EcoMobility TRANSITION

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Mobility, sustainable development and social dialogue in the Silesian Province

Report – Poland

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Executive summary

Although diverse in terms of geography, population and economy, the Silesian province (województwo śląskie) includes in its central part the traditionally most industrialised, populous and urbanised region of Poland, namely the GZM Metropolis. For decades, the leading industry here was hard coal mining, but also metallurgy and the machine industry, which expanded particularly strongly in the post-war period, when the region was the driving force behind the development of the socialist, centrally controlled economy. As a result, we are dealing with strong contrasts: on the one hand, we are still talking about a heavily industrialised area with large cities, human capital, well-developed transport infrastructure and a recognised academic centre. On the other hand, since the 1990s, the region has faced economic transformation, including the decline of traditional industries, and the social consequences of this process. Mines are now gradually being closed down, and existing industries – among which the automotive industry is very important, playing a significant role in terms of both the economy and employment that is unmatched anywhere else in the country – are facing new threats and worrying trends.

Rising energy costs, the European Union's climate policy, competition from outside the EU, the unfavourable position of most automotive companies within international value chains, and the push for electrification of transport are bringing increasing uncertainty and causing *automotive* companies, which have enjoyed stable growth and employed more and more workers in recent years, are now running out of steam. There are dangerous fluctuations in demand for cars and car components, and the scale of redundancies is slowly increasing. At the same time, automation and digitalisation, pointed to by economists as a remedy or rather an existential necessity, also offer little hope for maintaining employment levels in the industry.

Added to these problems are the long-term effects of rapid industrialisation and the subsequent fate of regional industry. The province, especially its central areas, is one of the most polluted and environmentally degraded areas in the country. There are numerous post-industrial areas in need of reclamation or revitalisation. The Silesian province, although very well connected and playing an important role as a national and international transport hub, is not perceived as a convenient place to live. Hence the increasing processes of depopulation and ageing of the population. At the same time, regional public policy makers accurately identify development problems and challenges. Numerous strategic documents present a clear vision for the region's further development, based on modernising its economic profile, revitalising devastated areas and developing more sustainable transport. However, in these ambitious plans, the region must face new challenges.

At the level of enterprises and among social partners in the automotive industry, optimism is currently hard to find. Worse still, they consider the current difficulties to be largely the result of external circumstances over which they have very limited influence. At the same time, even if entrepreneurs and employees are aware that they are interdependent, this does not lead to dialogue and action in the common interest. Social dialogue at the regional level can also hardly be considered satisfactory, despite attempts to debate current challenges within the existing bodies.

The development of transport in the region also calls for discussion. It will be necessary to develop solutions that reconcile maintaining high transit capacity with a more environmentally friendly, sustainable approach to the movement of residents within the province, especially in the largest cities, to reduce noise and exhaust pollution and relieve the most congested roads. There is a clash between the positions of those in favour of maintaining individual car transport and those advocating the strengthening of public transport based on an efficient rail network supplemented by last-mile micro-mobility solutions.

All this means that in the coming years, very different development scenarios may unfold in the province and its automotive industry, which is key to its economy, and broadly understood mobility.

The current green transition brings both opportunities for the region, which has the potential to develop new industries, and also serious risks to the functioning of its economy and labour market.

This makes the role of regional stakeholders, including social partners, who can influence economic processes in various ways and mitigate their social impact, all the more important. First and foremost, better information exchange would bring significant benefits. More accurate forecasting based on the plans of automotive companies would allow for more effective change management with the involvement of trade unions, as well as ensuring that employees and employers receive adequate support from regional authorities and other public entities. In order to be most effective, such measures should be based on a planned, systematic regional dialogue, anchored in, for example, a dedicated team appointed by the Provincial Social Dialogue Council.

This report was prepared by the Institute of Public Affairs on the basis of an analysis of the literature on the subject (research reports and studies prepared by public institutions at the central and regional levels, analyses, strategic documents concerning the Silesian Province, online press materials), statistical data provided by the Central Statistical Office (Statistics Poland), including the Local Data Bank platform), its regional branch in Katowice and other public institutions, as well as on the basis of interviews with regional stakeholders. In total, two focus groups and eight individual interviews were conducted with representatives of social partners (trade unions and employers' organisations) from the region, public institutions and non-governmental organisations in the summer of 2025 (with the exception of one interview conducted in November 2025) based on a partially structured interview scenario.

The report was developed as part of the project "EcoMobility Transition: Strengthening Regional Just Transition Processes in the Automotive Industry" co-financed by the European Climate Initiative (EUKI), which aims to support automotive regions in the Czech Republic, Hungary, Slovakia and Poland in managing structural change, taking into account the voice of employees and in line with the principles of sustainable development.

I. Background information

Introduction

The Silesian Province has a population of 4,291,441 (11.4% of the country's population)[1]. It is characterised by high population density (348 people per km^2) and **the highest level of urbanisation in Poland** (75%)[2]. There are 74 cities located in the province, including 13 cities with over 100,000 inhabitants. Five of the eight NUTS 3 subregions of the province[3] belong in whole or in part to **the GZM Metropolis** (GZM*: Górnośląsko-Zagłębiowska Metropolia)*, established in 2019, which groups 41 cities and municipalities belonging to the large metropolitan area – the Upper Silesian conurbation. The largest cities in the province are: Katowice – the seat of the provincial authorities (279,000 inhabitants, in the GZM), Częstochowa (205,000 inhabitants, located in the north of the region outside the GZM), Sosnowiec (187,000 inhabitants, in the GZM), Gliwice (170,000 inhabitants, in the GZM), Bielsko-Biała (166,000 inhabitants, located in the south outside the GZM.

The region, located in the south of Poland, is intersected by important international roads, including: E75 (north-south axis) and E40 (west-east axis), and is home to major transport hubs and the Katowice-Pyrzowice international airport. The province has the densest network of roads and railways in the country.

There is a growing polarisation between county-level territorial units in terms of the range of development dynamics, as well as a concentration of workers in several key cities in the region[4].

The province is one of **the most industrialised regions in the country** (second in terms of share in the sold production of industrial goods[5]) and 19[6] of the 20 hard coal mines operating in the Upper Silesian Coal Basin have their headquarters here, accounting for the largest share of employment in coal mining (NACE B05) in Poland (approx. 76%)[7].

On the one hand, the region can build on its experience gained in the process of its economic transformation which began in the region in the 1990s (when the largest wave of job cuts in mining took place) and is currently linked to the energy transition, and therefore it can benefit from the solutions developed on this occasion. On the other hand, the province **faces large-scale challenges related to the phasing out of coal mining**, compounded by challenges resulting from decarbonisation in other sectors of the regional economy, where the automotive industry has the largest share in terms of the value of sold production (21.6% in December 2024)[8] and employs 3.2% of the region's workforce.

1. Based on Statistics Poland (GUS) data of 2024. The province is one of 16 administrative divisions of Poland at the NUTS 2 level.
2. GUS (2025).
3. Planning documents additionally divide the province into four subregions: northern, western, central and southern.
4. Fundusz Transformacji Województwa Śląskiego S.A. (2025).
5. 15.5% in 2023; source: GUS (2024).
6. Of these, 17 mines are located within the Silesian Province and 2 in the Małopolska Province. As of 2025. Data source: Instrat https://energy.instrat.pl/gornictwo/baza-kopalni/ (accessed on 12 January 2026).
7. According to Statistics Poland.
8. Wojewódzki Urząd Statystyczny w Katowicach (2025), p. 12.

In the automotive industry (NACE 29), the region ranks first in the country in terms of both the value of sold production (33% share in domestic production in 2023[9]) and the number of employees (53,864 persons)[10], which accounts for 26.2% of those employed in this sector in Poland), and ranks fifth in the country in terms of the number of employees in the production of other transport equipment (NACE 30).

The Silesian Province **the country leader in production in the following sections** of the classification of economic activity[11] :

- hard coal and brown coal (lignite),
- metals,
- motor vehicles, trailers and semi-trailers,
- products from other non-metallic mineral raw materials,
- rubber and plastic products,
- finished metal products, excluding machinery and equipment,
- products made from other non-metallic mineral raw materials.

The region also plays a very important role in domestic and international transport. International transport routes of the Trans-European Transport Network (TEN-T), which is currently being developed, intersect in the region: E75 and E40; the E462 route is also present.

The main **social challenges of the transformation in the region** include retraining workers in low-carbon technologies, investing in education and vocational training, levelling out territorial disparities in development and the labour market situation, improving air quality, ensuring high-quality public transport as a factor of social equality; accessibility to electromobility; ensuring access to capital for the implementation of green technologies and changing the attitudes of society and business[12].

Sustainable development, greening of industrial production, transport infrastructure and services

Main topics of the debate

The main driver of the green transition in Poland is the EU's climate policy, and the national discourse on the green transition has been shaped by the country-specific conditions in which the country has been trying to pursue a low-carbon economy. Achieving climate targets is a particularly big challenge for Poland, given **the high degree of dependence of the national energy sector on coal** (in 2025, coal accounted for 52.8% of electricity production, and renewable sources – for 31.2%)[13] and the still large number of people working in coal-related industries (mining and energy). In this situation, concerns arise both about the cost (necessary financial outlays) and **the pace of the transition, the social effects involved**, as well as the impact of the transition on the situation in those regions where coal-dependent activities and employment are concentrated.

The high share of coal in energy production in Poland contributes to **higher energy prices** (which are affected by the cost of CO_2 emission allowances), which affects **the** entire **manufacturing industry**. Some manufacturing companies (e.g. Stellantis in Tychy) are therefore investing in **their own renewable** energy **sources** or forming partnerships with energy producers. Entrepreneurs and trade unions point out that EU environmental and climate standards weaken **the competitive position** of industry located in Poland (and Europe) vis-à-vis companies outside the EU, where similar standards do not apply. The carbon border adjustment mechanism (CBAM) imposed on goods imported from

9. Based on the data of Statistics Poland Local Data Bank (GUS BDL).
10. In December 2024. Statistics Poland.
11. GUS (2024), p. 27.
12. Województwo Śląskie (2023).
13. In 2015, the share of coal still exceeded 80%. Data from: Wójcik (2026).

outside the EU, which is intended to compensate for these differences, has raised hopes but also fears that it turns out counterproductive (raised, among others, by NSZZ "Solidarność"[14]).

In the area **of transport**, the EU policy of imposing on Member States ways of achieving climate targets, i.e. the failure to maintain the principle of technology neutrality and the selective targeting of support for battery electric vehicles at the expense of other solutions, has been criticised[15]. Entrepreneurs representing the automotive industry (Association of Distributors and Manufacturers and Distributors of Automotive Parts, Polish Automotive Industry Association (PZPM)) and fuel industries (Polish Organisation of Oil Industry and Trade) supported an appeal to the European Commission to include the share of renewable fuels in the system for calculating emissions from new vehicles and to allow vehicles powered exclusively by renewable fuels to be classified as zero-emission vehicles[16].

The problem for carriers – especially in long-distance road freight transport – is the high price of zero-emission vehicles and the lack of charging/refuelling infrastructure, as well as the shorter distance that can be covered on a single charge and the long charging time for electric vehicles (compared to combustion engine vehicles). Transport is a low-margin business, so increasing its costs raises concerns that Polish carriers operating in international road transport will be squeezed out by competitors from the East (e.g. Ukraine)[17]. Polish transport companies also have to face competition from better-supported entities from richer EU countries, as pointed out by the Union of Entrepreneurs and Employers (ZPP)[18].

The PZPM warned the government that weak demand for electric cars, insufficient charging and refuelling infrastructure, and unsatisfactory purchase incentives would threaten the health of the automotive industry, on which the EU has imposed a requirement to reduce the emissions of the EU fleet by 15% in 2025, under the threat of severe financial penalties (and appealed for them to be relaxed)[19]. In its position, the ZPP pointed to electric hybrid vehicles as the most accessible (given the purchasing power of customers in Poland) and effective (given the limited access to green energy in Poland) option for eliminating combustion engine vehicles from the market and reducing transport emissions over the next 10-15 years. The ZPP also assessed that this is a technology in which Europe still has a competitive advantage over China. At the same time, the organisation advocated for technological openness in regulating emissions and for the development of battery and rare earth metal recycling and alternative incentives to strengthen the entire value chain[20].

The planned introduction of ETS2 (i.e. the inclusion of fuels used in buildings and transport in the system of paid CO_2) has caused a considerable concern both among trade unions and the government, which has been involved in negotiating the date of entry into force and transition periods, and seeking to implement a mechanism to control the price of emission allowances. The concerns are that the cost of emission charges will be transferred onto consumers and cause increases in energy prices and inflation rate.

At the same time, experts criticise the government for its lack of a well-thought-out and consistent strategy to reduce emissions from buildings and transport (the lack of broad support for energy transition and energy efficiency in residential buildings, and for a better availability of public transport), which would limit the potential financial burden resulting from the implementation of ETS2. In Poland,

14. See NSZZ “Solidarność” (2021).
15. Cf. Koziarek (2024).
16. Gajda (2025).
17. Koziarek (2024).
18. ZPP (2025)
19. PZMP (2024).
20. ZPP (2025).

18.4% (approx. 2.5 million) households are heated with coal[21], and 20% of localities (26% of villages) remain outside the reach of public transport, with another 20% having marginal access to it[22].

For a large group of citizens, especially those living in smaller towns and rural areas, a private car is the only available transport option, most often secured by older imported vehicles (the average age of registered cars in Poland is 16 years[23]), which will be difficult to replace with electric cars due to the high prices of the latter and the low supply of cheaper used electric cars. The authors of a report on transport exclusion in Poland point out that "*the lack of a socially responsible decarbonisation plan for the transport sector threatens to worsen the living conditions of people living outside metropolitan areas and the competitiveness of these areas. It will also contribute to the deepening of transport exclusion and poverty*[24]**.** Similarly, the author of the ETS2 impact analysis commissioned by NSZZ "Solidarność"[25] draws attention to the possible exclusion of such people from the labour market, as well as to the inequalities that this mechanism will exacerbate to the detriment of less affluent regions of Europe.

In view of the challenges associated with the implementation of the European Green Deal, the social partners have adopted different attitudes, which is well reflected in the report on the activities of the Social Dialogue Council[26]: NSZZ Solidarność has been focusing on raising public awareness of the risks associated with the implementation of climate policy instruments (e.g. by publishing a collection of expert analyses on the subject), while the All-Poland Alliance of Trade Unions (OPZZ) is pushing for a national industrial policy that would support the development of manufacturing to meet the domestic demand related to the energy transition (e.g. would support a significant increase in the share of Polish components in the construction of wind farms) and developing new competitive advantages to create new prospects for manufacturing industry and employment opportunities to replace jobs lost in the coal-based energy sector and to reduce the risk of production being shut down or relocated in industries such as automotive and steel[27].

Overview of relevant policies

National strategies

The main national strategic framework for implementing climate targets is *the National Energy and Climate Plan* (a document required by the European Union from each Member State), last updated in August 2025 (*aKPEiK*). *Poland's Energy Policy until 2040,* adopted in 2019, is to be replaced by a new document*, Poland's Energy Policy until 2050*, on which the government plans to start work in 2026.

The directions for reducing GHG emissions **in industry** indicated in the aKPEiK include increasing the use of renewable energy sources, increasing the efficiency of industrial processes, the use of waste heat, renewable hydrogen, including non-biological hydrogen, ESG regulations, the popularisation of CSS[28] (e.g. for the production of petrochemical products and fuels), cooperation between industry and the energy sector, with particular emphasis on measures supporting low-carbon energy-intensive industries (including the metallurgical industry). The aKPEiK also identifies measures supporting the circular economy (including, among others, the efficient management of raw materials important for the national and EU economy).

21. Statistics Poland. Data of 2024.
22. Chrzanowski et al. (2023), quote from the cover.
23. Data from autoexpert.pl (2024) https://autoexpert.pl/artykuly/sredni-wiek-samochodu-w-polsce-rosnie (accessed on 16 January 2026).
24. Chrzanowski et al. (2023).
25. Lachowicz (2025).
26. RDS (2025).
27. See Ostrowski, Zaboronek (2024).
28. CSS (carbon capture and storage) – a technology that enables the capture of carbon dioxide at the source of emission.

In the area **of transport**, the key national policy document is *the Sustainable Transport Development Strategy until 2030 (SZRT)* (adopted in 2019). The aim of the strategy is to create a coherent network of motorways, expressways and high-standard railway lines, a developed network of airports, seaports and inland waterways, and public transport systems, thereby improving transport accessibility, road user safety and the efficiency of the transport sector. The priority task is **to catch up on infrastructure backlogs and create an integrated system**.

It includes, among other things, a plan to build motorways and expressways and connections to national roads, as well as the construction of bypasses around the towns with the heaviest lorry traffic, and the completion of the local road infrastructure with missing bridge crossings, particularly in areas at risk of marginalisation or medium-sized towns that are losing their functions. In the area of rail transport, the strategy provides for the development of the passenger rail transport system, including ensuring inter-city connections, reducing the number of towns and areas without rail transport (supplementing local and regional rail infrastructure – investments, the organisation of transport and protection of infrastructure against liquidation), the construction of daily commuting systems, and measures to increase the competitiveness of railways (travel time and cost, travel comfort and safety, and integration with other urban transport systems in agglomeration areas). The strategy emphasises the development of intermodality and interoperability in freight transport and provides for investments in railway infrastructure serving industry and international trade. In addition to the construction of new railway lines, the strategy plans to electrify parts of the existing railway network. In the area of air transport, the strategy provides for, among other things, investments to increase airport capacity and the share of air transport in passenger transport, the integration of aviation with other modes of transport, and the construction of a Central Communication Port.

In the context of **changes in individual and collective mobility**, the strategy lists the following necessary measures in urban areas: creating incentives to use public transport and giving priority to this form of transport over individual transport, taking into account the needs of people of different age groups and accessibility for people with disabilities, creating a pedestrian- and cyclist-friendly environment, and striving for greater use of rail transport by commuters travelling to cities. For non-urban areas, including rural areas, the strategy provides for, among other things, the establishment of minimum standards for transport services and the design of a system for financing transport and investment in rolling stock, as well as support for car-sharing schemes.

The document also contains an extensive list of measures to reduce the negative **impact of transport on the environment**, including organisational and systemic measures (e.g. the creation of transport corridors reserved for public transport, the creation of low-emission zones in city centres), investment measures (e.g. development of infrastructure for alternative fuels) and innovation and technical measures (e.g. digitisation of management, wider use of zero- and low-emission vehicles). Three indicators have been adopted to reduce the negative impact of transport on the environment by 2030: an increase in annual final energy consumption (maximum +15% compared to the 2017 baseline), annual greenhouse gas emissions (maximum 53.11 Mt CO2eq) and the number of passenger journeys by public transport per capita in urban areas (minimum 220 in 2030).

Road and rail infrastructure investments are included in the following programmes: *the Government Programme for the Construction of National Roads until 2030 with a perspective until* 2033, *the Programme for the Strengthening of the National Road Network until* 2030, *the Programme for the Construction of 100 Bypasses for 2020-2030*, *National Railway Programme until 2030 with a perspective until 2023*, *Programme for Supplementing Local and Regional Railway Infrastructure – Railway+ until 2029*, *Government Programme for the Construction or Modernisation of Railway Stops for 2021-2026*. In addition, there is *a Government programme to support the tasks of railway infrastructure managers, including maintenance and repairs until 2028,* and the Bus Transport Development Fund.

The national planning document concerning **mobility based on alternative fuels** (including electricity) is *the National Policy Framework for the Development of the Market for Alternative Fuels in*

the Transport Sector and the Development of Appropriate Infrastructure, and the main legal instrument is the Act of 11 January 2018 on electromobility and alternative fuels (Journal of Laws 2024, item 1289, as amended). The Act sets minimum targets for the share of low- and zero-emission vehicles in public procurement, including purchases for public transport, and empowers local authorities to designate clean transport zones. The Act contains regulations concerning vehicle charging infrastructure, including the obligation to ensure minimum connection capacity for public buildings and residential buildings in municipalities with a population of over 100,000, and it introduced a procedure for installing charging points at the request of residents of multi-family buildings. Under the provisions of other acts, users of zero-emission vehicles can benefit from incentives such as: exemption from excise duty, depreciation allowances, exemption from parking fees on public roads in paid parking zones, and the possibility of using bus lanes.

Other public policy instruments, using, among others, funds supporting *the National Recovery and Resilience Plan (KPO)*, include (1) programmes to subsidise charging and refuelling infrastructure, the construction of renewable hydrogen production facilities, and the development of electrical power infrastructure for the development of electric vehicle charging stations, (2) programmes to subsidise the purchase, leasing and long-term rental of zero-emission electric vehicles, including programmes addressed to natural persons and sole traders ("NaszEauto"[29], recently extended to selected public entities and non-governmental organisations), as well as local self-governments (the "Green Public Transport" programme supporting smaller urban centres in the purchase of electric buses, trolleybuses and hydrogen buses, in investments in charging or refuelling infrastructure and in renewable energy installations, increasing the share of renewable energy in the electricity supply for the city bus fleet. There are plans to continue and extend this support to inter-city transport).

Between 2025 and 2030, the Ministry of Climate and Environment anticipates a fourfold increase in the number of registered electric vehicles (BEV and PHEV) (excluding two-wheelers) (from 375,838 to 1,512,895), including a more than fourfold increase in the number of passenger cars and a more than twofold increase in the number of light commercial vehicles. Accordingly, the following infrastructure targets have been adopted: 86,494 charging points and 1,661 MW of output power by the end of 2030. It is assumed that by the end of 2030, a total of 6,245 hydrogen-powered vehicles will be registered in Poland (950 by the end of 2025), including 68% passenger cars, buses 16%, light vehicles 13%, heavy vehicles 3%), with an estimated demand of approx. 45,860 tonnes of renewable RFNBO hydrogen and the creation of 74 publicly accessible refuelling points (30 by the end of 2025)[30]

These assumptions are consistent with the directions of action set out in the aKPEiK, which provides for the decarbonisation of road transport, inter alia through instruments supporting electromobility, the development of the electrification of road freight transport (TSL industry), increasing vehicle emission requirements and an emission charge.

The aKPEiK also provides for a gradual increase in R&D expenditure in the areas of transition to a climate-neutral economy, training personnel for the needs of this economy, as well as measures for a just transition and consumer protection, including support for coal regions and high-emission areas and the reduction of energy and transport poverty using the Social Climate Fund.

Regional strategies

By law, regional policies must be consistent with national policies and support the implementation of the objectives contained in those policies. The main planning documents for the province are *the Silesian Province Development Strategy "Silesia* 2030" (SRW) and *the Silesian Province Spatial Development Plan*. The strategic objectives of regional policy, as set out in the SRW, are to build a competitive and innovative economy, strive for a high-quality environment and ensure effective

29. It replaced the previous '*Mój Elektryk*' programme.
30. Ministerstwo Klimatu i Środowiska (2025-2).

infrastructure (including transport). Implementation measures are set out in the relevant provincial sectoral strategies and detailed plans and programmes.

Economic development and greening of industry

The SRW focuses on diversifying the region's economic structure, developing the 4.0 economy, modernising technological processes and reducing the negative environmental impact of traditional industries, as well as promoting and implementing the circular economy. Innovation is to be built on the basis of the region's potential and locally developed technologies, in particular in the area of regional and smart specialisations (see below) and creative industries. On the one hand, the activities are focused on supporting strong local entrepreneurship, and on the other hand, on internationalisation, networking and regional cooperation. **The key areas of technological development for** the province, as defined by *the Regional Innovation Strategy for the Silesian Province 2030 – Smart Silesia (RSI)* and *the Silesian Province Technology Development Programme for 2019-2030* are: technologies for medicine, technologies for energy, production and processing of materials, logistics and transport, the machine and automotive industry, nanomaterials and nanotechnologies, aviation and space industry technologies, and technologies for the raw materials industry. The activities envisaged in *the Programme* include, among others, the development of research infrastructure, the dissemination of knowledge and cooperation with enterprises, the development of specialised cooperation networks, the identification of challenges, needs and areas of technology application, and the promotion and support of technology internationalisation. By the end of 2025, specialist observatories dedicated to specific key technologies (with the exception of machine and automotive industry technologies and technologies for the raw materials industry) were established in the Silesian Province[31].

Mobility and the environment

The SRW provides for measures to improve **transport cohesion and accessibility** in the region by improving transport links, developing aviation and aviation-related infrastructure, and supporting the development of intermodal and multimodal transport (development of regional transhipment centres). At the same time, **support** is planned **for the development of integrated, sustainable and low-emission transport** in cities and their functional areas and rural areas, in particular public transport, as well as improving the accessibility of public transport in peripheral and cross-border areas. In addition, the strategy provides for the integration of bicycle transport into the transport network, including the creation of safe connections between towns in the region, work on water transport routes and the promotion of sustainable mobility among the inhabitants of the province. The measures for a high-quality environment included in the SRW include, among others, supporting solutions that improve air quality and shaping spaces to reduce noise and its nuisance.

Detailed directions for activities related to the development of low-emission means of transport, including the development of electromobility, are set out in *the Regional Transport Plan for the Silesian Province* (adopted in January 2024). By 2030, the plan assumes, among other things, a 2.9% reduction in CO_2 emissions from internal transport (compared to 2021), a 10% share of zero-emission passenger vehicles among registered vehicles, 1,284 electric vehicle charging points, an increase in public transport from 327.9 million (2021) to 360.4 million, an increase in the rail passenger transport index from 4.297 (2021) to 6.446; increase in the annual capacity of railway terminals from 804,410 TEU (2021) to 954,030 TEU. Supplementary documents include **Sustainable Urban Mobility Plans** (SUMPs) for individual sub-regions of the province, adopted by the associations of municipalities in those sub-regions.

31. As part of projects supporting the development of the Regional Network of Observatories run by the Marshal's Office (information obtained from the Marshal's Office).

Institutional framework for regional social dialogue

The main **institutional framework for social dialogue at the regional level** is provided by the Act of 24 July 2015 on the Social Dialogue Council and other social dialogue institutions (Journal of Laws 2015, item 1240, as amended). Under this Act, a tripartite social dialogue body was established in each province: the Provincial Social Dialogue Council (WRDS). Its main competence is to take positions and express opinions on matters falling within the scope of tasks of trade unions or employers' organisations within the competence of the provincial self-government and local self-government administration. Among other things, the National Social Dialogue Council may refer matters of regional importance to the WRDS for consideration.

The Silesian Province has **a Provincial Social Dialogue Council**, composed of:

- Representatives of the provincial self-government: marshal of the province (*marszałek województwa*) and two persons appointed by him/her from among representatives of other local self-government units or organisations associating local self-governments
- The trade union side, represented by representatives of the regional structures of three nationally representative trade unions (NSZZ "Solidarność", OPZZ, FZZ)
- The employers' side, represented by representatives of the regional structures of five nationally representative employers' organisations (Polish Craft Association, Lewiatan Confederation, Employers of Poland, Business Centre Club, Association of Entrepreneurs and Employers, Federation of Polish Entrepreneurs)
- (National) government representatives: the provincial governor (*wojewoda*) and two persons appointed by him/her.

The Council meets in plenary sessions as often as necessary, but at least once every three months. The Chair of the WRDS is elected from among the members of the WRDS – alternately a representative of employers, a representative of employees (designated by the respective parties), the provincial marshal, and the provincial governor – for a one-year term. He/she chairs the Presidium and the plenary sessions of the WRDS. There are also WRDS problem-solving teams – currently, these are: the waste management problem-solving team and the health protection problem-solving team.

During the study, the chair of the Silesian WRDS was a representative of the employers' side and chair of the Silesian Association of Employers Lewiatan, while the Marshal of the Silesian Province was elected to this position for the following year. The current co-chairs of the WRDS from the trade union side come from the hard coal mining industry, a sector that still accounts for a large share of employment in the region and which will be most affected by the energy transition. The WRDS agenda covers a wide range of economic issues related to the labour market, vocational education, the healthcare system, the demographic crisis, the internationalisation of SMEs and waste management (including the problem of illegal waste dumps)[32]. The WRDS is listed in the SRW among the bodies important in the process of implementing regional development policy.

Key actors shaping transition in the region

The role of regional stakeholders in shaping transition in the region is potentially significant, although it is limited by the national legal framework, which is related to the unitary nature of the Polish State.

The provincial self-government is the main architect and coordinator **of development policy at the regional level**. Its bodies are the Sejmik – the legislative and supervisory body – and the Executive Board – the executive body, composed of the marshal and his/her deputies. The provincial executive board develops the Provincial Development Strategy (and related sectoral strategies and implementation programmes) – with a view to stimulating economic activity and increasing the

32. WRDS news 25 February 2025: https://dialog.slaskie.pl/pl/aktualnosci/szerokie-spektrum-tematow-na-2025-rok.html (accessed on 16 January 2026).

competitiveness and innovativeness of the province's economy, but also to preserving the cultural and natural environment, taking into account the needs of future generations, and shaping and maintaining spatial order. It identifies industries (specialisations) that are to become the driving force of the region's economy, and ensures the coherence of spatial order within the region. Regional policies respond to the specific needs of local communities and, at the same time, by law, must be consistent with (national) government strategies and support their implementation. The provincial self-government also **manages funds for the implementation of measures supporting regional policy objectives**, including, in particular, funds from the European Regional Development Fund and regional investments.

Regional strategies are updated (modified) in multi-year cycles, but the provincial self-government may, in accordance with the provisions of the applicable strategic documents, to a certain extent adjust the implementation of planned measures, e.g. by changing the allocation of funds between individual priorities or measures included in the European Funds for Silesia 2021-2027 Programme (FES), or by adjusting the criteria for project selection. The current Silesian Province Development Strategy "Silesia 2030" was adopted in 2020, and work on its update began at the end of 2024.

Although the activities of the Silesian Province related to the transformation of the region generally focus on the challenges associated with the phasing out of coal mining (reprofiling and diversification of the economy, creation of new jobs, retraining of workers), many of the activities envisaged in the FES concern areas that are also important for a just transition towards low-carbon and zero-emission mobility. These are: (1) measures supporting the development and competitiveness of the region's economy and its transition to low-emission, (2) measures related to the labour market and vocational training, and (3) measures related to transport services and infrastructure.

In shaping regional policy and funds programming, the Provincial Executive Board uses, among other things, the diagnostic and prognostic support of **the Provincial Labour Office (WUP)** in Katowice (which is a regional structure of the national government), an institution that provides analyses in the area of the labour market, and at the same time is the administrator of a large pool of funds for various forms of adult education for the needs of the labour market: courses, training, postgraduate studies, and improving qualifications. In particular, the WUP is the Intermediate Body (IB) for the FES programme in the area of the labour market, adult education and professional transformation processes (it manages funds from the ESF+). The **Silesian Centre for Entrepreneurship** (which is a provincial self-government organisational unit) acts as an IB, responsible for supporting the economic sector, including innovation in enterprises, while **the associations of municipalities and counties of the four subregions**: central, northern, western, and southern (Beskidy Agglomeration) act as IBs for projects of subregional importance (e.g. concerning sustainable mobility).

In the province, there is also **a metropolitan association** of 41 cities and municipalities – **the GZM Metropolis (GZM)**, established in 2019 to coordinate tasks that are difficult or impossible to implement at the level of a single municipality. These include the organisation of public transport (which is available in the GZM area under a common ticket system), including, among others, joint purchases of electric and hydrogen buses for the needs of the long-distance lines, and coordination of the construction of the necessary charging/refuelling infrastructure, spatial planning, and attracting investors.

Katowicka Specjalna Strefa Ekonomiczna S.A. (Katowice Special Economic Zone) plays an important role in the economic transformation of the region. Its shareholders are the State Treasury, represented by the Minister of Development and Technology, and the self-government of the Silesian Province. It is an entity supporting the development of new investments in a designated area where companies can operate on preferential terms, mainly through tax relief, i.e. in the Katowice Special Economic Zone (KSSE). The objectives of special economic zones (there are 14 in the country) include attracting investment, creating jobs and supporting the economic development of regions.

The Silesia Automotive and Advanced Manufacturing (SA&AM) cluster, which is one of the so-called National Key Clusters, was established within the KSSE. At the time of the study, the cluster brought together approximately 280 entities and organisations, of which more than 160 to 170 represented the automotive industry. Its mission, as defined by the representative interviewed, is to promote and support competitiveness among its member companies in order to strengthen their position within international value chains and vis-à-vis the headquarters of the multinational corporations of which they are a part. The cluster does not bring together companies representing types of mobility other than car transport, but it is open to the possible inclusion of manufacturers of means of transport (e.g. electric bicycles).

Entrepreneurs can influence the transformation of the region through their business decisions. Various regional employers' organisations, business associations, chambers of commerce and craft chambers operate in the Silesian Province, including:

- Silesian Association of Employers Lewiatan – part of the nationally representative Lewiatan Confederation
- Silesian Federation of Polish Entrepreneurs (ŚFPP) – belonging to the nationally representative Federation of Polish Entrepreneurs (FPP)
- Chamber of Crafts and Small and Medium-Sized Enterprises in Katowice – belonging to the nationally representative Polish Craft Association
- Silesian Chamber of Employers (ŚIP) – part of the nationally representative organisation Employers of Poland
- Regional Chamber of Commerce in Katowice – part of the National Chamber of Commerce (KIG).

The Polish Chamber of Automotive Industry (PIM) also has a branch in the province (in Gliwice).

Workers from the Silesian Province are represented at the provincial level **by regional structures** of representative nationwide trade union organisations: the All-Poland Alliance of Trade Unions, the Trade Union Forum, which are federations, and the Independent Self-Governing Trade Union "Solidarność" (NSZZ “Solidarność”), which is a single union. These are:

- OPZZ Council of the Silesian Province
- The Provincial Board of the FZZ of the Silesian Province.
- NSZZ “Solidarność” Management Board of the Śląsko-Dąbrowski Region

The employees of the individual sectors of the economy are represented by **national level sectoral structures**. In the case of the automotive industry, these are: the relevant national sections of NSZZ “Solidarność” and PZZ Kadra, a nationwide organisation affiliated to FZZ, and the Federation of Metalworkers and Steelworkers, which is a member of OPZZ. There are company and inter-company organisations operating **in enterprises**, some of which operate outside the structures of NSZZ “Solidarność” and are not affiliated with FZZ or OPZZ.

In the context of the transition, employers' organisations focus on issues related to maintaining the competitiveness of enterprises and supporting them in facing the challenges arising from the transition to a low-carbon economy. Trade unions, on the other hand, focus on protecting employees' rights during the transition, i.e. primarily on maintaining employment and soliciting new jobs, and in the event of redundancies, on appropriate protective measures.

Employers and trade unions can influence the path of transformation in the region to a certain extent through their representatives in bodies such as the WRDS, the Provincial Labour Market Council, and the FES Monitoring Committee, as well as by participating in consultations on regional strategies, programmes and plans organised by the Marshal's Office.

Concerns, needs and perspectives of key stakeholders

The representatives of **employers' organisations** associated with the automotive industry in the Silesian region and related industries have generally presented a rather pessimistic view of the current

situation and future prospects. In interviews, they reported **a high level of uncertainty** among entrepreneurs, which is linked, among other things, to their specific position within international value chains. As most of them are suppliers to multinational corporations, they are under strong pressure from the development strategies implemented by these global players. In recent years, the latter have placed a strong emphasis on the transition to electromobility and the resulting technological change: mainly components for electric cars were to be produced. However, it quickly became apparent that the scale of orders for these components was smaller than expected due to the slower-than-expected growth of the electric vehicle market. This creates instability and makes it difficult for companies that supply these components to plan their future activities, especially as the problem is both the volume of orders and their stability. According to an interviewee, fluctuations in market demand further increase companies' operating costs.

Regarding **the opportunities for improving** the **situation** of the automotive sector and related industries in the region, the general expectation is that the demand for electric vehicles and components for their production will stabilise to some extent, and that **the direction of** electromobility **development and** the **strategies** of further actions by transnational players **become clearer** – and, in a broader context, that **EU climate policies are relaxed**. However, employers seem to be rather pessimistic in this regard. For example, a representative of one organisation suggested a scenario in which the conversion of prices between electric and combustion engine vehicles would rather mean an increase in the prices of the latter. Stabilising demand is important for maintaining jobs in the sector and avoiding large-scale redundancies. At the same time, interviews with employers show that companies may have recently reduced their workforce by letting go of a number of temporary agency workers, which is not reflected in public statistics on collective redundancies.

In addition to expecting a general improvement in the economic situation, some automotive industry entrepreneurs in the region are counting on **the development of new technologies and the search for niches** that could bring additional competitive advantages to some companies. This is reflected, among other things, in the policy pursued by the SA&AM cluster, which supports companies in improving their competitive position based on the development of innovation and green solutions. This is accompanied by the conviction that such an approach is necessary to remain on the market and gain consumer confidence. Recently, the cluster has opened up to companies outside the automotive industry, as it has discovered that the technologies used in the production of vehicle components can be used in other manufacturing sectors, even those unrelated to the automotive industry. Other than that, a specific technology that some entrepreneurs in the region would like to see developed is the autonomous vehicle segment. In Poland, there are currently no regulations allowing them to be tested on public roads, but social partners at the Provincial Social Dialogue Council have recently proposed the construction of a special track that would be used, among other things, to test such cars.

Similar to employers, the **representatives of trade unions** (which are present in larger workplaces) expressed concerns about the future of the **automotive** industry**,** in particular **the competitiveness** of European companies. They pointed out that a loss of competitiveness means a loss **of jobs**, which not only deprives employees of their source of income when companies reduce, close down or relocate their operations, but also implies **a loss of revenue** for the local communities where these companies are located.

Trade union representatives pointed to **European policy** as a significant source of problems for the industry, but also as the key to improving the situation. As one of the interviewees put it, *"Europe is cutting off the branch it is sitting on"*, on the one hand, imposing a straitjacket resulting from ambitious climate policy, which increases **operating costs compared to competitors** outside the EU, and on the other hand, zero- and low-carbon technologies, which were supposed to build Europe's competitive advantage, have been increasing its dependence on raw material supplies from outside the Union (such as rare earth metals, which are key to the electrification of transport). For example, the production of neodymium magnets has proved sensitive to restrictions imposed by China, which has its own deposits. According to this interviewee, it is incomprehensible *"why Europe wants to be a*

pioneer of the green transition when it cannot afford it (...). Other large countries, which currently do not bear the costs of burdening their domestic dirty industries, will find it easier to finance the shift to a greener profile in the coming years".

He also pointed out that European policy is characterised by a lack of long-term planning and **expectations of too radical changes in too short a time**, ad hoc action. As an example of the effects of implementing *an "ill-considered solution"*, he cited the failure of Spain's renewable energy-based energy system. According to him, there is a lack of systemic solutions, and if there are any, they burden ordinary citizens, *"while we continue to produce dirty energy*."

Trade union interviewees also questioned the "environmental friendliness" of the solutions promoted by the European climate policy: *"an electric car becomes environmentally friendly after 200,000 kilometres, I think".* In this context, the interviewees raise the issue of the costs of disposing of such cars, and in particular the problem of recovering and disposing of electric car batteries. The participants in the study criticised EU policy for its hypocrisy: *"this is not ecology (...) it is a scam, if we continue to pretend, we will never move in the right direction. (...) we pretend that if we manufacture outside the EU, it's environmentally friendly because we don't see the mess." "We are against it because it doesn't lead to anything good."*

Given the uncertain economic situation in the industry, trade unionists also pointed to the significant impact **of energy costs** and the types of contracts with energy suppliers in production plants where production is based on electricity. The plant where one of the interviewees works has a contract for a fixed level of energy consumption, and in the event of deviations, it pays penalty rates, which sometimes forces production stoppages. In addition, the interviewees pointed out that the protection of individual consumers against high energy costs is offset by higher prices for businesses. They also expressed serious concerns about further price increases in connection with the expected introduction of ETS2.

According to trade unionists, changing the vehicle model produced is not enough to remain competitive; it is necessary to change the regulations that reduce this competitiveness [implicitly: resulting from the European Green Deal]. In this matter, the views of trade union representatives seem to coincide with those of employers, as the latter see an opportunity to improve the situation, among other things, in the relaxation of the EU's climate policy, which, according to the unions, should be actively pursued.

Respondents from trade unions emphasised that the interests of employees and employers are aligned, but this does not lead to cooperation between the two parties, e.g. on legal and public policy solutions that would contribute to improving the situation in the industry and reversing negative trends.

In view of the uncertain situation, trade unionists have signalled a significant need for access to information about companies' plans, the future of industries, knowledge about changes in the legal environment, and access to reliable information about the consequences of the implementation of the European Green Deal, e.g. ETS2 *"no one talks about the threat it poses, but we are finding out this information ourselves*." Trade unions also expect more effective dialogue: *"there are problems because everyone just talks, but (...) no one solves anything or does anything*."

According to interviewees from the Marshal's Office, the main concern **of the provincial self-government** is the economic diversification of the region, which has traditionally been dominated by heavy industry: *"our main problem is monoculture, and we see the automotive sector in the context of another monoculture*". The provincial self-government's transition activities to date have focused on the challenges associated with the phasing out of coal mining and are aimed, among other things, at supporting job creation (primarily to fill the gap left by job losses in mining), including through new investments in enterprises, as well as on retraining people leaving coal-based industries. At the same time, officials pointed out that in order to respond appropriately to the challenges related to the

situation of the automotive industry and its employees, the provincial self-government (like the trade unions) would need information about the planned activities of enterprises.

II. Employment and production in the automotive and mobility industry

The data sources used in this chapter are data available from the public statistics system (including the Statistics Poland Local Data Bank – GUS BDL), and data obtained from WUP, company directories and websites, news portals with sectoral or regional focus (slazag.pl, slaskibiznes.pl) as well as from interviews with regional stakeholders (representatives of trade unions, employer organisations and WUP). Some data are quoted after a sectoral report by the Polish Economic Institute.

The situation in the automotive industry

The automotive industry in Poland is dominated by **foreign capital** (which generated 75% of the industry's profits in 2024) and **is** strongly **linked to foreign markets** (92% of added value goes to exports)[33]. Production focuses on the manufacture of parts and accessories for motor vehicles (for both the primary and secondary markets) – 53% of the automotive industry's production value and 76% of employment in the automotive industry in 2024.[34] – and is characterised by relatively **low added value** (low margins and low share of wages), which results from the nature of foreign investments located in Poland. The most competitive export products include delivery vehicles, petrol engines, braking systems and lithium-ion batteries. Poland is the largest producer of lithium-ion batteries in Europe (with a 6% share of global production in 2024)[35]. It also manufactures electric buses and, in 2023, began production of hydrogen buses (in Świdnik in the Lublin Province).

The Polish automotive industry is sensitive to fluctuations in the European and global economy, not only because of its export orientation, but also due to the growing share of imports, which amounted to 36.3% in 2023[36]. The industry has been severely affected by the COVID pandemic and the war in Ukraine which disrupted supply chains. The difficult situation of the industry has been confirmed by both trade unionists and employers. The interviewees indicated that the industry's **competitiveness** was weak and threatened due to China's strong and growing position in the market (in the production of electric cars, batteries and more). Competitiveness has been further reduced by high production costs in Europe, which are influenced, among other things, by the need to comply with standards imposed by EU climate policy (CO_2 emission standards, Euro 7). Manufacturers cannot make up for poor sales of electric vehicles by increasing the production of combustion engine vehicles, as this would expose them to severe penalties. Trade unionists reported that **relocations** outside Europe are taking place in the industry, e.g. to Egypt and Morocco, and that in the context of Donald Trump's current policy, relocations to the US can also be expected. One of the interviewees noted that although the current formula of being *"Europe's manufacturing hub"* is coming to an end, *"we can still ride this horse for a while longer*".

The automotive industry in the Silesian Province (as in the rest of the country) is dependent on demand in Western European markets. The interviewees indicated that **demand** is influenced, among other things, by the economic situation of consumers and the price of the product, as well as the

33. Data quoted after: Ambroziak et al. (2025).
34. Statistics Poland.
35. Ambroziak et al. (2025).
36. Ibid.

availability of financial incentives. According to a trade union interviewee, after the withdrawal of subsidies for electric cars in Germany, orders for electric cars fell by 80%. In Poland, apart from price, another barrier to EV demand is **the insufficient charging infrastructure**, and in this context the study participants mentioned the incompatibility of power grids with the increased energy consumption associated with (especially fast) charging of vehicles, for which there is the greatest demand. In turn, **the** still **limited availability of hydrogen refuelling infrastructure** in Europe influenced Stellantis' decision to suspend the development of hydrogen fuel cell technology and postpone the launch of Pro One hydrogen-powered delivery vans in Poland (at a plant in the Silesian Province) planned for 2025[37]

The level of demand is crucial for the industry**,** as the business model (profit) of automotive companies is strongly based on large-scale orders and **mass production**. Meanwhile, respondents indicated that the demand has been unstable over the last five years (with short-term excess orders alternating with declines and restructuring of operations). Currently, production volumes for individual car models are low, which may lead to internal competition and threaten the continued production of different models targeting a similar market segment – e.g. within a large capital group (such as Stellantis), in a situation of a tightening market in Europe, where production plants are closing down. The **unpredictability of orders** is a major problem**:** according to one trade unionist*, "*[the customer] *does not provide a production plan even a week in advance, and we do not know where we stand*."

The study participants pointed out that the driving force behind **the transition to electromobility** are car manufacturers, who are at the top of the value chain. Many automotive companies, seeking to gain a competitive edge in the electromobility market, have created new structures, and subcontractors have also made investments, focusing on the electrification of cars. Meanwhile, demand has stagnated, with hybrid cars selling better. "*One of the plants focused on four-shift production of electric motors, but is now producing on a single shift, which turned out to be a financial disaster – it is only using 20% of its newly built capacity because the customer withdrew due to a lack of demand for electric cars*." The poor economic situation for electric cars has affected the situation of all component manufacturers.

Parts and component manufacturers are adopting different **strategies** in response to the emerging challenges. One plant, due to a decline in OEM orders, switched most of its production to aftermarket, but due to the several times lower prices on this market, it had to make up for it with the scale of production in order to remain profitable. Sometimes, production for aftermarket is more profitable due to the low margins on OEM products imposed by car manufacturers. Some plants where the technological process allows it (e.g. paint shops involved in painting and galvanising) are starting to look for customers outside the automotive industry, but this is very difficult when the process is designed for large-scale production.

Plants manufacturing products related to combustion engine technology will face particular **challenges**. For plants producing, for example, braking systems – which differ in combustion engine and electric cars (the same may be true for cooling systems) – this means, according to the interviewees, the need to "retool production", and for combustion engine manufacturers, the end of production and possibly a transition to a new production profile. An attempt to use the industrial infrastructure remaining after the liquidation of the FCA Powertrain plant in Bielsko-Biała for new production, ended in failure – in this case, engines for military use could have been produced there, which is what the trade unions and local authorities were hoping for, but the Polish Armaments Group (PGZ) ultimately was not interested to launch activity there.

For the time being, **the dependence of the domestic automotive industry on combustion engine technology** is not weakening – the share of products related to this technology in exports in 2024 was 25%, and in parts exports alone – 37%, similar to 2018[38].

37. slaski.biznes.pl (2025).
38. Ambroziak et al. (2025).

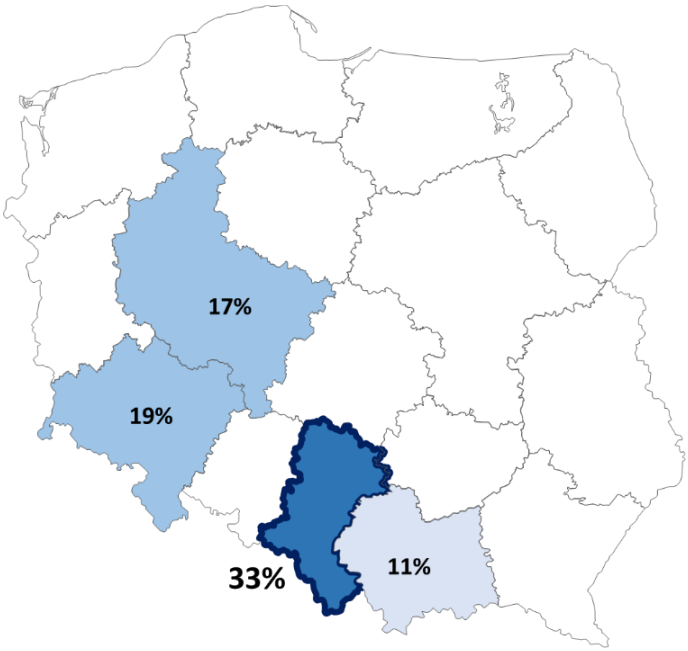
In addition to the challenges described above, **the competitiveness** of the Polish automotive industry **is declining** due to **rising labour costs** (e.g. as a result of an increase in the statutory minimum wage) **--- and rising electricity prices**[39]. At the same time, although the automotive industry in Poland is much more advanced in automation (implemented in response to labour shortages) than other branches of industrial processing in the country, in 2023 it still lagged significantly behind countries such as Germany, Italy and even the Czech Republic[40]. As one of the trade union representatives noted*, "sooner or later, real automation will come to us*."

The mobility industry in the Silesian Province

The Silesian Province compared to the rest of the country

Most of the Polish automotive industry is situated in three provinces: Silesia, Lower Silesia and Greater Poland, whose combined share in the value of sold production in 2023 amounted to 70%, and together with the Lesser Poland Province, 81% (seeMap 1), with the share of the Silesia Province alone amounting to 33%. The Silesian Province has the highest share of inhabitants working in the automotive industry in Poland, which amounts to 26% (seeMap 2). In 2024, this province, as well as the Lower Silesian Province, recorded the highest percentage of people employed in the automotive industry among the total working population in these provinces – in both regions it amounted to 3.2% (seeMap 3

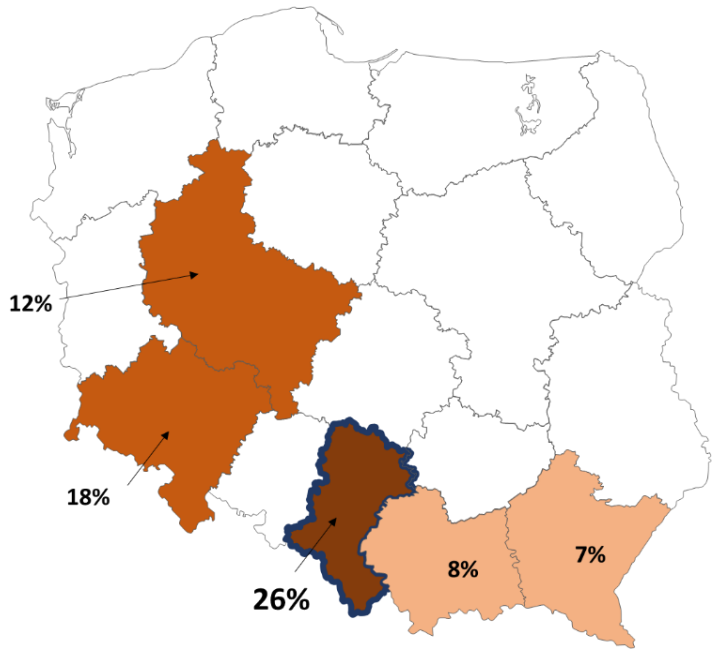
Map 1. Provinces with the highest share in the national value of automotive industry production sold in 2023



Source: own study based on data of Statistics Poland (GUS)

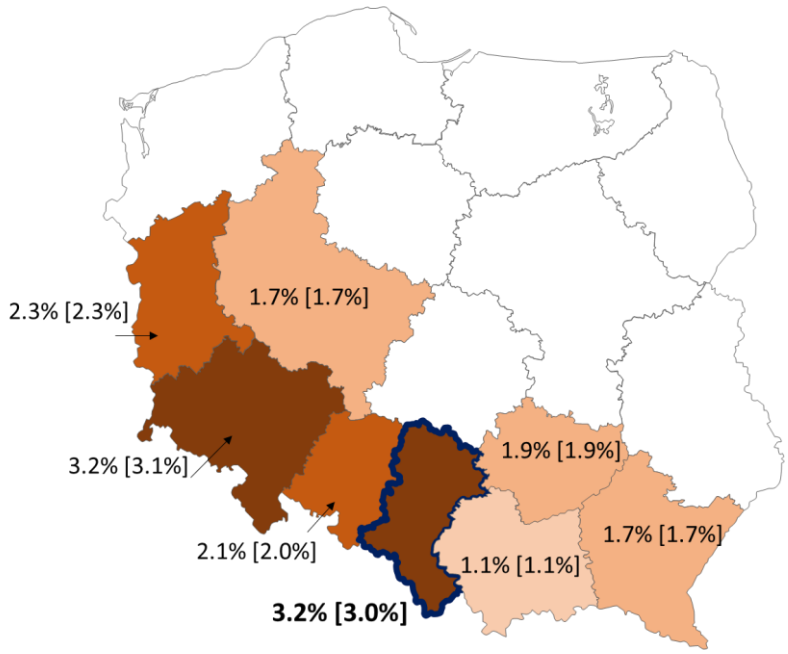
39. Electricity prices for non-domestic consumers in the first half of 2025 were 75% higher than in the second half of 2020 (the highest value – a 104% difference – was reached in the first half of 2023. Calculation based on Eurostat data nrg_pc_205. (accessed on 16 January 2026).
40. IFR.org https://ifr.org/news/global-robot-density-in-factories-doubled-in-seven-years/ (accessed on 16 January 2026).

Map 2. Provinces with the highest share in the number of people employed in the automotive industry in the country in 2024



Source: own study. Percentages calculated based on the annual average number of people employed based on monthly data of Statistics Poland Local Data Bank (GUS BDL).

Map 3. Provinces with the highest percentage (above 1%) of people employed in the automotive industry among the total working population in a given province in 2024 [in 1-7M 2025].



Source: own study. Percentages calculated based on the average number of people employed in a given period based on monthly data of Statistics Poland Local Data Bank (GUS BDL).

Mobility industry companies

There are three OEM factories belonging to the French-Italian-American Stellantis group in the Silesian Province: in Gliwice, producing large delivery vehicles, mainly electric: Citroën Jumper, Peugeot Boxer, Opel/Vauxhall Movano, Fiat Professional e-Ducato; and two plants in Tychy - a plant producing passenger cars with combustion, hybrid and fully electric drives: Alfa Romeo Junior, Jeep Avenger, Fiat 600, and a plant producing engines for hybrid cars. The region is also home to numerous manufacturers of vehicle parts and components, manufacturers of machinery and equipment for the automotive industry, and suppliers of technology and services for the industry. The companies located in the province represent all levels of supply for vehicle manufacturers: from Tier 0.5 to Tier 5[41]. Some companies manufacture exclusively for original equipment, some for both original equipment and the aftermarket, and some exclusively for the aftermarket.

For the purposes of electromobility, Valeo e-automotive in Czechowice-Dziedzice manufactures high-voltage drive systems for all electric vehicles (hybrids, PHEVs and EVs), while ZF in Częstochowa produces electronic systems for EVs. While the largest concentration of the battery industry in Poland is in the Lower Silesian Province, the following companies operate in the Silesian Province: SK high-tech battery materials Poland in Dąbrowa Górnicza – a manufacturer of lithium-ion battery separators used in electric cars, BMZ Poland in Gliwice – a manufacturer of lithium-ion batteries for electric bicycles, commercial vehicles and electric buses, among others, and – also in Gliwice – EMBS (formerly Johnson Matthey Battery Systems), a manufacturer of advanced lithium-ion battery systems for electric bicycles and autonomous vehicles, among others. In addition, Pszczyna is home to ZPUE S.A., a manufacturer of fast charging stations up to 150 kW.

There are also two battery recycling plants in the Silesian Province: Elemental Strategic Metals in Zawiercie (recycling of lithium-ion batteries and recovery of metals from catalysts) and Eneris in Żarki (recycling of lithium batteries and battery waste).

There are no major manufacturers of buses or trucks in the region, but some companies produce components for buses. The city of Bielsko-Biała is home to Wawrzaszek ISS sp. z o. o., a Polish manufacturer of special vehicles (mainly for the fire service). Meanwhile, Gliwice is home to Blees, a technology start-up working on the implementation of an autonomous bus under the same brand name.

Chorzów is home to a plant belonging to Alstom, which manufactures rail vehicles, including electric and electric-battery vehicles (metro carriages, trams, carriages for regional railways and components for rail vehicles). In 2024, the plant employed approximately 2,500 people[42]. The company also has a branch in Katowice (formerly Zakłady Wytwórcze Urządzeń Sygnalizacyjnych) and Delta electrical and welding workshops in Świętochłowice.

Several manufacturers of Polish bicycle brands also operate in the province – the bicycles are designed and assembled in Poland, while production takes place in China and Taiwan, including: Velo in Gliwice (Accent and Dartmoor brands), Artex FPHU in Czechowice-Dziedzice (Northtec brand), Prime Bicycles in Częstochowa (Prime brand); two companies produce electric bicycles: Zasada Bikes in Wieluń (Maxim brand) – the assistance system is manufactured in Poland (the company also offers bicycles without assistance) and Tosa Bikes in Rybnik; Mozartt in Katowice manufactures bicycle tensioners and chain guides.

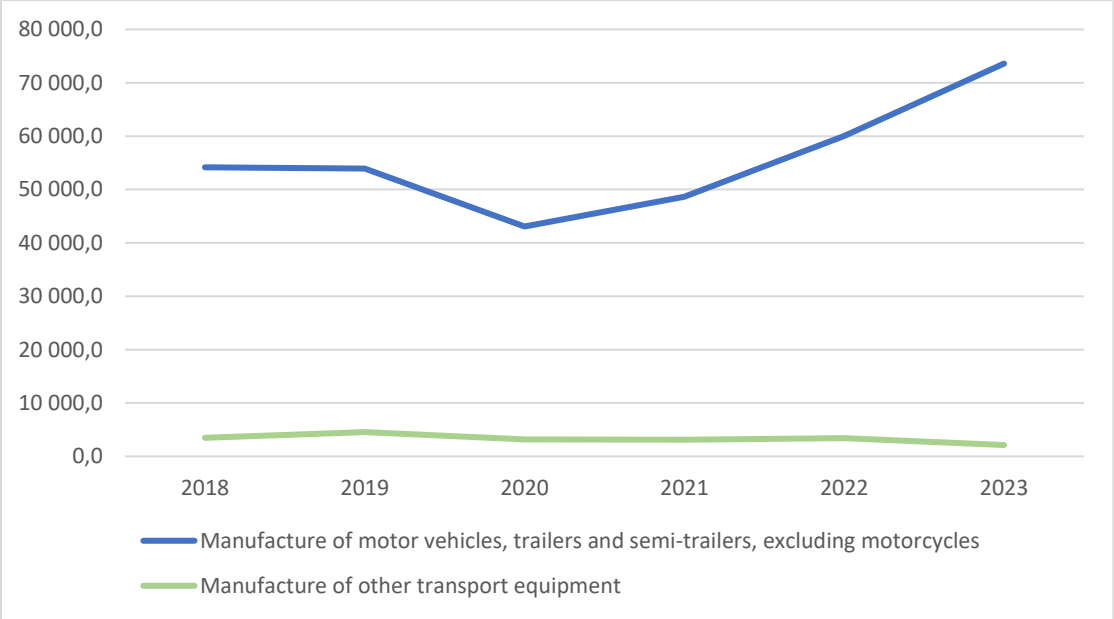
41. See the Polish Automotive Chamber's company directory https://www.pim.pl/kategoria/31/katalog (accessed on 16 January 2026).
42. Data from the company's website: https://www.alstom.com/pl/press-releases-news/2024/10/zaklad-alstom-w-chorzowie-obchodzi-160-lat (accessed on 16 January 2026).

Production

In public statistics, production for the mobility industry is included in various sections of the classification of activities. The most important of these is *the manufacture of motor vehicles, trailers and semi-trailers, excluding motorcycles* (NACE 29). This section includes, among others, the production of passenger cars, delivery vans and lorries. However, this section does not include the production of engines for electric vehicles, batteries or accumulators, or vehicle lighting, which are classified under the *production of electrical equipment* (NACE 27), while the manufacture of pistons, carburettors and fuel pumps is classified under *the manufacture of machinery and equipment not elsewhere classified* (NACE 28). The manufacture of rubber products is classified separately (NACE 22). However, the automotive industry value chain is much more extensive and includes, among other things, packaging and logistics, specialised services such as industrial cleaning, software, etc. The *manufacture of other transport equipment* (NACE 30) includes, among others, the manufacture of locomotives, rolling stock and trams, motorcycles, bicycles, wheelchairs, aeroplanes and military vehicles. In this situation, data on NACE divisions 29 and 30 were adopted as indicators of the condition of the mobility industry.

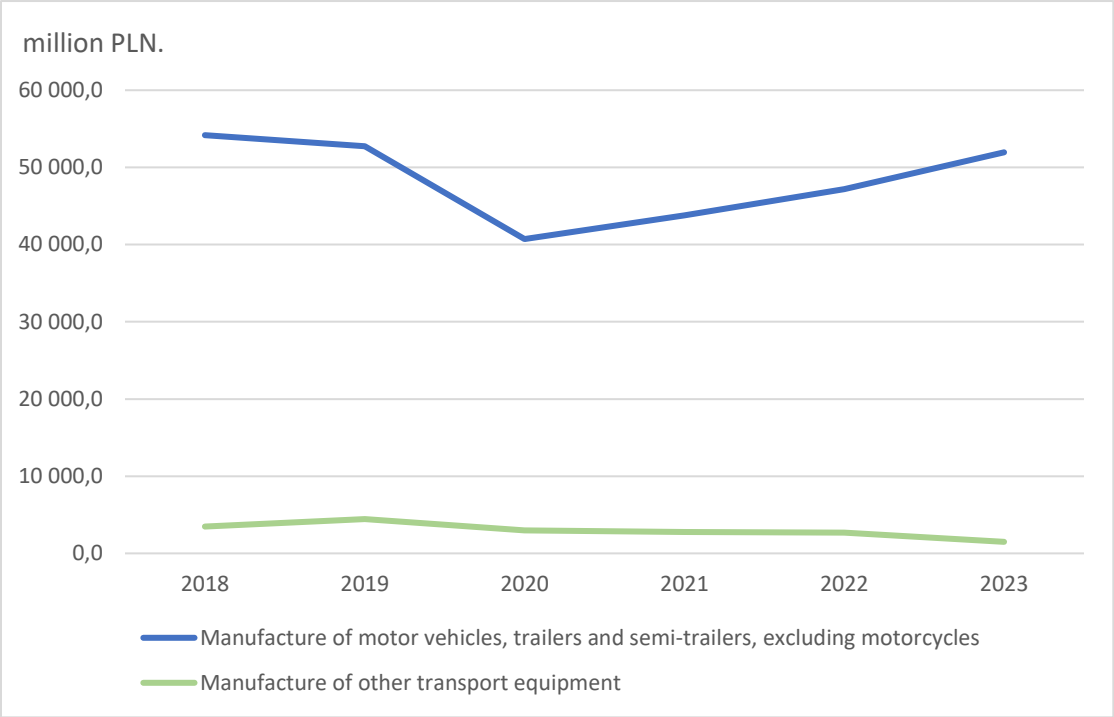
The value of sold production in NACE 29 in the Silesian Province in 2023 amounted to PLN 73,595.4 million, and in NACE 30 to PLN 2,122.3 million. Since 2020, the industry has been making up for the losses caused by the COVID-19 pandemic, but when prices are adjusted for inflation, it has not reached pre-pandemic levels (Chart 2).

Chart 1. Dynamics of the value of sold production in NACE 29 and NACE 30 in the Silesian Province (current prices in millions of PLN)



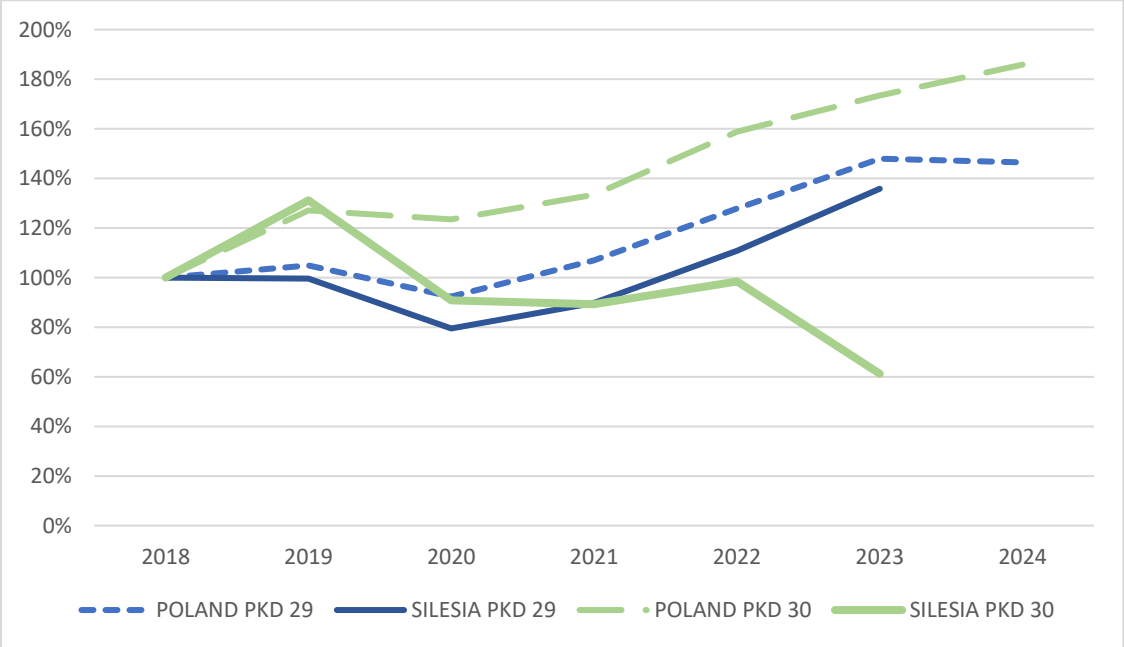
Source: Statistics Poland Local Data Bank (GUS BDL)

Chart 2. Dynamics of the value of sold production NACE 29 and NACE 30 in the Silesian Province, adjusted for inflation (in millions of PLN).



Source: own study based on data of Statistics Poland (GUS)

Chart 3. Comparison of the dynamics of sold production value in NACE 29 and NACE 30 in the Silesian Province and in the country (current prices, 2018=100%)



Source: own study based on data of Statistics Poland (GUS BDL; GUS *Outlays and results in industry*.

Changes in the value of sold production in NACE 29 in the province show a strong convergence with the national trend. Therefore, for the period beyond 2023 (for which the latest annual data at the provincial level are available), the national dynamics (Chart 3) may be an indication of the situation of the industry in the province. After the collapse caused by the pandemic and the disruption of supply

chains, the value of sold production grew. This trend in the country collapsed in 2024 (a 1.02% decline compared to 2023), with a significant drop in the number of passenger cars produced also recorded in that year (Table 1). In turn, in Q1-Q2 2025, the value of production sold in the country increased by 0.9% compared to Q1-Q2 2024.

Table 1. Production of selected means of transport in Poland (units)

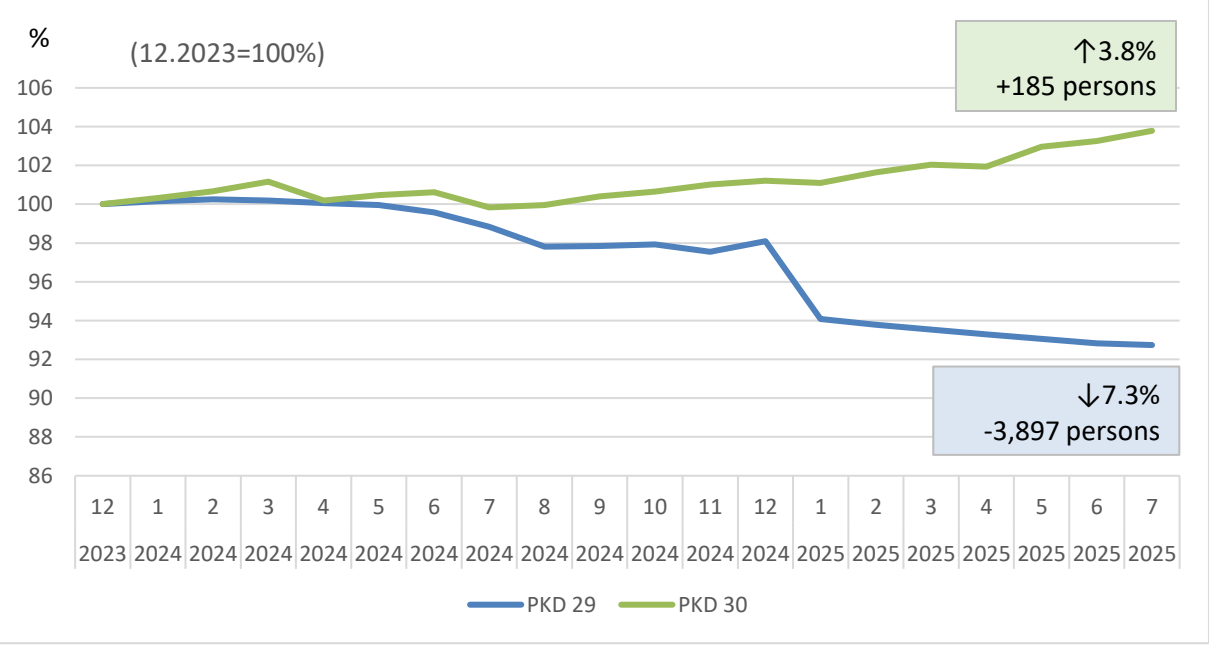
	2019	2020	2021	2022	2023	2024
Passenger cars	434,666	278,788	260,698	252,395	297,071	216,099
Public transport vehicles	7,358	6,037	5,250	5,089	5,160	4,263
Trucks and road tractors for pulling semi-trailers	194,819	155,893	154,043	203,586	279,151	332,043
Bicycles (including children's bicycles)	1,133,828	984,216	1,237,186	1,337,014	839,541	1,044,931

Source: Statistics Poland, *Production of major industrial goods.*

Employment

In July 2025, **50,922** people were employed in the Silesian Province in NACE 29 (*manufacture of motor vehicles, trailers and semi-trailers, excluding motorcycles*), 3,350 fewer than in July 2024 (a decrease of 6.2%). In turn, in July 2025, **5,073** people were employed in NACE 30, *manufacture of other transport equipment*, which is 193 more than in July 2024 (an increase of 4%). (Data of Statistics Poland Local Data Bank (GUS BDL)).

Chart 4. Employment dynamics in the Silesian Province in the automotive industry (NACE 29) and the manufacture of other means of transport (NACE 30) in the period December 2024 – July 2025.



Source: own study based on the data on the number of people employed, provided by Statistics Poland Local Data Bank (GUS BDL).

The respondents indicated that since the COVID pandemic, the economic situation in the automotive industry has been sinusoidal. During upturns, when the volume of orders increases, employers increase employment through **temporary work agencies** (such employees may, according to a representative of an employers' organisation, account for up to 15% of the workforce) or try to change standards to produce more in less time. When downturns occur, restructuring, redundancies or wage

cuts come into play. Job cuts are often achieved by not renewing temporary workers' contracts, thus avoiding collective redundancies. Nevertheless, collective redundancies have also taken place in the region (Table 2). However, according to a representative of an employers' organisation, this is not a widespread phenomenon, as employers decide to **reduce employment** as a last resort due to difficulties in recruiting employees. At the same time, according to a trade union representative, the provisions of the Labour Code concerning redundancies and severance pay are structured in such a way that **it is profitable to lay off employees in Poland**, especially for foreign manufacturers who settle their accounts in euros or dollars. According to this interlocutor, these provisions could be changed to make other solutions more profitable. He also pointed out that *"too little attention is paid to this aspect, for example severance pay, to ensure that employees have a transition period, retraining and perhaps further training at their own expense, because (...) employment offices do not offer much"* so that they can (also independently) find suitable training and take advantage of new employment opportunities.

In 2023-2025, collective redundancies took place, among others, at FCA Powertrain in Bielsko-Biała (withdrawal of combustion engine production, followed by the closure of the plant), Yazaki Automotive Products sp. z o.o. in Mikołów (end of production of wiring harnesses for Maserati, lack of new orders), MA Polska S.A. in Tychy (discontinuation of production of parts for Fiat 500 and Lancia), Magneti Marelli in Sosnowiec, Marelli in Bielsko-Biała, BCUBE Poland Logistics in Bieruń, ZF Lifetec and ZF Centrum Inżynieryjne Elektroniki in Częstochowa. The Stellantis Gliwice plant, which manufactures large delivery vehicles, increased its workforce in June 2023 to launch a third shift, which it then eliminated in September 2024, resulting in approximately 500 people gaining and then losing their jobs (many of whom were temporary agency workers). Collective redundancies registered by the Provincial Employment Office (which do not include temporary agency workers) are listed in Table 2.

Table 2. Collective redundancies in the automotive industry and in transport and logistics in the Silesian Province in the period January 2023 – October 2025.

Notifications of collective redundancies	**2023**	**2024**	**2025 I-X**	**Total**
Section C NACE 29 Manufacture of motor vehicles, trailers...	430	1264	622	2316
Section H Transport and storage	106	1293	947	2346
Collective redundancies	**2023**	**2024**	**2025 I-X**	**Total**
Section C Total manufacturing	687	1378	1973	4038
including NACE 29 Manufacture of motor vehicles, trailers...	350	1051	412	1813
Section H Transport and storage	33	582	335	950
Total economy	1179	2676	2676	6531
Share of NACE 29 in exemptions in industry (section C)	*51*	*76*	*21*	*45*
Share of NACE 29 in exemptions in the economy as a whole	*30*	*39*	*15*	*28*

Data source: WUP

At the same time, during the period in question (2023-2025), **new investments** were launched or announced within the mobility value chain, including in the area of battery recycling and the production and servicing of railway vehicles, generating approximately 1,000 jobs (incomplete data – see Table 3).

Table 3. New investments related to the mobility industry in the Silesian Province (selection)

Company name	Location	Profile	Comments	Planned employment
Boyd Polska	Gliwice	Refrigerants for e-mobility (production)	Planned completion of investment in 2026	100 people
Stellantis	Gliwice	Software hub – car software		300 people
Tenneco		European Engineering Centre – design and testing for Tenneco Ride Control and AST products	Opening 05.2023	240 people
Sanhua Automotive Poland	Tychy	Heat exchangers, valves, heat pumps for electric and hybrid cars (production)	Announced for December 2023, completed	100 employees
Elemental Strategic Metals	Zawiercie	Recovery of strategic industrial and precious metals from lithium-ion batteries of electric vehicles and from automotive and industrial catalysts	Opening 06.2024	150 employees
Elemental Strategic Metals	Zawiercie	Polvolt hub – profile as above.	Announcement 09.2025 EU strategic project.	TBD
Compal	Czeladź	On-board computers for Stellantis Group vehicles (production)	Planned production start – end of 2025. Full production capacity in 2028–2029.	Target number of employees: 328
Polmotors	Mazańcowice near Bielsko-Biała	Car body components (production)	Plant expansion	TBD
SK-Hi-Tech Battery Materials Poland	Dąbrowa Górnicza	Separators for the production of lithium-ion batteries for electric cars (production)	Factory expansion	bd
CGR Poland	Częstochowa	Seat belt accessories, seat adjustment levers, compression springs	Plant expansion – new hall opened in January 2024	N/A
Alstom	Chorzów	Rail vehicles (production and servicing)	Plant expansion – 2024–2025 (including in Świętochłowice)	N/A
DB Cargo	Rybnik	Repair work on rolling stock	New workshop hall opened in 2024.	N/A
Alstom and DB Cargo	Rybnik		Letter of intent dated 09.2025 regarding the establishment of a service centre for Traxx locomotives	TBD
Rafamet Machine Tool Factory	Kuźnia Raciborska	Railway equipment (manufacturer)	Letter of intent with Polregio S.A. concerning the establishment of a repair and regeneration centre for wheel sets – railway vehicle components	N/A

Source of data: own study based on press releases from the slaskibiznes.pl and slazag.pl websites; n/a – no data available.

In addition, a factory producing electric cars of the Polish brand Izera was to be built in Jaworzno (as announced by the Law and Justice government in 2016), with production scheduled to start in 2024.

However, this did not happen; only the site for the investment was prepared by cutting down the forest. In the meantime, after the change of government in 2023, the project was remodelled – there are plans to create a production and development hub as part of a joint venture with a global partner (probably from China). Electromobility Poland, the company responsible for the investment, is currently (January 2026) applying for PLN 4.5 billion from the National Reconstruction Plan for this purpose as part of the priority programme *Support Instrument for a Low-Carbon Economy* (the project has been included in the ranking list). According to information published by the company, serial production of electric cars is to start in 2028, and 3,300 jobs are to be created in the first two years of the hub's operation. The name of the business partner has not been disclosed[43].

The situation of redundant employees on the labour market

The prospects of finding new employment depend largely on the structure of the local labour market. Interviewees from Bielsko-Biała (where an internal combustion engine factory was closed) pointed to the domino effect of job cuts resulting from links within the value chain, where, for example, there are four employees at subcontractors for every employee working in an automated process. In such a situation, employees have to look for job in other industries, which means that they have to start their careers from scratch, which, according to this interviewee, often means lower wages, close to the minimum wage, even for employees with very long service in a given factory, and often also longer commutes from their place of residence. On the other hand, trade unionists from Zagłębie pointed out that skilled production workers who have been made redundant from the automotive industry in that area easily find work in factories within the industry or in industrial production plants outside the industry (often for better pay). *"When it comes to labour migration [in the manufacturing industry], you cannot focus on one industry – even a technician (...) works on specific programmes, he must have technical knowledge about production, but it is not very important to him whether he will be producing a telephone, a (...) television set or a car lamp, because the process he has to master is exactly the same, only on a different product*". However, in less industrialised parts of the province, e.g. in Częstochowa, there are no such opportunities: *"there is a slump"*.

The future of the industry and employment prospects

The focus on parts production in the Polish automotive industry, which allows it to serve both the primary and secondary markets, means that the industry is able to respond more flexibly to crisis situations (as pointed out by the authors of the Polish Economic Institute report[44]) and potentially adapt more easily to the observed trend of extending the life cycle of cars, which limits the demand for new cars. However, the demand for spare parts mainly concerns low-margin products.

According to the authors of the aforementioned report, development options for Polish companies may include investing in product specialisation, particularly for the needs of electromobility, while at the same time including products for other industries, e.g. the military, in their offer. Polish companies should develop their potential in areas with high added value (advanced components, systems integration, process engineering), while at the same time increasing efficiency through process optimisation, stabilisation of energy and logistics costs, automation and competing on quality. According to the authors of the report, areas (related to electromobility) that may offer development opportunities include battery reuse, IT and cybersecurity (for autonomous vehicles, among others).

The study participants pointed out that the Silesian Province had expertise in the field of **autonomous transport**, which could become a regional development niche. The autonomous vehicle testing track, whose construction was proposed by the AS&AM Cluster, could attract new investors and give rise to a centre for autonomous technologies.

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43. Electromobility Poland https://electromobilitypoland.pl/o-projekcie/ (accessed on 20 January 2026).
44. Ambroziak et al. (2025).

The interviewees indicated that the demand for electric cars would be influenced by the pace of development and support for electromobility, which was shaped by political factors. At the same time, however, the industry must reckon with shrinking demand for new cars. Cars are increasingly seen as a tool rather than a status symbol, and demand is shifting from goods to services, i.e. to meeting transport needs.

A factor weakening demand for cars (and therefore unfavourable from the point of view of maintaining jobs in the automotive industry), as perceived by trade union respondents, will also be the change in mobility patterns supported by public policy: the growing importance of public and shared transport (especially with improvements in its quality and accessibility), the increasing share of rail transport in passenger transport, and the use of personal means of mobility (bicycles). This trend should favour manufacturers **of means of transport such as buses, rail vehicles** and **bicycles**, but production volumes in this segment will not reach a scale comparable to large-scale passenger car production, which also means a correspondingly lower potential for job creation, as pointed out by trade union interviewees. What is more, there have recently been cases of mass redundancies and even closures of bus manufacturing plants in Poland and Europe[45]. Trade unionists also pointed out that electric (and hydrogen) buses were more expensive than those with combustion engines, and demand for them was also dependent on public support, while their operation, with rising energy costs, is a burden on city budgets.

Regardless of employment fluctuations resulting from economic conditions, the number of jobs in the industry will decline with the development of electromobility, as **the production of electric cars** is much **less labour-intensive**. Further **job cuts** in the industry are also possible due to **automation**, which is still less advanced than in other countries and seems necessary to build a sustainable competitive advantage, as mentioned above.

Among the new trends in the industry, re-manufacturing is also worth mentioning, although not yet present in the Polish automotive industry, so it is difficult to assess its impact – however, according to one of the trade unionists participating in the study, in the long term it may drive small workshops out of the market, just as supermarkets contributed to the decline of small shops.

III. Education for the automotive industry and the mobility sector

Education system

Occupations related to the mobility sector are taught within the technical and vocational education system and within higher education. The technical and vocational education system in Poland is based on two types of schools: **two-stage sectoral schools** and five-year **technical schools** (secondary technical schools).

In sectoral schools, education lasts three years at the first stage and can be continued for two years at the second stage. Practical vocational training as part of sectoral education can be carried out in a dual format, which means combining theoretical learning at school with practical training in a company that employs students as young workers. The dual mode can last for the entire cycle of education at a first-stage sectoral school. Young employees are protected by labour law and receive a small salary, which is reimbursed from public funds. As a rule, theoretical and practical learning is intertwined in a

45. In Poland, the following bus factories were closed in 2024: Volvo in Wrocław (Lower Silesia Province) and Scania in Słupsk (Pomerania Province).

short cycle (usually within a working week – for example, two days of classes at school and three days of practical training). The completion of a five-year vocational training cycle (either at a technical secondary schhol or in a two-stage sectoral school system) and passing the school-leaving examination entitles students to continue their education at the higher level.

The vocational education system is supplemented by **post-secondary schools** and institutions providing practical vocational training: **Vocational Training Centres** (CKZ), **Vocational and Continuing Education Centres** (CKZiU) and **Continuing Education Centres** (CKU).

In view of the shortcomings in access to dual vocational education, the insufficient capacity of companies to offer technical and vocational schools cooperation in organising practical vocational training, and the not always adequate quality of practical education in institutions such as CKZ or CKZiU[46], new initiatives are being undertaken to improve the functioning of the technical and vocational education system. These include **the Sectoral Skills Centres** (BCU) **project**, implemented since September 2022, co-financed under the National Programme for Reconstruction and Increasing Resilience (KPO). Ultimately, 120 Centres are to be established throughout the country, including several in the Silesian Province, with various specialisations.

New **instruments supporting lifelong learning** include vocational qualification courses (KKZ), which allow adults to obtain qualifications in various professions, and free market qualifications available under the Integrated Qualification System (ZSK)[47], as well as the PARP Development Services Database (BUR) – a publicly available, free register of training and advisory services co-financed by European funds[48].

Education in the Silesian Province

Students and graduates

Data of Statistics Poland (GUS) on **the structure of secondary school graduates** in the Silesian Province indicate a slight overrepresentation of technical and vocational school graduates (in relation to general secondary school graduates) compared to the rest of the country. In 2024, the former accounted for 54.8%, with general secondary school graduates accounting for 45.2%. These proportions were 51.5:48.5% for Poland as a whole. Among other regions, the highest share of vocational and technical school graduates was 62.4%, and the lowest was 48%. The percentage **of adults** aged 18-64 **in formal and informal education** is relatively low (46.7% compared to the national average of 54.0% and the level of 63.9% recorded in the Mazowieckie Province; Statistics Poland data of 2022). Other data for 2020 showed that 3.4% of the region's residents aged 25-64 **participated in continuing education,** compared to the national average of 3.7% and 9.2% in the EU as a whole[49].

Entities involved in education

In the 2023/24 academic year, there were **31 higher education institutions** in the Silesian Province, with **106,604 students**. There were 24,510 students attending 190 first-stage sectoral schools, 2,132 students continuing their education in 45 second-stage sectoral schools, and 90,906 students in 223 technical secondary schools. 264 general secondary schools provided education to 87,267 pupils. In 134 post-secondary schools and 81 adult education centres, 23,416 and 9,781 people respectively supplemented their education[50]. There are several technical universities in the province, namely: the

46. See: Najwyższa Izba Kontroli (2024).
47. Information available at https://kwalifikacje.gov.pl/ (accessed on 12 January 2026).
48. Information available at https://serwis-uslugirozwojowe.parp.gov.pl/component/site/site/serwis-informacyjny-bur/#czym-jest-baza-uslug-rozwojowych (accessed on 12 January 2026).
49. Zarząd Województwa Śląskiego (2023). *Op. cit*., p. 84.
50. Urząd Statystyczny w Katowicach (2024).

Silesian University of Technology, the Silesian Academy, the University of Information Technology in Katowice, the Częstochowa University of Technology, the WSB Academy in Dąbrowa Górnicza and the University of Technology and Humanities in Bielsko-Biała. Recently, three BCUs have been established with KPO funds, including one specialising in vehicle diagnostics and repairs (in Pszów in the western part of the region, which is to train at least 200 people including students, teachers and adults by mid-2026), the second specialising in renewable energy (solar) in the Żywiec district, and the third specialising in the operation of ports and airport terminals as part of the Vocational Training Centre in Katowice[51][52].

Other **entities** are also **involved** in the broadly understood sphere of vocational and technical education and lifelong learning**.** These include the aforementioned Silesia Automotive and Advanced Manufacturing cluster operating within the KSSE, which brings together companies as well as the Silesian University of Technology and the Częstochowa University of Technology, among others. In the past, the Cluster has been involved in the retraining of employees made redundant as a result of the automation of their jobs, organising workshops in accordance with the needs of its member companies. In turn, the KSSE actively co-operates with vocational and technical schools, as its Educational Projects Department supports companies in organising practical vocational training, among other things. This entity is also involved (as a partner) in the implementation of the regional project "Silesia. Professionals". Its aim is to increase the attractiveness of vocational education in the region, including by supporting cooperation between schools and business. Another KSSE initiative is the AutomotiveStref Academy, under which vocational schools and examination centres are equipped with modern educational tools, particularly in the field of new generation engine assembly. The Provincial Employment Office (WUP) in Katowice is also involved in project cooperation with the Zone. One of the joint ventures was the "Energy" project, completed in 2023, which offered various forms of support to people at risk of redundancy or losing their jobs in order to find or continue employment as quickly as possible.

Activities related to vocational training, activation and professional reorientation, vocational education, adult education (improvement, change, updating of qualifications) are widely supported under the European Funds for Silesia 2021-2027 Programme, both from the ESF+, ERDF and FST funds. Support for vocational training is tailored to promote the development of competences linked to the region's smart specialisations.

Interviews with employers show that companies usually provide the necessary training for their employees on their own, and in many cases, new employees are trained while performing specific tasks or in the course of a project. This is also confirmed by trade union representatives: *"if a new project is launched and new people join it, everyone learns as the project develops".* At *the* same time, the study showed a practical **lack of trade union involvement** in the development of programmes to improve the competences of employees in enterprises. *"We can make informal suggestions to the employer"; "we don't have such practices".* The issue of improving employee skills is usually not regulated internally. According to one trade union representative, in the past there were many training courses organised by employers and co-financed by the EU to improve qualifications, and it was even necessary to persuade employees to attend them, but in recent years, due to the uncertain economic situation, employers have focused on reducing operating costs. Trade unions, on the other hand, are focused on responding to the changing situation and defending employees' rights.

In an interview, representatives of the Marshal's Office assessed that the provincial self-government has the appropriate tools in the area of adapting competences to the labour market, which can support the automotive industry and its employees in the transformation process, but that such support would

51. See a BCU map on the website of the Foundation for the Development of the Education System, available at: https://www.frse.org.pl/kpo-bcu-mapa (accessed on 17 December 2025).
52. Press releases available at: https://www.slaskibiznes.pl/wiadomosci,umowa-podpisana-prawie-800-tys-zl-na-branzowe-centrum-umiejetnosci-dla-sektora-motoryzacyjnego,wia5-2-11645.html (accessed on 17 December 2025).

need to be appropriately targeted (e.g. at specific areas of competence). They also pointed out, based on their experience with miners, that it would be necessary to provide adequate information and education so that potential beneficiaries know what support is available, how to apply for it and how they can benefit from it. At the same time, they pointed to trade unions as an important channel of communication between the authorities, the agencies providing the services and the employees.

On the other hand, trade union representatives pointed out that retraining assistance is only available through employment offices once collective redundancies have been reported to the employment office and that there is a lack of proactive solutions. *"No solutions are being sought. No one is looking to the future*." The unions try to help employees who lose their jobs on their own, but it seems that they do not have full knowledge of the support available: *"Unfortunately, I am not familiar* with *this matter, but the district employment offices do not offer much here. We help where we can, because, for example, we know that one of the employers needs a CNC machinist or a locksmith, and we try to help these people, but the employee has to provide the training themselves*."

Education provision and labour market needs

The range of professions on offer is determined by local authorities at district level, which are the governing bodies of most vocational and technical schools, although an important link in the decision-making process in these matters are **the district labour market councils**, which play an advisory role and, among other things, submit proposals and issue opinions on the directions of technical and vocational education. At the regional level, the most important advisory body is **the provincial labour market council**, which bases its recommendations on forecasts of demand for occupations and qualifications, for which the Provincial Labour Office (WUP) is responsible.

In recent years, a mechanism has been introduced whereby **the introduction of a new field of education in a sectoral school** is conditional on the school entering into cooperation with a company operating in the industry related to the profession. Such employers can support the school in various ways, e.g. by taking on students for practical vocational training, helping to equip workshops or school laboratories, organising vocational examinations, or even creating a patronage class.

The core curriculum, which is regulated by the Minister of Education, is updated every few years. Stakeholders may request the inclusion of new occupations in the classification of occupations, as well as modifications to the core curriculum of existing jobs. **Sectoral Councils for Competences** have been established at the Polish Agency for Enterprise Development (PARP), including a council in the field of automotive and automotive services operating under the leadership of the Polish Chamber of Automotive Industry (PIM)[53]. The Silesia Automotive and Advanced Manufacturing cluster, among others, participated in the work of the council. The tasks of the councils include discussing the necessary changes in the classification of occupations in individual industries, as well as in the content of core curricula. The council may then submit a request to the relevant ministry to introduce the necessary changes.

The professions typically related to the automotive and transport industries available in the educational offer of sectoral schools include: **car mechanic, car electromechanic, driver-mechanic, motorcycle mechanic, as well as car body repairer and car painter,** and in the offer of technical schools: **motor vehicle technician, electromobility technician, warehouse clerk-logistician, logistics technician and freight forwarding technician**.

Among the above-mentioned professions, the following are particularly noteworthy, having been introduced in recent years: driver-mechanic and electromobility technician. The former has been effectively reinstated in the classification of vocational education professions after a long hiatus, as a result of intensive efforts by social partners associated with the transport sector[54]. The latter

53. Originally, there were 17 councils, and in the following current edition of the project, there are 34.
54. Cf. Pańków, M. (2022).

profession, taught in technical secondary schools and second-stage sectoral schools, consists of two qualifications: "servicing, diagnosing and repairing mechatronic systems in motor vehicles" and "organising and conducting the servicing and repair of zero-emission and low-emission vehicles", introduced on 1 September 2024 in response to the demand for a new occupation resulting from the development of electromobility.

Certain **occupations related to the field of mobility** are taught outside the technical and vocational education system, as part of higher (tertiary) education. This is the case with transport and rail transport courses offered by the Silesian University of Technology. According to one of the people interviewed during the research phase of the project, the first of these courses, which has around 200 students, is strongly focused on "traditional" combustion engine road transport. The second programme, established several years ago, educates approximately 30 people in a single cycle of education and provides qualified personnel for regional and national rail carriers, as well as the national rail infrastructure operator.

The Job Barometer – an annual forecast by the Provincial Employment Office (WUP) in Katowice covering 168 occupational groups – predicts that in 2026, 14 occupational groups will be in short supply in the Silesian Province (market demand will exceed the number of job seekers). This number includes professions related to the automotive and transport industries: **car mechanics, lorry** and **tractor-trailer drivers**, and **bus drivers**; professions that are potentially important for these industries include **electricians** and **welders**. (In previous years, the following occupations were also periodically in short supply: car painters and panel beaters, electromechanics and electrical fitters). In the case of other occupations, there is a relative balance between supply and demand, with no occupations where the number of job seekers exceeds the number of vacancies, but the trend in recent years indicates a decline in the number of occupations where the supply of jobs exceeds demand.

Based on statements by stakeholders and in light of the expected trends in the automotive industry, namely automation and digitalisation, we can expect**,** among other things**, a further decline in jobs** that do not require professional qualifications and are based on routine, repetitive tasks that can be automated or entrusted to artificial intelligence. At the same time, qualities such as flexibility and adaptability, combined with familiarity with new technologies, especially digital and green technologies, will become increasingly important. The Occupation Barometer predicts growing demand for unique and interdisciplinary skills. An example is the electromobility industry, which requires a combination of knowledge in the fields of mechanics, electronics, power electronics, electrochemistry and programming in the areas of big data and embedded systems. In this industry, the Polish Investment and Trade Agency (PAIiH) predicted demand for professions such as designers and engineers, service technicians – charging infrastructure electricians, data analysts and charging infrastructure monitoring systems analysts[55].

Representatives of the provincial self-government recognise the need to adapt the education system to the needs of the region's economy and its future development directions (including smart specialisations). The dynamic situation on the labour market necessitates a more selective approach to education. Even in the context of the expected continued rapid development of the ICT industry, there may be a surplus of IT specialists if their education is not of sufficiently high quality and tailored to the real needs of businesses, as pointed out by the authors of *the Development Scenario for the Silesian Province in the perspective of 2030, including technological areas and public administration*[56].

55. PAIiH (2021).
56. Wojewódzki Urząd Pracy w Katowicach (2025-2).

IV. Development of infrastructure and services

The data sources for this part of the report are data available from the public statistics system (including the Statistics Poland Local Data Bank – GUS BDL), contained in studies on the state of transport infrastructure and services and strategic documents, as well as knowledge gained from interviews with regional stakeholders: representatives of the Marshal's Office, a representative of the GZM Metropolis, urban activists associated with pro-environmental organisations operating in the region, and interviewees from trade unions.

Infrastructure

The Silesian Province has the most extensive road and rail infrastructure in the country (see Table 4. *Transport infrastructure in the Silesian Province compared to the rest of the country*), as well as the highest density of cycle paths. It is home to transport hubs of supra-regional (national and international) importance. At the same time, the province receives the largest supra-regional traffic flows in Poland.

Table 4. Transport infrastructure in the Silesian Province compared to the rest of the country in 2024.

Road length:	Nationwide (km/100km^2)	In the Silesian Province (km/100km^2)	Nationwide (km/10,000 inhabitants)	In the Silesian Province (km/10,000 inhabitants
with hard surface	101.4	177.1	84.9	50.9
on improved hard surface	95.3	170	79.8	48.9
urban areas with improved hard surfaces	19.9	80.6	16.7	23.2
expressways and motorways	1.66	3.16	1.39	0.92
cycle paths	6.87	12	6.16	3.8
railway lines	6.1	15.28	5.2	4.4

Source: Statistics Poland Local Data Bank (GUS BDL)

On the one hand, fast road connections, such as the A1 motorway and the S1 expressway, facilitate communication within the meridionally stretched province, between the main centre in the north – Częstochowa – and the largest city in the southern part – Bielsko-Biała – which are significantly distant from each other. On the other hand, expressways, as well as the A4 motorway, which is very important for **east**-west transit, run through the very heart of the GZM Metropolis, literally tearing apart the urban fabric in spatial terms. This results in significant levels of exhaust pollution (including nitrogen dioxide) and noise.

The Updated Air Protection Programme for the Silesian Province of 2023 identifies the improvement of the technical and environmental parameters of vehicles travelling on roads as the only remedy for reducing emissions from transit traffic. In this context, it is worth noting that the province is one of the leading regions in terms of the development of infrastructure for zero-emission vehicles. At the end of 2025, there were nearly 850 publicly accessible **electric vehicle charging stations** (including approx. 300 with a capacity of >=50 kW) operated by over 70 operators and two **hydrogen refuelling stations**[57].

57. Data from the Alternative Fuel Infrastructure Register available at https://eipa.udt.gov.pl/ (accessed on 16 January 2026).

Map 4. Road layout in the Silesian Province

Legend

National roads, including motorways, expressways and ring roads.

	in use		under construction
	in tender		in preparation

A1 S7 Motorway and expressway numbers

Source: GDDKiA

Representatives of the Marshal's Office participating in the study pointed out that solutions limiting the nuisance of external transport, such as shifting freight transport from roads to railways, are a postulate for national policy, which deals with issues such as freight transit and intermodality, while the activities of the provincial self-government focus on passenger traffic.

Measures taken in the region to reduce transport-generated **noise**, implemented as part of *The Environmental Protection Programme against Noise Pollution for the Silesian Province*, include replacing road surfaces, constructing and modernising noise barriers, promotion of alternative means of transport and environmentally friendly use of cars, creation of traffic calming zones and construction of ring roads.

A significant problem affecting large parts of the region, especially the GZM Metropolis, is **heavy traffic and significant road congestion during peak hours**[58]. Measurements from 2015 showed that the average daily annual motor vehicle traffic on national roads in the province was almost twice the national average[59]. The difference was slightly smaller for provincial (regional) roads. At the same time, two road sections recorded an average daily traffic volume of over 100,000 vehicles per day. One of them, the road connecting Katowice and Sosnowiec, which is the busiest in Poland, was also mentioned by an interviewed urban activist. These record levels of traffic mean that a large number of stakeholders, including the authorities of the GZM Metropolis and some non-governmental organisations involved in the debate on the direction of the region's development, are seeking to reduce individual road traffic, especially in the centres of large cities.

The general concept for the further development of transport in the GZM area assumes the strengthening of public domestic transport, which would form the backbone of the transport system. As part of several variants differing in the scale of expansion of the railway network, a metropolitan railway is to be developed, with dedicated tracks (currently, the tracks are shared with other carriers)[60]. Representatives of stakeholders interviewed reported that this project is at a fairly advanced stage of implementation, resulting in a fairly large number of railway sections being rebuilt. Ultimately, this backbone is to be connected to last-mile solutions, including public city bikes, which are already widely available in the metropolitan area (see section "Services" below). At the same time, paid parking zones are being introduced and parking space in the centres of large cities is being reduced. To a certain extent, the local authorities in some smaller urban centres are going in the opposite direction, trying to take advantage of their proximity to key national transport routes. As an urban activist pointed out in an interview, **in some locations large logistics centres are being created to handle road freight transport** using tractor units as an important element of local investment plans. This trend is in line with the role of the province as an important area for domestic and international transit, but it contradicts the aim of reducing road transport within urban centres in favour of rail transport. The challenge is, on the one hand, to make the optimum use of the region's assets, including its transport and logistics infrastructure and the location of TEN-T network nodes[61], and, on the other hand, to ensure a sustainable and friendly living environment for the residents of areas with a high concentration of transit traffic. It is a significant problem, as evidenced, among others, by the image of the region as an unattractive place to live, as indicated in the SWOT analysis of the region[62].

The interviewees from the Marshal's Office emphasised the need to reduce the large land consumption of transport systems in cities. The integration of expressways and other wide transport arteries into the urban fabric of the region is a consequence of the spatial policy of the socialist era, in line with the modernist urban planning concepts of the time. Many road infrastructure facilities in the region, some of which were built in the 1970s, are **in poor technical condition**. For example, in the first half of 2025, the flyover in Chorzów on the section of national road No. 79 connecting Chorzów with Katowice and Bytom, which had previously been closed to heavy goods traffic, was suddenly closed due to the risk of collapse[63]. On this occasion, voices are being raised that this is a good opportunity to move away from solutions from a bygone era and demolish this and some other ageing structures in order to establish a spatial order that is *"less harmful to the urban fabric"*, as one of the interviewees put it.

The high, albeit declining, density of the railway network in the province (17.5 km in 2018 and 15.8 km in 2024) **is largely due to freight traffic**[64]. According to UTK data of 2024, the region under

58. Województwo Śląskie (2020).
59. Ibid., p. 57.
60. Description of the Metropolitan Railway concept on the website of the GZM Metropolis, available at https://metropoliagzm.pl/kolej-metropolitalna (accessed on 16 January 2026).
61. Cf.: Województwo Śląskie (2020). Op. cit.
62. Ibid.
63. Wygas D. (2025)
64. Województwo Śląskie (2020), op. cit., p. 58.

study is one of those where the share of railway lines with a maximum speed of over 120 km/h is relatively small (17.98% for 120 km/h<Vmax<160 km/h compared to 34.66% in the Mazowieckie Province, and none with Vmax>160 km/h compared to 7.38% in the Mazowieckie Province). Among the factors limiting the development of railways, **the low capacity** of railway lines and **the lack of railway lines dedicated to agglomeration traffic** are named (as already mentioned, work is currently underway to fill this gap in the existing infrastructure)[65]. However, the province is the leader regarding the share of **electrified** railway lines, which is 93.1%, compared to 62.3% for the country as a whole (Statistics Poland data).

Some of the existing freight railway lines that have already been decommissioned, or more precisely the areas through which they used to ran, may, according to an urban activist interviewed, be converted into **cycle routes** as part of the Velostrad project, which aims to connect the cycle networks of individual GZM cities. This project, which has been underway since 2023 and is still at a relatively early stage, involves the creation of eight fast cycle routes, most of which will be separated from motor traffic, with a total length of approx. 120 km[66]. Eleven cities are involved in the project. Its implementation is not without difficulties, resulting, among other things, from the complex structure of land ownership (in some cases, the need to acquire private plots of land).

Services

The Silesian Province is among national leaders in public transport indicators and usage. **Several railway operators** with varying territorial coverage operate in the region. There are two nationwide carriers: PKP Intercity (which also provides international transport) and POLREGIO. Passenger transport within the Silesian Province, as in other regions, is operated by a carrier managed by the provincial self-government – Koleje Śląskie. In addition, several dozen Metropolitan Railway connections operate within the GZM. At the same time**, the number of journeys per capita** is low compared to the other regions, as confirmed by the latest data available from the Railway Transport Office (UTK). In the second quarter of 2025, it was 1.71, compared to 8.79 in the Pomeranian Province and 5.42 in the Mazovian Province. In 2024, the Silesian Province ranked sixth in the country in terms of **the number of passengers served**. Similarly, the railway station in the capital of the region, Katowice, also ranked sixth in the country with 16.33 million passengers served[67].

The structure of public bus transport **connections** corresponds to the high level of urbanisation in the region. Compared to the whole country, the Silesian Province is characterised by a lower density of long-distance, regional and suburban bus lines, and a higher density of urban bus connections. This pattern applies both to density calculated in relation to unit area and to the number of inhabitants. Detailed data is compiled in Table 5.

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65. Województwo Śląskie (2020). Op. cit.
66. GZM (2022)
67. Data of the Railway Transport Office, available at https://dane.utk.gov.pl/sts/przewozy-pasazerskie/wymiana-pasazerska-na-s/22403,Przewozy-pasazerskie.html (accessed on 16 January 2026).

Table 5. Bus connections in the Silesian Province compared to the rest of the country in 2024.

Length of bus routes:	Nationwide (km/100km^2)	In the Silesian Province (km/100km^2)	Nationwide (km/10,000 inhabitants)	In the Silesian Province (km/10,000 inhabitants
long-distance	15.3	9.9	12.8	2.8
regional	30.0	8.5	25.1	2.5
suburban	87.2	53.3	73.1	15.3
urban	0.3	2.0	0.2	0.6

Source: Statistics Poland Local Data Bank

The region is diverse in terms **of transport accessibility**. The accessibility index – which takes into account a number of factors, such as travel time and cost, and population size – is highest in the central part of the province, where the largest cities belonging to the GZM are located, such as Katowice, Chorzów and Gliwice[68]. This does not mean, as the authors of the analysis cited here point out, that this part of the region is completely free from transport exclusion; within the municipalities with the highest transport accessibility index, there are still more peripheral areas (districts) served by fewer buses or other means of public transport. Therefore, especially for people with special needs, resulting, for example, from disability or advanced age, accessibility in some parts of the GZM area may still be unsatisfactory. The average level of transport accessibility is characteristic of municipalities adjacent to the GZM, located in relatively central areas of the province, as well as larger urban centres (e.g. Bielsko-Biała, Częstochowa, Rybnik) and the areas surrounding them. On the other hand, the lowest level of the indicator is recorded in particular in peripheral areas of the entire province, distant from the main cities of the four subregions. This applies in particular to municipalities in the northern and north-eastern, as well as southern parts of the province (the latter are located in mountainous areas).

Trade union intereviewees pointed out that public transport in cities *"must have a future, because cities are suffocating"*, but it is no longer profitable in scattered settlements, in smaller municipalities that do not have the funds to maintain public transport, and in rural areas: *"where elections are won (...) where most people live*". *"*[In Bielsko-Biała] *we are still in a good situation because we have a railway line, but the further away from it, the worse it is. There has to be a car there, and it has to be a cheap car, because the population is simply not rich enough to buy expensive Chinese cars or even more expensive European ones*."

Commuters travelling to work in the Silesian agglomeration (GZM) can count on very accessible public transport, according to trade unionists participating in the survey. Employees commuting from non-urbanised areas can use employee buses. In the past, **providing transport to work by the employer** was part of the social package, an argument encouraging people to take up employment. The employer *used to "pick up [employees] in villages, driving from right to left"*, but now the routes have been optimised – employees from outlying towns have to get to "point A" themselves, from where the employer organises transport. Sometimes employment agencies are involved in organising transport for employees. Within a company that has undergone restructuring, transport is also organised for employees who have moved from a closed plant to a plant in a different location (here, the respondents cited the example of the Brembo company, which transports employees from Krakow to Dąbrowa Górnicza).

The province has the longest public transport lines[69] – both in absolute terms and per 1,000 inhabitants (3.2 in 2024, compared to the national average of 1.6 (data of Statistics Poland Local Data Bank). At the same time, **the number of passenger journeys by public transport** per 100,000

68. Departament Europejskiego Funduszu Społecznego Urzędu Marszałkowskiego Województwa (2023).
69. Województwo Śląskie (2020), op. cit., p. 59.

inhabitants is not impressive compared to Poland as a whole – in 2024 it was 8 million, with a national average of 9 million and the highest result in the Mazowieckie Province (including Warsaw) of 15 million (GUS data). Compared to 2015, there was a decrease from 9 million (also the country noted a decrease from 10 million). In 2024, 2,108 city buses were available to passengers throughout the Silesian Province, and 98.7% of the vehicles were **adapted to transport people with disabilities**. This fleet was supplemented by 142 trams, of which a relatively small proportion (44.4% compared to the national average of 57.5%) were adapted for the transport of persons with disabilities.

Particularly noteworthy is **the public transport system in the GZM Metropolis** (GZM), which since 2019 has been managed by a single entity, the Metropolitan Transport Authority (ZTM), which replaced the previous three different transport organisers in the metropolitan area. The GZM, which was established in 2018, integrates 41 cities and municipalities. Its activities are financed from two main sources: membership fees from cities and municipalities and 5% of the income tax collected in their area. One of GZM's main tasks is to provide metropolitan passenger transport. ZTM is also responsible for developing standards for cycling and pedestrian infrastructure, as well as guidelines for public transport. Currently, GZM's urban transport is operated by approximately 1,700 vehicles every day, and the number of stops in the metropolitan area reaches 7,000.[70] It is worth noting that GZM was a pioneer regarding **free transport for children and young people**, which was introduced there in 2018 for people under 16 years of age. Approximately 200,000 of the youngest residents from 41 cities and municipalities in the metropolitan area can use public transport free of charge all year long any day of the week.[71]

The GZM also has a uniform public bicycle rental system – **the metropolitan bicycle,** available in all cities and municipalities of the metropolitan area, enabling free movement within its territory[72]. Ultimately, these bicycles are to be equipped with electric assistance. Interviews with stakeholders indicate that this system is intended to be a so-called last mile solution, complementing the transport backbone based (mainly) on the rail transport, as well as city buses and trams. It is part of a broader concept, outlined above, of reducing individual car transport in metropolitan cities, "calming" traffic, especially in the centres of the largest cities, and promoting public transport.

The stakeholders interviewed outlined **the possible prospects for the development of transport services** in the metropolitan area of the region (related to infrastructure development). In the next ten years, they expect the full development of a coherent, integrated public transport system based on a backbone of rail connections (with a dedicated track system, separate from the tracks used by regional and national trains), supplemented by a network of transfer hubs, P+R car parks and complementary "last mile" solutions, such as a public metropolitan bicycle system. It is important, among other things, that railway lines do not duplicate bus routes. The role of the latter, including intercity connections, is to be reduced in favour of new rail connections. The system should be effective and serve to optimise the costs of providing transport services. In this context, the intensive processes of depopulation of city centres and suburbanisation pose a challenge.

Whereas **in the pessimistic scenario** for metropolitan development outlined by our interlocutors, such an integrated and cost-effective public transport system will not be created. The widespread use of private car transport (still preferred by many residents of the region) will continue, city centres will continue to depopulate – still congested and overflowing with parked cars, and new, housing estates continue to be chaotically developed in the suburbs, with no public transport connections, or with such connections provided at a disproportionately high cost, contributing to the ever-growing debt of cities and municipalities. Under the extremely pessimistic scenario outlined by two different interviewees the

70. GZM data, cited in a press release available at: https://metropoliagzm.pl/transport (accessed on 16 January 2026).
71. Press materials available at: https://metropoliagzm.pl/transport (accessed on 16 January 2026).
72. Press materials available at: https://metropoliagzm.pl/rower-metropolitalny (accessed on 16 January 2026).

inefficiency of the dispersed transport system would lead to the bankruptcy of cities (one of the interviewees even referred to the case of... Detroit).

Broader demographic trends, both related to natural movement and migration within the region and external migration, will be an important factor in the implementation of the outlined scenarios. These processes, in turn, will be influenced by, among other things, the development of cities and housing. On the one hand, the Silesian region has a significant housing stock (ranking second among all provinces)[73]. It ranks sixth in the country regarding the number of dwellings per 1,000 inhabitants, with a score of 437.3, compared to the national average of 425.9 in 2024. On the other hand, however, there are negative phenomena such as suburbanisation, urban decline and population ageing. The province has a large number of vacant buildings and degraded post-industrial areas, whose reclamation and revitalisation has been proceeding at an unsatisfactory pace[74]. At the same time, some areas are becoming peripheral due to the low availability of transport infrastructure. In addition, it should be noted that the region is perceived as not being one of the best places to live.

Prices of new flats in large cities in the region are moderate on a national scale, which may indicate a limited interest in settling or residing in the area. For example, the average price per square metre in Katowice in December 2025 was 85.7% of the average price in the 14 largest cities in the country and 69.1% of the price in Warsaw. Katowice ranked sixth in this respect among the largest metropolises in Poland[75]. On the other hand, from the perspective of many young people, this price may still be a barrier to purchase. On the secondary market, flat prices throughout the GZM in August 2025 were 50.2% of the prices in Warsaw and 57.3% of the prices in the Tri-City (Gdańsk, Sopot, Gdynia)[76]. An alternative to buying a flat is renting one. In the third quarter of 2025, the average monthly cost of renting a 50 m² flat in Katowice, Sosnowiec and Częstochowa was 62.9%, 52.5% and 48.2% of the Warsaw average, respectively[77], representing 27%, 22.5% and 20.6% of the average salary in the country in September 2025[78] and 50.6%, 42.2% and 38.7% of the statutory minimum wage in 2025, respectively.

V. Social dialogue

At the regional level social dialogue on the transition of automotive industry and of broader defined mobility is incidental, and at the company level it concerns typical worker issues such as wages, work organisation, etc., and focuses on the current situation in plants as they affect employment and working conditions. Sustainable transport, infrastructure and transport services are absent from this dialogue.

Issues related to the transformation of mobility have been discussed sporadically at the Provincial Social Dialogue Council (WRDS), and most of the interviewes from inter-company trade union organisations participating in the study were unaware of the topics discussed at this forum, which is due to the fact that there are no representatives of trade unions from the automotive industry in the WRDS. Nevertheless, some of the trade unionists interviewed had the opportunity to participate in meetings devoted to the situation of the industry, held either by the WRDS or by the Tripartite Team for the Automotive Industry[79] (which operates at the national level), invited by trade union leaders

73. Województwo Śląskie (2020). Op. cit.
74. Ibid.
75. Source: rynekpierwotny.pl (accessed on 16 January 2026).
76. Kraus-Kowalczyk, N. (2025)
77. Korólczyk-Lewandowska, A. (2025)
78. Source: Statistics Poland.
79. The team met four times between 2023 and 2025. In addition to the situation in the industry, including the impact of EU regulations resulting from the European Green Deal and industrial transformation, the

participating in these bodies. However, according to the interviewees, the effects of these discussions have been limited – *"paper chases paper*".

The situation of the automotive industry was brought up to the agenda of the Silesian WRDS in 2024 in response to the sharp slowdown in production, downtime and layoffs of employees in Silesian plants (at the request of the trade union side). The discussion focused on supporting the industry, counteracting the threat of mass redundancies and taking possible measures to reverse the negative trends observed[80]. Then, in July 2025, a representative of Pracodawcy RP (Employers of Poland) requested that the issue of transformation in the industry be addressed in the context *of tightening environmental regulations, competition from China and the implementation of new production models and supply chains by global corporations*, as well as *the risk of reduced activity in Poland*. It was then agreed that the situation of the automotive industry would be the subject of further work by the Council.[81] A few months earlier, the Council adopted a position calling for a re-evaluation and realignment of EU climate policy. In addition, as mentioned earlier a proposal to build a test-track for autonomous vehicles was put forward and discussed at the WRDS.

The WRDS meetings have been attended by the KSSE Management Board with the AS&AM Cluster taking part depending on the issues discussed. The cluster also appealed to the government to launch measures to support the automotive industry, pointing to the need for support if production is relocated due to Western corporations protecting their own markets. The cluster also submitted proposals to the European Action Plan for the Automotive Sector.

In light of the data obtained in the course of the study, **the social partners are virtually absent from the debate on transport infrastructure and services**. The trade unionists participating in the study quoted only one example of their addressing transport issues, which concerned the adjustment of public transport timetables to the working hours of the plant. Other participants in the study were unable to cite any cases of discussions on such issues involving employers' organisations or trade unions. In an interview, an urban activist mentioned some cooperation between a regional politician representing a left-wing, pro-environmental party and regional trade unions operating in the hard coal mining industry. He described the response from the unions as *"rather positive"*, which, in light of the political divisions and tensions in Poland regarding the implementation of EU climate policies, should be considered an unusual situation. At the same time, however, he admitted that *"we and they are entrenched"*, indicating a significant disparity between the mostly traditionalist trade unions present in heavy industry and progressive urban activists. The representative of the GZM management board, on the other hand, was unable to name any trade unions active in the field of public transport whose interests went beyond typical employee issues related to employment conditions and wages. He suggested the existence of an association of bus drivers from Sosnowiec who, in his opinion, spoke out on issues related to service quality. However, it was not possible to identify such an organisation – which is certainly not a trade union. The topic of transport infrastructure came up incidentally during the WRDS deliberations: the subject of discussion (at the request of the provincial marshal) was the route of the railway line to connect the province with the CPK national airport.

Social dialogue at the enterprise level is rated poorly, which is due to the unstable situation in the industry, which is strongly influenced by external factors (political and market), the location of decision-making centres outside the workplace (in the foreign headquarters of global corporations), and the lack of established and entrenched patterns of dialogue and operating models that take into account the participation of trade unions in the functioning of companies (as is the case, for example, in Germany and France).

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forum also discussed the situation on the labour market related to the announced production cuts and collective redundancies, including at FCA Powertrain Poland and Magneti Marelli Sosnowiec (in 2023).

80. WRDS News 13 September 2024 https://dialog.slaskie.pl/pl/aktualnosci/wrds-o-waznych-dla-slaska-galeziach-przemyslu.html (accessed on 16 January 2026).
81. WRDS News 14 July 2025 https://dialog.slaskie.pl/pl/aktualnosci/gospodarka-odpadami-i-branza-automotive-na-tapecie-wrds.html (accessed on 16 January 2026).

In light of the statements made by trade union participants in the study:

- Both the employer and the worker side are *"hostage to external regulations when it comes to the EC's policy on transformation*".
- Due to the volatility of the economic situation, employers react on an ongoing basis to the dynamically changing situation, and as a result, trade unions operate in a *"firefighting"* paradigm.
- In some cases, unions are merely informed about what is going to happen, and often even the plant management has no influence on this, because *"the head office imposes targets on factories within the group*". Unions have no contact with company owners, and directors *"only carry out orders".*
- In Poland, a trade union *"is* [for the employer] *something unnecessary and even hostile to the company, rather than a social partner with whom something good for the company can be achieved".*
- There are no joint activities between employees and employers (despite shared threats): *"Looking at what is happening with the Green Deal, we are actually all in the same boat, whether it is employees or the entrepreneur who owns the business – the Green Deal is going affect them all in exactly the same way, and paradoxically, even this dialogue is not happening at the moment, even though we have a common interest*."
- The dialogue is confrontational because trade unions are unable to refute the financial and cost arguments put forward by employers (e.g. regarding energy costs) or defend their own positions. Employers are dragging out the talks to delay financial regulations.
- Trade unions have limited opportunities to influence the path of transformation, because according to law, the final decision is made by the employer.

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