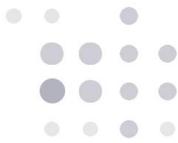


2016

Annual Review of Labour Relations and Social Dialogue Serbia

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- Serbia held General Elections in April in a calm atmosphere. The ruling party, the Serbian Progressive Party, reaffirmed its position and post-election tensions were eased by the entry of a so-called census opposition in the Parliament. Even though the new Parliament includes parties not supporting Serbia's Accession to the EU, official political leaders confirmed the commitment to the EU accession process. Accordingly, Chapters 23 and 24 of the European Acquis, related to law and justice, were opened for negotiation.
- The economic recovery policy, including fiscal consolidation and improvement of the business environment continued. The government's priorities focused on infrastructure projects, attracting foreign investments, and increasing employment opportunities. The economy recorded growth and low inflation, while the balance of payment deficit was considerably reduced.
- Unemployment is persistent, especially among the young, and numerous social problems are present. Workers from former state-owned enterprises that went bankrupt because of mismanaged privatization processes put big pressure on the weak labour market.
- The crisis of collective bargaining on the branch level culminated when the Serbian Employers' Association unilaterally cancelled already concluded collective agreements in the sectors of construction, agriculture and chemistry.
- Even though the social partners managed to agree on an increase of the minimum hourly wage for 2017 within the Social-Economic Council, social dialogue is still very weak. Trade unions are still not participating in drafting and implementing economic and social policy.



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1. SOCIAL-ECONOMIC DEVELOPMENT

The recorded rebound of economic activity was supported by base effects (a low base from which growth was measured), lower oil prices, and increased confidence as a result of implemented reforms and fiscal consolidation. GDP growth was modest in 2015 before accelerating strongly to 2.9 per cent in the first half of 2016. Although the economy remains only close to its pre-crisis level, there is a new growth momentum based on sounder fundamentals. It is driven by a robust and broad-based expansion of exports and investment. The overall value of infrastructure projects in 2016 amounted to €6 billion. The income gap with the EU remained broadly unchanged: per capita GDP in terms of purchasing power parity stood at 36 per cent of the EU average.

According to the data of the National Bank of Serbia, industrial production in 2016 grew by 9.5 per cent compared to 2015.¹ 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 permit procedure.²

Serbia's solid export performance continued unabated and import coverage of goods and services increased from around two-thirds five years ago to close to 90 per cent in 2016. As a result, the trade and current account deficits were markedly reduced. In the four quarters to June 2016, the current account deficit fell to around 4 per cent of GDP, compared with an average of close to 8 per cent over the last five years, and was fully covered by net Foreign Direct Investment (FDI). Moreover, FDI inflows, which picked up already last year, have been broad-based, with a significant share going into manufacturing and tradable sectors and according to the estimates of the National Bank of Serbia overall FDI net inflow will amount to €1.6 billion or around 5 per cent of GDP.

Monetary policy supported growth. The low

inflationary pressure and fiscal consolidation helped reduce inflationary expectations and supported further reductions in the key policy interest rate of the central bank from 5 per cent in September 2015 to 4 per cent in July 2016. In an effort to improve lending conditions and spur credit growth, the central bank also gradually cut the foreign currency reserve requirement ratio. In Q2 inflation continued moving below the low limit of permitted aberration from the goal (4.0 ± 1.5 per cent) and it finished the quarter at the level of 0.3 per cent.

By September 2016, the status of most of the companies in the portfolio of the Privatisation Agency has been resolved through sale or bankruptcy procedures. The protection of companies of strategic importance from forcible collection of debts and bankruptcy was lifted in the beginning of June. With a few exceptions, like the sale of assets of the Smederevo steel mill, the resolution of these companies remains a challenge. The restructuring of large public utilities has advanced, the government adopted a financial consolidation plan of Srbijagas and steps to reorganise Elektroprivreda Srbije, the state-owned power utility, were taken. The informal economy is estimated at around 20-30 per cent of GDP and leads to losses to the state budget.

Employment, salaries and pension benefits

The employment rate at the end of Q3 was 46.8 per cent. The unemployment rate decreased to 13.8 per cent according to the **Labour Force Survey** done by the National Labour Office (LFS), which is the lowest level in the last 15 years. The activity rate was equal to 54.3 per cent, the inactivity rate to 45.7 per cent and the rate of informal employment was 24.1 per cent. Labour market indicators improved further in 2016, to a large extent driven by rising informal, in particular agricultural, employment and precarious jobs.

Youth unemployment

Although in decline, unemployment is still particularly high among young people – with 28.5 per cent (Q3) of youth without a job and close to one in four not in employment, education or training (NEET). The young are

¹ Growth is recorded in the mining sector – 16.6%; energy and gas sector –16.6%; processing industry – 5.9%.

² The system allows for faster processing of applications for construction – in the first half of 2016 the number of building permits issued increased by 12.2 per cent and the anticipated value of these works is 50 per cent higher in comparison with the same period the year before.



still a vulnerable category, especially those with insufficient qualifications. However, even young persons with a higher education are employed on precarious and bad jobs. The brain drain is detrimental for Serbia's competitiveness.³ Job creation continued to be impeded by weak labour demand and structural obstacles. Both employers and graduates believe that the education institutions do not equip students with key soft skills, such as problem solving, organisation, and decision-making. Women's position in the labour market did not change and is characterised by significantly lower activity and employment rates compared to men.

The pension system continues to show a high deficit. The ratio of insured persons to pensioners is low and undermines the long-term sustainability of the system. Pensions are still paid according to the Law on Temporary Payment Arrangement of November 2014. According to the announcement of the Pension and Disability Insurance Fund, the average pension in September equalled 23,459 RSD (€188.40)

The average net salary (without taxes and contributions) paid in October 2016 amounted to 45,281 RSD (€367.62) and is nominally lower by 2.7 per cent compared to the previous month and on a real basis is 3.4 per cent lower. In October the minimum wage (net) amounted to 20,328 RSD (€165). The average net salary covered 74.9 per cent of average consumer's basket and the minimum wage covered 60 per cent of the minimum consumer's basket.

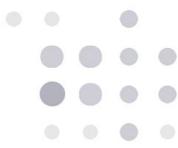
The current system of social benefits does not effectively help to reduce poverty. According to the Survey on Income and Living Conditions the risk-of-poverty rate in Serbia decreased slightly to 25.4 per cent, with the highest rates among young people aged 18-24 and those under 18, unemployed persons, and households with two adults and three or more children. The GINI (inequality) co-efficient was 38.2 in 2015.

³According to the Report of World Economic Forum for 2015, Serbia is ranked 94th out of 140 countries by the value of global competition, with a slight improvement in the Global Competitiveness Report 2016-2017, moving up four places to 90th place in the global rankings.

2. GOVERNMENTAL POLICIES AND LEGISLATION

Following a government decision, early parliamentary elections were held in April, together with provincial elections in Vojvodina and municipal elections. The turnout was 56 per cent. Seven lists of parties passed the 5 per cent threshold. The list led by the Prime Minister maintained a majority, with 131 seats out of 250, and the list of its main coalition partner, the Socialist Party of Serbia (SPS), obtained 29 seats. The opposition is fragmented (the Democratic Party (DS) has 16 seats; the "That's Enough" party (DJB) entered parliament for the first time, also with 16 seats. The coalition of the Social Democratic Party (SDS), the Liberal Democratic Party (LDP) and the League of Social Democrats of Vojvodina (LSV) obtained 13 seats. Parties opposing Serbia's EU integration re-entered Parliament: the Serbian Radical Party was in third position, with 22 seats, and the Democratic Party of Serbia (DSS) in coalition with the Dveri movement secured 13 seats. Five parties representing national minorities, which are exempt from the 5 per cent threshold, obtained 10 seats. Women continue to comprise a third of all MPs. The government was formed in August and continued with its program of reform and fiscal consolidation. In the next period the priorities of the government are: reduction of unemployment, a balanced budget, investment in infrastructure and tourism, spurring agriculture, reform of the education system, a new plan for health care, the fight against corruption, a fairer social care system, fundamental changes towards a more efficient public sector, and EU accession.

Important laws continue to be adopted by emergency procedure, without proper consultations with interested parties, and there are delays in the adoption of secondary legislation. Trade unions remained critical of the government's record in economic policy and its results in terms of job creation. In the field of labour law, the Law on the Conditions of Posting of Employees Abroad was adopted in November 2015 and entered into force in January 2016. This law, however, does not fully transpose Directive 96/71/EC on Posting of Workers and hence labour law is not fully



aligned with the acquis.

The November 2015 amendments to the Law on Health and Safety at Work, and in December the adoption of eight bylaws and a rulebook on electromagnetic radiation, contributed to further alignment with the acquis. The adoption of the employment and social reform program in June constitutes a significant step forward in terms of evidence-based policy development. The revision of the national employment strategy 2010-2020 is being completed. While authorised private employment agencies are already active in the labour market, it is important to advance in the development of this area's regulation. In the area of social inclusion and protection, the adoption of amendments to the Social Welfare Law, the Family Law and the Draft Law on Financial Support for Families with Children are still pending.

The strategy to support the development of SMEs, entrepreneurship and competitiveness for 2015-2020 is being implemented and 2016 has been declared the year of entrepreneurship in Serbia. Serbia joined the EU's competitiveness and SME program (COSME). Although SMEs' share in manufacturing has been above 40 per cent in the last few years, they have not been able to recover to their pre-crisis positions. SMEs face a number of challenges, including an unpredictable business environment, a high level of para-fiscal charges, and difficult and costly access to finance, especially when compared with large and state-owned enterprises. In line with the Economic Reform Program (ERP) it is necessary to improve the business environment and promote private investment by developing a more transparent and less burdensome system of "para-fiscal" charges⁴, putting in place a guarantee scheme for loans to SMEs and relaunching the "regulatory guillotine". On enterprise and industrial instruments, the government increased budget financing in 2016 to 33 different assistance programs for SMEs. However, access to finance remains

⁴ Para-fiscal charges refer to payments made by citizens and businesses to the state for which they do not receive any services in return or only disproportionately little. 371 non-tax charges were identified of which at least 179 are para-fiscal levies. On average, every citizen of Serbia pays the equivalent of 100 Euros per year of non-tax charges to the state while it is still not quite clear how and what this money is spent on.

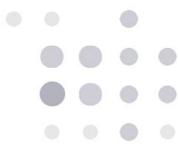
problematic and is a key obstacle to development of the sector.

Concerning equality between women and men, the new national strategy for gender equality 2016-2020 and an action plan for 2016-2018 were adopted in January. Serbia is the first country outside the European Union to introduce the EU Index of Gender Equality.

In 2016 a process to amend the Law on Strike started. The two representative trade union confederations, CATUS and TUC NEZAVISNOST, focused their demands on the exclusive regulation of strike through this law. The drafting procedure also started for the new Law on Temporary Employment Agencies and a Law on Seasonal Work Vouchers. The new Law on Temporary Employment Agencies will fill a legal gap for about 70,000 workers who are employed through agencies and whose rights are not regulated. Trade unions not only have been demanding regulation of workers' rights working through agencies but also monitoring of the agencies' licenses and guarantees.

Serbia has continued to build a track record in implementation of the obligations of the Stabilization and Association Agreement (SAA). Two Chapters (Judiciary and Fundamental Rights – 23 and Justice, Freedom and Security – 24) were opened in July 2016. Under Chapter 23 it is important to step up implementation of the national anti-corruption strategy, reform of the judiciary and establishment of the rule of law. Cooperation between civil society and Parliament in the area of EU negotiations has improved notably through the National Convent on European Integration (NKEU)⁵, as evidenced in the consultation on Chapters 23 and 24. The two representative trade union confederations constantly criticize the lack of transparency in the accession process; however, participation of the social partners in the process has improved in the framework of the EU-Serbia Civil Society Joint Consultative Committee (JCC). At the JCC's session held in October the topics of concern were: entrepreneurship and

⁵ NKEU was established primarily as a body for the special cooperation of the National Assembly of the Republic of Serbia and civil society in the EU accession negotiations.



industrial policy; economic-social influence of industrial policy; and climate change. The trade unions fiercely oppose the feigning of social dialogue for the benefit of opening further SAA Chapters. Serbia actively participates in the EU programs Horizon 2020, COSME, Erasmus+ and Creative Europe. There were no developments regarding preparations for the European Social Fund. Under IPA II (Instrument for Pre-Accession Assistance), Serbia continues to benefit from pre-accession assistance with a total indicative allocation of €1.5 billion for the period 2014-2020. The IPA National Program 2015 amounted to €216 million overall, with most of the funding supporting public administration reform, justice and home affairs, competitiveness, education and energy. Even though through IPA II greater participation of social partners has been envisaged, trade unions still have not been recognized as project leaders.

The government continued implementing the Stand-By Arrangement with the International Monetary Fund (IMF). At the beginning of December, the government determined its fiscal consolidation policy with 3 per cent programmed GDP growth for the next year and 0.6 per cent inflation. This was deemed realistic by the social partners at the Social and Economic Council (SEC) meeting.

3. INDUSTRIAL RELATIONS

Industrial relations in Serbia are burdened with problems. Only a small number of employees are covered by collective agreements, while the majority works under individual labour contracts. Trade unions face numerous difficulties to negotiate and conclude collective agreements with employers.

Various factors are affecting trade union membership: shut-down of enterprises and loss of jobs and increased work flexibility, but also internal factors. The decline of the traditionally-unionized workers from the Industrial sector to the benefit of other, less unionized sectors, also accounts for a reduction of members. The organization rate is around 25 per cent in the public sector and 15 per cent in the private sector. Despite legal regulations and the ILO Conventions ratified by Serbia such as Convention No. 87

relating to the freedom of association, private sector employers, including foreign investors, are not tolerating unions in their workplaces. Therefore, in 2016 trade unions conducted organizing campaigns in plants of the South Korean automobile components supplier company Yura and the Italian leather and footwear company GEOX. As a result of the campaigns, a trade union was successfully established in the GEOX plant, also because the Italian Confederation of Labour (CIGL) and IndustriALL supported the campaign, while in Yura the status quo remained. The fear of job loss and threats with dismissal, as well as disbelief that unions would protect them, has additionally influenced the apathy and disinterest of some workers in trade union membership and participation in trade union activities.

The trade union movement in Serbia is fragmented. According to data of the Ministry of Labour, Employment, Veterans and Social Affairs, there are 23,000 registered trade unions. Within that number, there are six confederations at the national level but also small unions that only operate at the enterprise level; and all of them have with different views on how to solve problems. The two representative trade unions, CATUS and TUC NEZAVISNOST, built a high level of cooperation during the past years, amidst unfavourable tendencies, pressures and evident divisions. Cooperation is expressed through joint positions and public statements, whether within their work in the tripartite SEC, in working bodies responsible for drafting laws or when organizing public protests.

This year the following congresses were held: in June the first Congress of the Confederation of Free Trade Unions (Konfederacija slobodnih sindikata - KSS), in October the second Congress of the Industrial Trade Union of the Serbia, (ISS) and in November the eighth Congress of TUC NEZAVISNOST. This congress marked its 25th year of existence and a new leadership was elected.

The Serbian Association of Employers (SAE) is the only employers' organization represented in the tripartite SEC. As the most important employers at the branch level are not members of the SAE (they are members of the Chamber of Commerce or associations



such as “Businessman”), the biggest obstacle for collective bargaining at the branch level is the non-existence of functioning employers’ organizations.

Consequently, bipartite social dialogue has remained weak and new collective agreements have been concluded almost exclusively in the public sector. Collective agreements which expired following the introduction of the new Labour Law in 2014 have not been renewed. In the so-called real sector – concerned with producing goods and services – only one collective agreement, concluded for the road maintenance sector, was extended. The agreement was concluded with an employers’ association that is not a member of SAE. Three already concluded collective agreements for the construction, agriculture and chemistry sectors were cancelled by the SAE, while CATUS and TUC NEZAVISNOST are questioning SAE’s representativeness. In a letter of protest, the International Trade Union Confederation (ITUC) and the European Trade Union Confederation (ETUC) requested the Serbian Minister of Labour to take measures in line with the ILO Convention No. 98 and the European Social Model.

This episode again illustrates the problem of concluding collective agreements at a branch level. As mentioned above, the most important and influential employers are not affiliated with SAE (or any other employers’ organization) and consequently trade unions have no counterpart for collective bargaining. Employers mainly argue that they do not want to be represented in negotiations by an association not familiar with their branch (which according to them would be the case for SAE) but they lack the good will to form branch-specific employers associations, which would remedy the situation. This obstructing strategy is also reflected in a so-called White Book issued by the Foreign Investors Council (FIC).

The amendments to the Labour Law made in July 2014, concedes the possibility to extend collective agreements in theory but in practice the conditions are almost impossible to fulfil. The most challenging condition is to prove that the collective agreement binds employers who employ more than 50 per

cent of employees in a specific branch, group, sub-group or profession (previously this number was 30 per cent). Given the above-mentioned situation with the lack of employers’ associations at the branch level, this condition is not realistic. Even if all conditions were fulfilled, the final decision on the extended effect is no longer taken solely by the Labour Minister, but the government as a whole has to reach a consensus on the matter.

This shows that the legal framework for collective bargaining, especially regarding the representativeness of social partners and the extension of collective agreements, needs to be adapted. The criteria and procedures to establish representativeness of trade unions and employers’ organizations need to be agreed in a clear and transparent manner, as government bodies often consult smaller trade unions, which do not have any representativeness.

Industrial conflicts

In 2016, strikes were frequent in Serbia. There are no precise data on the number of workers and the duration of strikes but they were mainly organized in the public sector (education and science), including warning strikes and announcement of strikes in the judiciary because of planned radical reforms. The demands ranged from pay rises, (i.e. returning pay to the previous level) and the need to regulate the criteria for redundancy, to the payment of short-term help, promised in the negotiations with line ministries. The Association of Pensioners’ Trade Unions of Serbia protested against the reduction of pensions and submitted a request to the Constitutional Court to examine the constitutionality of the Law on Temporary Arrangement of Pension Payment.

In the private sector, strikes were organized in companies going through restructuring or in those where privatization was carried out unsuccessfully. Demands for the payment of remaining salaries, connecting the years in length of service, payment of taxes and contributions and relaunch of production were made in those companies where restructuring had failed or where badly-managed privatization further deteriorated the situation of workers who had not been paid for



months. Due to a limited number of participating workers and lack of solidarity, the effects of these strikes were not considerable.

Strikes are weak due to union fragmentation and conflicting interests, the lack of strike funds, employers' threats with dismissals, insolvency of companies whose business is not doing well, as well as general apathy due to the failure of past activities. A large number of unemployed persons are ready to work under any conditions, even in precarious jobs. Additionally, the unpopularity of strikes within the population also contributed to weakening the trade unions' negotiating power. The last time Serbia witnessed an important strike movement was in 2014 during the protests accompanying the passing of the new and controversial Labour Law by the government in an urgent procedure.

Mediation and arbitration

According to data of the National Agency for Peaceful Settlement of Labour Disputes, in the first six months of 2016 alone the number of procedures being processed by the Agency's arbiters more than doubled compared to the overall number in 2015. In 2015, 284 individual labour disputes were initiated before the Agency, while in 2016 there were 625, out of which 176 were settled. All employees and employers either from the public or private sector may present their dispute before the Agency, and the duration of procedure is limited to one month by the Law on Peaceful Settlement of Labour Disputes. Despite the fact that the number of disputes submitted for peaceful settlement increased, this mechanism is not used appropriately, as the tradition to settle disputes in court prevails. Therefore, TUC NEZAVISNOST and CATUS have proposed to establish special labour courts in order to shorten the length of the process.

4. TRIPARTITE SOCIAL DIALOGUE

The twinning project "Support for the Social Dialogue" funded with EU pre-accession funds ended in March, resulting with a set of recommendations for improvement of tripartite social dialogue, aimed at enhancing the quality of policy-making processes and increasing institutional support for tripartite social dialogue on the national and local levels.

Tripartite dialogue has shown some progress with more frequent meetings of the Social and Economic Council at the national level (nine meetings in 2015 and seven from January to December 2016)⁶; however, the Council is not systematically consulted on all relevant draft legislation. Reaching consensus within the SEC remains a problem, as are the frequent changes of the SEC members and the non-implementation of agreed decisions. After two years of negotiations, in September 2016 the social partners reached a consensus agreement on the adoption of the minimum hourly wage for the next year (130 RSD per working hour).

There are 29 local economic and social councils; their sustainability is hampered by the problem of representativeness of social partners, lack of capacity and funding. 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.

5. FORECASTS

Despite impressive economic growth and a reduction of the deficit, fiscal imbalance and other risks remain. Reforms have only been implemented partially. Therefore, strict monitoring of current expenditures, further implementation of public finance reforms and restructuring of public enterprises are necessary. The expectations of the IMF are related to a more transparent growth policy, with clearly-defined priorities in investments and greater transparency.

⁶ www.socijalnoekonomskisavet.rs

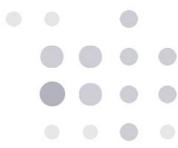


A big challenge in 2017-2018 will be sustainable restructuring of the remaining state-owned enterprises, as well as further implementation of reforms of state administration and the public sector.

The improvement of the overall performance of the labour market compared to the previous period is primarily the result of a changed calculation methodology. Labour market policy will have to tackle problems related to the integration in the labour market of employees of former state-owned enterprises. Youth unemployment remains a challenge as well. Solving the labour market's problems will require inter-sectoral cooperation and inclusion of social partners.

It is expected that social dialogue will continue to face serious difficulties in reaching agreements and implementing them, including a lack of regular information and consultation procedures about all relevant drafts of legal regulations.

On the agenda of the trade unions, resolving the crisis of collective bargaining on the branch level and raising awareness of its importance will be important. A more offensive attitude by the trade unions should also be directed to the reduction of precarious work as well as to representing employees in small enterprises.



ANNEX OF DATA

• Collective bargaining system

According to Labour Law ("Official Gazette of the Republic of Serbia", No. 24/2005, 61/2005, 54/2009, 32/2013 and 75/2014) collective agreements can be concluded at a general, branch and company level. Representatives of trade unions and employers, who participate in negotiations for the conclusion of collective agreements and are signatories, need to be authorised by their governing bodies. General collective agreements and branch collective agreements for a specific branch, group, sub-group or profession are concluded for the territory of the Republic of Serbia. Branch collective agreements can be concluded for a territorial unit, territorial autonomy or local self-government.

Levels of collective bargaining:

- National level: Evidenced through the social partners' engagement in the tripartite Social and Economic Council, where labour legislation and working conditions are discussed and the minimum hourly wage is determined. The General Collective Agreement has not been renewed since 2010 despite initiatives from the trade unions.
- Branch/Sectoral level: Collective bargaining at this level almost exclusively takes place in the public sector, which has a relatively high prevalence of trade unions and high coverage of collective agreements (around 60 per cent).
- Company level: This is the dominant form of collective bargaining in the private sector, which is characterized by low union density.

• System of tripartite social dialogue

In line with the Law ("Official Gazette of the Republic of Serbia", No. 125/04), the Social and Economic Council (SEC) is an independent tripartite body, including the representatives of the government of the Republic of Serbia, representative trade unions and employers' associations. The SEC has 18 members, 6 government representatives, 6 representatives from the Serbian Employers Association and 6 trade union representatives (currently, 4 from CATUS and 2 from TUC NEZAVISNOST). The SEC is rather dysfunctional in practice. Essentially, tripartite social dialogue is basic and boils down to the exchange of information, often without the intention to reach an agreement between the participants. Important laws regarding labour-social legislation are not submitted to the SEC and they are sent to parliamentary procedure without being given "green light" by social partners.



- **Social insurance systems**

Pensions

Table: Pensioners, 2013-2016

	2013 Dec	2014 Jun	2015 Oct.	2016 Oct
Beneficiaries of pensions total(utilization of rights)	1,722,649	1,722,834	1,733,308	1,725,784
Structure				
Old-age pensions*	1,021,216 59.28%	1,030,620 59.60%	1,061,477 61.24%	1,067,510 61.90%
Disability pensions	334,040 19.39%	327,501 19.20%	314,021 18.12%	304,483 17.6%
Survivors' pensions	367,393 21.33%	364,713 21. 20%.	357,755 20.64%	353,791 20.50%
Compensation for physical injury (No. of users)	74,237	78,000	70,513	67,319
Compensation for assistance and nursing (No. of users)	61,536	77,000	73,708	75,385
Pension benefits (in RSD)				
Pension benefit amount	23,947	24,312	16,661	23,446
Real growth rate	0.3	-2.0	0.01	0.00

Source: National Fund for Pension and Disability Insurance, 2016, October
http://pio.rs/images/dokumenta/statistike/Statisticki_mesecni_bilten_okt2016.pdf

Table: Average Pensions, 2013-2016

	2013	2014	2015 Oct.	2016 Oct.	real growth rate
Average pension adjusted by the law, (in RSD and €)	23,947 (€213)	23,724 (€199)	22,726 (€186)	23,446 (€188,40)	-0.3

Source: National Fund for Pension and Disability Insurance, October, 2016,

Health

Table: Number of insured persons by insurance base, 2012-2015

	2012	In %	2013	In %	2014	In %	2015	In %
Insurance basis								
Employed persons	2,842 446	41.27	2,828,201	40.00	2,811,088	40.50	2,810,877	40.00
Unemployed persons	86,693	1.26	88,000	1.30	65,245	0.94	65,078	0.94
Beneficiaries of pension	1,887,801	27.41	1,920,584	28.00	1,956,656	28.19	1,956,987	28.00
Self-employed	274,832	3.99	278,000	4.00	279,026	4.02	278,905	4.02
Farmers	303,879	4.41	300,800	3.20	283,885	4.09	283,721	4.09
Health insurance covered from the budget of the RS	1,329 833	19.31	1,358,202	20.00	1,370,839	19.75	1,370,593	20.00
Other	161,420	2.34	418,913	3.30	174,912	2.52	174,798	2.52
Total citizens covered	6,886,904	99.9	6,886,900	99.8	6,940,959	100.00	6,940,959	99.57

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



- **Education and vocational training**

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

Serbia	Census 2011		2012		2013		2014		2015	
	Total	%	Total	%	Total	%	Total	%	Total	%
	6,161,584	100	6,117,563	100	6,161,584	100	6,161,584	100	6,161,584	100
Without education attainment	164,884	2.68	132,909	2.17	164,884	2.67	164,884	2.68	164,884	2.68
Illiterate	164,884	2.68	127,462	1.96	124,424	0.36	127,463	1.96	127,463	1.96
Incomplete primary education	677,499	11.00	653,032	4.57	677,499	10.99	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	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	3,015,092	48.93
Higher education	652 234	10.59	720,000	11.76	1,000,569	16.23	1,000,569	16.24	1,000,569	16.24
Computer literate			2,108,144	59.9	3,906 444	63.4	2,108,144	34.21	2,108,144	34.21
Computer illiterate			3,142,854		2,255,139	36.6	3,142,854	51.01	3,142,854	51.01

Source: Statistical Office of the Republic of Serbia, Statistical Year Book of Republic Serbia, October 2016, pp. 40-41, No 49, G20162019.pdf

- **Employment rate**

Table: Employment Rate, 2013-2016 III Q (age 15-64)

	2013	2014	2015	2016
Population aged 15 and over	6,117,563	6,095,268	6,047,416	6,013,200
Employed persons average (thousands)	1,723	2,559,4	2574,2	2,814,0
Employment rate	49.2	42.0	42.5	46.8
Activity rate (Working age 15-64)	49.0	51.9	51.6	54.3
Employees in legal entities average (thousands)*	1,335	1,320	1,698	2,136,5
Informal sector employment rate	18.9	23.4	20.4	24.1

Source: Statistical Office of the Republic of Serbia, Labour force Survey III Q 2016



• **Unemployment rate**

Table: Unemployment rate, 2013-2016

	2013	2014	2015	2016 (October)
Unemployed persons average (thousands)	762.6	608,2	551,9	450,1
Unemployment rate, ILO definition in %	24.1(ILO)	19.2 (ILO)	17.7	13.8%
First time job seekers	267,904	258,052	249,634	232,358
Unemployment benefit recipients	77,216	67,798	49,008	46,539
Newly registered	36,951	34,749	38,334	38,361
Deleted from the register	50,928	62,692	61,863	60,900
Registered vacancies	36,724	39,000	35,354	6,334
Employed from the register	115,348	19,234	20,913	20,275

Source: National Employment Service, Monthly bulletin, October 2016 <http://www.nsz.gov.rs>

• **Youth unemployment**

The worsening demographic situation and weak education outcomes require increased focus on human capital policies. Serbia's population is aging and shrinking by around 0.5 per cent per year. Serbia ranked below all EU Member States in the 2016 Economic Forum human capital index, with particularly weak results in the 15-24 age group. Emigration of young, skilled people remains

high.

The position of youth in the labour market in Serbia could be described like this – a vulnerable group of people that finds it difficult to enter the labour market; and no matter what their educational background, they often find employment in precarious jobs and jobs with bad working conditions. A huge problem is also the inactivity and demotivation of youth for entering the labour market.

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

	Activity rate	Employment rate	Unemployment rate
Youth (15-24)	31.3	22.4	28.5
Population of working age (15-64)	66.6	57.0	14.4

Source: RSO, 2016 October

Table: Youth unemployment rate in Serbia and neighbouring Balkan countries

	General rate	Youth rate
EU 28	8.3	18.4
Euro zone	9.8	20.7
Slovenia	9.7	16.3
Croatia	14.0	30.6
Macedonia	20.4	46.3
Montenegro	17.7	34.5
Serbia	13.8	28.5

Source: Eurostat and national RSO, 2016 October

The National Employment Service is being strengthened and the budget for active labour market policies was increased, with a special focus on young people. 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 search); 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	Youth participation (%)
Job club for job search	2,010	63.93
Training for active job search	12,236	58.0
Motivation activation training	3,248	29.36
Self-efficacy training	618	22.68
Training workshop on coping with stress due to loss work	79	9.18
Total	18,191	36.63
Employment fairs	17,695	33.63

Source: NES, 2016

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. The

program of professional practice 6-12 months; training for independent work in the occupation for which youth acquired the proper education/qualification, without employment, 6-12 months, 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	2,946	82.2
Acquiring practical skills	47	37.30
Training	269	45.5
Total	3,226	79.4

Source: NES, 2016

The employers are encouraged to employ the youth by: subsidies for job creation; employment subsidy beneficiaries for social assistance; subsidies for employment of persons with disabilities, those without work experience; reimbursement of appropriate

costs of workplace adjustments; incentives for starting one's own business are also developed through 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	827	23.10
Subsidies for opening and equipping of new jobs	1,351	54.56
Public works	2,279	31.79
Total involved	4,457	36.48

Source: NES, 2016

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



Table: Average monthly Net salaries, in RSD, 2013-2016 (October)

	2013	2014	2015 Oct.	2016 Oct.
Net salaries	44,120	44,021	44,764	45,281
in €	385.50	375.10	366.90	367.62
Real growth rate (%)	-2.0	-0.3	-2.0	1.1

Source: NBS, Labour Force Survey, 2016, Statistical Office.

- **Monthly minimum wage**

Table: Minimum Net salaries, period average, in RSD, 2013-2016

	2013	2014	2015	2016, Oct.
For 174 hours work	20,240.00	21,160.00 (for 184 hours)	21,054.00 (for 174 hours)	20,328,00 (for 168 hours)
Per hour	116.32	115.00	121.00	121.00

Source: Labour Force Survey, 2016, October

In April 2016, for the first time since average salary has been calculated using current methodology, the average salary paid in the private sector was higher than the average salary in the public sector due to the pay reduction in education and health.

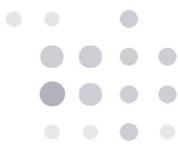
- **Gender pay gap**

Based on the Index of Gender Equality, the area of work has the biggest gap between men and women in Serbia. As in other countries, the Gender Pay Gap in Serbia partially results from more women proportionally working in sectors with lower salaries (education, health and social services). The gap is bigger in the private sector than the public sector. The biggest pay gap is among employed women with higher education; secondary school educated women earn on average about €100 less in wages than men; for highly qualified workers

the pay gap is around €200 on average as well as among semi-qualified workers. The lowest gap was among non-qualified workers. Budgetary reform includes gender equality considerations and the budget system law adopted in 2015 introduced gender-responsive budgeting as mandatory for all budget users at the national, provincial and local levels that will be introduced gradually by 2020.

Serbian anti-discrimination law is mostly in accordance with the EU gender equality acquis. In some areas, Serbian legislation has even introduced more favourable provisions in relation to the duration of parental leave and leave for the care of a seriously ill child and a child with a disability. The Gender Equality Act contains some important provisions, such as the recognition of positive measures, guarantees of gender equality in all areas of public and private life, and the initiation of special civil law suits.⁷

⁷Country report, Gender equality, Serbia 2016, ec.europa/justice/gender-equality/files/ge_country_reports_d1/2016-rs-country_report-ge_final.pdf



- **Actual weekly working hours**

Table: Actual weekly working hours, 2013-2016 / % of total employed

Aged 15-64	2013	2014	2015	2016
1-4 hours	0.2	0.2	0.2	0.2
5-19 hours	2.7	1.2	1.2	-
20-29 hours	3.8	3.0	2.9	-
30-39 hours	3.1	3.0	3.1	2.7
40-49 hours	73.4	83.0	82.0	87.5
50-59 hours	8.2	8.2	10.2	9.2
60 and more hours	8.5	8.4	8.0	-
Other	0.1	0.2	0.6	-

Source: Labour Force Survey, 2016, Number 168

Full weekly working time is 40 hours. Working time may be shortened, but not less than 36 hours. Overtime work cannot extend longer than eight hours a week; a worker cannot work longer than 12 hours a day, including overtime work (premium for overtime work (per cent on hourly pay) is 26 per cent. The largest number of employees in the first half

of 2016 worked from 40 to 49 hours a week. There are no precise data for those who work over 60 hours, as well as for those who work less than 30 hours. Structure of employees by paid and unpaid overtime work hours were 45.8 with all overtime works hours paid, and 52.0 per cent with no overtime work paid.⁸

⁸ RSO, Bulletin 2016/ 608



- **Normal work/atypical work**

Table: Normal work/atypical work in %, 2013-2016

	2013	2014	2015	2016
1. Normal work/full-time, open-end contracts/permanent job	88.3	78.1	75.0	78.1
2. Atypical work / fixed term contracts	12.9	11.0	13.2	16.8
2.1. Part-time	9.1	7.2	8.5	2.0
2.2. Seasonal	1.3	1.5	1.3	0.20
2.3. Temporary	2.5	2.2	2.0	2.9

Source: Labour Force Survey, Bulletin 2016/ 608

Amendments to the Labour Law adopted two years ago increased the Economic Reform Program policy guidance, which stepped up the provision of labour market flexibility but it only slightly increased employment (mostly in precarious jobs). The growth of the employment share of atypical jobs is evident

and precarious jobs have almost doubled. The trends of salary totals in Serbia are developing faster than the trends in social contributions, which is partly the consequence of the growth of part-time work in overall employment.⁹

⁹ Arandarenko, M., Kovačević, M., Aleksić, D. (2016). "Kretanje zaposlenosti u Srbiji između tražnje za radom i ponude rada" (Developments of Employment in Serbia: between Work Supply and Demand), Scientific Society of Economists in Serbia, "Economic policy of Serbia in 2016", February 2016



- **Migration**

Table: Migration in Serbia, 2013-2016

	2013	2014	2015 Residing in Serbia	2015 Originating from Serbia	2016 Residing In Serbia	2016 Originating from Serbia
Refugees	64,000	57,083	35,309	44,892	35,295	38,273
Asylum Seekers	19,000	400	464	55,253	116	53,309
Returned Refugees		168	73	73	328	328
Internally Displaced Persons (IDPs)	210,000	227,495	220,227	220,227	203,140	203,140
Returned IDPs	-	780	159	159	545	545
Stateless Persons	3,490	-	3,490	-	2,700	-
Various	0	0	0	0	0	0
Total population of concern	282,850	290,898	259,722	320,604	242,124	312,821

Source: UNHCR, *Global Trends, June 2016*

Serbia's legal framework is partially in line with the *acquis*. Legislation on the return of unsuccessful asylum seekers and apprehended irregular migrants, transposing the Return Directive, remains to be adopted. Serbia has partially aligned the legal

framework on family reunification and the status of third country nationals migrating for studies, research and seasonal work. The national legislation is not yet in line with the *acquis* on the blue card or on the single residence and work permit.

- **Human Development Index**

Table: HDI, 2011-2014

	2012	2013	2014	2015
HDI	0.743	0.745	0.771	0.771
HDI ranking	76	77	66	66

Source: *Human Development Index, UNDP- Human development Report, December 2015*

- **GINI-coefficient**

Table: GINI-coefficient, 2012 - 2015

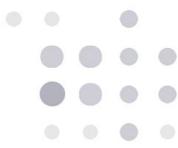
	2012	2013	2014	2015
GINI coefficient	38.0	38.0	38.7	38.2

Source: *Statistical data (as of 5.10.2016) Serbia*

- **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 15 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.

According to data from the SEC records, active collective agreements concluded in 2015 and 2016 are:

- A branch collective agreement for the construction industry and production of construction material, concluded on 10.02. 2016 for a three-year period, (Official Gazette RS, No. 77/2016, the Serbian Association of Employers unilaterally cancelled this contract
- A branch collective agreement for agriculture, food, tobacco industry and waterworks of Serbia, concluded on 28.01.2016); the Serbian Association of Employers unilaterally cancelled this contract
- A branch collective agreement for Pre-School Upbringing and Education, concluded in November 2016
- A branch 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;
- A branch 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 29.01.2015;
- A branch collective agreement for social protection in the Republic of Serbia, Official Gazette No. 11/2015 of 30.01.2015;
- A branch 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;
- A branch collective agreement for police officers, published in the Official Gazette No. 22/2015 of 27.02.2015;
- A branch 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;
- A branch collective agreement for public authorities effective as of 09.03.2015 and published in the Official Gazette of the Republic of Serbia No. 25/2015 of 13.03.2105;
- A branch collective agreement on amendments to the Branch Collective Agreement for public authorities, published in the Official Gazette of the Republic of Serbia, No. 50/2015 of 09.06.2015;
- A branch 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;
- A branch collective agreement for chemistry and non-metals of 11 September 2015, published on 23 October 2015 in the Official Gazette of the Republic of Serbia, No. 88/2015. Just a few days after its release, on 02.11.2015, the Serbian Association of Employers unilaterally cancelled this contract
- A branch collective agreement for employees working in student dormitories financed by the Republic of Serbia, published in the Official Gazette of the Republic of Serbia, No. 100/2015 of 04.12.2015.
- Several collective agreements were also concluded at the company level: A collective agreement for the Serbian Railways, 24.03.2015; a collective agreement for Post Serbia, 04.02.2015; HIP Petrochemistry Pančevo, 27.1.2015.

According to the new labour law from 2014, all active collective agreements expired on 29 January 2015 and were subject to renegotiation. Only in the public sector were collective agreements renewed, while only four sectorial collective agreements were signed in the private sector. Three out of four were subsequently cancelled by the Serbian Association of Employers.



- **Trade union density**

There are no precise data available since the last determination of trade union representativeness and counting of affiliation forms took place seven years ago. 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 25 per cent. 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. One-third of the total employees in 2016 were in the public sector (where the trade union density rate is 60 present) and union density in the private sector is as follows: from 5 per cent in micro-businesses and around 20 per cent in medium-sized businesses and in large businesses around 40 per cent. There are also self-employed, solo trades but they have low participation in trade union activities.

Trade unions traditionally have high representation in the industrial sector and trade unions often have established representation in construction and metalworking. 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 who 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. Trade union density rates can be further categorized according to the difference between the previously state-owned but now privatized companies (30 per cent) and newly-established private companies (5 per cent). The factor that has significantly reduced trade union density has been the fall in private sector unionization. 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 (See data by Eurofund and national research data). The new Labour Law, 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 – medium. Even though, the formation of Works Council is envisaged by the law, trade unions oppose this development as there is a conflict of interests, in other words double representation. Subsidiaries of multinational companies in Serbia have representatives in the European Works Councils.

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 Trade Union Confederation "Nezavisnost" (TUC NEZAVISNOST, Ujedinjeni granski sindikati "Nezavisnos"), both of which participate in the Social and Economic Council at the national level. Apart from these, there are the Association of Free and Independent Trade Unions (Asocijacija slobodnih i nezavisnih sindikata, AFITU) that is currently struggling for national representativeness status and the Confederation of Free Trade Unions (Konfederacija slobodnih sindikata, CFTU), which has representativeness at the national level but it is not in line with the procedure and its representativeness has been denied by the CATUS and TUC NEZAVISNOST. Two other confederations are the Industrial Trade Union of the Serbia, (ISS) (Industrijski sindikat - ISS) and the Associated Trade Unions of Serbia – Sloga (Udruženi sindikati Srbije - Sloga) which represent employees in industry or mixed sectors – industry and public. Overall, there are more than 23,000 trade unions in Serbia at all levels, from company to national level, and sectoral trade unions belonging to the main confederations. According to one survey (CESID) around 30 per cent of all union members are outside of



three largest confederations and mostly exist as small local unions “house unions”. There is some evidence that the trade union scene is becoming more fragmented and trade unions have weaker social power. This year the following congresses were held - in June the First Congress of CFTU, in October the Second Congress of the ISS and in November the Eighth Congress of TUC NEZAVISNOST, which marked 25 years of existence and elected new leadership.

Only 25-30 per cent of members pay any subscription (fees/dues) or the subscription amount established in the statutes. Membership subscriptions are collected by the employer, which is controversial within trade unions raises a discussion among trade unions as this practices discloses the membership to the employer who could exercise pressure on them.

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 sectoral organizations and national bodies keep on average a mere 10-15 per cent of membership fees at their disposal – too little for financing the running costs of the organization along with campaigns, activities or the necessary resources for organisation of strikes and protests.

- **Employer’s organization density**

By far the most relevant employer organisation in the recent period has been the Serbian Association of Employers - SAE (Unija poslodavaca Srbije, UPS), which remains the only representative employer organisation at the national level and is a member of the International Organisation of Employers (IOE). 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. In 2010, another employers’ organisation was registered at the national level, known as Poslodavac (Employer). This employer organisation has been openly supported by the Chamber of Commerce of Belgrade. However, up to this point the SAE remains the only representative employers’ organization at the national level.

- **Employer representation**

The legitimacy of the SAE is disputed by its rivals, such as ASME, but also by other social partners on the grounds that its representativeness is questionable. The legal requirement for representativeness at the 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 for a representational role with regard to public authorities and without specific employer representation functions. The SAE is the only employer organization involved in collective bargaining but without any collective agreements. Recently signed branch collective agreements in the construction, agriculture and chemical sectors were cancelled and caused huge dissatisfaction among the trade unions.

There was not a consolidation of the processes of organisational changes in employers’ organizations in 2014, just fragmentation 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 is consulted on major economic and social issues, proposals and laws. In Serbia an association gathering employers in the public sector does not exist.



• **Trade Union Mapping**

Table: National Trade Union Confederations

	Trade Union	Number of individual members	International affiliations
1	Savez samostalnih sindikata Srbije, SSSS, Confederation of Autonomous Trade Unions of Serbia, CATUS	350,000	International Trade Union Confederation (member); European Trade Union Confederation (member)
2	Ujedinjeni granski sindikati Nezavisnost, Trade Union Confederation "Neyavisnost"	100,000	International Trade Union Confederation (member); European Trade Union Confederation (member)
3	Asocijacija slobodnih i nezavisnih sindikata ASNS, Association of the Free and Independent Trade Unions, AFITY	Members from industry and public sector	-
4	Industrijski sindikat, (ISS), Industrial Trade Union of the Serbia	Members mostly from industry sector	IndustriAll-ETU
5	Udruženi sindikati Srbije Sloga Associated Trade Unions of Serbia – Sloga	Members mostly from public and utilities sector	-
6	Konfederacija slobodnih sindikata, Confederation of Free Trade Unions	130,000 Members mostly from public sector	EPSU/PSI, EUROFEDOP, UNI global union

Source: There are no precise data on the number of trade union members. Data on the websites of organizations and published interviews from the previous period are significantly different than some partial research and assessment

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, (PPDIV) Autonomous Trade Union of Workers in Agriculture, Food, Tobacco Industry and Water Management	20,000	CATUS	EFFAT
2	Samostalni Sindikat metalaca Srbije, (SMS) Autonomous Metalworkers Union of Serbia (AMUS)	25,000	CATUS	IndustriAll-ETU; IndustriAll-Global Union
3	GS "Nezavisnost", Teacher's Trade Union	21,000	UGS Nezavisnost	IEI, ETUCE
4	Sindikat radnika gradjevinarstva i industrije gradjevinskog materijala Srbije, (SGIGMS) Trade Union of Workers in Construction and Building Materials Industry of Serbia	14,000	CATUS	BWI EFBWW
5	PTT Serbia, Postal Workers Trade Union Serbia	9,500	Confederation of Free Trade Unions	
6	Unija sindikata prosvetnih radnika Srbije, Association of Teachers Unions of Serbia Serbia	27,000	Confederation of Free Trade Unions	
7	Samostalni sindikat hemije i nemetala Srbije (HEMINS) Autonomous Federation of Chemistry and Nonmetallic Minerals Workers of Serbia		CATUS	IndustriAll-Global Union
8	Samostalni sindikat ugostiteljstva i turizma Srbije, Autonomous Union of Catering and Tourism Workers of Serbia		CATUS	EFFAT
9	Sindikat zaposlenih u zdravstvu i socijalnoj zaštiti Srbije, Health and Social Protection Employees Union of Serbia	55,000	CATUS	EPSU-PSI
10	Sindikat obrazovanja Srbije, Teachers Union of Serbia (TUS)	31,000	CATUS	EI, ETUCE

Source: Data from some partial research

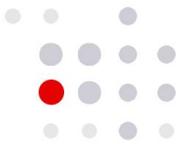


• **Employer’s Organisations Mapping**

Table: Employers’ Organisations

	Employer’s organisations	Number of members	International affiliations
1	Unija poslodavaca Srbije UPS Serbian Association of Employers (SAE) /1994/	100,000 employers	International Organization of Employers - IOE BUSINESSEUROPE, member
2	Asocijacija malih i srednjih preduzeca i preduzetnika Srbije, (APPS), /2008/ Association of SMEE of Serbia		Eurochambers
3	Srpski poslovni klub Privrednik, Serbian Business Club Businessman	It is not registered according to the Labour Code but under the Law of Civil Associations	International employers’ associations Eurochambers

Source: Number of members from partial research



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