increased productivity. This was developed through: preliminary training for workers and their representatives; a joint labour-management commission, composed of worker representatives, production managers and technical staff; communication initiatives, focus groups for in-depth analysis; as well as a survey to detect the ergonomic effects of the pilot phase. **Overall impact**: Increase in productivity, improvement in work quality in terms of ergonomics, enhancement of worker autonomy and social connections; and an increase in workers' versatility and skills. A significant improvement in the company climate has been achieved, along with the prospects for a new industrial relations	Innovation project aimed to revise key business processes and integrate a new software system to connect the various production areas. This was developed through: training initiatives; suggestion schemes; and a joint labour-management commission comprising 5 thematic groups of managers, interested workers and their representatives. **Overall impact:** Good productivity results. Workers seem generally happier and more engaged, although some people are still reluctant to engage.	Various direct participation practices, such as structured work teams, cross-departmental project groups, professional communities for the exchange of experiences and know-how, professional self-assessment templates, and top-down information practices. Furthermore, workers are granted autonomy and flexibility in organising their time via collective bargaining. **Overall impact:** Management maps the organisational and social results of company practices via surveys, templates, etc. Another survey is planned to collect feedback from workers about flexible working time arrangements.	Various direct participation practices, such as top-down information practices, surveys on workers' well-being, structured work teams and cross-departmental project groups and a quality management system also via focus groups. Workers are granted autonomy in the temporal and spatial management of their work, via collective bargaining, coordinated by a joint labour-management commission. **Overall impacts**: Worker participation is viewed as essential for pursuing innovation and change. Workers also provide positive feedback regarding their direct involvement and request an intensification of the efforts in this area. However, difficulties have been reported, for example, in relation to the passive attitude of some workers and the reluctance of

model in the workplace that links collective bargaining over industrial plans with organisational participation. However, worker representatives are concerned about a return to hierarchical practices in the light of the current market downturn.			middle management to implement remote work.
Business structural and environmental context			
ELECTROLUX	**COMPONENTS FOR HOUSEHOLD APPLIANCED**	**TRAINING**	**TELECOMM**
Manufacturer of household appliances. It operates in international markets. It is part of a Swedish multinational group. The company invests in automation technologies, and lean methods. It faces competition from non-EU countries. It employs 640 people.	Manufacturer of household appliance components. It collaborates with major international brands and exports around 80% of its production. The company follows a vertically integrated production model with a high level of automation. The company invests in skills and research, and development. It employs 229 people.	Private and multi-located (with around 16 premises throughout Italy) training institution and employment agency. It stands out for its innovative approach in both product development and internal processes, which is facilitated by a dedicated R&D team and an innovation manager. It employs 275 people.	Leading, multi-located (with around 14 premises all over the country) telecommunications provider in Italy, that focuses on the B2B market. It was established in 2018 through the merger of 5 companies and became part of a pan-European private equity fund in 2022. The company aims to support the digitalisation of Italian companies, which require continual technological and organisational innovation in order to stay competitive. It employs 752 people.
Associative and organisational characteristics			
ELECTROLUX	**COMPONENTS FOR HOUSEHOLD APPLIANCED**	**TRAINING**	**TELECOMM**
Single (union-led) workplace labour representation. Unionisation rate: 35% (though over 80% of workers participate in the elections for worker representatives).	Single (union-led) workplace labour representation. Unionisation rate: 10-15% (although around 80% of workers participate in	Single (union-led) workplace labour representation. Unionisation rate: around 10%. The trade unions with members are Filcams-Cgil and Fisascat-Cisl.	Two union-led bodies for workplace labour representation (RSA and RSU) Unionisation rate: 24% (with differences across the various sites).

There are three trade unions with members at the plant: Fim-Cisl, Fiom-Cgil and Uilm-Uil. There is an RSU (Workplace Labour Representation Body), composed of 11 members. The company is covered by both sectoral and company agreements.	the elections of worker representatives). Only Fim-Cisl has members among company workers. There is an RSU (Workplace Labour Representation Body), composed of 7 members. The company is covered by both sectoral and company agreements. The company has good relations with the local employers' association, Assolombarda, and often participates in its initiatives and events.	There are 3 RSAs (Workplace Labour Representatives), located in just two company premises: 2 are affiliated with Filcams-Cgil and 1 is affiliated with Fisascat-Cisl. The company is covered by both sectoral and decentralised agreements, which cover the entire company and have been signed by the RSA and the territorial union branches in the most unionised areas.	Overall, there are 10 RSAs appointed by all the 3 sectoral trade unions (Filcams-Cgil, Fisascat-Cisl and Uiltucs-Uil), based on their members, and 1 RSU. They are mainly concentrated in four premises. The majority of the workforce is covered by the NCLA for the tertiary, retail and services sector. A minority of workers (formerly belonging to another company) are covered by the NCLA for companies performing telecommunications services. Workers covered by the NCLA for the tertiary sector are also covered by a company agreement, signed by national trade unions.
Identity and ideological orientations of the actors			
ELECTROLUX	**COMPONENTS FOR HOUSEHOLD APPLIANCED**	**TRAINING**	**TELECOMMUNICATIONS**
Trade unions do not all have the same attitude towards worker participation. However, Fim-Cisl supports direct participation practices and has succeeded in introducing a relevant clause on the issue into the company's collective agreement. Management is open to organisational innovation and has sought the support of two external experts who have extensive experience of assisting companies and worker representatives with innovation projects.	The local branch of Fim-Cisl sees worker participation as a strategic asset for the company and a central objective of the trade union mission, since it empowers workers. The branch is therefore keen to become a partner of the company in this area. The RSU members are also in favour of direct participation as a means of promoting a better work environment for all. The HR management is open to organisational innovation and worker involvement and is also	From the interviews with the HR manager and the worker representatives, the general perception is that the company can implement positive organisational practices on its own and that labour representation does not need to take the lead in this area. The HR Manager depicts worker representatives as collaborative rather than proactive in the area of direct participation.	The company management declares to be strongly committed to listening to its workers, being as transparent as possible and keeping them informed about the company's various challenges, goals and available resources. However, middle management appears to be more reluctant to develop remote working. Furthermore, worker participation and active contribution are considered essential for Case 2T to keep up with the constant innovations and

	receptive to contributions from RSU members. The company welcomes the involvement of unions and RSU in organisational processes, as this helps to bridge the gap between managerial goals and the actual implementation of day-to-day operations by enhancing acceptance and contributions from workers.		changes in the telecommunications market. Worker representatives are not particularly interested in direct participation (other than working time autonomy), possibly due to their satisfaction with managerial practices and their lack of expertise.

THE NETHERLANDS

Solvay (interviews with 2 managers, 1 worker representative and 1 trade union representative)
Pharma (interviews with 2 managers and 1 worker representative)
Care (interviews with 2 managers and 1 worker representative)
Municipality (interviews with 1 manager, 1 data officer and 1 worker representative)

Type of relationship between direct and representative worker participation

SOLVAY	PHARMA	CARE	MUNICIPALITY
Coexistence without interaction In 2019, a global framework agreement was reached upon the initiative of the Dutch works council, providing for the early involvement of workers and their representatives in the implementation of new technologies. However, the agreement does not specifically refer to direct participation practices, despite these being implemented in Dutch sites.	**Interaction – Low degree** The works council is not structurally involved in direct participation practices. However, it raised its voice after an app was introduced for reporting malfunctions, notifying management about some workers' accessibility issues.	**Coexistence without interaction** Direct participation is encouraged through regular conversations between executives/supervisors and employees, for example, and is also present in the field of technological innovation. However, it does not interact with representative participation.	**Interaction – Low degree** Direct participation has developed particularly in relation to digital innovation. Although the works council is not systematically involved in designing direct participation practices, it has succeeded in gaining additional training for workers after being informed about the implementation of a new technology.

Institutional context, structured policies and programmes

SOLVAY	PHARMA	CARE	MUNICIPALITY

With regard to representative participation:

- The Works Council Act (adopted in 1950 and strengthened in 1979) regulates the obligation for companies with 50 or more employees to set up a works council. It also provides works councils with rights of codetermination, information and consultation. Notably, works councils have the right to be consulted on the introduction of new technologies and in case of organisational restructuring. One issue with applying the Works Council Act is that AI is an ongoing process and both employers and works councils find it difficult to identify the exact moment for the consultation procedure. Works councils also have the right to approve personnel tracking/registration systems, occupational health and safety measures, training initiatives and remuneration solutions for new functions. In contrast, unless they operate in sectors not covered by NCLAs, trade unions can only bargain at the company level with regard to the effects of organisational or technological changes.

With regard to direct participation:

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The tripartite consultation body, the Socio-Economic Council (SER), has a committee dedicated to the 'Promotion of employee participation'. In recent years, the SER has been quite active in producing publications with recommendations for companies, trade unions and works councils on 'social innovation', 'professional autonomy' and 'worker participation'.
In 2017, the national employers' association, AWVN, the trade union, FNV and a smaller union federation, CNV, launched the SPDI initiative, which is aimed at promoting sustainable employment. The SPDI has also developed a specific approach/strategy to promote innovation in work organisation by providing HR managers with support and consultancy in this field.

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<td>With regard to representative participation:
Social innovation is not a hot topic in collective bargaining, nor is worker participation. Furthermore, there is no sectoral collective agreement covering the chemical industry.</td>
<td>With regard to representative participation:
Social innovation is not a hot topic in collective bargaining. Nor is worker participation.
With regard to direct participation:
The NCLA for the long-term care sector includes an important clause titled Employee participation in proposed changes in the organisation, which allows employers to seek employees' opinions at an early stage of organisational change. The NCLA also provides a definition of 'employee participation' in organisational development in a specific table. Furthermore, the NCLA stipulates that "during the term of this agreement, the parties will develop instruments and programmes that promote and facilitate opportunities for influence, (co-)determination and participation". A notable innovation is the chapter titled A good conversation, which aims to promote better worker participation, particularly</td>
<td>With regard to representative participation:
According to the NCLA for Dutch municipalities, local consultations between managers and trade unions should take place periodically. Collaboration with the works council is also encouraged. However, digitisation is not a major topic in these meetings.</td>
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		in the light of the growing labour shortages in the sector.	
Areas for developing direct participation, specifically in interaction with worker representation, where applicable			
SOLVAY	**PHARMA**	**CARE**	**MUNICIPALITY**
Direct participation practices are implemented at the Dutch sites, including structural work consultations in the context of shift transfers, suggestion systems on technology and social matters; job autonomy (though this depends on specific managers within employee groups). **Overall impact**: -	Structured lean organisational methods, implying involvement of workers in providing suggestions and analysing malfunctions. Workers are involved in the implementation of new technologies, e.g. via ad hoc training and workshops. **Overall impact:** Limited impact in terms of tailoring the implementation of new technologies in specific sites. A standardised approach still prevails.	Direct participation is implemented, although a certain degree of hierarchy is deemed necessary. This is mainly achieved through individual and team conversations on topics ranging from work-life balance and workloads to career development. It is also achieved during technological innovation processes, such as when employees were asked to choose a new technological system or when 'digi-coaches' were appointed among employees. **Overall impact:** Workers' involvement faces difficulties, e.g. a lack of time and skills.	Direct participation has developed particularly in relation to digital innovation. Although the works council is not systematically involved in designing direct participation practices, it has succeeded in gaining additional training for workers after being informed about the implementation of a new technology. **Overall impact**: Pilot processes integrating digital technologies are ongoing, with attention being given to training workers.
Business structural and environmental context			
SOLVAY	**PHARMA**	**CARE**	**MUNICIPALITY**
Dutch site of a multinational company in the chemical industry. It invests heavily in new technologies, particularly in the areas of production robotisation and security cameras. Other digital innovations in HRM, such as recruitment and satisfaction surveys, are driven by the	Dutch site of a multinational company with US headquarters. Business processes include high-quality technological production as well as simpler packaging operations. The company focuses on continuous improvement and makes investments in IT technologies. AI policy guidelines	Private, non-profit company provides long-term and elderly care. It has six locations in the Netherlands and also provides home care. It uses new technologies, such as smart sensors. It employs 1,200 people across the country, most of whom are women and migrants.	Municipality is one of the largest municipalities in the Netherlands. It presents itself as an innovative city and was one of the first in the country to implement data-driven working practices. In order to serve its residents, the municipality employs approximately 2,500 employees in a sizeable

company's headquarters in Brussels. The company employs 85 people in the Netherlands.	have recently been produced by the US headquarters and disseminated top-down. The Dutch site employs 1,400 people.		organisation. This consists of 18 different departments, including 1 dedicated to 'Data, Information and Technology'.
Associative and organisational characteristics			
SOLVAY	**PHARMA**	**CARE**	**MUNICIPALITY**
Single (non-union-led) workplace labour representation body. Unionisation rate: 33%. Most of unionised employees are affiliated with FNV. There is a works council. The company is covered by a decentralised agreement, as there is no sectoral agreement in the chemical industry.	Single (non-union-led) workplace labour representation body. Unionisation rate: 10%. There is a works council but only a few of its members are unionised. There are no good relationships between the works council and the trade unions, particularly FNV. On the other hand, the relationship between management and the works council is based on mutual trust and cooperation. A company agreement has been signed with two trade unions (FNV and VHP2).	Single (non-union-led) workplace labour representation body. Unionisation rate: less than 10%. There is a works council but only 2 of its members are unionised (affiliated with FNV). There have been improvements in the dialogue between management and the works council. The company is covered by a sectoral agreement for nursing homes and homecare. The company is a member of the ActiZ employers' association.	Single (non-union-led) workplace labour representation body. Unionisation rate: 12% (affiliated with FNV). There is a works council comprising 17 members who can dedicate 6 hours per week to their representative duties. The works council's structure incorporates a system of 'linking pins': individuals from the 18 departments acting as connectors between their departments and the works council. For example., they ensure that the works council remains aware of developments, needs and questions arising from the departments. Municipality is covered by a sectoral agreement.
Identity and ideological orientations of the actors			
SOLVAY	**PHARMA**	**CARE**	**MUNICIPALITY**
At the national level, FNV recognizes the importance of direct participation in organisational or technological developments. However, they acknowledge that it may be poorly implemented in the workplace and that they lack control over the quality of direct participation. Overall, works councils and trade unions in the Netherlands only support technologies when managers introduce them alongside attention to job quality.			

	The works council at Pharma would like to play a more active and earlier role in discussions about new technologies and AI. For instance, in the field of risk assessments.	The management would like the works council to be more proactive in addressing the impact of technological developments. The management also believes that involving the works council earlier in innovation planning could encourage workers to accept innovation more readily. The works council wants to increase visits to local sites to improve its understanding of current professions and work processes. This is a prerequisite for becoming more involved in innovations.	The policy advisor believes that the works council could support the implementation of digitalisation by acting as a feedback system. However, the works council is concerned about equipping workers with the necessary skills to use new technologies and avoid being replaced.

SLOVENIA

Tire (interviews with 1 worker representative, 1 trade union representative and 1 manager)
Pharmaceutical (interviews with 1 worker representative, 2 trade union representatives and 1 manager)
Retirement home (interviews with 1 worker representative and 1 manager)
Broadcasting (interviews with 1 worker representative, 1 trade union representative and 1 manager)

Type of relationship between direct and representative worker participation

TIRE	PHARMACEUTICAL	RETIREMENT HOME	BROADCASTING
Interaction – Low degree Direct participation practices, including a suggestion system, satisfaction surveys, daily interactions between workers and their supervisors and information activities, are implemented. However, worker representatives are generally unfamiliar with them, except for their contribution to the suggestion system. This involves taking workers to visit successful Slovenian companies that encourage employee participation in organisational innovation.	**Interaction – Low degree** Direct participation is implemented via a system for collecting workers' ideas and rewarding them, surveys, information channels, etc. Although they are very supportive, worker representatives are not formally involved in its design and implementation.	**Coexistence without interaction** Direct participation is implemented via a quality management system, regular team meetings and informal conversations. However, there are no links with worker representatives.	**Coexistence without interaction** Direct participation is poorly developed. There is no role for worker representatives in it.

Institutional context, structured policies and programmes

TIRE	PHARMACEUTICAL	RETIREMENT HOME	BROADCASTING
With regard to representative participation: • Workplace-level representation in Slovenia is provided by both unions and works council. Both have information and consultation rights, although the works council's rights in this area are more extensive. Only the union, however, can undertake collective bargaining. • Worker Participation in Management Act: Article 2 stipulates that employee participation in management is realized through:		**With regard to representative participation**: • Institutes Act: the Act stipulates that the institute is managed by a council comprising representatives of the founder, the institute's employees and users or interested members of the public. This means that, while employees usually hold between one-third and half of the members, they do not hold a predominant influence.	

o the right to take the initiative and the right to receive a response to such initiatives; o the right to information; o the right to provide opinions and proposals; and o the right to a response to these. These rights are exerted either individually or collectively, through: representation on supervisory boards, worker representatives or works councils, or workers' assemblies. According to Articles 89 and 90, employers are required to inform the works council of key business matters (e.g. the company's economic situation, strategic goals, production and sales, technological changes and organisational restructuring) before making final decisions. Article 4 guarantees the right to participate in management both individually and collectively, particularly with regard to influencing work organisation and contributing to improved working conditions and business performance. Article 5 allows for participation agreements between the employer and the works council. These agreements can define additional forms of co-management that go beyond the minimum legal requirements. In practice, however, such agreements tend to focus more on collective participation than on direct individual involvement. **With regard to direct participation**: • Worker Participation in Management Act: while it primarily supports collective representation, it does recognise forms of direct individual employee participation (e.g., Articles 2 and 88). This includes: o the right to initiative and to receive a mandatory response from the employer if the initiative concerns the employee's work or unit. This empowers individuals to suggest changes in any area of business; o the right to information and to request clarification on matters such as pay, working conditions, and organisational changes; o the right to express opinions and make proposals, and the employer is obligated to respond; o the employer must enable individuals to voice opinions on workplace organisation and the work process directly.	• All public servants are covered by at least one collective agreement. Typically, in addition to the general collective agreement for the public sector, there is also a sectoral or professional agreement, resulting in 100% collective bargaining coverage. **With regard to direct participation**: • Worker Participation in Management Act has never been enacted in the public sector.

However, despite these legal provisions, direct participation remains underdeveloped in practice, as most agreements between employers and works councils emphasise collective mechanisms over individual engagement.	

Areas for developing direct participation, specifically in interaction with worker representation, where applicable			
TIRE	**PHARMACEUTICAL**	**RETIREMENT HOME**	**BROADCASTING**
Although a hierarchical organisational structure persists, direct participation practices are implemented, including a suggestion system, satisfaction surveys, daily interactions between workers and their supervisors, information activities and a 'speak up' line for reporting possible forms of violence. Indirect participation is depicted as being stronger. Worker representatives are generally unfamiliar with direct participation, except when contributing to the suggestion system or by taking workers to visit successful Slovenian companies that involve employees in organisational innovation. **Overall impact**: workers' satisfaction varies by department depending on the degree of hierarchy in the organisational structure. Participation, whether individual or group, is encouraged but the lack of rewards for new ideas leads to low motivation. There are efforts to engage employees and encourage innovation but	Direct participation is implemented via a system for collecting workers' ideas and rewarding them, satisfaction surveys and information channels. Worker representatives encourage employees to address their issues with supervisors. **Overall impact:** high levels of job satisfaction, innovation, and organisational stability.	Both formal and informal mechanisms are in place to support direct participation. Formally, the institution has a quality management system, holds regular team meetings, and operational meetings every two weeks to discuss observations and agree on actions. Informally, the director fosters a relaxed atmosphere by engaging in casual conversations with staff and promoting a positive work environment. Moreover, surveys are conducted and suggestion boxes are available. **Overall impact:** employees have more confidence to speak up and feel less afraid of management.	Direct participation is primarily confined to providing workers with the opportunity to suggest improvements. The effectiveness of these participatory mechanisms depends on the persistence and courage of those involved. There is no interaction with worker representatives. **Overall impact**: -

sometimes issues remain un-addressed by management.			
Business structural and environmental context			
TIRE	**PHARMACEUTICAL**	**RETIREMENT HOME**	**BROADCASTING**
Part of a global corporation since 1998 and leading tyre manufacturer in Slovenia. Focuses on high-quality and premium-segment tyres and is committedto continuous improvement and sustainable production processes. The company places emphasis on developing its workers' skills. It employs about 1,800 people.	Slovenian pharmaceutical company operating in over 70 markets worldwide. It has a strong focus on research and development. The company is also committed to training and educating its workers.	A well-regarded public retirement home that provides care and support for elderly individuals over the age of 65. There is strong emphasis on continuous improvement and innovation in its services. Currently in crisis management mode, the institute is dealing with daily challenges and making critical decisions to avoid mistakes, such as closures due to staff shortages.	National public broadcasting organisation, providing radio, television, and multimedia services. Located in Ljubljana, with regional centres in Koper and Maribor, as well as correspondents globally. It is committed to maintaining high standards of quality and innovation. It employs more than 2,000 people.
Associative and organisational characteristics			
TIRE	**PHARMACEUTICAL**	**RETIREMENT HOME**	**BROADCASTING**
Dual (union- and non-union-led) workplace labour representation. Unionisation rate: 16%. The unions with members at the company are KNG and KNSS. There is a works council, half of whose members are unionised. The relationship between the works council and the unions, and with the management are positive. While the company is not covered by any binding collective agreement, either at sectoral or company level, it	Dual (union- and non-union-led) workplace labour representation. Unionisation rate: depicted as high. Two unions with members at the company. There is a works council. There is smooth cooperation between the works council and the unions, as well as positive relations with the management. The company is covered by a company agreement. Board-level worker representation is also in place.	Dual (union- and non-union-led) workplace labour representation. Unionisation rate: depicted as high, with an active union presence in the institute. There is an institute council. The company is covered by a sectoral agreement. There is also board-level worker representation.	Dual (union- and non-union-led) workplace labour representation. Unionisation rate: over 50%. Most workers are affiliated with two unions: the Slovene Association of Journalists or the Trade Union of Journalists of Slovenia. Relations between the unions have been adversarial. There is a works council. Both the unions and the works council play an active role within the company. The company is covered by both sectoral and company agreements.

does follow a gentlemen's agreement for the rubber and chemical industry. Board-level worker representation is also in place.			Board-level worker representation is also in place.
Identity and ideological orientations of the actors			
TIRE	**PHARMACEUTICAL**	**RETIREMENT HOME**	**BROADCASTING**
-	The company's approach to direct participation is characterised by structured communication, robust leadership support and a commitment to continuous improvement. The works council is particularly supportive towards direct participation.	The institute promotes accessibility and encourages open communication.	-

SWEDEN

Workshop (interviews with 1 consultant, 1 manager and 1 worker representative)
Mine (interviews with 2 worker representatives and 1 manager)
Group Home for Disabled (interviews with 2 worker representatives and 1 manager)
Warehouse (interviews with 2 worker representatives and 1 manager)

Type of relationship between direct and representative worker participation

WORKSHOP	MINE	GROUP HOME FOR DISABLED	WAREHOUSE
Interaction – Medium degree The company implemented an organisational innovation project, which was coordinated by a steering group comprising the chairman of the local IF Metall union section and a workers' safety representative. IF Metall has recently launched a monitoring project to gather feedback from its members on the project's results.	**Coexistence without interaction** – although worker representatives were informed of and involved in the implementation of a technological innovation project. In 2021, the company launched a project to replace 250 truck drivers with autonomous trucks, leading to the creation of new job roles. Trade unions were informed about the plans in 2018. The implementation process was based on established dialogue structures and regular meetings with worker representatives. At the beginning of the project, a working group was also created, where the unions could raise workers' concerns.	**Interaction – High degree** – although at the municipality level, a union representative was part of a working group that decided how to improve the work environment via direct participation. A new flexible working schedule was presented to and discussed with workers. Employees were also asked to suggest changes to improve health at work. There was no involvement of worker representatives.	**Coexistence without interaction** – although there is an intention to involve unions in the planning of a new automated warehouse. An advanced lean organisation with self-managed teams. No involvement of worker representatives in this area.

Institutional context, structured policies and programmes

WORKSHOP	MINE	GROUP HOME FOR DISABLED	WAREHOUSE
With regard to representative participation:			

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• Co-Determination Act: it entails a duty for the employer to inform, consult and negotiate, though there is no obligation to reach an agreement on all technical and organisational changes made in the workplace.
• Work Environment Act: it provides for worker representatives' rights to information, consultation and participation on safety and work environment issues (i.e via safety committees). Specifically, every workplace with at least 5 employees must appoint a workers' safety representative, who must be notified of any changes affecting safety matters and participate in the planning of new processes, methods and organisation of work.
With regard to direct participation:
• There are programmes aimed at providing the conditions for direct participation such as Afa Försäkring. This organisation is owned by the Swedish labour market parties and insures employees in the private sector, municipalities and county councils. It is a major financier of research and development in the fields of work environment and health.
</td></tr>
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<td>With regard to direct participation:
• In addition to Afa Försäkring, there is Prevent, which is owned by the Confederation of Swedish Enterprise (Svenskt Näringsliv), the LO trade union and the PTK Council for Negotiation and Cooperation, which brings together 26 member unions with the aim to coordinate collective bargaining. It provides managers and workers' safety representatives with information, education and assistance in developing useful products to help with work environment management.
• There are also programmes aimed at promoting direct participation, such as The Production Leap, which was introduced in 2007 by the Employers' Association of Swedish Engineering Industries and the trade union IF Metall. This 18-month development programme helps participating companies to build structures for workers' development, learning and engagement at all levels.</td>
<td>With regard to direct participation:
• In addition to Afa Försäkring, Suntarbetsliv is a non-profit organisation that is run jointly by trade unions and employers' associations in the public sector. Suntarbetsliv collects knowledge about preventive, health-promoting and rehabilitative efforts in the workplace and makes this knowledge available and useful in the workplaces.
• There are also programmes aimed at promoting direct participation, such as the Healthcare Leap and the Elderly Care Leap.
• In 2023, employers and trade unions in municipalities and regions established the Welfare Council of the Social Partners to address skills supply and the working environment. The Suntarbetsliv is used as a tool by the Council.
• At the local level, there are so-called 'workplace meetings' where</td>
<td>With regard to direct participation:
• In addition to Afa Försäkring, there is Prevent, which is owned by the Confederation of Swedish Enterprise (Svenskt Näringsliv), the LO trade union and the PTK Council for Negotiation and Cooperation, bringing together 26 member unions with the aim to coordinate collective bargaining. It provides managers and workers' safety representatives with information, education and assistance in developing useful products to help with work environment management.</td>
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		the union is not involved, and the dialogue takes place only between managers and employees.	
Areas for developing direct participation, specifically in interaction with worker representation, where applicable			
WORKSHOP	**MINE**	**GROUP HOME FOR DISABLED**	**WAREHOUSE**
Following a rapid growth and efficiency problems, an innovation project was launched under The Production Leap programme. This project led to decentralised decision-making, an expansion of some operators' roles, and increased workers' involvement in day-to-day management. This was developed via preliminary training for workers and managers, coordinated by a project steering group that included also worker representatives. **Overall impact**: workers are actively involved, and their voices are heard. There are broader professional roles, and increased training opportunities as well as an overall improvement in the work environment. Financial benefits have also been achieved.	Technological innovation project which has replaced 250 truck drivers with autonomous trucks. Prior and continuous information sharing with worker representatives, within regular dialogue structures and a working group. Direct participation practices were implemented too, such as a communication plan and a deviation reporting system. **Overall impact:** satisfactory results in terms of the project's development (the unions emphasised the absence of layoffs and the introduction of new roles), and there was more open climate and greater trust.	Due to high rates of staff absence rates, a new work schedule was introduced and presented to workers for discussion. Furthermore, in line with Suntarbetsliv's guidance, the unit involved workers in a health improvement process. **Overall impact:** reduction in staff turnover and sick leave, as well as increase in well-being and an improvement in the work environment at the unit.	Advanced lean organisation with self-managed teams. Plans are in place to build a new automated warehouse, with trade unions set to play a role through safety representatives and two project groups. **Overall impact**: improved safety, enthusiasm and engagement among workers.
Business structural and environmental context			
WORKSHOP COMPANY	**MINE COMPANY**	**GROUP HOME FOR DISABLED**	**WAREHOUSE**

Manufacturer of complete products, subsystems, components and spare parts based on steel and aluminum. The company strives for high-quality and precision in its products, and offers high flexibility to its customers. It operates primarily at regional and national level, but also has some international clients. It employs 110 people.	A copper mine which is part of an international mining company. It employs around 900 people.	The Group Home employs 8 workers. It is a part of a municipality with over 1,800 workers, organised into administrations: management; social services; children, education and culture.	Part of an international group consisting of 50 companies operating in 15 markets. The business in Sweden focuses on medical consumables in the healthcare sector. Quality issues are of the highest importance.
Associative and organisational characteristics			
WORKSHOP	**MINE**	**GROUP HOME FOR DISABLED**	**WAREHOUSE**
Single (union-led) workplace labour representation. Unionisation rate: 82% (most of whom are affiliated with IF Metall). There is a local union club whose board comprises 5 members. The company is covered by both sectoral and company agreements. No board-level employee representation, even though the company would be entitled to it, as both the club chairman and the CEO say there is no need.	Single (union-led) workplace labour representation. Unionisation rate: over 90% (most of whom are affiliated with IF Metall or Unionen). There are 2 local union clubs, one affiliated with IF Metall and the other with Unionen. The company is covered by both sectoral and company agreements. There is board-level employee representation.	Single (union-led) workplace labour representation. Unionisation rate at the municipality: just under 70%. Workers affiliated with 3 unions: Kommunal, Vision and the Alliance of Professionals. Three levels of labour-management dialogue across the whole municipality: 1) the 'central collaboration group' which represents many trade unions and liaises with the municipality's HR manager on issues at the municipality-wide level; 2) the 'administrative collaboration group', which also represents various unions and focuses on issues linked to the 3 administrations; 3) the 'departmental collaboration group', and in some cases the 'unitary collaboration group', which deals with unit/business-related issues and hears	Single (union-led) workplace labour representation. Unionisation rate: just under 70%. Most workers are affiliated with Handels and Unionen. Strained relationships between Handels and the HR management, but better with logistics managers. There is 1 local union club affiliated with Handels. The company is covered by both sectoral and company agreements. There is board-level employee representation.

		the views of the unions. In addition, at the local level, there are 'workplace meetings', which do not involve the union and where dialogue takes place only with employees. The company is covered by both sectoral and company agreements.	
Identity and ideological orientations of the actors			
WORKSHOP	**MINE**	**GROUP HOME FOR DISABLED**	**WAREHOUSE**
IF Metall has historically been in favour of new organisational and technological developments, provided that they are kept informed.		-	Management appreciates direct participation. The chairman of Handels Club believes that the union is also interested in the company doing well. There is a consensus that if the company does well, everyone benefits. Handels has no problem with direct participation.
At the workplace, IF Metall had a positive attitude towards the innovation project and wanted to contribute. The management was keen to update its organisational model to address inefficiencies and thus agreed to purchase The Production Leap programme. Having initially forgotten to consult IF Metall, the management then involved them in coordinating the entire project.	At the workplace, IF Metall and Unionen drew attention to the social impact of the innovation project, i.e its potential to improve the work environment, a constructive approach of both unions towards the project.		

Appendix 2

Summary of the findings from interviews with social partners and stakeholders from 11 EU countries (Belgium, Czech Republic, Denmark, Finland, France, Germany, Hungary, Lithuania, Poland, Slovakia and Spain).

Belgium (3 interviews with representatives from the trade unions ACV and ABVV, as well as the employers' association VBO).

There is limited evidence of interaction between direct participation and worker representation. Direct participation is, however, more prevalent in the automotive industry and in new economic sectors, such as information technology and the creative industries.

Although an institutional framework supports worker representation in cases of organisational and technological changes, the actual voice of trade unions in these domains is limited due to skill gaps. There is also a lack of cooperation between the parties.

Unions fear being marginalised by direct participation, believing it may only benefit the company. Conversely, companies argue that direct participation has not spread because unions, with whom they often have conflictual relationships, dominate social dialogue in workplaces. Furthermore, they have an ambiguous attitude towards direct participation practices, such as autonomous teams. While these practices may benefit both employers and workers, they require significant maintenance and support, which demands more intensive efforts from employers.

The power and cultural distance between management and workers in Belgium may also compromise cooperation in the field of direct participation.

Czech Republic (2 interviews with the trade union CMKOS and the employers' association SP ČR).

Direct participation has not developed much, except in multinational companies with European parent firms or in emerging sectors employing younger workers. No notable cases of interaction between direct and representative participation channels have been reported.

An institutional framework that supports representative participation, and employers are only required to inform workers directly in the absence of representative bodies. Beyond this, little additional support is provided, and there is a general lack of strong employer associations.

Neither companies nor the employers' association appear to show significant interest in the topic. The trade union is positive about direct participation, as it can improve decision-making processes and boost worker motivation. However, there is concern that direct participation could undermine the role of the unions. For this reason, it is believed that although direct participation is important, it is equally necessary to strengthen the representative channel to ensure that workers' rights are protected.

Obstacles to developing direct participation practices may include workers' reluctance and the unilateral managerial approach.

Denmark (2 interviews with the trade union FH and the employers' association DA).

Direct participation appears to be relatively widespread in companies, particularly with regard to working time arrangements, autonomous work groups, and performance-related pay. However, there have been no reports of interaction between direct participation and worker representation.

An institutional framework exists that supports information, consultation, and participation rights for worker representation, including in the context of organisational change. Additionally, programmes similar to Sweden's Production Leap assist both trade unions and companies in fostering workplace innovation.

Nonetheless, direct participation does not appear to be a particular focus for the social partners. Rather, it appears to be integrated into broader agendas, such as technological innovation.

Finland (2 interviews with representatives from the trade union SAK and the company Metsä Group).

There are few documented experiences of integration between direct and representative worker participation. The case of Metsä Group in the forestry sector is particularly notable, as direct participation is actively promoted across various dimensions and ongoing dialogue is maintained with the local union. However, the direct and representative channels do not interact, they operate in parallel.

It is believed that government-led decentralisation of industrial relations has encouraged both local-level social dialogue and direct participation. Nevertheless, unlike in other Northern European countries, the lack of a climate of trust between the social partners is seen as a key barrier to the development of integrated practices that combine direct and representative participation.

Currently, trade unions are more concerned with the weakening of national-level collective bargaining brought about by recent government interventions than with advancing direct participation, which appears to be a lower priority.

France (2 interviews with representatives from the trade union FO and the employers' association UIMM).

Few collective agreements address direct participation, and where such provisions exist, they are rarely implemented effectively. This is largely due to a lack of training for the involved parties and an insufficient strengthening of the role of worker representation, especially following recent labour law reforms. However, positive cases have been reported especially in relation to the collective regulation of remote working (e.g. at Renault).

An institutional framework that promotes direct participation (*droit d'expression directe et collective des salariés*) already exists, but its content must be defined through collective agreements. Currently, this is one of the topics subject to mandatory company-level negotiations. Additionally, some collective agreements have recently promoted the concept of 'professional dialogue' as an addition to traditional 'social dialogue'. However, professional dialogue is not governed by collective bargaining and, according to the terms of these agreements there is no formal hierarchy between the two channels.

Within the trade union movement, there is a division: organisations such as the CFDT and CFTC support professional dialogue and direct participation, while others (such as FO) remain sceptical. They view management's emphasis on professional dialogue as a potential strategy to bypass and weaken representative bodies. Nevertheless, there is a general acknowledgement that both channels can be important, provided that social dialogue is not undermined in the process.

Germany (2 interviews with a representative from the trade union IG Metall and 2 consultants from a research institute founded by the employers' association Gesamtmetall).

The development of direct participation is largely shaped by company-specific factors and organisational culture. However, the metal and electrical industry is comparatively better positioned than other sectors for implementing worker participation practices. A notable initiative in this context is the APRODI project, a joint effort by IG Metall and the employers' association Südwestmetall, which promotes a socio-technical approach to digitalisation (https://www.aprodi-projekt.de/ergebnisse/betriebliche-digitalisierung-erfolgreich-gestalten/#tx-rkw-shop).

Germany benefits from a strong institutional framework that supports worker representation, including in the management of technological and organisational change. This support extends specifically to the implementation of direct participation practices, such as suggestion schemes, team-based work, and mobile working arrangements. In contrast, sectors lacking representative structures typically only observe direct forms of participation.

IG Metall underscores the importance of fostering communication and coordination among direct participation mechanisms, works councils, and trade unions to reinforce each other through mutual support. According to consultants from the institute founded by Gesamtmetall, direct participation is becoming increasingly essential for shaping the introduction of new technologies in the workplace and enhancing acceptance among workers.

Hungary (2 interviews with the employers' association VOSZ and the advisory company of the trade union MSzOSz)

There are no reported experiences of interaction between direct participation and worker representation.

An institutional framework is in place that provides for information and consultation rights for employee representatives.

However, direct participation does not appear to be a priority issue for the social partners, nor is it generally well developed within Hungarian companies.

Lithuania (4 interviews with the employers' associations LPK and LINPRA, the trade union LPPSF, and the Lithuanian Labour Inspectorate VDI)

Experience of direct participation is limited, particularly when in relation to representative bodies – partly due to the limited role of works councils. While social partners at the national and sectoral levels are playing an increasingly prominent role, the influence of works councils remains marginal.

Some social partner organisations, such as LPK and LPPSF, have begun to show interest in direct participation and workplace innovation. They have engaged in projects and established relationships with Scandinavian social partners in an effort to learn from their experiences. However, some employers still fail to recognise the value of direct participation, and trade unions tend to remain focused on more traditional issues.

In this context, management's role is crucial for developing participatory practices in Lithuania, particularly in light of the lack of strong institutional support.

Poland (5 interviews with representatives from the trade union Solidarność and with researchers at the Institute of Public Affairs and the Kozminski University)

Direct participation remains underdeveloped, and there are few interactions with representative bodies, except in a few cases in the automotive

sector, such as Volkswagen. The prevailing managerial approach continues to be traditional, relying heavily on top-down decision-making processes.

Institutional support for representative worker participation is also weak, as evidenced by low union density and limited coverage in terms of both representation and collective bargaining structures.

Furthermore, direct participation is not actively promoted either by management, whose practices largely reflect a hierarchical, conventional model, nor by trade unions, which often perceive it as a potential threat to their role and influence.

Slovakia (2 interviews with representatives from the trade union NKOS and the employers' association RUZ)

Some cases of interaction, albeit seemingly limited in scope, between direct and representative forms of participation do emerge, particularly in the information technology and manufacturing sectors.

While the institutional framework provides support for worker representation, including during periods of organisational change and in the introduction of new technologies, it does not specifically promote the integration of direct and representative participation. Nevertheless, government ministries and social partners have reportedly led initiatives aimed at fostering employee participation and workplace well-being.

The focus of social partners remains largely on traditional issues, yet trade unions generally express a positive view of direct forms of employee participation, as a way to increase workers' motivation and foster workplace democracy.

Cultural resistance from management, along with a lack of time and skills, are cited as the main obstacles to a broader involvement of worker representation in direct participation practices.

Spain (3 interviews with representatives from the trade unions UGT and UGT-FICA, and the employers' association CEOE)

There is evidence of interaction between direct and representative forms of employee participation within large companies (e.g. Seat and Mercadona), particularly in sectors such as information technology and advanced manufacturing. By contrast, direct participation tends to prevail in small and medium-sized enterprises (SMEs), though it often develops in a more informal manner. When interaction between direct and representative participation does occur, the outcomes are generally very positive, contributing to enhanced organisational efficiency, employee satisfaction, and commitment.

While the institutional framework supports worker representation, including during periods of organisational change, it does not appear to explicitly encourage or facilitate the integration of direct and representative forms of participation.

Nonetheless, social partners generally have a positive attitude towards direct employee participation, although trade unions remain cautious and voice concerns that it could undermine collective bargaining processes.

Chapter 4.

Direct Worker Participation and Industrial Relations in Eastern European Countries

by Vassil Kirov, Bagryan Malamin, Dessislava Yaneva, Stefania Gergova

1. Introduction

This chapter aims to investigate the development of direct employee participation in Central and Eastern European Countries (CEECs). The direct participation literature has overlooked this region, but the findings from the BroadVoice research project aim to shed light on the drivers and barriers of this process.

2. Comparison methodology

This chapter builds on the national reports on Bulgaria and Slovenia, which summarised the literature and trends, and presented eight company-based case studies (Franca, 2025; Kirov et al., 2025). The Bulgarian and Slovenian cases were selected to demonstrate alternative models to those of the larger group of countries in the region. While Bulgaria was characterised as a liberal market economy (e.g. Bohle & Greskovits, 2012; Delteil & Kirov, 2016), Slovenia's industrial relations models were more closely aligned with those in Austria and Germany. In these countries, indirect employee participation developed through both trade union sections and works councils.

Additionally, interviews with experts from five countries (Czech Republic, Hungary, Lithuania, Poland and Slovakia) were examined (see Appendix

2 of Chapter 3). This data was collected by the BroadVoice teams in autumn 2024 and early 2025. It should be acknowledged that the small number of interviews conducted per country (between two and five) introduces some limitations. Nevertheless, these spotlights enabled us to observe some general regional trends.

Finally, we acknowledge that the trade union strength is an important factor in understanding the development of direct employee participation. The collective bargaining coverage rate, which indicates the proportion of employees whose working conditions are governed by collective agreements irrespective of union membership, is a meaningful proxy for trade union strength. For instance, Slovenia boasts a collective bargaining coverage rate of 79%, in contrast to the rates of 13% in Poland and 22% in Hungary. These disparities illuminate why trade unions in countries with low collective coverage rates may be more sceptical about direct employee participation.

Table 1. Rate of collective bargaining coverage* in selected countries in Central and Eastern Europe (2021 or the most recent year available)

Country	Collective bargaining coverage rate (%)
Bulgaria	28
Czech Republic	35
Lithuania	27
Hungary	22
Poland	13
Slovakia	24
Slovenia	79

Note: Proportion of employees covered by a collective agreement, expressed as a percentage of those with the right to bargain.

Source: Müller, Vandale, Zwysen (2024)

3. Direct employee participation in CEECs: case studies findings from Bulgaria and Slovenia

As Franca et al. (2024) have already pointed out, studies on direct employee participation have mainly been conducted in Scandinavia and countries such as the United Kingdom, Australia and Germany. Unsurprisingly, direct participation in Central and Eastern Europe was poorly developed following the collapse of the communist regimes in 1989-1990. However, several attempts were made during the 1980s to address the shortcomings of socialist economies through various measures to introduce and strengthen employee participation (Kirov, 2005).

3.1. The cases in Bulgaria

The cases in Bulgaria were carried out in two manufacturing companies and two water supply companies (see Kirov et al., 2025 for details).

The Copper company (Case 1) is a key player in Bulgaria's mining and metallurgical industry. As part of a multinational group, it provides significant economic benefits to the local area, including employment and infrastructure. The plant has been operating since the late 1950s and was acquired by the international group in 2008 to focus on producing copper cathodes and related products.

Despite the presence of two main trade union organisations (CITUB and CL Podkrepa), negotiations between them and management do not always proceed smoothly. The unions play an important role, particularly in renegotiating the collective agreement, which provides many social benefits, including additional holidays and insurance. Workers participate directly through meetings and councils related to safety and improvements to production processes, but this is not well developed due to a lack of activity and insufficient information. While management implements HR practices, such as training and the development of social policies, challenges include facilitating more active dialogue and improving the relationship between trade unions and management to ensure better protection of workers' interests and enable more effective decision-making.

The Mechanical engineering company (Case 2), which has 700 employees, is also a branch of an international corporation that is a leader in the production of hydraulic lifting and cargo solutions. Its organisational structure and working climate promote respect and collegiality, which is maintained through active communication and regular meetings between management and employees. The company has an effective system for workers' representation that plays an important role in communication between employees and management. Each representative is elected by their colleagues and represents their point of view, relaying questions and suggestions to management. This system not only allows employees to express their needs but also helps management to understand and solve specific problems related to the work process and working conditions. The company actively encourages innovation and improvements to the work process. Every month, the suggestions from employees that contribute to optimisation and increased efficiency are evaluated and rewarded. This initiative maintains high motivation among staff by providing recognition and financial incentives for improving production processes and the working environment.

The two case studies in the water supply sector were carried out in public sector companies.

Case 3 is a publicly owned water and sewage company that operates in central-north Bulgaria, employing around 400 people across the district. It holds a regional monopoly and is 51% owned by the Bulgarian Water Supply Holding Company, with the local municipalities owning the remaining 49%. While efforts are made to innovate through digital technologies and water treatment upgrades, tight state regulation and financial constraints limit progress. The workforce is ageing and underpaid. The two existing trade union sections, CITUB and CL Podkrepa, maintain good relations with each other and management. A new collective agreement is under negotiation as of 2025. Despite its limited resources, the company encourages worker participation, primarily through union-led proposals. The main challenge remains retaining skilled professionals.

The Case 4 is a state-owned water supply company, operating in south-western Bulgaria and managing nine treatment plants with ageing staff totalling around 550 people. The workforce is partially unionised under

CITUB and CL Podkrepa. However, all personnel are covered by the collective labour agreement. Benefits include financial bonuses, health-related support, and training opportunities. There are some initiatives that involve direct worker participation, mostly relating to suggestions about working conditions or materials. Nevertheless, individual initiative is generally discouraged in a state-run setting. There exist tensions between direct and indirect representation, and employee engagement is low. The company is facing ongoing challenges due to labour shortages and limited recognition of participatory structures such as the Working Conditions Committee.

3.2. The cases in Slovenia

In the case of Slovenia, the research covered two manufacturing companies and two public companies, a retirement home and the national broadcasting company.

Case 1 is part of a global corporation that has invested significantly in its Slovenian facility which employs around 1800 people and focuses on producing high-quality, premium-segment tyres. Despite facing economic challenges and a decline in demand for certain products, the company has continued to invest in its production capabilities and workforce. The company emphasises employee development and well-being. Labour relations are characterised by a high level of unionisation, although there are no binding collective agreements. The company maintains a collaborative relationship with its workers, which is facilitated by effective works councils and worker representation at the board level. This structure enables direct worker participation and ensures that employee concerns are addressed, and their rights and interests are represented. However, direct employee participation in decision-making is limited due to the existing hierarchical structure, whereby workers report to shift supervisors. The company has an innovation system that allows employees to submit ideas for improvement or cost savings, which are evaluated and rewarded. Nevertheless, the financial incentives for innovation are minimal, resulting in low participation. The company places a strong emphasis on workplace safety and communication, using various channels to keep employees informed. Efforts to engage employees and encourage innovation include visits to successful

Slovenian companies. Employees are not very organised, however, management exerts more pressure, which leads to a lack of motivation and initiative. Various initiatives are in place to foster employee engagement, such as family days and events for long-serving employees. Despite these efforts, repeated unaddressed issues and budget constraints reduce employee motivation. While management consults with unions and the works council, direct participation is limited, and unions often prioritise their own interests. In conclusion, a hierarchical structure and limited financial incentives constrain direct employee participation in the company. According to Franca (Franca, 2025: 15), "future development of direct employee participation depends on market conditions and management support".

Case 2 is a Slovenian pharmaceutical company operating in the global market and known for its extensive range of high-quality, affordable medicines. Operating in over 70 markets worldwide, the company has a strong presence in Central, Eastern and South-Eastern Europe, with manufacturing facilities in Slovenia, Russia, Poland, Germany, Croatia, and China. Labour relations within the company are well-structured and collaborative. The workforce is diverse, with employees from various countries and backgrounds. The company prioritises worker well-being by providing competitive salaries, additional pension insurance, accident insurance, and various health and wellness programmes. The company has a high level of unionisation, and labour relations are managed through effective works councils and worker representation at the board level. This structure facilitates direct worker participation, ensuring that employee concerns are addressed, and their rights are protected. Regular communication with employees through various channels promotes transparency and collaboration. Despite these positive aspects, the company faces challenges such as high staff turnover and the need for continuous investment in training and development. The company has made significant strides in developing direct employee participation. Employees are now more vocal about their satisfaction and suggestions for organisational improvements. This shift has been facilitated by the works council, which encourages employees to first address issues with their supervisors and then escalate unresolved matters to the council. This structured approach has led to continuous improvements in both direct and indirect participation. However, the effectiveness of direct participation depends heavily on the leadership style

of supervisors. Innovation is encouraged through a well-established system that allows employees to propose improvements. These suggestions are evaluated, and successful ideas are rewarded, thereby fostering a culture of continuous improvement. Annual events celebrate the best proposals, thus reinforcing the value of employee contributions. Employee satisfaction is regularly measured through surveys to help identify areas for improvement. In conclusion, the company's approach to direct employee participation is characterised by structured communication, strong leadership support, and a commitment to continuous improvement. The collaborative efforts of the works council, unions, and management have created a positive work environment in which employees feel valued and heard. This has resulted in high levels of job satisfaction, innovation, and organisational stability.

Case 3 in Slovenia is a retirement home, dedicated to providing comprehensive care and support for elderly individuals over the age of 65. It offers residential and nursing care, as well as various social and recreational activities. The home also provides home care services for individuals who prefer to stay in their own homes but require assistance with daily activities. As a public sector institution, the retirement home adheres to legislative standards, and its employees are public servants. There was no collective agreement for this institution, but it is covered by the general agreements for the public sector and healthcare. The retirement home promotes accessibility and encourages its employees to voice their concerns and suggest solutions. Formal mechanisms, such as a quality management system and regular meetings, support this culture of participation. Informally, the director fosters a relaxed atmosphere through casual interactions and team-building activities. The director also mentioned initiatives such as satisfaction surveys and suggestion boxes to gather employee feedback and identify areas for improvement. Respondents shared that younger generations are more likely to voice their opinions, necessitating a focus on communication and relationship-building.

Case 4 in Slovenia focuses on the country's national public broadcasting organisation, which provides a wide range of radio, television, and multimedia services. Established in 1928 for radio and 1958 for television, the organisation operates under a specific legal act to fulfil its public service obligations and employs over 2,000 people. The organisation is committed

to quality and innovation, continuously upgrading its technology and expanding its multimedia offerings. It also contributes to the cultural landscape through its symphony orchestra, big band, and choirs. Trade unions and works councils play a crucial role in representing employees and ensuring their rights. The works council facilitates worker participation in decision-making, ensuring that employee perspectives are integrated into organisational strategy. Direct employee participation is facilitated through worker assemblies and direct interactions. Recent legislative changes have increased the number of employee representatives on the programme council, thereby enhancing employee influence in decision-making processes. However, the effectiveness of these mechanisms depends on the persistence and courage of the groups/individuals involved. The HR manager noted that, while the participatory system encourages dialogue, it can also hinder necessary organisational changes. Future development of the organisation will involve balancing robust employee participation with effective management and organisational flexibility. The ageing workforce and limited opportunities for younger employees further complicate the situation. Strategic efforts will be crucial for the institution's future success, as they aim to enhance communication, foster collaboration, and adapt to legislative changes.

3.3. The cases findings from a comparative perspective

While it would be too ambitious to generalise the findings from particular case studies, the empirical material allows us to identify certain similarities. Companies in both countries face significant challenges.

The first of these are related to the workforce. In most of the cases the workforce is ageing, and companies/organisations are finding it difficult to recruit in the context of severe skills shortages. Issues related to employee motivation emerge across all the organisations covered, which could lead to significant staff turnover.

In this context, it is logical that skills acquisition is considered as an important approach to tackling workforce-related challenges. Across both countries, companies and public institutions recognise the importance of internal training, dual education and skills development. Training is not only seen as a means of upskilling, but also as a motivational tool and a

means of retaining staff. The third set of challenges relates to indirect representation. Most of the examined companies have active trade union sections and work councils in Slovenia. These play an active role in negotiations, despite the relationships with management ranging from cooperative to tense. However, the existence of formal indirect representation does not guarantee direct employee participation. As the case study authors observed, effectiveness depends on the specific organisational context and leadership.

Finally, the case studies reveal that, despite formal representation (through works councils and union representation), HRM initiatives, and communication channels, these often lack effectiveness and consistency. There is a shared need for more transparent, inclusive, and responsive communication to further boost the development of employee participation.

Employee participation occurs in both subsidiaries of multinational companies and public-owned enterprises. Despite the more developed social dialogue structures, higher trade union density, and greater collective bargaining coverage, the outcomes do not differ significantly.

4. Additional information from the interviews

Throughout the interviews it was very difficult to disentangle the different stakeholders' perspectives. At the same time, it is logical that their views do not always align with regard to direct employee participation. Furthermore, it was apparent that respondents often struggled to differentiate between direct and indirect employee participation.

4.1. Czech Republic

The respondent from the Czech trade union highlighted the importance of unions negotiating collective agreements and ensuring that workers have a voice. However, participation levels vary significantly depending on company origin. German companies, which have a tradition of worker involvement, are more receptive than their US or Korean counterparts.

In terms of institutional support for direct employee participation, it was stated that, while the Czech Labour Code mandates that employers inform

employees about certain matters, it lacks a robust framework for active direct worker involvement. Trade unions play a central role in collective bargaining and social dialogue, but their effectiveness varies depending on the company and its leadership. At the national level, trade unions engage in tripartite meetings with the government and employers to influence labour policies, though the outcomes are inconsistent.

The social partners' perspective on direct worker participation was seen as dependent on the activity of trade unions and the proactivity and negotiation skills of their leaders.

Overall, the respondent stated that direct participation should be supported for its potential to improve decision-making and employee motivation. However, it was emphasised that strengthening trade union structures is essential for protecting workers' rights. However, there is concern that excessive direct participation might weaken unions, which are crucial for maintaining collective bargaining power. Challenges to worker participation include employees' reluctance to take on additional responsibilities, management's unwillingness to involve workers, and the lack of robust employer organisations to facilitate effective social dialogue. Fostering a positive workplace environment and providing incentives for innovation are highlighted as ways to encourage worker engagement. A stronger institutional framework, improved management practices and stronger trade unions are considered necessary to balance individual participation and collective representation, particularly in Eastern Europe.

The views of the employer representative in the Czech Republic differed significantly. Direct worker participation is common in young companies, such as tech firms and start-ups, where decision-making is democratised. Employees often acquire shares, thereby aligning their motivation with the company's growth and performance. These companies also encourage greater involvement in decision-making processes. The Labour Code ensures workers' participation in company matters by governing representation through trade unions, works councils, and safety representatives. It also regulates collective bargaining. However, direct worker participation is not legally mandated, instead depending on corporate culture and management strategies, such as employee surveys, regular meetings, and feedback mechanisms. While employee engagement is gaining attention, particularly on non-governmental platforms that focus on better leadership

and work environments, there are no specific rules that address the interaction between representative bodies and direct participation. The Labour Code, by default, requires employers to inform and consult employees directly unless formal representative bodies are in place.

Direct worker participation is emphasized more at companies with foreign parent owners from countries where such involvement is a standard practice. Employer organisations focus on educating their members about the benefits of direct participation, such as fostering a positive corporate culture, and recognise exemplary practices through awards such as 'Employer of the Year'. As participation is voluntary, its implementation depends on the strategy of each employer. While best practices are shared, direct feedback from member companies is limited. Large multinational companies set examples by emphasizing care and direct communication in their strong corporate cultures, which often influence their supply chains.

Overview of the Czech Republic

Worker participation in the Czech Republic varies widely. German-owned firms and start-ups lead the way in terms of engagement, while others rely on unions. The Labour Code mandates basic information-sharing but lacks strong participation requirements. Unions prioritise collective bargaining and have some concerns about direct employee participation, while employers promote voluntary participation. Challenges include management resistance and limited frameworks, emphasising the need for balanced representation and stronger support.

4.2. Lithuania

According to the Lithuanian trade union representative, the main barrier to direct worker participation in Lithuania is employers' limited understanding of its benefits. This highlights the need for better communication. Amid low salaries and opportunities abroad, improving job quality is urgent for attracting and retaining young workers, so workforce engagement and sustainability must be prioritised. Worker participation in Lithuania is driven by the Labour Code and trade unions, and rising membership is being boosted by a national agreement and potential sectoral deals.

Upcoming elections may strengthen support for these agreements and promote collaboration between employers and unions. Works councils, once a cause for concern, now complement unions when union members are involved. The interviewee highlighted a Norwegian project involving the LPK and the Labour Inspectorate as an example of effective employer-employee communication, emphasising the need to implement similar practices in Lithuania. Inspired by the collaboration between unions and employers in Norway, the aim is to foster a close and collaborative environment. The Federation also learns from Scandinavian trade unions and shares these lessons through training and development programmes. However, attracting younger union representatives remains challenging. The next steps involve continuing to collaborate with the government and employers to enhance worker participation, and there is optimism about Lithuania's progress.

The Lithuanian employer representative interviewed shared that Lithuania scores poorly on direct participation indicators, such as job autonomy, but fares better in allowing employees to raise concerns or share ideas with managers. Domestic companies often reflect 'Soviet-era' cultural patterns of low trust and high surveillance, which are further intensified by new IT systems. However, a new generation of managers and returning employees with Western experience are driving change and fostering a shift towards modern work expectations. Notable transformations, such as Lithuanian Railways' shift from a bureaucratic model to a more human-centric approach, exemplify this progress. Lithuania lacks specific legislation for direct participation beyond EU regulations and the Labour Code. A tripartite council has discussed workplace issues, but without achieving any concrete outcomes. The Labour Inspectorate now emphasises psychological wellbeing alongside safety, but workplace innovation remains limited in universities, with some involvement in EU projects. The employers' organisation faces resource constraints compared to well-funded Scandinavian counterparts and focuses on immediate challenges such as the energy crisis and high taxation. In 2022, the LPK led a project on workplace innovation funded by Norway, involving trade unions and the Labour Inspectorate. This project included webinars, a study visit to Norway, and awareness sessions in Lithuania. While the project fostered dialogue on workplace innovation, progress is limited by resource demands and occa-

sionally adversarial relationships with unions. Promoting workplace innovation and direct participation often takes a back seat to reactive challenges due to limited institutional capacity and legislative support in Lithuania. Proactive steps, such as sharing best practices, building a strong business case for workplace innovation, providing implementation guidelines, and encouraging peer-to-peer learning are considered valuable measures for improving industrial relations.

Finally, a third interview was conducted with a representative of an engineering company. The company has implemented participative work practices that emphasise employee autonomy and self-management, leading to high satisfaction levels. The company invests in training and skill development to foster a highly skilled workforce and collaborates with a training school to improve vocational education standards. Rather than having a trade union, the company has a works council, but council members often lack the skills to represent employees effectively, so the company provides internal training. The success of this approach and the empowering culture is attributed to the company's status as a newly formed entity, free from Soviet-era practices, with a younger management team. The interviewee contrasts this with older companies, where top-down cultures persist and innovation is more challenging. This interview illustrates that that positive workplace practices are more typically the result of inspired individuals rather than from a wider legislative or institutional ecosystem, which remains largely underdeveloped in Lithuania.

Overview of Lithuania

Despite the low level of trade union membership, the level of trade union and employee influence in Lithuania remains relatively high, both at national, sectoral and company levels (as evidenced by the interviews and the Table 2). However, ECS data and findings suggest that this is not widely translated into direct participation, especially in areas such as job design, where participation rates fall well below the EU average. Whilst some aspects of the Lithuanian industrial relations system remain adversarial, there is encouraging collaboration between social partner federations, such as LPK and the Industrial Trade Unions, which is building a framework within which good practices can be shared and influence can be exerted on national policymaking. Tripartite initiatives, such as the exchange of

experience project with Norway, demonstrate the potential for future collaboration.

Table 2. Lithuanian data in the EWCTS 2021 and the ECS 2019

European Working Conditions: Telephone Survey 2021			
Questions to employees	**Value**	**EU**	**LT**
Ability to choose or change methods of work	% often/always	46	35
Ability to choose or change order of tasks	% often/always	53	34
Ability to change speed or rate at work	% often/always	49	43
Ability to influence decisions important for work	% often/always	57	58
Involvement in improving work organisation or work processes	% high	57	47
Organisational participation and discretion index	% high and high	31	34
European Company Survey 2019			
Questions to managers	**Value**	**EU**	**LT**
Direct employee influence on payment schemes	% great/moderate	33	55
Influence on training and skills development	% great/moderate	57	56
Influence on work organisation	% great/moderate	57	65
Influence on working time	% great/moderate	51	56
Level of direct influence of employees on management decision-making	% high	34	45
Meetings between employees and their immediate manager	% yes regular	59	58
Online discussion boards	% regular	8	12
Suggestion schemes	% yes	36	44

4.3. Poland

The respondent from the trade union discussed the slow growth of direct work participation practices among individuals in recent years. The interviewee observed that multinational companies frequently implement different practices in Central Europe than in their home countries. While some companies conduct employee surveys to understand preferences, these are usually carried out without the involvement of trade unions. The

interviewee emphasised the lack of collaboration between employers and trade unions when it comes to establishing channels for complaints or surveys. Additionally, the respondent pointed out that Poland's historical context, marked by feudalism and foreign occupations, has contributed to a culture of hierarchical relationships. Initially, the implementation of the EU's legal information and consultation rights in Poland faced resistance, which was only addressed after intervention by the European Commission. Two types of works councils exist in Poland: one funded by trade unions and the other by employers. Trade unions, especially at the central level, remain sceptical of work councils, and their use is limited due to legal restrictions. Furthermore, worker representatives are not included on company management boards in Poland. While direct worker participation is considered important, it is met with scepticism by trade unions who view it as competing with their own activities. Promoting young leaders and gender balance could help. The 2022-2024 Solidarność project on digitalisation focused more on legal issues than direct participation. The BARMETAL project[1], which addresses collective bargaining in the metalworking industry, also encountered limited bipartite dialogue, reflecting the collapse of sectoral social dialogue and bargaining in Poland. The employee voice is rather weak, except in some establishments of multinational companies. In a context where less than 12% of workers nationwide are covered by collective agreements, there is a low trade union density and only a few works councils.

A second interview with a manufacturing sector employee respondent underlined the lack of direct worker participation practices in the country. However, the interviewee mentioned that some companies, especially in the automotive industry, promote employee participation. While both employers and trade unions support direct worker participation, they frequently only pay lip service to it. Trade unions tend to focus on salaries and bonuses rather than decision-making.

A third interview focused on the implementation of the Volkswagen participation model, which works well, but is not representative of the reality of industrial relations in Poland. It requires shared responsibility and un-

[1] Project co-funded by the European Commission. More information here: https://celsi.sk/en/barmetal/.

derstanding across management levels. Challenges include making unpopular decisions and convincing employees to participate. Success depends on understanding, leadership, trust, and effective communication from both managers and employees.

A fourth interview with an NGO expert confirmed the previous findings, stating that Polish workplaces, especially SMEs, rely on hierarchical structures that discourage worker initiative. While some international companies, such as Volkswagen and Toyota, use works councils effectively, others, such as Amazon, avoid them, thereby undermining unions. Though rare, inclusive work models have shown success; for example, a cosmetics company transitioned to autonomous management, boosting profitability and satisfaction. However, Poland's deeply ingrained hierarchy hinders participation. Direct employee participation is not part of the Polish culture, with a few exceptions. There is tension between direct employee participation and trade unions.

Interview 5 discussed employee-driven innovation programmes in 3 companies: a pharmaceutical company, a telecommunications company and a financial company. The pharmaceutical company created its program from scratch, whereas the telecommunications company incorporated employee-driven innovation into wider entrepreneurial schemes. The financial company's call centre adopted a bottom-up approach. None of these programmes involved trade unions or works councils. The interviewee emphasised the importance of trust (in terms of goodwill and competence) and informal relationships in supporting innovation. Direct worker participation in these three employee-driven innovation programmes was rather successful because management created the right conditions, and employees in the call centre also recognized its importance for their own workload.

Overview of Poland

According to the interviewees there is hardly any employee participation in Poland, with a few exceptions. The EWCTS and ECS data show (Table 3) some discrepancies with the interviews. The surveys scores are at or above the EU average. This difference could possibly be explained by the

different positions held by experts, managers and employees, and the different frames of reference that accompany them.

Table 3. Polish data in the EWCTS 2021 and the ECS 2019

Data on direct worker participation in the Broad-Voice project	**Poland**		
European Working Conditions: Telephone Survey 2021			
Questions to employees	value	EU	PL
Ability to choose or change methods of work	% often/always	46	44
Ability to choose or change order of tasks	% often/always	53	54
Ability to change speed or rate at work	% often/always	49	51
Ability to influence decisions important for work	% often/always	57	67
Involvement in improving the work organisation or work processes	% high	57	56
Organisational participation and discretion index	% high and high	31	33
European Company Survey 2019			
Questions to managers	value	EU	PL
Direct employee influence on payment schemes	% great/moderate	33	48
Influence on training and skills development	% great/moderate	57	53
Influence on work organisation	% great/moderate	57	53
Influence on working time	% great/moderate	51	60
Level of direct influence of employees on management decision-making	% high	34	39
Meetings between employees and their immediate manager	% yes regular	59	42
Online discussion boards	% regular	8	3
Suggestion schemes	% yes	36	60

4.4. Slovakia

The respondent from the Slovakian trade union emphasised that direct worker participation is growing in Slovakia, particularly in the automotive

and IT industries. Companies such as Kia Motors Slovakia use autonomous production teams, which give employees significant decision-making power and boost motivation and quality. Many Slovak companies host competitions or use suggestion boxes to encourage employee involvement. Participation is regulated by the Labour Code and the Collective Bargaining Act, and in some companies, works councils contribute to decisions on key issues. Employee participation also drives innovation, with practices such as hackathons and design competitions becoming increasingly prevalent.

Employee involvement leads to increased productivity, innovation, job satisfaction and reduced staff turnover. While laws such as the Labour Code and the Collective Bargaining Act provide a framework, there is no specific legislation that comprehensively regulates participation. Programmes from the Ministry of Labour, as well as various employer and trade union initiatives, support this process. Works councils, collective agreements, and other bodies ensure that employees are involved in decision-making, particularly with regard to health and safety, and new technologies. Trade unions view direct participation positively, as it enhances employees' influence and satisfaction. It fosters a more democratic and trusting workplace and strengthens the role of unions. However, successful participation requires trust, mutual respect, and proper training for both employees and managers. Trade unions emphasise that participation must be genuine, not just formal, to ensure that employees' voices are genuinely heard. Barriers to effective participation include resistance to change, a lack of time and resources, and managers' and employee representatives' insufficient skills. Successful participation requires a comprehensive approach involving cultural change, adequate resources, and strong leadership support. Effective cooperation between employers and trade unions is essential for fostering successful participation systems.

According to the employer organisation representative, direct employee participation in Slovakia varies greatly depending on company culture, history, and management. Employee involvement is minimal in traditional industries such as construction, whereas modern companies, such as Pixel Federation, a computer game producer, foster a more inclusive approach, by involving employees in decision-making. Company heritage and man-

agement's willingness to engage employees are key factors in the development of participation systems. There is limited formal institutional support for direct worker participation in Slovakia. While large companies must include trade union representatives on their boards, there are no specific policies or laws that promote direct participation in decision-making. Any formal structures usually stem from collective bargaining agreements. Trade unions and works councils in Slovakia primarily focus on their own interests, paying little attention to empowering employees to participate in decision-making. Collective bargaining primarily covers wages, benefits, and social issues. However, start-ups and innovative companies tend to have higher levels of employee involvement. The development of direct worker participation is not a priority for employer organisations, so the responsibility lies with individual companies. The approach depends on management's culture and willingness to engage employees. While competition and innovation may encourage participation, legislative measures and public policies are less effective in promoting it.

Overview of Slovakia

As the interviews revealed, the level of worker participation in Slovakia varies by industry. Traditional sectors demonstrate minimal involvement, while modern companies such as Pixel Federation and Kia Motors Slovakia promote employee engagement through decision-making processes and innovative practices. Institutional support is limited, with frameworks such as the Labour Code only offering some guidance. Participation therefore relies heavily on company culture and management. Barriers include resistance to change and limited resources, but achieving success depends on cultural shifts, strong leadership and effective cooperation between employers and unions.

4.5. Hungary

The interview with the Hungarian trade union representative emphasised that, although employers are not obliged to follow their recommendations, they are required to inform work councils about company conditions and consider their opinions. Progress in expanding direct worker participation

has been minimal over the last couple of years. The Hungarian labour legislation supports worker engagement through works councils, which are elected by employees. These councils facilitate annual meetings, report on developments, and suggest changes to incentive systems. Employers are obligated to provide information, organise meetings, and conduct surveys to encourage worker involvement. In general, trade unions influence the incentive system in companies. They are involved in developing financial incentives and designing bonuses. They can also elect representatives to works councils. According to the respondent, direct worker participation in Hungary is rare, with limited progress towards integrating employees into decision-making systems. Challenges include extending management incentives, addressing concerns about trade secrets, and clarifying information-sharing practices. The EU Transparency Law could improve access to information. Additionally, respondents advocate for employee representatives to play a greater role in Environmental, Social and Governance (ESG) initiatives.

The second interview in Hungary was with an employer representative. The organisation itself fosters communication through weekly meetings. Although informal, this practice aims to facilitate open communication and worker engagement. The interviewee noted the absence of an institutional framework or legal mandate to promote direct worker participation in the country. Employers are not obligated to keep their employees informed, and there are no formal systems in place to involve workers in decision-making processes. Trade unions play a role comparable to that of employers' associations in the context of social dialogue and collective bargaining, but their influence on direct participation appears to be limited. The interviewee remarked that they had never encountered a specific perspective from social partners regarding direct worker participation. However, it was suggested that the tripartite council (consisting of trade unions, employers' organisations, and the government) or its committees could address the issue in future. The interviewee believes that, in their personal opinion, direct worker participation is not a primary concern in Central and Eastern European countries, indicating that it may not be a dominant topic of discussion within the region.

Overview of Hungary

Direct worker participation in Hungary is limited, with minimal progress despite legal requirements for works councils to facilitate communication and provide input. While trade unions influence financial incentives at company level, they play a modest role in fostering participation. Institutional support is weak, with no legal mandates for active employee involvement. Informal, employer-led meetings exist, but they lack standardisation. Broader challenges include unclear guidelines on information sharing, a limited focus on integrating decision-making, and the need for cultural and institutional changes to enhance participation.

4.6. A comparative perspective

Data collected through expert interviews in five Central and Eastern European countries enriched the project findings obtained through in-depth research in Bulgaria and Slovenia.

Direct employee participation throughout the region demonstrated several similarities.

- Direct employee participation is more prevalent in subsidiaries of multinational companies, where the country-of-origin influences whether such practices are supported, in public entities and modern, innovative companies such as start-ups or those with foreign ownership. This contrasts with traditional industries or domestic companies.
- Across all countries, institutional frameworks for direct worker participation are either weak or applied inconsistently. Although legal instruments exist for indirect employee participation, such as works councils and information and consultation mechanisms, none exist for direct employee participation.
- Common obstacles include management resistance, a lack of resources, cultural resistance to change and insufficient institutional structures, as well as trade union attitudes which view direct employee participation as a potential threat.

5. Barriers to and drivers of direct employee participation in Central and Eastern Europe

Based on our analysis of the examined countries, we identified several factors that support or hinder the development of direct employee participation.

The driving factors are listed below:

- Path dependency from state socialism: forms of brigade organisations and self-management in former Yugoslavia and other countries; labour legislation that supports individual participation to improve production quality and support innovation.
- Relatively strong trade unions exist in some areas of the economy, such as public services and heavy industry.
- Some funding opportunities are available from European Social Fund programmes or the Norwegian Mechanism.
- The attitude of the younger generation, who are interested in having a strong voice at the workplace.

The barriers include, among others:

- Lack of legal and/or institutional support.
- Cultural traditions of developed hierarchies and authoritarian management in some of the domestic companies.
- Scepticism among trade unions and works councils, who view direct participation as a threat to indirect participation rather than an opportunity.
- Reluctance among employees to participate in forms, as this could lead to negative reactions from management or a lack of rewards.

6. Conclusions and possible recommendations

This chapter analyses the development of the direct employee participation in Central and Eastern European countries. The research involved

desk research and expert interviews, as well as eight company case studies in Bulgaria and Slovenia. Additional expert interviews were conducted with relevant social partners in a further five countries in the region.

The findings of the analysis are consistent with previous research, emphasising that direct employee participation practices are underdeveloped in the region. Direct employee participation has not developed as strongly in many Central and Eastern European countries as it has in Western Europe. One of the main reasons for this is the legacy of state socialism, where 'participation' often meant pseudo-democratic control in state-run enterprises. This has contributed to long-term scepticism and apathy towards participatory mechanisms following the transition to market economies. The reasons for this lack of interest and development are complex, as discussed in the previous section.

Our recommendations are first aimed at academics and then at stakeholders.

The recommendations for academics include the need for further research into workplace democracy in the region.

The recommendations for stakeholders are as follows:

- In Central and Eastern Europe, there is a need to improve and enhance the communication about the benefits of direct worker participation at company and sector/branch level.
- The dissemination and exchange of good practices is crucial to convince HR managers, managers, and employee representatives (e.g. trade union activists or works council members) of the potential benefits of direct participation.
- Especially for employees, managers need to connect direct participation-induced innovation to systems that incentivise participation.
- Finally, the direct participation could be developed with the help of supporting programmes through EU and national funding instruments and public authorities should be convinced to take steps in this direction.

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Conclusions

by Vassil Kirov

This report presents a comparative analysis of the main findings from the empirical research conducted within the framework of the European BroadVoice project across six European countries: Bulgaria, Ireland, Italy, the Netherlands, Slovenia and Sweden. The analysis is further enriched by interviews carried out in additional 11 countries: Belgium, Czech Republic, Denmark, Finland, France, Germany, Hungary, Lithuania, Poland, Slovakia and Spain. The study is structured around four central thematic areas:

- the interaction between direct participation and workers' representation in fostering workplace innovation in the manufacturing sector (Chapter 1);
- the orientation and strategic approach of trade unions and workers' representatives towards direct participation (Chapter 2);
- the enabling conditions for a productive interplay between direct and representative participation in workplace innovation (Chapter 3);
- the development of direct participation and the role of workers' representation in Central and Eastern Europe (Chapter 4).

The research findings are subject to several limitations. These include the relatively small sample size, the limited sectoral scope – primarily focusing on manufacturing and certain public services – and the incomplete representation of national-level organisations in some Central and Eastern European countries.

The conclusions derived from this study can be summarised as follows:

Chapter 1 compares 14 case studies of manufacturing companies across all the six EU countries covered by the BroadVoice project. The key conclusions drawn from the analysis are as follows:

- **The importance of joint design**: In the context of the relationship between technological and organisational innovation, jointly designing and managing both processes enhances outcomes and increases the likelihood of successful investments in each.
- **Positive synergy between technological-organisational innovation and direct participation**: The comparison reveals significant positive synergies. When the connections between these processes are well established and effective participatory practices are implemented, companies can achieve notable improvements in both productivity and working conditions. The case studies demonstrated clear advances in safety, ergonomics, job autonomy, and teamwork. However, such outcomes require strong managerial commitment and active employee engagement. The analysis indicates that the greatest challenge lies in transforming company culture and management practices.
- **The complex relationship between industrial relations and innovation**: The interaction between industrial relations and technological-organisational innovation is not easily defined. The case studies suggest that effective direct participation may, over time, foster a shift towards more cooperative industrial relations. Nonetheless, conflicting practices persist. In such contexts, processes tend to remain fragmented, communication is limited, and setbacks in social dialogue are common. Changes in management can also hinder progress, particularly when they introduce divergent cultural or leadership approaches. Furthermore, the evolution of industrial relations appears to be highly experimental and does not follow a fixed trajectory.

Chapter 2 analyses the six national reports produced within the BroadVoice project. It focuses on the approaches of trade unions and worker representatives towards increasingly widespread practice of direct employee participation. The key conclusions are as follows:

- **Direct participation as an opportunity:** In all countries studied, direct participation is seen as a potential tool to improve the work environment, efficiency, and employee engagement – particularly when

implemented in collaboration with worker representatives. Sweden is the most positive example, as direct participation is deeply embedded in the 'Swedish model' and complements collective agreements and co-determination. In contrast, Slovenia is more hesitant, with concerns that direct participation may become symbolic or be used to bypass unions although there have been some practical successes.

- **History matters:** A country's historical institutions, trade union traditions, and labour market models significantly influence the implementation of direct participation. Examples range from highly structured and integrated systems – where direct participation is embedded within traditional industrial relations frameworks to more fragmented approaches, where trade unions are not involved. Respecting national and local contexts is essential, as each country or trade union must navigate its own path within a changing labour market.
- **The role of trade union membership and density:** The effectiveness and perception of direct participation are closely linked to levels of union membership. In countries with high union density, direct participation is generally considered to complement union activities. A strong union presence provides legitimacy and bargaining power, thereby reinforcing the trust that direct involvement will not undermine representative roles. Conversely, in countries with low or declining union membership, such as Bulgaria, Slovenia, Ireland and the Netherlands, there are more common concerns that direct participation may erode union influence. In such contexts, participation risks becoming employer-driven or symbolic, and union engagement tends to be reactive rather than proactive.
- **Legal framework or collective bargaining:** The legal and institutional framework plays a decisive role in shaping the relationship between trade unions and direct participation. In countries with strong legal protections for unions (e.g. Sweden), direct participation is more easily integrated and viewed as complementary. Where union roles are less clearly defined by law (e.g. the Netherlands) or rely heavily on collective agreements (e.g. Ireland and Bulgaria), union influence is more fragile and participation tends to be fragmented and employer-led. In intermediate cases (e.g. Italy and Slovenia), participation tends to be project-based and inconsistently structured. Overall, clear legal

or contractual guarantees foster trust and support for direct participation, whereas their absence leads to uncertainty and more defensive union attitudes.

- **Competence development as a union strategy:** In several countries, competence development is highlighted as a vital strategy for empowering individual workers and union representatives alike. Strengthening expertise in areas such as technological change, work organisation, and improvement methodologies can enhance confidence, legitimacy, and influence. Competence development supports unions by:
  - positioning them as partners and experts rather than adversaries;
  - reducing the risk of being sidelined by direct participation mechanisms;
  - deepening understanding of complex changes, such as digitalisation or restructuring; and
  - promoting the long-term integration of participation into workplace culture.

Chapter 3 focuses on six company case studies that demonstrate a high level of integration between direct participation and workers' representation in innovation processes. The chapter explores the enabling conditions that facilitate this effective relationship, comparing the cases with each other, with the other company cases analysed within the BroadVoice project and with the findings from interviews conducted with national social partners in an additional 11 European countries. The key conclusions are as follows:

- **Complementarity of participation forms:** A comparative analysis of six best-practice company case studies demonstrates that meaningful interaction between direct and representative worker participation is not only possible but can also be mutually reinforcing. However, such synergy does not automatically arise in workplaces where both channels exist. Instead, it depends on the presence of specific institutional, structural, associative, and cultural conditions.

- **Supportive institutional and policy frameworks:** A supportive institutional and policy framework is a key enabler of successful integration. This includes both the promotion of, and widespread presence of worker representation as well as its active role in managing and negotiating organisational and technological change. Equally important is the explicit recognition of direct participation as both an outcome and a tool within these processes. Institutional support is most effective when it goes beyond formal rights and incorporates capacity-building measures – such as training, consultancy, and advisory services, targeted at both management and worker representatives.
- **Sectoral influence of manufacturing:** The presence of widespread worker representation, supported by an appropriate institutional infrastructure, helps to explain why manufacturing companies provide particularly conducive environments for the effective interaction of direct and representative participation. In this sector, traditional industrial relations institutions (e.g. trade unions and collective bargaining) have historically taken root and remain influential in many European countries despite ongoing economic and organisational transformations.
- **Single, union-based representation channels:** The presence of a single, union-based representation channel enhances the impact of institutional support for workplace labour representation. This setup facilitates coordination between national trade union strategies and the actions of shop-floor representatives, including the regulation of direct participation through company-level collective bargaining. In countries with dual-channel systems, such as the Netherlands, enhancing interaction may require efforts to bridge the divide between existing representative bodies and to foster stronger inter-organisational cooperation.
- **Innovation as a shared domain of participation:** Innovation emerges as a central domain for collaboration between direct and representative forms of participation. This is largely due to institutional frameworks that grant worker representatives rights to information and consultation regarding organisational and technological change,

while also valuing direct participation as part of transformation processes.

- **Cultural and organisational orientation:** The institutional context also influences how management and worker representatives approach direct participation and mutual collaboration. A favourable orientation, built on trust and shared interests, can alleviate worker representatives' concerns about marginalisation and foster openness to joint experimentation. The Irish case is especially noteworthy in this regard: the establishment of the IDEAS Institute by the trade union SIPTU provided a dedicated support structure for workplace innovation, enabling the union to proactively lead participatory initiatives.
- **Caution against deterministic views:** Finally, the analysis cautions against viewing enabling conditions as mechanically determinative. There are documented cases where direct and representative participation merely coexisted, despite seemingly favourable conditions. No single factor guarantees integration. Instead, meaningful embedding of direct participation within industrial relations is fostered by the alignment and mutual reinforcement of multiple elements across institutional, organisational and cultural dimensions, particularly when actors are open and willing to engage.

Chapter 4 focuses on Central and Eastern Europe, with a particular emphasis on Slovenia and Bulgaria, which are covered by BroadVoice research. The chapter explores the often-overlooked developments in direct employee participation within the region. The analysis highlights the following key points:

- **Underdeveloped direct employee participation in Central and Eastern Europe:** The findings align with previous research, indicating that direct participation practices remain underdeveloped in this region. The reasons behind this limited progress are complex and multifaceted.
- **Drivers of direct participation development:** Several factors have contributed to the emergence of direct employee participation in Central and Eastern Europe, including:

- Path dependency from state socialism, such as legacy forms of brigade organisations and self-management practices, especially in former Yugoslavia and other countries.
- Labour legislation that supports individual participation to improve production quality and foster innovation.
- Relatively strong trade unions in specific sectors such as public services and heavy industry.
- Funding opportunities from sources such as the European Social Fund and the Norwegian Mechanism.
- The expectations of the younger generation, with many young workers expressing a desire for a stronger voice in the workplace.

- **Barriers to the implementation of direct worker participation:** Despite these drivers, several obstacles hinder the development of direct participation in the region:
  - A lack of legal and institutional support.
  - Cultural traditions of hierarchical structures and authoritarian management styles in many domestic companies.
  - Scepticism from trade unions and works councils, who may perceive DEP as a threat to indirect participation rather than a complement.
  - Employee reluctance to engage in participation initiatives is often due to fear of negative repercussions from management or a perceived absence of tangible rewards.

The below summaries, which contrast union attitudes, institutional strength, the embeddedness of direct participation and key challenges across countries, would add analytical clarity and facilitate cross-national learning.

Table 1. Cross-country comparison: Union attitudes, institutional frameworks, embeddedness of direct participation and key challenges

Country	Union Attitude to Direct Participation	Institutional Framework Strength	Level of Embeddedness of Direct Participation	Key Challenges
Sweden	Supportive & proactive (embedded in collective agreements)	Strong legal protection (Co-Determination Act, high union density)	High – integrated into workplace and union roles	Balancing decentralization and co-determination
Ireland	Proactive (via IDEAS Institute, training-based approach)	Weak legal backing, but union-driven initiatives	High – unions participate in defining innovation processes	Sustainability of initiatives without legal support
Italy	Ambivalent, project-based, lacking national strategy	Intermediate – relies on collective bargaining and pilots	Medium to High – strong cases in Electrolux, others more limited	Lack of a unified strategy, uneven local engagement
Netherlands	Supportive but reactive, weak influence in the early stages	Strong legal basis, weak coordination of union action	Low – limited involvement in shaping practices	Fragmentation of representation, late involvement
Slovenia	Cautiously positive, with symbolic concerns, low impact	Weak, but underutilized formal structures	Low to Medium – good structures but inconsistent application	Hierarchical culture, low incentives, unclear union roles
Bulgaria	Cautiously positive but institutionally weak	Weak, fragmented and post-socialist legacy issues	Low – limited to symbolic or informal participation	Weak union legitimacy, lack of training and structure

Policy recommendations

Based on the findings of the report, the following policy recommendations are proposed:

- **Promote employee commitment to innovation through direct participation:** Support efforts to engage employees in reaching agree-

ments with management on innovation initiatives driven by direct participation. This applies to both single- and dual-channel representation systems (e.g. trade union sections and works councils).

- **Encourage joint and participatory design:** Facilitate the development of participatory design practices that serve shared goals and generate mutual benefits for employers and employees. Responsible teams as well as tasks with decision latitude and skill discretion increase the likelihood and effectiveness of direct participation.
- **Build trade union expertise:** Invest in trade union capacity-building to position unions as expert partners in innovation processes. This includes supporting their engagement in direct participation initiatives aimed at fostering workplace innovation.
- **Strengthen institutional and policy frameworks:** Create supportive environments that actively promote both representative and direct participation, as well as interaction between the two. This includes investing in capacity-building initiatives such as training, consultancy, and advisory services, for management and worker representatives alike.
- **Establish intermediary support structures:** Develop or strengthen independent institutions – such as Ireland's IDEAS Institute or Sweden's Production Leap – to support employers and worker representatives in jointly implementing participatory innovation strategies. These structures provide external guidance, resources, and continuity during organisational transitions.
- **Expand effective workplace representation across sectors:** Encourage the development of robust labour institutions in sectors other than manufacturing, particularly in services and small enterprises, by tailoring representation strategies to diverse structural contexts.
- **Enhance coordination between levels of labour representation:**
    - In single-channel, union-led systems, improve alignment between national strategies and local-level actions while introducing safeguards to manage potential workplace conflicts.

  - In dual-channel systems, ensure clear role differentiation and coordinated strategies to prevent fragmentation and strengthen cohesion between different representative bodies.

- **Use company-level social dialogue to shape direct participation practices:** Leverage company-level negotiation to tailor direct participation practices – including training, rewards, and involvement tools – to local needs, while also enhancing union engagement in innovation processes.
- **Integrate direct and representative participation in innovation pathways:** Establish joint labour-management committees to define, implement, and monitor innovation strategies. Involve worker representatives in these bodies, and enable direct employee input into the design and implementation of organisational changes.
- **Foster a culture of collaboration:** Promote mutual trust and a culture of joint experimentation between management and worker representatives to overcome scepticism and resistance to direct participation.
- **Monitor and evaluate:** Recommend establishing systems to monitor and evaluate the effectiveness of direct participation initiatives and policy implementations. Continuous feedback can help refine strategies and demonstrate impact.
- **Inclusivity and diversity:** Ensure that direct participation initiatives actively promote inclusivity and diversity, and make sure that underrepresented groups (e.g. women, minorities, younger or older workers) have a voice.
- **Digital transformation and direct participation:** Address the growing role of digital tools and remote working environments in shaping direct worker participation. Suggest policies that leverage digital platforms to facilitate participation while managing the associated challenges.
- **Cross-national learning:** Encourage the fostering of cross-national or cross-sectoral learning networks (such as EUWIN) where countries or companies can share best practices and lessons learned regarding direct participation.

- **Leadership development:** Emphasise the need to develop leadership skills among management and employee representatives alike to support collaborative innovation and sustained participation.
- **Special considerations for Central and Eastern Europe:**
    - Improve communication around the benefits of direct participation at both company and sector/branch levels.
    - Facilitate the exchange of good practices to demonstrate the value of direct participation to HR professionals, managers, and employee representatives (e.g. trade union activists and works council members).
    - Connect direct participation-driven innovation to employee incentive systems to ensure motivation and sustained engagement.
    - Encourage the development of support programmes through EU and national funding mechanisms to promote direct participation and participatory innovation.

Finally, the BroadVoice research revealed the need for further focus on the future challenges relating to direct employee participation in the context of the twin transition. The rise of artificial intelligence, algorithmic management and remote working platforms are fundamentally reshaping workplace dynamics. Future efforts should therefore promote 'algorithmic co-determination', ensuring that workers and their representatives play a part in the governance of digital systems. Policies that support digital literacy, participatory technology audits and inclusive design frameworks will be essential in aligning digital transformation with democratic workplace values. Climate change and the transition also open up new avenues for employee participation that should be explored in future research.

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