

2018

BULGARIA

By Plamen Dimitrov

Socio-economic developments

Industrial relations

Forecasts

Annual Review

of Labour Relations and Social Dialogue

State policies

Tripartite social dialogue



Annual Review 2018

of Labour Relations and Social Dialogue

Bulgaria / By Plamen Dimitrov

- The Bulgarian presidency of the Council of the European Union in the first half of 2018 was the main government priority, with the expectations for strengthening the position of Bulgaria in the European community and for setting goals, which should enhance security, economic activity, protection of consumer rights and protection of the interests of the Bulgarian communities abroad.
- Bulgaria is currently enjoying relatively stable GDP growth. The pace of real economic growth of 3.8 percent in 2017 continued also in 2018 and it is estimated that this level will be preserved in the upcoming years. Despite the economic growth, social indicators did not significantly improve. Bulgaria remains among the poorest countries in the EU. The Gini-coefficient (40.2 for 2017) is increasing compared to the previous year and is the highest in the EU.
- The labour market in 2018 recorded positive changes. The total employment rate grew by about 1-3 percentage points on an annual basis, while the unemployment rate fell below 6 per cent. But the youth unemployment rate is above 13 per cent.
- The trend of an increasing average monthly wage (AW) registered in 2017 continued in 2018; in the third quarter the AW increased by 7.7 per cent on an annual basis. Nevertheless, wages in Bulgaria are still the lowest in the EU. The minimum wage increased to BGN 510 (€ 261), but its sole existence is facing more and more intensive opposition from employers' organisations.
- There have not been significant internal changes regarding social partners' organisations. Trade union and employers organisations membership is decreasing with a slower pace.
- The environment for industrial relations and social dialogue development is worsening. Tripartite social dialogue is more intensive while bipartite dialogue is even deteriorating. Tensions in negotiations on minimum insurance thresholds and on the framework for minimum wage setting became more prominent during 2018.
- The collective bargaining system is still bearing the consequences of the crisis and austerity measures. A trend towards decentralisation of collective bargaining continued. The number of collective agreements (CAs) is decreasing, namely at the company level. The practice of extending sector/ branch collective agreements was abandoned.
- There were a couple of strikes, strike threats and protests in the public and private sectors, mainly to protest against low wages or wage arrears. The campaign of CITUB for higher wages remains a main priority and will be further developed in the framework of the ETUC's Initiative Partnership for Wage Convergence.

Contents

- [Socio-economic developments](#)
- [State policies](#)
- [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

Socio-economic developments

The pace of real economic growth of 3.8 per cent in 2017 slowed down in 2018 - respectively 3.5 per cent in the first, 3.2% per cent in the second and 2.7 per cent in the third quarter but remains above the EU average. Analysis of the factors that contributed to this result in 2017 points to the main contribution of information and communication (growth of 6.0%), agriculture (by 8.9%) but also construction (by 4.4%) and industry (by 4.0%). As far as the GDP drivers are considered, a significant contribution to the growth has been consumption (+4.3%), while the net export is negative (-1.7 percentage points).

For the first time in the post-crisis period a tangible increase of the foreign direct investments (FDI) has been observed. In the period January-December of 2017 the inflow of FDI was € 901.9 million (1.7% of GDP), compared to only € 660 million (1.4% of GDP) in the same period of 2016. The increase on an annual basis is € 241.9 million (or 36.7%). The main net direct investments in the country in 2017 have been from Netherlands (€ 875.7 million), Switzerland (€ 126.6 million) and Germany (€ 94 million). In the first nine months of 2018 however FDI dropped from € 812.0 million in the same period of 2017 to € 230.5 million¹.

In 2017 a trend of improvement of the trade balance (to -1.5% of the GDP) was registered, which is expressed in an increase of the current account surplus (6.4% of the GDP). In January-September 2018 the trade balance was negative at € 2030.4 million (3.8% of GDP) while the deficit for the same period of 2017 was € 194.3 million (0.4% of GDP). In January-September 2018 the current account was positive and amounted to € 2,116.1 million (4% of GDP), against a surplus of € 3,597.4 million (7% of GDP) in the same period of 2017 which means a trend of deterioration.

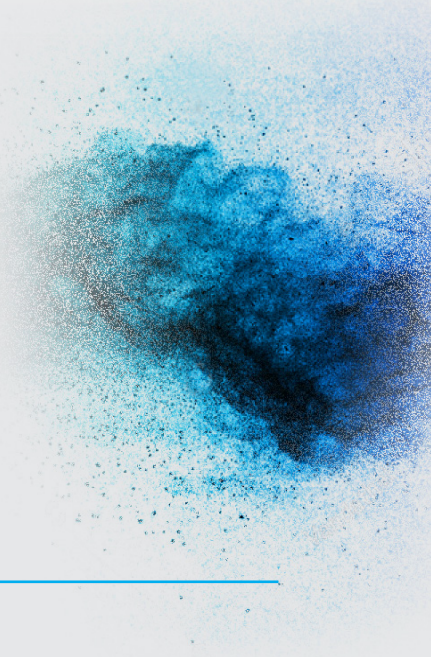
The fiscal balance in 2017 was positive at +0.8% of GDP and the public debt reached 25 per cent of GDP with a tendency of reduction. With the forecasted fiscal deficit target of -1 per cent in the 2018 budget a surplus is expected at the end of the year. This improvement is due to the estimated significant over-fulfilment of tax and social security revenues.

The three-year trend of deflation with an annual average of -1.4 per cent in 2014, -0.1 per cent in 2015 and -0.8 per cent in 2016 ceased in 2017, as the inflation was positive at 2.1 per cent (IPC national statistical data). In the first 11 months of 2018 the CPI increased by 2.8 per cent on an annual basis. EUROSTAT HICP is expected to reach 2.7 per cent for 2018, and then accelerate to 3 per cent in 2019.

The average monthly wage (AW) reached BGN 1037 (€ 530) in 2017 with a nominal growth of 9.4 per cent over the previous year while the real increase was 8.5 per cent. This trend continued in 2018 as well; in the third quarter AW reached BGN 1117 (€ 571) with an increase of 7.7 per cent on an annual basis. The minimum wage increased from the beginning of 2018 to BGN 510 (€ 261), representing 45.7% of AW in the third quarter.

The labour market in 2018 recorded positive changes. The total employment rate grew by about 2 percentage points on an annual basis and reached above 68 per cent. The employment rate was 72.6 per cent for men and 65.0 per cent for women (Q3 2018, population aged 15-64). The gender employment gap is about 7.5 percentage points. The unemployment rate for the first time since the beginning of the 2008 crisis fell below 6 per cent but the youth unemployment rate is above 13 per cent. In the context of an aging population, the increasing brain drain of educated and skilled young people is already creating shortages of a qualified workforce in many sectors. An important issue for the Bulgarian labour market however is the shadow economy, the share of which is estimated at about 30% of GDP.

Despite the economic growth in the last years, social indicators did not significantly improve. Bulgaria remains among the poorest countries in the EU. According to EUROSTAT data (SILC-2017), 23.4 per cent of the population is at risk of poverty after social transfers (compared to the EU28 average of 16.9 per cent). Inequality is increasing. The Gini-coefficient (40.2 for 2017) is the highest in the EU and increased compared to the previous year (37.7).



¹ Provisional data. The Bulgarian National Bank revises the data every month. Final data available after 3 years.

State policies

The Bulgarian presidency of the Council of the European Union in the first half of 2018 was the main government priority, with expectations for strengthening the position of Bulgaria in the European community and for setting goals that should enhance security, economic activity, protection of consumer rights and protection of the interests of the Bulgarian communities abroad. Among the main priorities of the Bulgarian presidency were: the future of Europe and young people as a main priority; the European perspective and the connectivity of the Western Balkans countries; a secure and stable Europe; the digital economy; and the skills needed for the future.

The presidency brought new dynamics into social and political life and the proactive participation of trade unions in a range of formal and informal meetings, forums and conferences under the Bulgarian Presidency programme that provided for inclusion of important social aspects and themes into the agenda.

The Tripartite Social Summit, entitled "Delivering on the European Pillar of Social Rights" on 21 March 2018 in Brussels, focused on: enhancing innovation, job creation and social justice in the multiannual financial framework; new forms of work; the challenges and opportunities for employment and social dialogue; and economic and social cohesion in order to boost growth and sustainability. A high-level international conference "The Future of Work" was held on 21-22 March in Sofia with more than 200 representatives from the ILO, OECD, ETUC, and the EESC at which the social partners from the member states discussed the challenges and opportunities that arise in the context of a highly digitalized and fast-paced world of work. The discussion featured topics such as new forms of employment, working conditions and quality of new jobs, the necessary changes in education, training and retraining, adapting social security and remuneration systems to the new forms of employment, and exchange of good practice.

The Council of the European Union on Employment, Social Policy, Health and Consumer Affairs adopted on 15 March 2018 a Recommendation on a European Framework for Quality and Effective Apprenticeships. The framework includes the ETUC proposals and aims to stimulate the development of appropriate skills, mainly of young people, to accelerate their rapid integration into the labour market and their professional development. The council also endorsed the main messages of the Employment Committee on the implementation of the Youth Guarantee as well as a commitment to building a European Union that provides more opportunities for upward social development and economic growth and in which social and employment standards are equally targeted.

On 16 and 17 April 2018, a high level international

conference on "Social Economy - for Economically Sustainable and Socially Inclusive EU" encouraged an exchange of views on the challenges and opportunities for the future of the social economy in the context of the Digital Revolution and inclusive growth.

The new political, economic, labour and social dimensions of the integration of the Western Balkans into the EU have been discussed in several successive fora: the Economic and Social Cohesion in the Western Balkans region Conference (15 May 2018) organised by the EESC and the EC Technical assistance and information exchange programme, supported by the Bulgarian Presidency and the Bulgarian Economic and Social Council; the International Trade Union Conference "The Voice for Integration of the Western Balkans" (May 16, 2018); and EU - Western Balkans Summit: Growth, Security and Connectivity (May 17, 2018).

The High Level Alliance for the Upward Convergence of Wages in the EU organized by ETUC, CITUB and Podkrepa CL was held at the very end of the Bulgarian Presidency on 26 June 2018. It is described as one of the most important trade union initiatives that will be further developed.

The second half of 2018 was marked by organised and spontaneous civil protests that began in June 2018 with a tent camp of protesting mothers of children with disabilities under the "The System Kills Us" initiative. As a result of their pressure and the ongoing negotiations until December 2018, including Minister of Labour and Social Policy, Bisser Petkov, the Ombudsman of the Republic of Bulgaria, Maya Manolova, experts from the government, social partners and NGOs, a package of laws was adopted for people with disabilities and for personal assistance, and an additional BGN 150 million was allocated in the 2019 budget to finance the increased expenditures for people with disabilities.

The rapid rise in oil and gas prices has led to a rise in fuel, electricity, heating and some basic commodity prices. Some changes in local taxes and fees have sparked additional public tension and a series of protests, marches, cases of civil disobedience, and blocking of settlements and motorways.

The government confirmed the main benchmarks related to labour compensation set out in the Government's Programme (minimum wage of BGN650 and average wage of BGN1500 at the end of the term - 2021). Considering the expected adoption of a mechanism for minimum wage setting by the social partners, the government ratified the ILO Convention 131 on Minimum Wage Fixing in early 2018.

What is subject to constant criticism from trade unions is that all the governments since 2007 persistently maintained a conservative fiscal policy based on low direct taxes (10 per cent corporate tax and 10 per cent flat income tax), a

relatively high VAT rate of 20 per cent and almost annually increasing excise duties. This has led to an unprecedented ratio for the EU of direct and indirect taxes of 25:75 in the tax revenue structure. All trade union proposals for the

introduction of a more redistributive tax system, such as an untaxed amount up to the level of the minimum wage, more progressive taxation, family taxation policy, and a tax on financial transactions have been ignored.

Industrial Relations

The Bulgarian industrial relations system follows the general European trend of deregulation and decentralisation. In recent years, however, the already established mechanisms, and even the very spirit of social partnership and mutual trust at national level, have been challenged. The environment for industrial relations development in Bulgaria is worsening. Tripartite social dialogue is stagnating, while bipartite dialogue at the national level is further deteriorating. Tensions in negotiations between the trade unions and employers' organisations and aggressive behaviour by employers became more prominent during 2018.

The cooperative relationships between national social partners existing in the initial stage of the crisis worsened further in 2018. Negotiations for minimum social insurance income (MSII) in 2018 for a third consecutive year failed as the employer organisations refused to negotiate. The negotiations in NCTC on procedure and mechanism for national minimum wage setting are controversial and it is still unlikely that consensus can be reached in the near future. Employers' organisations have attacked the minimum wage for 2019, fixed by the government on the level of BGN 560 and have demanded abolition of seniority pay (according to length of service) and the minimum social insurance income. Their approach to social dialogue is provoking tension, while their appeal for restricting collective bargaining is leading to confrontation.

Collective bargaining is one of the main elements of the new system of industrial relations established in 1990s. The collective bargaining system is still bearing the consequences of the crisis and austerity measures. A trend towards decentralisation of collective bargaining continued. The number of collective agreements (CAs) is decreasing, namely at company level. Even more alarming is the fact that in most enterprises and companies there are practically no negotiations for a CA (or higher-level agreements apply). The practice of extending sector/branch collective agreements, a legal provision which was granted in the amended Labour Code from 2003, was abandoned (an exception is the CA in the brewery industry). The downward trend is proved by the data on collective agreements in force in 2017 and 2018.

The number of sectoral/branch CAs remains relatively stable (19 in 2017 and 2018). From 2011 to 2018, the number of CAs at enterprise level has decreased by 18.7 per cent. The

data shows that a larger proportion of the CAs are in the public sector - 87.6 per cent (including 6.4% in various public administration structures) and 12.4 per cent are in the private sector (including MNCs and foreign enterprises - 4.1%). By economic activities the largest is the number of CAs education - 750, followed by health care and social work - 300, manufacturing - 121 and public administration - 116².

There are no reliable statistics on industrial disputes. However, according to the information of trade unions and the National Institute for Conciliation and Arbitrage (NICA), both industrial disputes and strikes decreased in the last years.

Protests and discontent of certain groups of public sector employees in 2018, e.g. of the children and school health care personnel in the municipalities of Haskovo and Kardzhali and prison staff, were mainly related to low wages, poor working conditions, understaffing and especially against the funding of some activities in the public sector envisaged in the 2018 budget.

About 1,000 workers in the Maritsa Iztok mines and Maritsa Iztok 2 TPP in the town of Radnevo organized a protest rally. They warned of a permanent deterioration in the financial situation of the major state-owned energy companies and opposed the elimination of jobs in the region. The protests have been also provoked by the shock price increase of the carbon emissions imposed by the new EU climate change requirements, threatening 100,00 jobs in the coal mining and energy sectors, prompting urgent state interference in defence of the national interests and the country's energy independence. The two trade unions, KNSB and Podkrepa CL, have insisted on the adoption of a new energy strategy with a horizon 2030-2050, in which it will be stipulated what share of electricity production will be provided by local coal-fired thermal power plants (currently this share is 45 per cent and guarantees of national energy security).

In 2017, there were not significant internal or external changes related to the structures and organisation of the national representative social partners' organisations. According to the latest official census in 2016 two trade union confederations meet the representativeness criteria: the Confederation of Independent Trade Unions in Bulgaria (CITUB) with 271,312 members and the Confederation of Labour Podkrepa (CL Podkrepa) with 79,567 members.

² NICA (2018). Report on the state of the database for collective agreements to 30 September 2018 (in Bulgarian)

Data in the Annex shows that the trend of declining union membership has continued, albeit at a slower pace than in the initial years of transition. Nevertheless, both confederations managed to recruit new members. In 2017 CITUB reported for the first time since the beginning of transition an increase of its membership by over 7,000 members or by about 3 per cent in the period 2012-2017. There were no major internal developments also in the employer organisations in 2017. The employer organisations officially recognised as representative at national level in

2016 are: Association of Industrial Capital in Bulgaria (AICB); Bulgarian Industrial Association (BIA); Confederation of Employers and Industrialists in Bulgaria (CEIB); Bulgarian Chamber of Commerce and Industry (BCCI); and Union for Private Economic Enterprise (UPEE). The UPEE position in national social dialogue is still unclear as all other employer organisations questioned its representativeness. Membership in and coverage of companies and employees by the employers' organisations are dynamic as shown in the Annex.

Tripartite Social Dialogue

Tripartite social dialogue at national, sectoral and branch levels is developing unevenly and contradictorily. Its development is still influenced by the 2008 crisis and austerity policies followed by the government. The political instability, frequent changes of governments in the last years, unwillingness of the government to share power with the social partners and the lack of readiness of the latter in some cases to seek a mutual compromise have further aggravated the environment for social dialogue.

At the background of the need for adopting a number of amendments to important laws in 2018, the National Council for Tripartite Cooperation (NCTC) accelerated its work and eight meetings were held during the year. Additionally, in 14 cases there was no need to convene NCTC meeting because of a consensus or unanimity reached in the relevant NCTC expert committees. The most important issues discussed in the NCTC in 2018 were: labour migration and labour mobility; working hours, breaks and holidays; social security; actions in

the field of the social economy; policies towards people with disabilities; corporate income tax; the state budget for 2019, the budgets of the State Social Security and the National Health Insurance Fund; and the minimum wage for 2019.

The main points of controversy and sharp disputes between trade unions and employers within the NCTC remain income policy, social security, tax policy and labour migration.

In the course of a year, the chairman of NCTC - Mr. Valeri Simeonov, who served as Deputy Minister for Economic and Demographic Policy in Prime Minister Borisov's cabinet was replaced. Under the pressure of street protests and the tent camp of protesting mothers of children with disabilities against his inconsistency with the 'bon ton' public speeches, he was forced to resign. He was replaced by Mrs. Mariana Nikolova (nominated by United Patriots in the Coalition Cabinet) at the same position in the Council of Ministers and as a Chair of NCTC.

Forecasts

The opposition in the face of the Bulgarian Socialist Party (BSP) and the Movement for Rights and Freedoms (MRF), after three unsuccessful no confidence votes and boycotts of some parliamentary sessions, remains weak and does not represent a viable alternative to current governance. The risks to the ruling coalition in perspective are rather driven by internal contradictions between the three leaders of the parties in the "small coalition" UNITED PATRIOTS, which is a coalition partner of the ruling GERB.

The mid-term forecast for GDP growth of yearly 3.7 per cent in 2019, 3.5 per cent in 2020 and 3.5 per cent in 2021 would secure better prospects for rapid labour market recovery; however there is a need for a substantial increase of domestic investments, as well as for attracting significantly more FDI. Within the planned fiscal consolidation the budget deficit will continue to decrease to -0.5 per cent in 2019 and reaching a neutral position of 0 per cent in 2020 and 2021. The average wage in Bulgaria will continue to grow under

the pressure of strong demand for skilled workforce and its competitive remuneration within the common European labour market. According to the mid-term forecast the minimum wage will increase by yearly steps to reach BGN650 in 2021. However, CITUB considers that this growth is insufficient and should be accelerated to reach 50 per cent of the average country wage.



There is no evidence that social dialogue will improve in the year to come considering the firm position of employers' organisations to boycott the negotiations on minimum social insurance incomes by sectors/branches and their aspiration for decentralisation of collective bargaining. However, as shown in the annex, the situation with collective agreements at company level is not promising at all, as the number of concluded company CAs has steadily declined in recent years. Nevertheless, trade unions will seek opportunities for

improvement of autonomous social dialogue and for effective development of the dialogue on all other levels, as well as continuing to fight for wage increases.

Trade unions will continue their engaged and responsible participation in the European semester and will initiate, support and implement policies and decisions related to the European Pillar of Social Rights and the ETUC's Partnership for Wage Convergence.

Annex - Information about:

- Collective bargaining system

Collective bargaining is one of the main elements of the new system of industrial relations established in 1990s. The Labour Code stipulates that collective bargaining is a right of trade unions and an obligation of employers and the signed collective agreement is mandatory in nature. It is worth mentioning also that only a trade union organisation is entitled to conclude collective agreement. The Labour Code clearly outlines the scope, the parties to a CA, and levels of collective bargaining – enterprises, branches/sectors and municipalities. Since 2003 collective bargaining at branch/sectoral level has been expanded to include annual bargaining of minimum social insurance incomes for each economic activity and for nine occupational groups.

The collective agreement applies to employees who are members of the trade union organisation/organisations that are party to the agreement. Employees who are not members of trade union organisation – party to the agreement – or are not trade union members at all can join the collective agreement with a written application to the employer or to the trade union. Regardless of different attitudes to collective bargaining by

different governments and employers, even in times of crisis, it continues to be an active instrument of industrial relations, creating opportunities to increase the competitiveness of Bulgarian businesses and at the same time protecting the labour and social rights of employees.

The role of the branch collective agreements has become more significant in the period 2010-2012 when a clause for extension over all companies in the respective sector/branch was applied for the first time, despite the legislative provision since 2003. The Minister of Labour and Social Policy, upon request and after consultations with the social partners, has extended the validity of the collective agreements in five branches. The extension was intended to tackle the growing informal economy and to prevent unfair competition and social dumping. This practice was not continued in the following years, however, with the government and employers using the crisis as an excuse to avoid additional commitments. In 2018 only one branch collective agreement was extended, that of the brewery industry with validity till 30 January 2020.

Information about valid collective agreements (CAs), 2011-2018

At the end of	CAs at company/enterprise level	CAs at sectoral/branch level	CAs at municipality level	CAs Total
2011	2081	21	140	2242
2012	2209	25	154	2388
2013	2132	25	160	2317
2014	2013	24	158	2195
2015	1973	22	169	2164
2016	1883	23	149	2055
2017	1812	19	150	1981
September 2018	1692	19	150	1861

Source: National Institute for Conciliation and Arbitrage (NICA)

The main level of collective bargaining remains the enterprise/company level. This decentralisation process has been typical for Bulgaria since the beginning of the transformation process, but during the financial crisis it has been reinforced. The decentralisation is often forced and provoked by employers' sector/branch organisations. So, for example in the production of chemical products there has been no sector collective

agreement since 2002. Similar was the situation in light industry and in some branches of the food production industries. However, after a long period without sector collective agreement in the electronics and electrical engineering industries, the social partners managed to agree a sector collective agreement in 2014 and renewed it for the period 2016-2018.

• System of tripartite social dialogue

Tripartite social dialogue (social partnership) in Bulgaria is well-institutionalised and implemented at different levels. In compliance with the legislative framework and Bulgarian practice, the system of social dialogue is organised along the following levels:

- At national level social dialogue is conducted within the National Council for Tripartite Cooperation (NCTC), set up in 1993. It has standing commissions on different areas.
- At the sectoral/branch level there are 51 sectoral/branch councils for social cooperation with the participation of representatives of the respective representative sectoral/branch employers' organisations and trade unions. In some sectors there are representatives of the state as an employer.
- At the district level (since 2010) there are district councils for tripartite cooperation.
- At the municipal level there are 82 councils for social cooperation. Representatives of municipal authorities take part in the negotiations on budgetary activities (education, health and social care, culture, local government).
- At the enterprise level the participants in the negotiations in special commissions for social partnership are the employer and the existing trade union organisation(s).

NCTC comprises, on a parity basis, representatives of the government, workers' and employers' organisations which are recognised as nationally representative according to a census (conducted every four years) under criteria for representativeness set up in the Labour Code. After the last census of 2016 two trade union confederations and five employers' organisations (instead of four in the period 2012-2015) were recognised as nationally representative.

NCTC is a consultative body in which amendments to social and labour legislation are discussed, as well as policies and documents related to the labour market, vocational training, wages/salaries, incomes, and living standards of the population.

In recent years tripartite cooperation at the national level has been expanding. The social partners participate also in the management and supervision of a number of bodies in the areas of employment, migration, social and health insurance, health and safety at work and vocational education and training, etc. established along a tripartite principle, as well as in the Monitoring Committees of Operational Programmes co-funded by the European Stability Fund and other EU funds.

• Social security systems

Coverage rate of the labour force (LF) by types of insurance (%)*

Insurance type	2010	2011	2012	2013	2014	2015	2016	2017
Health insurance (number of insured persons, in relation to the LF = employed + unemployed persons)	72.8
Pension insurance (number of insured persons related to all employed)	79.7	84.0	80.6	79.8	79.7	80.0	79.8	80.3
Insurance for unemployment (number of insured persons related to all employees)	88.9	92.7	90.5	92.5	92.8	97.3	96.2	97.8

Source: National Social Security Institute (NSSI), various years.

* The coverage is calculated on the basis of data for all insured persons provided by the NSSI. These persons are classified in different groups based on the following features:

1. All employees, including all self-employed persons, are obliged to have pension insurance.
2. Only employees are insured for unemployment.
3. All persons are obliged by law to have health insurance but in practice significant parts of the self-employed are not covered.

• Education and vocational training

The adoption of the Law on Pre-school and School Education, promulgated in the official State Gazette in October 2015 (in force since August 2016), started a process of creating conditions for inclusive education and improving equal access to quality education for disadvantaged groups, including Roma. It is an important step towards comprehensive reform of the school system.

In the last few years the issues related to VET are gaining momentum in the political discourse. In the course of reform the VET system in Bulgaria underwent significant changes, including legislative amendments and institutional changes. Recent (2014, 2016, 2017 and 2018) amendments to the Vocational Education and Training Act (1999) broaden the access to VET through: validation of non-formal and informal learning; provide for better matching between the competences acquired and labour market needs; restructure the state educational standards for VET qualifications; strengthen quality assurance; and introduce dual training. The pilot phase of the introduction of dual training is in progress and it is expected that dual training would be a serious way for overcoming labour market demand and supply mismatches. In 2017-2018 school year the involved employers and schools enlarged the classes, disciplines and the participants in the dual training.

The government has also adopted several strategic documents aimed at supporting the development and improvement of the quality and image of vocational education in the country, including Strategy for VET Development 2015-2020 and Action Plan 2015-2017 for its implementation. The Ministry of Education and Science elaborated a Concept for VET Development discussed in the regions in 2017.

In the field of higher education the 2017 policy focus is on implementation of the Action Plan of the Strategy for Development of Higher Education 2014-2020 and on the regulatory framework (including admissions and the financing model of higher education institutions), promoting activities related to improving the quality of education, learning outcomes in priority economic areas, as well as the successful incorporation of graduates into the labour market.

The government approved the Annual Action Plan 2017 for implementing the National Strategy for Lifelong Learning (2014-2020). The document envisages further implementation of the NQF and ECVET and a series of measures to establish a functioning quality national system of lifelong learning, encompassing all stages (pre-school, school, VET, higher education and adult learning) and forms (formal, non-formal and informal) of education and training, allowing inclusive lifelong learning through flexible pathways.

The Science and Education for Smart Growth Operational Programme is one of the key instruments for achieving the education and training targets adopted by Bulgaria under Europe 2020 in the next years.

Trade union representatives participate in the activities of National Consultative Council on workforce professional qualification and in the Governing Council and expert commissions of the National Agency for Vocational Education and Training (NAVET), built and acting on the tripartite principle.



- Employment rate

Employment rates (%)

	2013	2014	2015	2016	2017	2018- 1 st quarter	2018-2 nd quarter	2018-3 rd quarter
Population aged 15 years and over								
Total	46.9	48.0	49.1	49.3	51.9	51.5	52.5	53.3
Men	51.4	52.7	54.1	54.6	57.8	57.3	58.1	59.4
Women	42.8	43.6	44.5	44.3	46.6	46.1	47.3	47.8
Population aged 15-64								
Total	59.5	61.0	62.9	63.4	66.9	66.5	67.9	68.8
Men	62.1	63.9	65.9	66.7	70.6	70.1	71.2	72.6
Women	56.8	58.2	59.8	60.0	63.1	62.8	64.4	65.0
Population aged 20-64								
Total	63.5	65.1	67.1	67.7	71.3	71.1	72.6	73.5
Men	66.4	68.1	70.4	71.3	75.3	75.0	76.1	77.6
Women	60.7	62.0	63.8	64.0	67.3	67.1	68.9	69.3

Source: National Statistical Institute. Labour force survey, various years.

- Unemployment rate

Unemployment rates (%)

Calculated on the basis:	2013	2014	2015	2016	2017	2018- 1 st quarter	2018-2 nd quarter	2018-3 rd quarter
K ₁ : Population aged 15 years and over	12.9	11.4	9.1	7.6	6.2	5.7	5.5	5.0
K ₂ : Population aged 15-64	13.0	11.5	9.2	7.7	6.2	5.8	5.5	5.0
K ₃ : Population aged 15-24 (Youth unemployment)	28.4	23.8	21.6	17.2	12.9	11.8	15.1	13.4
K ₄ : Registered unemployed persons in the employment offices	11.3	11.2	10.1	8.7	7.2	7.0	6.1	5.6

Source: For K₁, K₂ and K₃ - National Statistical Institute (Labour force survey) and for K₄ - National Employment Agency (registered unemployed persons in Employment Offices), various years.

- Average monthly wages

Average monthly wage – total and by economic sector (in €)

	2013	2014	2015	2016	2017	2018- 1 st quarter	2018-2 nd quarter	2018-3 rd quarter
Total	396	420	449	485	530	551	575	571
Public sector	427	454	473	502	545	559	590	586
Private sector	386	409	441	480	526	548	570	566

Source: National Statistical Institute. Statistics of employment and labour costs, various years. Data for 2017 quarters is preliminary.

- Gender pay gap

There are not significant changes in the remuneration of labour by gender. Traditionally in Bulgaria the gap is about 20 percentage points in favour of men and it is explained mainly with employment specifics – women are employed in large numbers in the so-called “feminised” branches and sectors such as textiles, the knitwear and tailoring sector, retail trade and similar sectors where the average monthly

wage is significantly below the average wage for the country (60-70 per cent). On the other hand, the so-called “male” sectors such as metallurgy, energy/power engineering, coal extraction and ore extraction maintain wage levels far above the average country wage. There is no concrete evidence for a gender pay gap at the same workplace or at least there are no statistics available.

Average monthly wage by gender, in € and women/men wage ratio (%)

	2013	2014	2015	2016	2017	2018- 1 st quarter	2018-2 nd quarter	2018-3 rd quarter
Men	440	467	501	539	589	604	631	628
Women	353	373	395	430	470	496	518	513
Ratio w/m	80.2	79.9	78.8	79.8	79.8	82.1	82.1	81.7

Source: National Statistical Institute. Employment statistics and labour costs, various years. Quarterly data for 2018 preliminary.

- Monthly minimum wage

Monthly minimum wage in the country (in €)

from 1.5.2012	from 1.1.2013	from 1.1.2014	from 1.1.2015	from 1.7.2015	from 1.1.2016	from 1.1.2017	from 1.1.2018	from 1.1.2019
148	158	174	184	194	215	235	261	286

Source: National Statistical institute, various years

- Actual weekly working hours

There is no clearly expressed tendency for a reduction of working time under the crisis conditions, demonstrating that employers are not flexible enough in working time

organisation and tend to choose the option of dismissal of workers rather than looking for ways to maintain employment levels.

Average actual weekly working hours

	2013	2014	2015	2016	2017	2018- 1 st quarter	2018-2 nd quarter	2018-3 rd quarter
Total	40.0	40.0	40.1	40.2	40,0	40.1	39.4	40.2
By Gender:								
Men	40.3	40.4	40.5	40.5	40,4	40.4	39.8	40.6
Women	39.6	39.6	39.7	39.8	39,6	39.7	39.0	39.8
By type of ownership:								
Private sector	40.4	40.5	40.6	40.6	40,3	40.4	39.8	40.6
Public sector	38.6	38.6	38.8	38.9	38,6	38.9	38.2	38.8

Source: National Statistical Institute. Labour force survey, various years.

• Normal work/atypical work

Atypical employment is not widespread in the country – especially part-time and temporary work. More widely spread in the private sector is the “undeclared” employment (the share of the shadow economy in Bulgaria is estimated at over 30 per cent). The largest number of undeclared workers can be seen in construction, hotels and restaurants, and agriculture. Informal employment has two main dimensions – work without employment contracts and employment under contracts with “hidden” clauses (e.g., envelope wages). While we can observe a stable downward

trend of decreasing employment without contracts since 2003, employment with “hidden clauses” shows an opposite trend – it increased to include about 10 per cent of the employees. The social partners are concerned about the prevalence of the shadow economy and its effect on the legitimate businesses and the labour and social rights of undeclared workers. In recent years they have launched a number of joint measures and initiatives for its prevention, including joint projects, training of workers and employers, forums and conferences.

Relative share of the employees by type of contract (in %)

	2013	2014	2015	2016	2017	2018- 1 st quarter	2018-2 nd quarter	2018-3 rd quarter
By the length of working time:								
Full time	97.8	97.9	98.1	98.2	98.1	98.2	98.2	98.3
Part time	2.2	2.1	1.9	1.8	1.9	1.8	1.8	1.7
By type of contract with the employer:								
Labour and civil service contract	97.0	97.0	97.1	97.0	96.8	97.2	97.0	96.4
Civil contract	1.2	1.1	1.0	0.9	0.9	1.0	0.8	0.9
Without any contract	1.8	1.9	1.9	2.1	2.3	1.8	2.2	2.7
By type of working activity:								
Permanent job	94.3	94.7	95.5	95.8	95.5	96.4	95.8	95.1
Temporary/agency work	5.7	5.3	4.5	4.2	4.5	3.6	4.2	4.9

Source: National Statistical Institute. Labour force survey, various years.

- Migration

*External migration by gender**

Number of persons	2015			2016			2017		
	total	men	women	total	men	women	total	men	women
Immigrants in the country	25223	13493	11730	21241	10941	10300	25597	12471	13126
Emigrants from the country	29470	15360	14110	30570	15393	15177	31586	16046	15540
Mechanical increase/decrease	-4247	-1867	-2380	-9329	-4452	-4877	-5989	-3575	-2414

Source: National Statistical Institute (Population and demography), various years.

* Includes only those persons who have declared before administrative authorities a change of their permanent address
- from Bulgaria to abroad and from abroad to Bulgaria.

- Human Development Index

BULGARIA	2013	2014	2015	2017
HDI – Value	0.777	0.782	0.794	0.813
Ranking (from 189 countries)*	58	59	56	51
Life expectancy at birth (years)	73.5	74.2	74.3	74.9
Mean years of schooling of adults (years)	10.6	10.6	10.8	11.8
Expected years of schooling of children (years)	14.3	14.4	15.0	14.8
Gross national income per capita (PPP \$ - 2011)	15,402	15,596	16,261	18,740

Source: UNDP. Human Development Report 2016.

*Ranking scale: 1-47 (Very high HD); 48-94 (High HD); 95-141 (Medium HD); 142-186 (Low HD)

- Gini-coefficient

Gini-coefficient	2013	2014	2015	2016	2017
Bulgaria	35.4	35.4	37.0	38.3	40.2
EU-27	30.5	31.0	31.0	30.8	30.3
Ranking (BG in EU-27)	1	3	3	1	1

Source: Eurostat (SILC)

• Collective agreement coverage

Expert estimates on collective agreement coverage are based on: the changes in the number of signed collective agreements, the approximate number of covered persons and the number of employed persons. In this case the indicator of the coverage rate is influenced more by the number of employed persons than by other factors, which play a less significant role (the number of signed collective agreements and the approximate number of covered persons have remained relatively stable).

According to the latest NSI Structure of Wages survey data in 2014, 29.7% of the employed under labour contract were covered by CAs with slightly higher coverage for women (33.1%) compared to men at 26%. This is due to the fact that highly feminized sectors and activities have a higher CAs coverage, e.g., education – 90 per cent; human health and social work – 58 per cent. The average hourly gross salary of employees covered by a CA (BGN 4.72) is 12.4 per cent higher than those employees not covered by CA employees (BGN 4.20)³.

Collective agreements coverage rate for employees (in %)

2010	2011	2012	2013	2014	2015	2016	2017	2018
35	38	29*	30	30	30	30	30	30

Source: Expert estimate – ISTUR of CITUB

*Data from National representative survey "Work-climate-index" (ISTUR of CITUB)

• Ongoing important collective bargaining agreements

Negotiations at the national level are taking place related to the elaboration of a concept and procedure for national minimum wage-setting. The negotiations are controversial and employers' organisations and trade unions did not reach consensus on some points. In the Country Specific Recommendations of May 2017 and May 2018, the EC noted again the lack of substantial progress in reaching an agreement and the adoption of clear criteria and a mechanism for setting the statutory minimum wage in the country.

Some important sector/branch collective agreements were renegotiated in 2018 in: education, healthcare, transport, construction, the paper industry, railways, tourism and three branches of the cultural sector.

• Trade union density

The explanations of the changes in the collective agreement coverage rate also apply for trade union density. As a rule, when there is higher employment (as Bulgaria had in 2008) the relative share of the trade union membership is lower. When the number of the employees in the national economy decreased, trade union membership density increased due to the fact that the majority of the dismissed/laid off employees were not trade union members. Data from empirical sociological research indicate higher trade union

density (around 21-22 per cent) in 2010 and 2012. This is also due to the fact that members of not recognised as representative trade unions are included in the surveys, while the census data relate only to members of representative trade unions. However, despite the establishment of a number of new trade union organisations in some branches, as a whole the trend towards decreasing trade union density, despite with a lower pace, remains.

*Trade union density (number of trade union members to the number of total employees, %)***

2010	2011	2012	2010	2012	2013	2014	2016	2017	2018
18.9	18.9	16.4	21.2*	21.9*	20.9**	20.9**	15.4	15.2	15.1

Source: *Data from National representative survey "Work-climate-index" (ISTUR of CITUB), **Data from National representative survey "Syndibarometer" (ISTUR of CITUB). Data for 2010, 2011, 2012, 2016, 2017 and 2018 based on the official censuses.*** Trade union density is underestimated as it is calculated on the base of trade union members of representative trade unions only.

³ NSI (2017). Structure of wages in 2014, p. 25

• Employers' organizations density

According to data from the census 2011-2012, the four employer's organisations recognised as representative at the national level for a four-year period were the Bulgarian Industrial Association (BIA), the Bulgarian Chamber of Commerce and Industry (BCCI), the Confederation of Employers and Industrialists in Bulgaria (CEIBG) and the Bulgarian Industrial Capital Association (BICA). The

census of employers' organisations in 2016 recognised as representative five employers organisations, with the Union for Private Economic Enterprising (UPEE) regaining its representative status. The Bulgarian Union of Private Producers 'Vazrazhdane' also applied for recognition of representativeness but failed to meet the representativeness criteria.

Employer's organisations density 2016 (%)

	BIA	BCCI	CEIBG	BICA	UPEE	Total
Membership as % of companies	1.4	10.1	1.1	2.1	0.6	15.5
Membership as % of employees	5.7	14.8	16.4	13.8	2.2	53.1

Source: MTSP. Census data, 2016; NSI, own calculations

• Workplace representation

Bulgarian labour legislation does not provide for establishment of works councils in companies or enterprises. Workplace representation is realised by trade union organisations directly in the workplace and where there are no such organisations representation can be realised through the general assembly or the assembly of the delegates/proxies of the entire company staff. In 2001 the general assembly/assembly of representatives was entitled to additional functions, e.g. the right to choose representatives for the economic and social interests of the employees; the right to choose representatives for participation in the General Assembly of shareholders/partners/associates; and for companies with 50 and more employees – the right to choose a representative in company governing bodies. However, the board level representation is still rarely realised.

In 1997 a Law on Health and Safety at Work was adopted according to which companies with 50 or more employees must establish committees on working conditions. In all other companies (with less than 50 employees) groups on working conditions have to be established. The committees comprise employees and employer representatives on a parity basis.

With the amendments to the Labour Code, in force since July 2006, the election of workers' representatives for information and consultation was stipulated. However the introduction of information and consultation systems is slowing down. Employees' representatives on information and consultation have been elected in only 20 per cent of the enterprises covered by the law.

Furthermore, a law relating to the election of workers/

employees representatives in European Works Councils in multinational companies (MNCs), in bodies of supervision/management in European companies and in European cooperative societies has been in force since 2006. In 2012-2017, both the number of MNCs in the country in which information and consultation systems were established and the number of elected representatives in European Works Councils has increased, with more than 30 MNC subsidiaries having elected representatives in the EWC.

In 2012-2014 CITUB, jointly with the BIA, launched a country-wide campaign "Be Info" to promote and encourage the process of information and consultation in establishments which, as yet, do not have elected employee representatives on information and consultation. A total of 171 establishments/companies throughout the country were visited and the direct result is that 20 per cent of the visited companies created systems for information and consultation, and in some of them trade union organisations were also established.

The campaign was renewed in 2018 and till the end of November more than 160 companies were visited and their representatives were trained both in attendance and distance courses. A National Centre for Information and Consultation of CITUB was established. In 2019, it should provide additional methodological and organisational assistance in the development of information and consultation systems; to provide online consultations and to develop a model for the integration of electronic resources on information and consultation in a single module of the electronic site of the CITUB confederation.

- Trade unions

a. National Trade Union Confederations

Name in Bulgarian	Name in English	Number of members*		International affiliations
		2012	2016	
Trade union confederations recognised as nationally representative				
Конфедерация на независимите синдикати в България	Confederation of Independent Trade Unions in Bulgaria (CITUB)	275 762	271 312	ETUC ITUC
Конфедерация на труда Подкрепа (КТ Подкрепа)	Confederation of Labour Podkrepa (Podkrepa CL)	88 329	79 567	ETUC ITUC
Total		364 091	350 879	

Source: Ministry of Labour and Social policy. Data from the official censuses carried out in 2012 and 2016

b. Trade Union Federations by sector/branch

TRADE UNION FEDERATIONS AFFILIATED TO CITUB

№	Name in Bulgarian	Name in English	Number of members		International affiliation
			2012	2016	
1	Синдикат на българските учители	Bulgarian Union of Teachers (BUT)	70587	80352	ETUCE; EI
2	Федерация на синдикатите от държавното управление и организации	Federation of Independent Trade Unions of State Government and Organisations (FITUGO)	25646	25037	EPSU PSI
3	Федерация на синдикатите в здравеопазването	Federation of Trade Unions – Health Services (FTUHS/ ITUFC)	23152	22126	EPSU PSI
4	Синдикат на железничарите в България	Trade Union of the Railways Workers in Bulgaria (TURWB)	16118	12781	ETF
5	Съюз на транспортните синдикати в България	Federation of Transport Trade Unions in Bulgaria (FTTUB)	11904	11215	ETF ITF
6	Национален браншов синдиката Водоснабдител	National Branch Water-Supply Trade Union (NBTU Vodosnabditel)	10916	10638	EPSU PSI
7	Национална федерация на енергетиците	National Federation of Energy Workers (NFE/NFEW)	9974	9023	IndustriAll-Europe and Global EPSU/PSI
8	Федерация на независимите синдикати на миньорите	Federation of the Independent Trade Unions of Miners (FISM)	9515	9274	IndustriAll-Europe and Global
9	Национална синдикална федерация Метал - електро	National Trade Union Federation Metal-Electro (NTUF Metal-Electro)	9509	10121	IndustriAll-Europe and Global
10	Синдикална федерация на съобщенията	Trade Union Federation of Communications (TUFC)	9128	7787	
11	Федерация на независимите синдикални организации от леката промишленост	Light Industry Trade Union Organisations Federation (FOSIL/LITUOF)	8904	7399	IndustriAll-Europe and Global
12	Федерация на независимите синдикални организации от българската армия	Federation of Independent Trade Unions in the Bulgarian Army (FITUBA)	6432	6266	
13	Независима синдикална федерация на енергетиците в България	Independent Labour Federation of Workers in Energy (NSFEB /ILFWE)	6224	4961	EPSU PSI
14	Федерация на независимите синдикални организации от горското стопанство и дървопреработващата промишленост	Federation of Trade Union Organizations in Forestry and Woodworking Industry in Bulgaria (FSOGSDP)	5783	5737	EFBWW BWI

№	Name in Bulgarian	Name in English	Number of members		International affiliation
			2012	2016	
15	Федерация на независимите синдикати в земеделието	Federation of Independent Agricultural Trade Unions (FIATU)	5620	4845	EFFAT IUF
16	Независим учителски синдикат	Independent Teachers' Trade Union (ITTU)	5437	6097	
17	Независима синдикална федерация на търговията, кооперациите, туризма и услугите	Independent Trade Union Federation of Employees in Commerce, Cooperatives, Tourism, Credit and Social Services (ITUFECCS)	4466	3294	UNI -EUROPA
18	Национален браншов синдикат Висше образование и наука	National Branch Trade Union of Higher Education and Science (NBTU-HES)	4215	4843	
19	Федерация на независимите строителни синдикати	Federation of Independent Trade Unions in Construction (FITUC)	4120	3040	EFBWW BWI
20	Синдикална федерация МЕТАЛИЦИ	Trade union of METALWORKERS (TU METALIZY)	3572	2882	IndustriAll-Europe and Global
21	Национална федерация на труда Химия и индустрия	National Labour Federation of Chemistry and Industry (NLF Chemistry and Industry)	2871	3456	IndustriAll-Europe and Global
22	Федерация на синдикатите от военнопromишления комплекс	Federation of Trade Unions of the Military Industrial Complex (FTUMIC)	2687	2085	
23	Национален банков синдикат	National Banking Union (NBS)	2208	2361	
24	Синдикална федерация на организациите от електрониката, машиностроенето и информатиката	Trade Union Federation of Organizations of Electronics, Machine-building and Informatics (TUFOEMI)	2137	1808	IndustriAll- Europe jointly with FTISI "Podkrepa"
25	Федерация на независимите синдикални организации от хранителната промишленост	Federation of Independent Trade Unions in the Food Industry (FITU-FOOD)	2126	1962	EFFAT IUF
26	Съюз на българските музикални и танцови дейци	Union of Bulgarian Musicians and Dancers (UBMC)	1973	1762	Before 2012 - member of ITUF CULTURE
27	Независима федерация Култура	Independent Trade Union Federation Culture (ITUF CULTURE)	1791	2053	
28	Независима синдикална федерация на кооперативните организации	Independent Trade Union Federation of Cooperative Organizations (ITUFC)	1490	968	
29	Моряшки синдикат	Seamen's Syndicate – Bulgaria	1355	625	ETF; ITF
30	Синдикат Корабостроител	Trade Union Korabostroitel (Shipbuilder) (TU Korabostroitel)	1223	739	
31	Синдикат на туризма в България	Trade Union of Tourism in Bulgaria (TUTB)	1198	1161	
32	Независим синдикат на тютюноработниците	Independent Trade Union of Tobacco Workers (ITUTW)	1131	473	
33	Синдикат на автотранспортните синдикати	Trade Union of Road Transport Workers (TURTW)	1089	935	
34	Синдикат Пиво, Храни и Напитки	Trade Union of Beer, Food and Beverages (TUBFB)	888	982	EFFAT IUF
35	Национален радио-телевизионен синдикат	National Radio and TV Trade Union (NRTVTU)	237	226	
36	Национален синдикат на икономистите и одиторите в България	National Trade Union of Economists and Auditors in Bulgaria (NTUEAB)	29	0	
37	Национален синдикат на пожарникарите и спасителите „ОГНЕБОРЕЦ“	National Trade Union of Firefighters and Rescuers * (NTUFR 'Firefighter')	2300**	2041	EFFUA

Source: Data from the internal registration system of CITUB

* Affiliated to CITUB in late December 2014, not included in the official census conducted in 2011-2012, ** Data for 2014

TRADE UNION FEDERATIONS AFFILIATED TO PODKREPA CL

№	Name in Bulgarian	Name in English	Number of members		International affiliation
			2016	2012	
1	Синдикат Образование	Union of Education	18 032	17462	ETUCE EI
2	Медицинска федерация	Medical Federation	8 074	9140	EPSU PSI
3	Синдикална миньорска федерация	Miners Federation	7 262	7721	IndustriAll-Europe and Global
4	Федерация на транспортните работници	Federation of Transport Workers	5 232	6140	ETF
5	Синдикат на административните служители	Union of Administrative Employees	5 039	5742	EPSU PSI
6	Федерация Енергетика	Federation of Energy	4 483	5573	IndustriAll-Europe and Global
7	Федерация Строителство, индустрия и водоснабдяване	Federation of Construction and Water Supply	5 058	5428	EFBWW EPSU BWI
8	Синдикална федерация на машиностроителите и металоработниците	Trade Union Federation of Metal Workers	4 711	5182	IndustriAll-Europe and Global
9	Федерация Лека промишленост	Federation of Light Industry	2 366	3096	IndustriAll-Europe and Global
10	Федерация Търговия, Услуги, Контролни органи и Туризм	Federation of Commerce, Services, Control Bodies and Tourism	2 350	2916	EPSU PSI
11	Федерация Съобщения	Federation of Communications	2 110	2520	UNI Europe
12	Федерация Химия	Federation of Chemical Industry	2 131	2360	IndustriAll-Europe and Global
13	Федерация Атомна енергетика	Federation of Nuclear Energy	1 412	2030	IndustriAll- Europe
14	Федерация Металургия	Federation of Metallurgy	771	2010	IndustriAll-Europe and Global
15	Федерация Земеделие и горско стопанство	Federation of Agriculture and Forestry	2 173	1906	EFFAT IUF
16	Национален железничарски синдикат	National Railway union	1 695	1804	
17	Национален професионален синдикат на работещите в сигурността и охраната	National Union of Employees in Private Security Services	96	1621	UNI Europe
18	Федерация Техническа индустрия, наука, информатика	Federation of Technical Industry, Science, Informatics	2 251	1577	IndustriAll-Europe jointly with TUFOEMI -CITUB
19	Синдикат Тютюнева промишленост	Union of the Tobacco industry	475	1307	
20	Федерация Хранителна и питейна промишленост	Federation of the Food and Beverages Industry	1 554	1153	EFFAT IUF
21	Синдикат Отбрана	Union of Defence	1 185	1115	EPSU, PSI
22	Федерация Култура	Federation of Culture	1 068	1025	
23	Синдикат на свещено и църковно служителите	Union of Priests and Churchmen	-	821	
24	Национален синдикат Телевизия и радио	National Union of Television and Radio	34	204	
25	Съюз на журналистите в България Подкрепа	Union of Journalists Podkrepa	5	187	EFJ IFJ

Source: Data from the internal registration system of Podkrepa CL

- Employers' Organisations

	Name in Bulgarian	Name in English	Number of members 2012	Number of members 2016	International affiliation
1	Българска стопанска камара – Съюз на българския бизнес (БСК)	Bulgarian Industrial Association - Union of the Bulgarian Business (BIA)	93 branch organisations in 26 sectors; 13,082 companies with 644,723 employees; 120 regional chambers;	117 branch organisations in 117 economic activities; 5 668 members with 132 217 employees; 143 regional chambers	BUSINESSEUROPE, IOE – International Organization of Employers
2	Българска търговско промишлена палата (БТПП)	Bulgarian Chamber of Commerce and Industry (BCCI)	103 sectoral/branch organisations; 21,977 companies with 665,714 employees; 28 regional chambers;	73 branch organisations in 74 economic activities; 39 669 members with 341409 employees; 98 regional chambers	International Chamber of Commerce, Paris; World Trade Centers Association, USA; EUROCHAMBRES
3	Асоциация на индустриалния капитал в България (АИКБ)	Bulgarian Industrial Capital Association (BICA)	38 sectoral/branch organisations; 6,626 companies with 335,805 employees; 75 regional structures.	101 sectoral/ branch organisations in 60 economic activities; 8281 members with 317 617 employees; 171 regional structures.	European Centre of Employers and Enterprises Providing Public Services (CEEP)
4	Конфедерация на работодателите и индустриалците в България (КРИБ)	Confederation of Employers and Industrialists in Bulgaria (CEIBG)	70 sectoral/branch organisations; 5,336 companies with 504,984 employees; 101 territorial bodies.	114 sectoral/ branch organisations in 117 economic activities; 4 598 members with 378 869 employees; 128 regional structures.	International Chamber of Commerce (ICC)
5	Съюз за стопанска инициатива на гражданите (ССИ)	Union for Private Economic Enterprising (UPEE).	Not recognised as representative at national level	40 sectoral/ branch organisations in 39 economic activities; 2651 members with 51 742 employees; 88 regional structures.	International Organisation of Employers (IOE) European association of craft, small and medium size enterprises (UEAPME)

Source: Ministry of Labour and Social Policy. Data from the official censuses of employer organisations held in 2011-2012 and in 2016.



Annual Review 2018

of Labour Relations and Social Dialogue

Bulgaria / By Plamen Dimitrov

About the Author

Plamen Dimitrov is the President of the Confederation of Independent Trade Unions in Bulgaria (CITUB/KNSB), member of the ILO Governing Body and member and Vice-President of the Workers' Group in the European Economic and Social Committee

Imprint

Friedrich-Ebert-Stiftung | Regional Project on Labour Relations and Social Dialogue
Maróthyho 6 | 81106 Bratislava | Slovakia
www.fes-socialdialogue.org

Responsible:

Matthias Weber

Commercial use of all media published by the Friedrich-Ebert-Stiftung (FES)
is not permitted without the written consent of the FES.

The views expressed in this publication are not necessarily those of the Friedrich-Ebert-Stiftung
or of the organization for which the author works.