

2015

# Annual Review of Labour Relations and Social Dialogue Serbia

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## Executive Summary

- The recovery of the Serbian economy continued in 2015, backed by efforts to strengthen public finances, address structural weaknesses, and improve the business climate. Current developments suggest that the macroeconomic perspective of the country has improved and that the recovery in economic activity has intensified.
- Consistent implementation of fiscal consolidation along with the initiated structural adjustments favourably affected the investment environment. The balance of payment deficit was considerably reduced and inflation as well as indications of internal imbalances is extremely low.
- Despite the restrained positive economic development, social problems persist. Youth unemployment is of particular concern.
- Social dialogue remained weak in 2015. The social partners did not succeed in agreeing on an increase in the minimum wage or to build a joint agenda that would be ambitious and bring a positive contribution to growth and job creation, especially regarding youth unemployment and layoffs due to company restructuring.
- This year's government's legislative track record was impressive, especially with regards to the economic and education sector. However, the Government did not involve trade unions in the design and implementation of its employment and social policies.



## Content

- Socio-economic developments
- Governmental policies and legislation
- Industrial relations
- Tripartite social dialogue
- Forecasts

### Annex - Information about:

- Collective bargaining, social dialogue, social security, education & vocational training, employment, wages
- Trade unions and employer organizations



## 1. SOCIO-ECONOMIC DEVELOPMENT

Serbia continued to make good progress in the implementation of the government's economic programme; its fiscal strategy consists in maintaining macroeconomic stability, restoring public debt sustainability and strengthening growth potential. GDP growth was revised upward from 0.5 per cent to 0.8 per cent. Domestic investment has grown, especially in the construction sector due to the impact of reforms intended to improve the business environment, such as the revised labour and bankruptcy legislation, as well as to the improved financial positions of companies because of falling oil prices and low borrowing costs. The negative short-term effects of fiscal consolidation on final consumption were reduced by the fall in oil prices, lower borrowing costs and an increase in the flow of remittances.

From the production side robust growth in industrial production and construction was registered (8.3 per cent and 18.3 per cent y-o-y, respectively), while agriculture gross value added (GVA) recorded a fall (-6.4 per cent y-o-y). The growth in the construction sector is a result of the acceleration of public investment in transport infrastructure as well as a more simplified building permitting procedure. The drought effects on the autumn crops were alleviated during Q3.

It is estimated that the current account deficit in 2015 of 4.7 per cent of GDP will be fully covered by net FDI inflows. Foreign direct investments, net, totalled € 1,231.4 million. Since the beginning of the year the country's balance of payments position has significantly improved. Annual inflation in November was at 1.3 per cent, which is still below the lower limit of the target tolerance band (4 ±1.5 per cent). The national bank (NBS) in December decided to keep its key interest rate at the level of 4.5 per cent.

The scope of foreign trade in October increased. Export of goods was € 10,052.2 million (+8.3 per cent). The biggest contributors to export growth were electrical equipment, fabricated metal products and machinery and equipment. The total export value of the 15 largest exporters in the period January-November 2015 amounted to € 3.2 billion and since the beginning of the year, exports by

FCA Serbia doo Kragujevac amounted to € 1,093.8 million. Import of goods was € 13,536.6 million. Growth of imports was due to increased imports of electrical equipment, computer, electronic and optical products and motor vehicles, trailers and semi-trailers. The foreign trade deficit was € -3,484.4 million. The fall in world oil prices and the recovery in external demand positively affected foreign trade, which has been characterized by an increase in the volume of trade and a reduction in the trade deficit. A higher inflow of remittances and positive effects of fiscal consolidation influenced the improvement of the country's balance of payments position.

### ***Employment, salaries and pension benefits***

The average employment level was 1.973 million and the average unemployment level was 748,000. The unemployment rate, according to ILO definition, was 16.7 per cent according to the yearly study done by the National Labour Office (LFS). The activity rate was 51.9 per cent and the overall employment rate was 43.2 per cent.

**Youth unemployment** rate was calculated at 38.8 per cent of which 18.2 per cent are Not in Education, Employment or Training (NEET). Data on youth prepared by the National Employment Office (NES) indicates that 87,528 young people (38.5 per cent of those who had been unemployed) found employment with the help of the National Labour Office, and with the mediation of the NES over 60 per cent are in part-time employment. In all, 213,678 young people (33 per cent) are included in active employment policy measures and services. There are 182,008 registered unemployed young people up to 30 years of age (25.4 per cent). Of these 116,952 (64.3 per cent) are first-time job seekers and unemployed young women (51.3 per cent). Young women accounted for 25.2 per cent of the total female unemployment. The average age of the unemployed young people is 22.6 years. The largest group of unemployed young people are age 25-29 years and they account for 49.6 per cent of the unemployed youth and make up 12.6 per cent of the population. The educational structure of these young people is as follows: one-fifth are unskilled (18.9 per cent), one-fifth have a higher education (22.5 per cent) and



the most numerous group has secondary education (58.6 per cent). Statistics indicate that 52.4 per cent of the young people search for a job for more than 12 months.

Net average monthly salaries (43,764 dinar) shrank 2.0 per cent in real terms. Average monthly pension benefits (22,726 dinar, equaling €186 EUR) shrank 5.5 per cent in real terms. The reduction of salaries in the public sector as well as cuts in pensions contributed to a decline in overall government expenditures. At the same time, the pension reduction was compensated by growth in other social transfers.

Successful implementation of the structural reforms identified under the Programme of Fiscal Strategy and Economic Aims were important for reducing fiscal risks and supporting competitiveness and growth. Significant fiscal tightening and efforts to address structural weaknesses and improve the business climate have helped restore growth and boost confidence and FDI. While monetary easing has led to a considerable reduction of lending rates, inflation remains below the tolerance band of the National Bank of Serbia (NBS) due to low inflation in imports, one-off factors, and still subdued domestic demand.

## **2. GOVERNMENTAL POLICIES AND LEGISLATION**

In 2015 more than 40 laws tackling the economy were amended or supplemented in order to improve macroeconomic stability and create opportunities for growth, such as: the Law on Companies; the Law on Amendments to the Customs Act; on the Fund for Pension and Disability Insurance for the year; the draft decision on approval of the Financial Plan for Health Insurance; the Proposal of Decision on approval of the Financial Plan of the National Employment Service; amendments to the Law on Incentives in Agriculture and Rural Development; the law on conditions for referring workers on temporary work abroad and their protection; the law on the conversion of rights of use to rights of ownership on construction land for a fee; and amendments to the Law on Employment and Unemployment Insurance and others.

Legislative activities concerning reconstruction and privatization processes were also important this year.

Other laws tackled the number of employees in state institutions with the aim to reduce the public sector. According to a statement by the Ministry of Public Administration and Local Self-Government the new Government's development strategy will ensure more efficient administration for citizens, reducing complicated bureaucratic procedures and scraping all unnecessary clerk windows through quality services that the citizens and the economy require, and founding a unique register of citizens, which would contain in one place a basic set of data on all citizens in accordance with existing laws and regulations in this area. Important legislative decisions were also made in the education and health sector. The importance of entrepreneurship and companies founded by students, as active support to youth employment, is recognized in strategic documents such as: the Education Strategy 2020; the strategy to support small and medium enterprises, entrepreneurship and competitiveness for the period from 2015 to 2020; the National Employment Strategy for the period 2011-2020 (target-oriented and aligned with the specific needs of youth) aimed at creating opportunities for productive employment and effective transition from school to the world of work; the National Action Plan Employment; and Strategy for Youth 2025, which states as one of the priorities "to support the institutionalization of student companies as a practical vision of learning entrepreneurship".

Completing the list of undertaken reforms, the Government has also adopted new laws regarding the judicial system and the police, where there have been a lot of problems in implementation as well as in the time for passing judgment, as predictability and enforcement of court decisions remain weak.

Serbia is expecting a € 89.5 million World Bank loan that will be used to fund the programme of activity planning, monitoring and coordination aimed at developing competitiveness and employment and a programme promoting investment and exports. On 18 December 2015, the Executive Board of the International Monetary Fund (IMF) completed the



third review of the Republic of Serbia's economic performance under the precautionary Stand-By Arrangement (SBA), which made available the cumulative amount of SDR of 491.085 million (about €627 million) and a 36-month SDR of 935.4 million (about €1.2 billion) SBA for Serbia on 23 February 2016.

### 3. INDUSTRIAL RELATIONS

Industrial relations are still marked by top-to-bottom development, in the concept of national, sectoral and company level, where the role of central bodies has remained the most important in collective bargaining on wages and working conditions. This is even more pronounced given the dominant role of the government in tripartite negotiations due to diminishing union strength as well as the existence of a single representative and a relatively weak employers' organization, only the legitimacy of the government has remained undisputed.

Trade unions' power is gradually weakening. Data show that in Serbia today political parties have more members than unions, as workers tend to think that political parties will more so solve their problems through political deals and laws than the unions can. By some estimates, the political parties have more than one million members while trade unions have less than 750,000 members, most of them in the public sector. Mistrust in the trade unions, which has been occurring for years, has lately become even more visible, both in the public and private sector. Many private entrepreneurs, especially foreign investors, oppose union organization and workers agree because they struggle for survival and are afraid of dismissal and potential reprisals for union involvement. These things are far greater in the private sector than in the public. According to independent unions there are more than one hundred individual charges against private companies which have prevented union organizing and some of them have ended in court. New employers blackmail workers if they think they are union members, threatening loss of their jobs. This is contrary to the ILO conventions and should be sanctioned, however national legislation does not provide for those mechanisms.

The Serbian Association of Employers, as the

main employer representative, has been weakened by repeated internal strife and other problems.

The asymmetry in power and legitimacy of the industrial relations actors makes it very difficult to coordinate industrial relations effectively in Serbia. Therefore, it has never been possible to conclude a full-blown tripartite agreement in the form of a social pact, despite repeated attempts to do so.

The most important levels of collective bargaining for the setting of pay are different for the public and private sectors – in the public sector it is intermediate (sectoral) level while in the private sector bargaining is largely decentralized to the company level and the coverage rate is very low. Determination of the minimum wage has been fully centralized within the Social and Economic Council and the minimum wage is binding for the whole economy, including sole proprietorships and employees outside the corporate sector. Working time was determined centrally. The Labour Code and general collective agreement are the primary sources of general rules regarding working time, while sectoral collective agreements in the public sector may contain branch specific regulations concerning working time, depending on working conditions.

The entire public sector has nearly full coverage by sectoral agreements; additionally some company-level agreements exist for Railway and Post. Only some branches in the private sector have branch agreements, but with incomplete coverage. Also, there are some company-level agreements in the private sector. The coverage rate of collective agreements (apart from the expired and never fully implemented general collective agreement) can be estimated at slightly over 50 per cent. Judging by the collective agreements signed, the main trends with regard to collective bargaining are differentiated – in the public sector there is a tendency for sectoral negotiations while in the private sector decentralized, company-level bargaining is more common. However, throughout Serbia the involvement of leadership by union and employer organizations remains high at all levels, including company levels.



The actual mechanism of collective bargaining is still very centralized, whereby the heads of all organizations represented at the Social and Economic Council (two trade unions, the Serbian Association of Employers and the Ministry of Labour, due to the Minister's role in providing extended application) are heavily involved in collective bargaining, even though it mostly takes place on the branch level. Collective agreements are in principle voluntary instruments. However, according to the Labour Code, collective agreements can be extended by the decision of the Minister of Labour and Social Policy to all relevant entities at the national or branch level. It is possible to extend the general collective agreement's regulations by ministerial decree.

### ***Industrial conflict***

Strikes are frequent in Serbia but no consolidated data are available. While strikes in the public sector can in principle be measured (in practice they are not), the picture is more blurry with strikes and other forms of industrial action in the private sector. Therefore, it is sometimes difficult to categorize industrial actions by workers whose firms are effectively closed. Often, actions can include negotiations with the local and central governments, including organized trips to Belgrade and mass protests to exert pressure on the government, the privatization agency and relevant ministries.

The main reasons for collective actions are different in the public and private sectors. In the public sector they are largely around pay rises. In the private sector, strikes occur mostly as a consequence of unsuccessful privatizations and restructuring, and include demands for unpaid wages, elimination of wage arrears, severance payments and sometimes the scrapping of privatization, restitution of workers' ownership rights and/or takeover of the firm by the government.

### ***Mediation and arbitration***

The Serbian Republic's Agency for Peaceful Settlement of Labour Disputes, set up by the Law on Peaceful Settlement of Labour Disputes in 2004, was the first institutionalized service aimed at the peaceful settlement of individual and collective disputes, using external independent arbiters in settlement of labour disputes and it has been very successful in

thousands of individual labour disputes and collective disputes, of which some hundreds involved the public sector. In the private sector, mechanisms of conflict resolution are more often informal, and include political intervention from the local governmental level typically with the ministry in charge, until the end of 2015, or the Privatization Agency, or both, mediating between the workers and employers.

## **4. TRIPARTITE SOCIAL dialogue**

Tripartite social dialogue has been at a stalemate since autumn 2013 when the representative trade unions withdrew from the Working Group on the Labour Code. The meetings of the Social and Economic Council are not systematic and should be improved according to the relevant rules. The criteria and procedure to establish representativeness of trade unions and employers' organizations need to be agreed in a clear and transparent manner, as government bodies very often consult a heterogenic association of union confederations, which does not have any representativeness. At the local level, tripartite social dialogue still needs to be developed. The administrative capacity of social partners needs to be further strengthened to ensure their participation in collective bargaining and legislative consultations. Bi-partite social dialogue remains underdeveloped.

The Tripartite Social and Economic Council failed to agree on a minimum wage raise for 2015, another indication that institutional social dialogue does not provide results in practice. In the absence of a decision by the Social and Economic Council, the Government decided to retain the established minimum wage of 121 RSD (net) per working hour for the period January-December 2015 (see Official Gazette of the RS, No. 79/2015). The trade unions had requested an increase to 143.50 RSD per working hour.

However, despite the low level of social dialogue, 13 new collective agreements that apply to the territory of the Republic of Serbia were agreed upon in 2015 (see Annex).

The 2015 national employment action plan with a focus of on youth, unemployed with low qualifications, and workers made redundant



from companies in restructuring, notably the forthcoming large redundancies linked to the restructuring of state-owned enterprises and public sector resizing, should be accompanied by actions of social partners.

Further work is needed to align the Labour Code with the EU *acquis*. Social dialogue needs to be strengthened at all levels and the stalemate in tripartite social dialogue is of particular concern. Regarding enterprise and industrial policy principles, the strategy for the development of entrepreneurship and competitiveness identifies the main activities to support entrepreneurship and competitiveness, in line with principles of the Small Business Act, but the budget for these activities is too low. According to some research in this field, the average score for social dialogue is very low. In a situation characterized by efforts to join the EU and the enormous difficulties Serbian workers and citizen's face, unions are convinced that the best way of solving the problems is by regular social dialogue. Unfortunately, that dialogue is currently at its historical minimum.

The principles of tripartism, hence the effort to resolve problems between workers, employers and governments have not been realized as a part of social partnership, policy concentration or societal corporatism, and have been evaluated in 2015 as displaying a lack of trust among the social partners, maintained in narrow room for manoeuvre in which each party lobbied for its interests without willingness to listen and hear the claims of the other parties.

Besides the number of organized strikes in 2015 (which demonstrate the weakness of institutional social dialogue as a way of solving workers' rights and development issues), the behaviour of all social partners in 2015 in drafting and debating in public leads to the conclusion that most new laws can be seen as a major failure of tripartite social dialogue

in Serbia. In contrast, most of the employer organisations supported the drafts and proposals from ministries.

## 5. FORECASTS

Placing public debt on a firm downward path requires further structural adjustment of around 1.5 per cent of GDP in 2016-17. In the IMF's view, in order to improve Serbia's growth potential public investment projects need to be well-prioritized and planned, underpinned by feasibility studies and fiscal risk analysis to ensure that projects contribute to growth potential without incurring excessive public debt. In this regard, the second phase of public sector "rightsizing" needs to be prepared and implemented expeditiously. Serbia's ban on new employment in the public sector will remain in place next year under the new budget system law passed by the Serbian parliament. The law also allows for an increase of pensions and salaries in a part of the public sector in 2016 after the fiscal consolidation measures were undertaken by the Serbian government in 2015 to maintain the stability of public finances.

In view of the above-mentioned World Bank loan that will be used to fund the programme of activity planning, monitoring and coordination aimed at developing competitiveness and employment, the government should adopt a programme promoting investment and exports, an innovation programme and a programme for reforming the job market in 2016.

Labour relations and social dialogue will continue to face serious challenges, with trade unions losing more power and the government bypassing the social partners. Most important would be to restore the operative and social role of the Tripartite Social and Economic Council in order to agree on a minimum wage rise in 2016 and to participate in economic and social legislation.



## ANNEX OF DATA

- **Collective bargaining system**

Levels of collective bargaining in 2015 in Serbia can be summarized as:

- The national level - collective bargaining remains, de facto, the most important. The principal or dominant level remains National (inter-sectoral). Its importance stems from the institutions, such as the Social and Economic Council and equally important from the involvement of central bodies of national industrial relations actors in sectoral and sometimes even company-level bargaining;
- Sectoral level is an important but not dominant form of collective bargaining in the public sector, which accounts for the majority of union members and where the coverage of collective agreements is around 60 per cent;
- Company level is a weak level, dominant in the private sector, which is characterized by low union density and a low incidence of collective bargaining and collective agreements. There are some new collective agreements in the public sector in 2015, such as for Railways and Post.

Redundancies at the company level are going to be very important in the public and private sectors, and despite the rules within the Labour Code for handling them there is considerable variation in how companies undertake redundancies because of the case-by-case privatization methods (sales and tenders) that took place in Serbia. As a result, there have been a variety of approaches to downsizing and severance pay schemes, depending on the economic power, business philosophy and goals of the buyers and relative strength of the unions. In principle, in situations where multinational companies were involved, more generous schemes were applied, in the general atmosphere of cooperation rather than conflict with trade unions. In general, issues of training and lifelong learning are not given much attention in branch and company collective agree-

ments, other than repeating general prescriptions from the Labour Code and the general collective agreement. However, there is no explicit mention of the lifelong learning concept. There is no mention of gender equality in collective agreements as gender equality issues have not yet been recognized as a matter relevant for collective agreements.

- **System of tripartite social dialogue**

National tripartite policy discussions take place within the Social and Economic Council, defined by the law as an independent legal entity formed to enhance the development of social dialogue. The Social and Economic Council has a relatively broad agenda and remit but in 2015 the activity was reduced to only minimum wage determination and discussion of various socio-economic issues. The Social and Economic Council has not made efforts to develop new measures to cushion the impact of the economic and fiscal crisis on the Serbian economy and to support a new growth model for the country.

**Employee rights.** The Labour Inspectorate is an agency within the Ministry of Labour and Social Affairs operating in 30 district offices throughout Serbia. Its goals are to suppress informal work, protect employee rights in the workplace, prevent harassment and discrimination, and promote health and safety at work. Labour Inspectorate offices are typically understaffed and its right to intervene on behalf of employees in practice are rather limited because typically they need to act in cooperation with other institutions and authorities. There are no special labour courts; employees (and all other citizens) must use the regular courts for grievances related to their employment rights. However, the Republic Agency for Peaceful Settlement of Labour Disputes has achieved very good results in 2015.

Limited effects of the widespread dissatisfaction with current practices are the result of the absence of mutual trust and willingness to adequately take into account the interests and positions of other participants in the social dialogue process.



## ▪ Social insurance systems

### Pensions

Table: Pensioners, 2012-2015

	2012	2013 Dec	2014 Jun	2015 Oct.
Beneficiaries of pensions total( utilization of rights)	1,565,386	1,722,649	1,722,834	1,733,308
<b>Structure</b>				
Old-age pensions*	780,953	1,021,216 (59.28%)	1,030,620 59,6%	1,061,477 61,24%
Disability pensions	311,314	334,040 (19.39%)	327,501 19.2%	314,021 18.12%
Survivors pensions	32,8625	367,393 (21.33%)	364,713 21. 2%.	357,755 20,64%
Compensation for physical injury (No. of users)	79,271	74,237	78,000	70,513
Compensation for assistance and nursing (No. of users)	63,174	61,536	77,000	73,708
<b>Pension benefits (in RSD)</b>				
Pension benefits	22,450	23,947	24,312	16,661
Real growth rate	-2.2	0.3	-2.0	0.01

Source: National Fund for Pension and Disability Insurance, 2015

Table: Average Pensions, 2012-2015

	2012	2013	2014	2015 Oct.	real growth rate
Average pension adjusted by the law, (in RSD and €)	25,033	23,947 (213 EUR)	23,724 (199 EUR)	22,726 (186 EUR)	-5.5

Source: National Fund for Pension and Disability Insurance, NBS, 2015

### Health

Table: Number of insured persons by insurance base, 2011-2014

	2011	In %	2012	In %	2013	In %	2014	In %
<b>Insurance basis</b>								
Employed persons	2,850,962	41.60	2,842 446	41.27	2,828,201	40.00	2,811,088	40.50
Unemployed persons	87,592	1.28	86,693	1.26	88,000	1.30	65,245	0.94
Beneficiaries of pension	1,893,339	27.63	1,887,801	27.41	1,920,584	28.00	1,956,656	28.19
Self-employed	284,151	4.15	274,832	3.99	278,000	4.00	279,026	4.02
Farmers	317,639	4.64	303,879	4.41	300,800	3.20	283,885	4.09
Health insurance is covered from the budget of the RS	1,419,137	20.70	1,329 833	19.31	1,358,202	20.00	1,370,839	19.75
Other			161,420	2.34	418,913	3.30	174,912	2.52
Total citizens covered	6,852,820	96.24	6,886,904	99.9	6,886,900	99.8	<b>6,940,959</b>	100.00

Source: National Fund for Health Insurance; <http://www.rfzo.rs/index.php/broj-osiguranika-stat>, /2015 Dec



## ▪ Education and vocational training

Table: Serbian Population 15+, by Educational attainment, census 2011

Serbia	Census 2011		2012		2013		2014	
	Total	%	Total	%	Total	%	Total	%
	6,161,584	100	6,117,563	100	6,161,584	100	6,161,584	100
Without educational attainment	164,884	2.68	132,909	2.17	164,884	2.67	164,884	2.68
Illiterate	164,884	2,68	127,462	1.96	124,424	0.36	127,463	1.96
Incomplete primary education	677,499	11.00	653,032	4.57	677,499	10.99	677,499	10.99
Primary education	1,279,116	20.76	1,473,87	32.25	1,279,116	20.75	1,279,116	20.75
Secondary education	3,015,092	48.93	3,000,873	49.05	3,015,092	48.93	3,015,092	48.93
Higher education	652 234	10.59	720,000	11.76	1,000,569	16.23	1,00,569	16.24
Computer literate			2,108,144	59,9	3.906 444	63.4	2,108,144	34.21
Computer illiterate		,	3,142,854		2,255,139	36.6	3,142,854	51.01

Source: Statistical Office of the Republic of Serbia, Statistical year Book, 2015, pg. / [http://webzrs.stat.gov.rs/WebSite/repository/documents/00/01/88/31/02\\_Stanovnistvo.pdf](http://webzrs.stat.gov.rs/WebSite/repository/documents/00/01/88/31/02_Stanovnistvo.pdf)

## ▪ Employment rate

Table: Employment Rate, 2012-2015 III Q (age 15-64)

	2012	2013	2014	2015
Population aged 15 and over		6,117,563	6,095,268	6,047,416
Employed persons average (thousands)	1,731	1,723	1,715	1,973
Employment rate	45.3	49.2	50.8	42.8
Activity rate (Working age 15-64)	60.1	49.0	62.2	52.3
Employees in legal entities average (thousands)*	1,341	1,335	1,320	1,698
Entrepreneurs and other employees* (thousands)	386	380	356	585
Informal sector employment rate	17.9	18.9	23.4	20.4

Source: Statistical Office of the Republic of Serbia

## ▪ Unemployment rate

Table: Unemployment rate, 2012-2015

	2012	2013	2014 (October)	2015 (III quarter)
Unemployed persons average	761,834	762,638	741,362	735,958
Unemployment rate, ILO definition in %	25.5	24.1(ILO)	17.6 (ILO)	16.7
First time job seekers	270,256	267,904	258,052	249,634
Unemployment benefit recipients	61,633	77,216	67,798	49,008
Nearly registered	40,119	36,951	34,749	38,334
Deleted from the register	47,219	50,928	62,692	61,863
Registered vacancies	55,931	36,724	39,000	35,354
Employed from the register	206,207	115,348	19,234	20,913

Source: National Employment Service, 2015



• **Youth unemployment**

50% of the current world population is under the age of 27 years. Youth unemployment is a global problem. The European Union in its strategies insists that every young person should have practical entrepreneurial experience before the end of his or her compulsory education. Who are they? Generation Z. They are: connected, informed, ready for business. The causes of youth unemployment are connected to: the general economic situation and changes in the economy, low labour mobility, lack of experience in job searching, lack of work experience – employers prefer hiring people with experience – larger employers' expectations as to the degree of education, specific knowledge and skills employers tend to hire young people without work employment, stereotypes about youth influence employers

to prefer to employ older workers, and other factors.

The position of youth on the labour market and active employment policy measures in Serbia can be described as:

- Youth belong to the category of vulnerable groups in the labour market;
- Difficult entry into the world of work;
- Easier access to the temporary and poorly paid jobs, which they hardly leave;
- Decreased quality of employment as adults ;
- Have not acquired the necessary knowledge and skills for a permanent job;
- Loss of skills, motivation for work and learning in a position to easily remain without work.

Table: Participation of young people out of work, Serbia 2015 (%)

	Activity rate	Employment rate	Unemployment rate
Youth (15-24)	29.9	18.3	38.8
Population of working age	64.3	53.2	17.3

Source: RSO, 2015 October

Table: Youth unemployment rate in Serbia and neighbouring Balkan countries

	General rate	Youth rate
EU 28	10.2	22.2
Euro zone	11.6	23.8
Slovenia	9.7	20.2
Croatia	17.3	45.5
Macedonia	28.0	53.1
Montenegro	18.2	35.8
Serbia	17.3	38.8

Source: RSO, 2015 October

Measures and services of active employment policy toward youth in Serbia are:

- Measures of active job search (objective: increasing employability and motivation of job seekers through the development of skills for active job)
- Job Fairs;
- Job Club ;
- Training for active job search;
- Motivation activation training;
- Training of self-efficacy;
- Workshop on coping with stress due to job loss.



Table: Youth participation in the implementation of measures of active job search

Measures of active job search	Number of youth involved	Participation of youth
Job Club for job search	2,164	67.6
Training for active job search	11,468	57.0
Motivation activation training	4,341	28.9
self-efficacy training	608	23.5
training workshop on coping with stress due to loss work	82	9.3
<b>Total</b>	<b>18,377</b>	<b>44.6</b>
<b>Employment fairs</b>	<b>18,753</b>	<b>36.0</b>

Source: NES, 2015

With the aim to raise the level of competence, competitiveness and employability of the unemployed youth, the acquisition of additional or practical knowledge and skills is organized to perform jobs within the same or a new occupation, in accordance with the needs of the local labour market. More specific are:

- The program of professional practice (acquiring practical knowledge and skills for independent work in the occupation for which youth acquired the proper education/qualification, without employment, 6-12 months;
- The program to acquire practical knowledge (acquiring practical knowledge and skills for independent work in the occupation for which youth acquired the proper education/qualification, without employment, 6-12 months;
- Training (acquiring practical knowledge and skills for independent work in the occupation for which youth acquired the proper education/qualification, without employment, 6-12 months;
- Training at the request of employers to acquire additional knowledge and skills needed for specific jobs codes of employers;
- Functional elementary adult education;
- Recognition of prior learning.

Table: Youth participation in implementation of programs for additional education and training

Measures of active job search	Number of youth involved	Youth participation (%)
Professional Practice	3,031	83.3
Acquiring practical skills	16	34.0
Training	488	42.6
Total	3,535	73.2

Source: NES, 2015



There are specific incentives for employers to hire youth such as:

- Subsidies for job creation;
- Employment subsidy beneficiaries for social assistance;
- Subsidies for employment of persons with disabilities, without work experience;
- Reimbursement of appropriate costs of workplace adjustments;
- Reimbursement of expenses for an earning person engaged in the provision of support in the workplace – working assistants.

Incentives for starting one’s own business are also developed but the self-employment rate of young people in Serbia remains three times lower than the average in the EU. Most popular measures are:

- Support for self-employment;
- Providing technical assistance;
- Training in entrepreneurship;
- Subsidies for employment or a lump sum cash benefits for self-employment.

Table: Participation of youth in the implementation of employment and entrepreneurship development

Measure	No. of youth involved	Youth participation rate (%)
Encouraging entrepreneurship development	4,999	27.7
Subsidies for opening and equipping of new jobs	2,012	38.2
Public works	1,134	29.4
<b>Total involved</b>	<b>8,005</b>	<b>30.4</b>

Source: NES, 2015

There are also E-applications created by the National Labour Office on educational attainment, secondary schools, curricula and descriptions of occupations such as:

- Guide to primary school;
- Contains basic concepts about the world of work and education, type of school, errors in the selection, job descriptions and tips for proper career planning ;
- Careers;
- Journey through the game to get acquainted with their interests and any work which would suit the person;
- What to learn, what to do?

- Developing new models and services to support youth employment at the local level through local partnerships, supported by funds from the IPA funds;
- Improving information services about the opportunities for career development;
- Increasing activation in the process of personal and professional development and youth employment such as: 20 new centres for information and professional counselling (CIPS); 80 new self-service workstations and 60 new job clubs.

▪ **Average monthly salaries**

Table: Average monthly Net salaries, in RSD, 2011-2015 (October)

	2012	2013	2014	2015 Oct.
Net salaries	41,377	44,120	44,021	44,764
in EUR	380.30	385.50	375.10	366.90
Real growth rate (%)	1.1	-2.0	-0.3	-2.0

Source: NBS, Labour Force Survey, 2015, Statistical Office.



• **Gender pay gap**

Women make up 51.3 per cent of the total population of the Republic of Serbia. Broken down by age, within the adult and older population the number of women is higher, while in the younger population men are numerically dominant. Women are most represented in the category of "dependent" (57.6 per cent), followed by women whose main source of income is retirement (57 per cent), grants (56.5 per cent) and social benefits (55.5 per cent). The highest rate of poverty risk in 2014 is among the youth of both genders and it is 26.8 for women and 27.7 for men, while the lowest rate is among the elderly male population at 15.3. Wage differentials between men and women in Serbia are still high.

According to Eurostat, the gender pay gap is 3.5 per cent. According to the data of the Statistical Office, October 2015, the wages of employed women were lower than for men. The pay gap could be illustrated by the fact that wages for women were lower than men by €

200 in 2014 (monthly average) for the same job and qualification. The biggest pay gap is among employed women with higher education; secondary school educated women earned € 100 euro less in wages than men; for highly qualified workers the pay gap is around €250 Euro as well as among semi-qualified workers. The lowest gap was among non-qualified workers.

The lowest wages belonged to single mothers and married mothers with children who are pre-schoolers. The Law on Ministries from April 2014 dismantled the previous Directorate for Gender Equality. The new Ministry of Labour, Employment, and Social Policy include issues on gender equality but sector data does not exist in 2015. Minister of Infrastructure Zorana Mihajlovic is the most prominent government official on improvement of labour legislation regarding the dismissal of pregnant women and women on maternity leave, sexual harassment and inequality in promotion and salaries.

▪ **Monthly minimum wage**

Table: Minimum Net salaries, period average, in RSD, 2012-2015

	2012	2013	2014	2015
For 174 hours work	20,010.00	20,240.00	21,160.00	21,054.00
Per hour	115.00	116.32	115.00	121.00

Source: Labour Force Survey, 2015, Number 142 - Year LXV, 29.05.2015

▪ **Actual weekly working hours**

Table: Actual weekly working hours, 2012-2015 / % of total employed

Aged 15-64	2012	2013	2014	2015
1-4 hours	0.2	0.2	0.2	0.2
5-19 hours	0.6	2.7	1.2	1.2
20-29 hours	1.0	3.8	3.0	2.9
30-39 hours	2.5	3.1	3.0	3.1
40-49 hours	93.2	73.4	83.0	82.0
50-59 hours	1.3	8.2	8.2	10.2
60 and more hours	1.1	8.5	8.4	8.0
Other	0.1	0.1	0.2	0.6

Source: Labour Force Survey, 2015, Number 142 - Year LXV, 29.05.2015



▪ **Normal work/atypical work**

Table: Normal work/atypical work in %, 2012-2015

	2012	2013	2014	2015
1. Normal work/ full time, open-end contracts/permanent job	88.2	88.3	78.1	75.0
2. Atypical work / fixed term contracts	11.8	12.9	11.0	13.2
2.1. Part time	8.2	9.1	7.2	8.5
2.2. Seasonal	1.2	1.3	1.5	1.3
2.3. Temporary	2.4	2.5	2.2	2.0

Source: Labour Force Survey, SRB 359 RS10 301213

• **Migration**

Table: Migration Serbia, 2012-2015

	2012 Residing in Serbia	2012 Originating from Serbia	2013	2014	2015 Residing in Serbia	2015 Originating from Serbia
Refugees	70,707	161,671	64,000	57,083	35,309	44,892
Asylum Seekers	399	15,381	19,000	400	464	55,253
Returned Refugees	392	392		168	73	73
Internally Displaced Persons (IDPs)	228,215	228,215	210,000	227,495	220,227	220,227
Returned IDPs	845	845	-	780	159	159
Stateless Persons	8,500	n.a.	2,500	4,195	3,490	-
Various	519	9,679	350	777	0	0
Total population of Concern	309,577	416,183	282,850	290,898	259,722	320,604

Source: UNHCR, June 2015

Table: 2015 UNHCR's budget in Serbia (USD)

2015 Revised budget	Refugee programme PILLAR 1	Stateless programme PILLAR 2	Reintegration projects PILLAR 3	IDP projects PILLAR 4	Total
16,585,990	2,568,713	1,198,094	0	12,801,434	16,568,241

Source: UNHCR Global Appeal 2015 Update

▪ **Human Development Index**

Table: HDI, 2011-2014

	2011	2012	2013	2014
HDI	0.824	0.743	0.745	0.771
HDI ranking	59	76	77	66

Source: HD Report 2015, World Bank



• **GINI-coefficient**

Table: Gross national income (GNI) per capita (constant 2005 PPP \$), 2011-2014

	2011	2012	2013	2014
GINI	10.236	9.533	11.301	13.5

Source: HD Report 2015, World Bank

• **Collective agreement coverage**

The entire public sector (approximately one-third of total employment) has nearly full coverage by sectoral agreements. Therefore, the coverage rate of collective agreements can be estimated at slightly over 60 per cent in the public sector and around 25 per cent in the private sector.

The company level is dominant in the private sector, which is characterized by low union density and a low incidence of collective bargaining and collective agreements. In general, issues of training and lifelong learning are not given much attention in branch and company collective agreements, other than repeating general prescriptions from the Labour Code and the General Collective Agreement. Branch Collective Agreements for some sectors cover the responsibility of employers to provide training and education to their employees in accordance with changes in the working process, technological and organizational changes in the company, etc. However, there is no explicit mention of the lifelong learning concept.

• **On-going important collective bargaining agreements**

According to data from the SEC records, active collective agreements concluded in 2015 are:

1. A special collective agreement for the road industry of the Republic of Serbia, published in the Official Gazette of RS, No. 3/2015 of 14.01.2015;
2. A special collective agreement for cultural institutions founded by the Republic of Serbia, autonomous provinces and local governments, published in the Official Gazette of the Republic of Serbia, No. 10/2015 of 29 January 2015;
3. A special collective agreement for social protection in the Republic of Serbia, Official Gazette No. 11/2015 of 30.01.2015;
4. A special collective agreement for employees in primary and secondary

schools and students dormitories, published in the Official Gazette of the Republic of Serbia, No. 21/2015 of 25.02.2015;

5. A special collective agreement for police officers, published in the Official Gazette No. 22/2015 of 27.02.2015;
6. A special collective engagement of popular music for working-musical artists and performers in the hospitality industry, published in the Official Gazette of RS, No. 23/2015 of 02.03.2015;
7. A special collective agreement for public authorities effective 09.03.2015 and published in the Official Gazette of the Republic of Serbia No. 25/2015 of 13.03.2105;
8. A special collective agreement on amendments to the Special Collective Agreement for public authorities, published in the Official Gazette of the Republic of Serbia, No. 50/2015 of 09.06.2015;
9. A special collective agreement for public enterprises in communal activities in the territory of the Republic of Serbia, published in the Official Gazette of the Republic of Serbia, No. 27/2015 of 18 03.2015;
10. A special collective agreement for chemistry and non-metals 11 September 2015, published on 23 October 2105 in the Official Gazette of the Republic of Serbia, No. 88/2015. Just a few days after its release, on 02.11.2015, the Union of Employers of Serbia unilaterally cancelled this contract;
11. A special collective agreement for employees working in student dorms financed by the Republic of Serbia, published in the Official Gazette No. 100/2015 of 04.12.2015.
12. A collective agreement for the Serbian Railways, 24.03.2015.
13. A collective agreement for Post Serbia, 04.02.2015.





From previous years:

14. The General Collective Agreement with its Annex of Extension, and further Special Collective Agreements:
15. Special CA for employees in primary and secondary schools and pupils' homes, ("Sluzbeni glasnik RS", 12/09, 67/11 and 1/12), 15.12.2011 on which is concluded an Agreement with an extension of the validity of the CA;
16. Special CA for high education ("Sluzbeni glasnik", No. 12/09 and 9/12), 20.01.2012. on which is concluded Agreement with an extension of validity of CA;
17. Special CA for government bodies and institution ("Sluzbeni glasnik RS", No.95/08 and 86/11), on which is concluded Agreement with an extension of validity of CA;
18. Special CA for employees in institutions and organizations of local government and provinces ("Sluzbeni glasnik", 23/98, 95/08, 11/09 and 15/2012), on which is concluded Agreement with an extension of validity of CA;
19. Special CA for employees in student dorms financed by the Republic of Serbia ("Sluzbeni glasnik RS", 14/07 and 7/10) – implemented from 14.02.2013,
20. Special CA for employed in culture institutions whose founder is the Republic of Serbia concluded 27.11.2009, ("Sluzbeni glasnik RS", 97/09 and 112/09; with extended action – decision No. 110-001397/02 and 28.12.2009),
21. Special CA for social protection ("Sluzbeni glasnik RS", 22/02 and 110/06; extended action – decision No 110-00-1044/2006-02 and 14.11.2006),
22. Special CA for health institutions whose founder is the Republic of Serbia ("Sluzbeni glasnik RS", 36/10 and 42/10; extended action – decision No. 110-00-581/2010-02 from 07.06.2010),
23. Special CA for police officers – concluded 28.02.2011, ("Sluzbeni glasnik RS", No. 18/11),
24. Special CA for construction industry and production of construction material, concluded 14.02.2012 for time a two-year period, ("Sluzbeni glasnik RS", No.15/2012 and 21/2012) - extended action – decision No.110-00-137/2012-02 from 12.03.2012,
25. Special CA for agriculture, processing tobacco and water industry, – concluded 09.02.2011, ("Sluzbeni glasnik RS", broj 11/11, 14/11 и 50/11 extended action – decision No.110-00-121/2011-02 from 23.02.2011),
26. Special CA for chemistry and non-metals – concluded 13.12.2011, ("Sluzbeni glasnik RS", No. 103/11 and 14/2011) – extended action – decision No. 110-00-1239/2011-02 from 06.02.2012
27. Special sectoral CA – for metal industry ("Sluzbeni glasnik RS", No. 10/2012, 41/2012, 69/2012, 80/2012 and 101/2012); extended action – decision No. 110-00-1224/2011-02 from 23.04.2012,
28. Special CA for work engagement of the entertainment industry and music artists and performers in the hospitality industry (covers 20,000 performers in the country) signed by Autonomous Entertainers' Union of Serbia and Serbian Employers' Association.
29. At the company level are interesting new collective agreements signed with Mercator (retail industry) and in the former US STEEL Smederevo by the two representative trade unions and the employer (temporarily resolving the destiny of 5,200 workers, most of whom are on paid leave getting 60 per cent of their regular wages).

#### ▪ Trade union density

Trade union density remains high in the public sector at over 60 per cent and is low, below 20 per cent, in the private sector, with an overall density rate of around 35 per cent (according to Arandarenko). There are two sides of the trade union density equation – trade union membership and the eligible workforce. Trade union density is different in various kinds of enterprises. In 2015 there were around 1.9 million employees in Serbia, out of which one third were in public sector (where the trade union density rate is 60 present), and the private



sector where union density is as follows: workers in micro-businesses (from 0-9 employees) – 5 per cent; from small enterprises (from 10-49 employees) – 15 present; from medium-sized businesses (from 250-249 employees) – around 25 per cent; and large businesses (250 employees or more) – 40 per cent. There are about 350,000 in self-employed, solo trades but they have low trade union activities.

Trade unions traditionally organized self-employed workers in some quite specific professions characterized by high skills and significant autonomy in the performance of their work, such as journalists and performing artists. Another sector with a high representation of self-employed workers and where trade unions often have an established representation is construction. In transport, especially in road haulage, the situation is more mixed, but trade associations seem to prevail even if there are recurrent debates on whether trade unions should more clearly try to organize (or involve) self-employed truck drivers alongside employees. In the other traditional sectors of the economy, such as agriculture and crafts, business organizations clearly prevail.

In addition to these types of workers, in recent years trade unions have tried to extend their representation to new groups of workers which are formally self-employed but have a less clear-cut professional identity. This is particularly the case where new types of employment contracts have been introduced in recent years in the context of labour market deregulation – or even with the aim of normalizing formerly unregulated positions. Beside this category, farmers and the self-employed in agriculture are also not covered by trade union activities, which including the unemployed and people working in the informal sector, accounts for a total of around 500,000 workers.

Trade union density rates can be further categorized according to the difference between the old but privatized companies (30 per cent) and newly-established private companies (5 percent). Trade union density rates can be estimated for 2015 to be around 35 per cent; the factor which has significantly reduced trade union density has been the fall in private sector employment. In other words, trade union density remains high in the public sector and is low in the private corporate sector.

#### ▪ **Workplace representation**

Workplace representation provided by trade unions could amount to 25 per cent of the labour force (Eurofound and national research data). New legislation, such as the New Law on Criminal Proceedings, violates the right of trade union representatives to represent members who authorize them to do so and threatens the very existence of trade unions since workers become union members primarily to have their collective and individual rights and interests protected. The new Labour Code, as well as actual employers' behaviour in practice has created unfavourable conditions for workplace representation. Employee representation at the establishment level could be summarized as: trade unions – high, joint trade union committee – low, Works Council – low, Health and safety committee – low.

The two trade union confederations currently recognized as representative on the national level are the Confederation of Autonomous Trade Unions of Serbia (CATUS, Savez samostalnih sindikata Srbije, SSSS) and the United Branch Trade Unions (UGS Nezavisnost), both of which participate in the Social and Economic Council at the national level. Apart from them, the most prominent trade union confederations that are currently struggling for national representative status are the Association of Free and Independent Trade Unions (Asocijacija slobodnih i nezavisnih sindikata, AFITU) and the Confederation of Free Trade Unions ((Konfederacija slobodnih sindikata, CFTU), whose representativeness at the national level will probably be verified in the near future, and it is the only confederation that has been able to preserve membership and financial stability during the past five years. Overall, there are more than 20,000 trade unions in Serbia at all levels, from company to national level, and 31 sectoral trade unions belonging to the main confederations.

Only 25-30 per cent of members pay any subscription (fees/dues) at all or the subscription established in the statutes. Membership subscriptions are collected by the employer – who can thus exercise complete control over union members in the company. The subscriptions are then passed on directly to company trade



union representatives, who under union statutes, can use between 60 per cent and, in extreme circumstances, up to 90 per cent of the funds at the local level. The remaining income from membership subscriptions are shared between the sectoral body and the umbrella organization (in Serbia the latter receives around 5 per cent). This means that a sectoral organization has on average a mere 10-15 per cent of membership fees at its disposal – too little for financing the running costs of the organization along with campaigns, activities or the necessary expert personnel, not to mention amassing a strike fund for use in the event of a serious industrial dispute. As a consequence, sectoral and umbrella organizations continue to have limited scope, and the decentralized structure based primarily at the company or site level continues to predominate.

The minimum number of members required for the establishment of a trade union in a company is three employees. The principal ‘filter’ in this respect is once again the ubiquitous rule that employees may only join a union via the company trade union. There have been no mergers between confederations and no new confederations have appeared at the national level since 2008; the main focus in 2015 was the struggle for representativeness at the national level. There is some evidence that the trade union scene is becoming more fragmented. According to one survey (CESID) around 30 per cent of all union members are outside of three largest confederations, which might signal the relative weakening of the traditional confederations and the rise of smaller, local unions. This development probably reflects the dissatisfaction of employees at the local level with traditionally dominant confederations and their bureaucratized headquarters. The issue of representativeness causes considerable friction both among the unions and in their relations with other social partners.

#### ▪ **Employer’s organization density**

By far the most relevant employer organisation in the recent period has been the Serbian Association of Employers (Unija poslodavaca Srbije, SAE), which remains the only representative employer organisation at the national level in Serbia and is a full member of the International Organisation of Employers (IOE). It is also a member of a number of other international organisations. In mid-2008 the

SAE underwent a major upheaval (the third since 2003), which resulted in the creation of the Association of Small and Medium-Sized Entrepreneurs (Asocijacija malih i srednjih preduzeca, ASME), formed by breakaway members of the SAE. The ASME has repeatedly disputed the representativeness of the SAE and invested considerable time and energy trying to obtain representative status but these attempts have so far not succeeded.

In 2010 another employer organisation was registered at the national level, known as Poslodovac (Employer), and led by one of the most prominent business leaders in Serbia, Miodrag Kostic. This employer organisation has been openly supported by the Chamber of Commerce of Belgrade. However, up to this point the SAE remains the only employer organization at the national level in Serbia that actively operates and provides services to its membership in return for their membership fees. The remaining two employer organizations do not collect membership fees and membership is free of charge.

#### ▪ **Employer representation**

As in the case of trade unions, mutual recognition of representativeness among the employer organizations has not been attempted and the SAE has been continued efforts to retain its sole representativeness. The legitimacy of the SAE is disputed by its rivals but also sometimes by other social partners on the grounds that its representativeness is questionable. The legal requirement for representativeness at national level is that an employer organization unites at least 10 per cent of all registered employers, and that these employers employ at least 15 per cent of the total number of employees in the country. In most cases, self-employed workers are regarded as entrepreneurs and (potential) employers. Their typical collective representation is therefore to be found within the boundaries of business associations, sometimes with a general interest representation role with regard to public authorities and without specific employer representation functions. Moreover, it should be noted that practically no business representation exists as such for self-employed workers without employees; rather, they essentially refer to professional associations, small and medium-sized enterprises (SMEs) or general employer associations, as well as



to public representation bodies, such as the Chambers of Commerce.

In 2011 the International Organization of Employers and the International Labour Organization jointly warned the Serbian Government against excessive involvement in the functioning of employer organizations in Serbia, after the repeated collaboration of the Chambers of Commerce of Serbia and Belgrade with newly-established employer organizations. The SAE is the only employer organization involved in collective bargaining and recently it signed branch collective agreements in the construction and agriculture sectors, although its presence and membership in these two branches is rather low.

There was not a consolidation of the processes of organisational changes in employers' organizations in 2014, just fragmented trends in SAE. According to European research and employers' data the density of employer's organizations is around 25 per cent. The SAE as the main national organization of employers, has participated regularly in the activities of the Social and Economic Council of the Republic of Serbia and with other employer's organizations in the Business Council founded by the new Government in 2012; it is consulted on major economic and social issues, proposals and laws.

• **Trade Union Mapping**

**Table: National Trade Union Confederations**

	<b>Trade Union</b>	<b>Number of individual members Members</b>	<b>International affiliations</b>
1	Savez samostalnih sindikata Srbije, SSSS, Confederation of Autonomous Trade Unions of Serbia, CATUS	505,111	International Trade Union Confederation (member); European Trade Union Confederation (observer)
2	Ujedinjeni granski sindikati Nezavisnost, "Independence" Trade Union Confederation	200,000	International Trade Union Confederation (member); European Trade Union Confederation (observer)
3	Asocijacija slobodnih i nezavisnih sindikata ASNS, Association of the Free and Independent Trade Unions, AFITY	159, 000	-
4	Industrijski sindikat, (ISS), Industrial Trade Union of the Serbia	35,000	IndustriAll-ETU
5	Udruženi sindikati Srbije Sloga Associated Trade Unions of Serbia – Sloga	100,000 Members mostly from public and utilities sector	-
6	Konfederacija slobodnih sindikata, Confederation of Free Trade Unions	200,000 Members mostly from public sector	EPSU/PSI, EUROFEDOP, UNI global union

Source: Web sites of organizations; data from published interviews with leaders

Table: Important trade union federations by branches

	Trade union	Members	National Confederation	International affiliation
1	Samostalni sindikat zaposlenih u poljoprivredi, prehrambenoj, duvanskoj industriji i vodoprivredi, Autonomous Trade Union of Workers in Agriculture, Food, Tobacco Industry and Water Management	70,000	CATUS	
2	Samostalni Sindikat metalaca Srbije, Autonomous Metalworkers of Serbia (AMWUS)	25,000	CATUS	IndustriAll-ETU; IndustriAll-Global Union
3	GS "Nezavisnost", Trade Union of Metalworkers	20,000	UGS Nezavisnost	IndustriAll-ETU; IndustriAll-Global Union
4	Sindikat radnika gradjevinarstva i industrije gradjevinskog materijala Srbije, Trade Union of Workers in Construction and Building Materials Industry of Serbia	45,000	CATUS	BWI
5	PTT Serbia, Postal Workers Trade Union Serbia	9,500	Confederation of Free Trade Unions	
6	Samostalni sindikat trgovine Srbije, Autonomous Trade Union of Commerce Workers of Serbia	20,000	CATUS	
7	Samostalni sindikat hemije i nemetala Srbije, Autonomous Federation of Chemistry and Non-metallic Minerals Workers of Serbia	36,520	CATUS	IndustriAll-Global Union
8	Samostalni sindikat ugostiteljstva i turizma Srbije, Autonomous Union of Catering and Tourism Workers of Serbia	18,000	CATUS	
9	Sindikat zaposlenih u zdravstvu i socijalnoj zastiti Srbije, Health and Social Protection Employees Union of Serbia	65,000	CATUS	
10	Unija sindikata prosvetnih radnika Srbije, Association of Teachers Unions of Serbia Serbia	30,000	Confederation of Free Trade Unions	

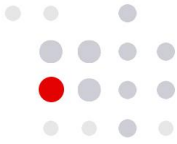
Source: Web sites of organizations; data from published interviews with leaders

## • Employer's Organisations Mapping

Table: Employers' Organisations

	Employer's organisations	Number of members	International affiliations
1	Unija poslodavaca Srbije, in English: Serbian Employers Association (SAE) /1994/	1,666 Big enterprises, SMEs and associations of entrepreneurs with 372,000 employees	International Organization of Employers - IOE Union of Black Sea and Caspian Confederation of Enterprises - UBCCE Union of Mediterranean Confederation of Enterprises - BUSINESSMED Adriatic Regional Employers' Centre – AREC
2	Asocijacija malih i srednjih preduzeca i preduzetnika Srbije, (APPS), /2008/ Association of SMEE of Serbia	145,000 employers with 220,000 Employees	Eurochambers
3	Udruženje privrednika Poslodavac /2010/ Association of Employers – Employer	500 enterprises with 250,000 employees	-
4	Srpski poslovni klub Privrednik, Serbian Business Club Businessman	The biggest and most successful in private companies and financial institutions. It also has membership by individual businesspersons. It is not registered according to the Labour Code but under the Law of Civil Associations 100,000 employees	International employers' associations Eurochambers

Source: Web sites of organizations; interviews with leaders published in 2012



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