

Annual Review 2014

Estonia, Latvia, Lithuania - Labour Relations and Social Dialogue

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Executive Summary

In 2015 all three Baltic States will be using euro currency: Estonia joined the first, in 2011; Latvia did it on 1st January 2014, while in Lithuania follows a year later, on 1st January 2015 and becomes the 19th member of the euro zone (Lietuvos Bankas, 2014). Latvia will be the presiding country of the Council of the European Union during the first half of 2015.

At the macro level, all three Baltic States still continued to demonstrate recovery from economic and financial crisis with the GDP growth forecasts for Estonia 1.9%, for Latvia 2.7% and for Lithuania 2.7% in 2014. However, at the second part of 2014 the geopolitical tensions in Russia and Ukraine and subsequent EU sanctions on Russia made a negative impact also on the Baltic states.

Shadow economy in the Baltic states is estimated around 15%-27% of GDP according to different estimations in 2013-2014.

According to the UNDP Human development reports in 2014 Estonia remained in the 33th place as it was also a year ago, Latvia was occupying the 48th place, while Lithuania improved from the 44th place in 2013 up to 35 in 2014.

Trade unions (TU) in the Baltic states still remain generally weak. General perception in the Baltics is the discourse that trade unions are not powerful players. However, in 2014 there were positive trends: for example, in Lithuania the Labour Code and other labour related laws were changed thanks to TU influence.

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1. Report

1.1 Executive Summary

Baltic states entered the EU in 2004 and all have liberal market economies. Estonia joined the euro zone in 2011; Latvia joined on 1st January 2014, and Lithuania will join on 1st January 2015.

In 2014 all three states exhibit recovery trends with GDP forecasted 1.9% for Estonia, 2.7% for Latvia and 2.7% for Lithuania in 2014. Inflation is expected 0.7% for Estonia, 0.8% for Latvia and 0.3% for Lithuania in 2014.

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According to the calculations by Friedrich Schneider, Johannes Kepler University of Linz, shadow economy in Latvia has reduced in recent years. The study reveals that shadow economy in Latvia in 2014 was 24.7% of GDP, in 2013 – 25.5% of GDP, in 2012 – 26.1%. In Lithuania and Estonia, shadow economy is said to be 27.1% of GDP. Schneider's calculations differ from the conclusions of Latvian researchers Arnis Sauka and Talis Putnins. According to their study, shadow economy in Latvia in 2013 was 23.8% of GDP, while in Estonia it was 15.7% and in

Lithuania 15.3% (The Baltic course, 09.10. 2014; Sauka and Putnins, 2013).

Trade unions (TU) in the Baltic states still remain generally weak. Persisting problem in the Baltics is the discourse that trade unions are not powerful players. "People in Estonia still see EAKL as an organisation that goes backwards and try to protect people from change. We have to change that, we want to be in the frontline and make successful changes happen," Peep Peterson, the chairman of the Estonian EAKL said at the BASTUN meeting in November 2014 (Rolfer, 18.12.2014). However, in 2014 there were positive trends with respect to TUs in the Baltic states: for example, in Lithuania several important labour related laws were changed thanks to TU influence.

1.2 Socio-economic developments

Real GDP growth is expected to stabilise at around 2% in 2014 and 2015, affected by regional tensions, but to reach 2.7% in 2016 as external demand gradually recovers (EU economy forecasts, autumn 2014). In 2013 Estonian yearly growth of GDP was 2.2 %, Latvia 4.1 % and Lithuania 3.3% (Eurostat, GDP volumes).

Unemployment in the all three Baltic states continues to decline steadily and is forecasted 7.8% for Estonia, 11.3% for Latvia and 11.2% for Lithuania in 2014 (EU economy forecasts, autumn 2014).

Real GDP growth, volumes Eurostat

Country; year, quarter	2008	2009	2010	2011	2012	2013	2014 f*	2015 *
EE	-4.2	-14.1	3.3	8.3	3.9	2.2	1.9	2.0
LV	-3.3	-17.7	-0.9	5.5	5.0	4.1	2.7	4.3
LT	2.9	-14.8	1.5	5.9	3.7	3.3	2.7	4.2

*EU economy forecast, autumn, 2014.

GDP Volume indices per capita in PPS, 2008 – 2011, Eurostat (updated in December 2014)

Country	GDP				Price level indices for actual individual consumption			
	2010	2011	2012	2013	2010	2011	2012	2013
EE	63	68	71	73	69	59	63	65
LV	54	57	60	64	66	57	60	65
LT	51	65	69	73	66	70	73	78

In Estonia, on June 1, 2014, the foreign direct investment (FDI) figure reported in CEIC's WorldTrend Database was 2.66, decreased -5.95 from 8.61 reported on March 01, 2014. In Latvia, FDI figures for the same period were 1.21 on 1

June 2014, increased 1.04 from 0.17 reported on 1 March, 2014, while in Lithuania figures were - 6.11, decreased -6.36 from 0.25 reported on 1 March, 2014 (CEIC's WorldTrend Database, 2014).

Foreign direct investment, net inflows (% of GDP)

Year/country	2012	2013
EE	7.0	3.9
LV	3.8	2.8
LT	1.4	1.6

Source: World Bank, 2014.

Current account of balance (% of GDP, annual percentage change) EU economy forecast, autumn 2014

Country	2011	2012	2013	2014 f	2015 f	2016f
EE	-0.8	-3.3	-0.9	-2.8	-3.2	-3.7
LV	-3.1	-3.5	-2.2	-2.2	-2.3	-2.8
LT	-3.7	-0.9	1.6	0.8	-0.4	-1.4

Trade balance (goods) (% of GDP, annual percentage change) EU economy forecast, autumn 2014

Country	2011	2012	2013	2014 f	2015 f	2016f
EE	-4.5	-7.4	-5.7	-5.5	-5.8	-6.2
LV	-12.4	-12.0	-10.9	-10.5	-10.6	-10.9
LT	-6.6	-3.3	-2.6	-4.0	-4.8	-5.6

Structural budget balance (% of GDP, annual percentage change) EU economy forecast, autumn 2014

Country	2011	2012	2013	2014 f	2015 f	2016f
EE	-0.2	-0.4	-1.1	-0.8	-0.7	-0.7
LV	-1.1	-0.1	-1.0	-1.5	-1.6	-1.5
LT	-3.8	-2.8	-2.2	-1.8	-1.6	-1.1

Privatization

There are several major state-owned strategic companies in **Lithuania** such as Klaipėdos Nafta (the state oil company), Lietuvos Energija (the state energy company), and Lietuvos Geležinkeliai (the national railway), which could be privatized in coming years (Radzeviciute, 2014). These strategic companies have special status and requirements provided by law, for example (a potential investor must be a member state of the EU or NATO). Also, it is not possible to acquire a controlling stake of shares of such companies, as the law requires that the state possess more than half of all voting shares.

In 2014 **Latvian** government has finally signed the agreement with a group of international investors (the biggest of which is the US Ripplewood Holdings) buying state-held shares in Citadele Bank. The deal would be closed in the first quarter of 2015 and the price can change depending on the bank's performance results in 2014 (BNN, 05.11.14). The final price therefore will be set in the first quarter of 2015. All gains from the possible price correction will be invested in the bank's capital. After the deal is closed, Ripplewood will own a 22.4 percent stake in the bank and the other investors 52.6 percent. Latvia expects to receive about 74 million euros for its

stake in Citadele Bank. Citadele Bank, established as a result of restructuring Latvia's Parex Bank, became operational in August 2010. In late 2008, the Latvian government took over the privately-owned Parex Bank, which was the second largest bank in Latvia at the time, in order to save it from looming bankruptcy amid the global financial crisis.

In **Estonia**, according to the restructuring plan submitted to the European Commission, Infotar, which is a joint owner of the Estonian shipping company Tallink, is also set to become the majority shareholder of Estonian Air (EPB 29.10.2014). If the restructuring program gets the Commission's and of the Estonian government approvals, Infotar is expected to invest in the national airline in the spring of 2015. In 2013, Estonian Air suffered a deficit of 8.1 million euros. During the first six months of 2014 the airline had accumulated a 5-million-euro deficit.

Inflation

According to the EU economy forecast (autumn, 2014) in Estonia inflation fell to 0.9% in the first half of 2014, as global mineral and oil prices markedly declined and trade sanctions related to the crisis in Ukraine pulled domestic food prices downwards.

In Latvia 12-month average rate of **inflation** slowed to 0.3% in September 2014, due to weak energy and food price developments.

Also in Lithuania 12-month average rate of inflation slowed to 0.3% in September 2014, due to weak energy and food price developments.

The annual inflation in Estonia is forecasted 0.7%, in Latvia 0.8% and in Lithuania 0.3%.

Annual average inflation rates (%), Eurostat

Country; year	2008	2009	2010	2011	2012	2013	2014 f
EE	10.6	0.2	2.7	5.1	4.2	3.2	0.7
LV	15.3	3.3	-1.2	4.2	2.3	0.0	0.8
LT	11.1	4.2	1.2	4.1	3.2	1.2	0.3

Sources: Eurostat, Statistics Estonia, Latvia, Lithuania

Unemployment

In **Estonia** unemployment for 2014 is forecasted at 7.8%, decreasing from 8.6% in 2013 and down from 10.0% a year earlier.

In **Latvia** unemployment fell to an average of 11.3% in the first half of 2014 from 12.2% a year earlier.

In **Lithuania** unemployment for 2014 is forecasted at 11.2%, down from 11.8% in 2013 and 13.4% in 2012 (EU economy forecasts, autumn, 2014).

Gini-coefficient (Eurostat) suggests that Latvia is still the most unequal society among the three Baltic states: in 2013 Gini-coefficient for Latvia was 35.2%, while in Lithuania 34.6% and Estonia 32.9%. In all three countries inequality has slightly increased compared to a year earlier.

Population size

As of January 1, 2014 actual population size in Latvia was 2,001,468, in Lithuania population size was 2,944,459 while in Estonia it was 1,315,819. Population in all three countries are declining due to low birth rates and high emigration. In the beginning of 2013-2014 the largest relative decreases in population in the whole EU were reported by Lithuania (-10.6 per 1 000 inhabitants) and Latvia (-10.3 per 1 000 inhabitants).

Age structure was as following, according to Census 2011 (thousands):

Country; by age group	0-14	15-64	65+
EE	15.1	67.2	17.7
LV	13.7	68.9	17.4
LT	13.8	69.7	16.5

Source: National statistics in EE, LV and LT

The **life expectancy** is slowly growing year by year in the Baltic countries. It is the highest in Estonia 76.7 years in 2012), in Latvia it is 74.1 years, and in Lithuania 74.1 years of average life expectancy (Eurostat, 2014).

Shadow economy

There are considerable share of shadow economy in all three states. In Latvia it is the most typical in small enterprises and related to dissatisfaction with tax system in Latvia. In Estonia the construction sector is the most typical where unreported wages are paid, which is also the case in Lithuania (Sauka and Putnins 2013).

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Shadow economy index in Baltic states % of GDP

Country	2010	2011	2012	2013
EE	19.4	18.9	19.2	15.7
LV	38.1	30.2	21.1	23.8
LT	18.8	17.1	18.2	15.3

Source: Sauka, A. and T. Putnins (2013) Shadow economy index in the Baltic states 2009-2013, Stockholm School of Economics, Riga

1.3 State policies

As of 1 January 2015 all three Baltic states will be using euro currency as Lithuania finally joins the Eurozone.

In 2014 the **Estonian minimum wage** is 355 euros a month. From 2015 it will be raised to 390 euros.

The minimum wage in **Lithuania** was 290 euros and was raised to 300 euros a month from 1 October 2014. It was last time increased in December 2012. However, it is still below the poverty limit and one quarter of Lithuanian workers only get the minimum wage.

Minimum wage was also raised in **Latvia**, reaching 320 euros in 2014. Minimum wage will be increased to 360 euros per month (before tax) in Latvia in 2015.

In all three Baltic states child and parent social benefits were increased in 2014 to compensate cuts during the economic crisis in recent years. Increases are expected also in forthcoming years. For example, all top-limit restrictions to social allowances, which were introduced during the economic crisis in 2009 will be abandoned in Latvia in 2015. In case of illness, unemployment benefits, maternity and paternity social allowances will be paid in full amount according to taxes paid by a socially insured person. Also, child allowances are again progressively bigger for each next child in a family: 11.38 EUR per month for a first child, 22.76 for the second and 34.14 for the third in 2015. During the economic crisis only 11.38 EUR was paid for all children therefore crisis hit large families relatively harder than families with one child.

There were also slight **tax reductions** in **Latvia**. Employer's social tax rate has been slightly lowered in Latvia in 2014: from 24.09 to 23.59%. Individual income tax will be reduced from 24 to 23% in 2015. However, income tax for micro-enterprises and individual entrepreneurs is raised from 9% in 2014 to 11% in 2015.

As of 2015 **electric energy** can be bought in an open market in **Latvia and Lithuania**. Electricity market for households and commercial users have been open in Estonia already since 2013.

In late 2014 a novel policy of issuing **e-residence** cards was introduced in **Estonia**. E-residency is a state-issued secure digital identity for non-residents that allows digital authentication and signing of documents. E-residency is provided by the Estonian government, but does not bring physical residency or rights of entry to Estonia or EU. Digital authentication allows to access different e-services (provided both by the public and private sector), and to log in to any online portals that recognize this type of authentication (such as internet banks, government portals etc).

Digital signing allows securely sign any type of documents from anywhere in the world. Within EU, digital signatures are legally binding in all member states. Outside EU, digital signatures are legally binding in the case of mutual agreement between the parties (E-Estonia, 2014).

1.4 Industrial Relations

Estonian presidency in BASTUN² in 2014-2015 highlights its priorities for social dialogue: effective organising and learning of best practices amongst trade unions in the Baltic Sea Region, tackling challenges related to the mobility of labour and to combat social dumping and increasing training opportunities of labour during structural changes of economy.

In the Baltic countries the bargaining coverage is slightly higher than the trade union density, but in both categories the figures are among the lowest in Europe.

In **Estonia** the new government that was formed in March 2014 and, according to the President of the Estonian Confederation of Trade Unions (EAKL), Peep Peterson representative, has changed the climate for trade unions in a positive way. For instance, there are new plans on how to protect workers' health and about more training of adult workers.

EAKL is the major confederation in Estonia and comprises of 20 branch unions with a total of around 30 000 members. Altogether there are around 50 000 people in Estonia are trade union members. However, membership is decreasing and there are no unions for construction workers and office employees.

In BASTUN's High Level Meeting in Tallinn, Estonia, on November 19, 2014, Estonian State President Thomas Hendrik Ilves emphasised a need for a "dramatic change" in the systems for education and vocational training, especially in IT sector (Rofler, 18.12. 2014).

For Estonia priorities of the Estonian confederation EAKL are to promote lifelong learning so workers are able to maintain at work until pension age of 65 as well as ensuring healthy work environments.

President of **Lithuanian** Trade Union Confederation, LPSK Arturas Cerniauskas emphasised at the BASTUN meeting that Lithuanian priorities are: increase of salaries and initiatives to improve workers' rights in work-related legislation.

LPSK is the major trade union confederation in Lithuania with 25 branch unions and a total membership of 55 000, which comprises 10 percent of the country's workforce. The strongest

² The Baltic Sea Trade Union Network – BASTUN – comprises of representatives from the 22 confederations, all together representing 11 million workers.

unions are in the education and health sectors and in industry (Rolfer, 18.12. 2014).

In **Latvia** Free Trade Union Confederation of Latvia (LBAS) Priorities are to demand for the increase of the minimum and average wages and to reduce taxes for small-salary earners as well as increase of social benefits for children and other family members a wage earner has to care for, e.g., relatives with disabilities or old-age parents (LBAS, Tri party meeting 2014)

Representation of public sector employers

On 5 June 2014, amendments to the Labour Code (effective from 12 June 2014) were adopted to improve regulation of labour relations and reduce the administrative burden on employers. A significant change is that public sector employers shall now be represented by the government or an institution authorised by the government. The new version of the Labour Code stipulates: 'Employers – enterprises, agencies and organisations funded from national, municipal and State Social Insurance Fund budgets, as well as from other funds established by the State – shall be represented in the social partnership on national, sectoral (production, services, professional), territorial (municipality, county) levels by the government or its authorised institution'.

1.5 Youth unemployment

All unemployment rates peaked in 2010, with the highest value in youth unemployment (36.2% in 2010) and started to level off in the following years, representing the largest absolute decrease of 10.1 p.p. in youth unemployment during the observed period.

Youth unemployment, less than 25 years, Eurostat

Country	2009	2010	2011	2012	2013
EE	27.4	32.9	22.4	20.9	18.7
LV	33.3	36.2	31.0	28.5	23.2
LT	29.6	35.7	32.6	26.7	21.9

Source: Eurostat

1.6 Forecasts

In **Estonia** GDP growth is expected about 1.9% in 2014.

Very low birth rates and high emigration is expected to reduce the unemployment rate to 6.3% in 2016 down from 8.6% in 2013 and to exert upwards pressure on wages. Labour force participation remains high at close to 70%, and is not expected to change. Inflation fell to 0.9% in the first half of 2014. Inflation is forecasted 1.6% in 2015 and 2.2% in 2016.

The general government balance is forecast to show a small deficit of 0.4% of GDP in 2014. In 2015, the general government deficit is projected to widen to 0.6% of GDP. The public wage bill is expected to grow by more than 5%. Additional social transfers are directed to households, as child benefits are set to double and pensions are planned to increase by 5.9% (EU economy forecast, autumn 2014).

Economic growth slowed to 2.5% in **Latvia** in the first half of 2014.

Growth is projected to be weaker at 2.6% in 2014 and 2.9% in 2015 as compared to 3.8% and 4.1% in the spring forecast. In 2016, growth is forecast to reach 3.6%. The growth pattern is sensitive to geopolitical tensions. (EU economy forecast, autumn 2014).

Construction was the main growth driver in the first half of 2014, while the industrial sector was in a standstill, due mainly to suspended production in some metal processing companies, including the country's largest steelmaker Liepajas Metalurgs resumption of production at Liepajas Metalurgs towards the end of 2014 represents a positive risk to the growth forecast for 2015 (EU economy forecast, autumn 2014).

The annual average unemployment rate is projected to drop steadily to around 9% in 2016. The share of long-term unemployed dropped to around 40% in the first half of 2014 from just over 50% a year earlier. Wages increased by 7% over the same period, pushed by a 12% hike in the minimum wage at the beginning of 2014. (EU economy forecast, autumn 2014).

Latvia's inflation is forecast to rebound from 0.8% in 2014 to 1.8% in 2015 due to the forthcoming deregulation of household electricity prices at the beginning of 2015.

The general government deficit is estimated at 1.1% of GDP in 2014. The general government deficit is projected at 1.2% of GDP in 2015 and declining to 0.9% of GDP in 2016.

The personal income tax will be further reduced to 22% in 2016. The share of social security contributions diverted to private pension funds will increase from 4% in 2014 to 5% in 2015 and then to 6% in 2016.

Pension indexation, increasing family benefits per child and electricity cost assistance to vulnerable households will all contribute to an increase in social benefits. Public sector wage increases are expected to match those in the private sector in view of the government's initiative to reduce the pay gap especially for skilled specialists.

The gross government debt level is projected to reach 40% of GDP by the end of 2014, including reserves accumulated for a large repayment of EU financial support due in 2015. Following this repayment, Latvia's debt should decline over the following years, helped by GDP growth which should outpace the government's net borrowing.

In the first half of 2014, real GDP expanded by 3.1% compared to the same period last year. Real GDP growth is set to decrease in the second half of the year, resulting in an overall growth rate of 2.7% in 2014 as a whole, as the EU sanctions to Russia are set to have a negative impact. Real GDP is forecast to grow by 3.1% in 2015 and 3.4% in 2016.

The unemployment rate is set to continue declining, from 11.2% in 2014 to 9.5% in 2016.

Inflation is forecast to remain at this level until early 2015. A slight pick-up is expected, also due to a small one-off effect from the euro changeover. Overall, inflation is forecast to stand at 0.3% in 2014, 1.3% in 2015, and 1.9% in 2016. In 2014, the general government deficit is forecast to decrease to 1.2% of GDP, from 2.6% in 2013.

In **Lithuania**, in the first half of 2014, real GDP expanded by 3.1% compared to the same period last year, driven by strong domestic demand. Real GDP growth is set to decrease in the second half of the year, resulting in an overall growth rate of 2.7% in 2014 as a whole.

Real GDP is forecast to grow by 3.1% in 2015 and 3.4% in 2016.

In early 2015 a small increase is expected, also due to a small one-off effect from the euro changeover inflation is forecast to stand at 0.3% in 2014, 1.3% in 2015, and 1.9% in 2016.

2. Annex of data

Acronym	Full Name
CDEFOP	European Centre for the Development of Vocational Training
EIRO	European Industrial Relations Observatory
ETUI	European Trade Union Institute
ES	Eurostat
IOM	International Organization for Migration
ML	Ministry of Labour
ND	National Data
OECD	Organisation for Economic Co-operation and Development (OECD)
UN	United Nations
U	Universities
WB	World Bank

2.1 Structure of the economy

Enterprise size and class analysis of non-financial business economy by country (2009-2012)

Country	Total of enterprises	Micr o %	Sma ll %	Mediu m-sized %	Larg e %
EE	50.600	86.8	10.7	2.1	0.3
LV	78.280	88.3	9.6	1.8	0.2
LT	113.059	88.0	9.9	1.9	0.2

Source: Eurostat

Total market (EUR) by turnover, EE 2011; LV and LT 2010, % of all enterprises

Country/turnover	0-0.3m	0.3-1.5m	Above 1.5
EE	89	7	4
LV	94	4	2
LT	85	10	5

Source: Baltic Business Outlook, January, 2014

New companies established

Country	2012	2013
EE	20,087	20,654
LV	16,889	16,365
LT	14,832	13,449

Source: Baltic Business Outlook, January, 2014

2.2 Collective Bargaining System

Both union density and bargaining coverage are lower in the Baltic States than in the other EU countries. In all Baltic countries single employer bargaining at the level of the company is predominant.

Estonia: In beginning of 2011 there were 195 agreements on the database of the Estonian Social ministry, which were stated to be current, and 29 agreements had been signed in 2010. (Fulton 2011; ETUI)

Latvia: The most important level is the company-level bargaining. Sector-level bargaining occurs in some sectors (railways and metalworking). Regional agreements are concluded with local governments and other regional organisations in other sectors, for example, in education a trade union has concluded 380 general agreements. At the start of 2008 there were 1,921 company and organisation level agreements, compared with only 23 industry level agreements, according to the Latvia's Trade Union confederation. Collective bargaining is more important in the public sector and large state-owned companies, than in the private sector.

Lithuania: In 2009 expert estimates show that perhaps 15% of all employees were covered by collective agreements in Lithuania, according to Eurofond EIRO research. However, in reality in might be much less as figures from inspections by the state labour inspectorate in 2010 show. Here, only 248 companies and organisations had signed a collective agreement out of 12,411 inspected – which is only 2.0%. Figures for 2009 were similar, with 15,935 inspections and 290 collective agreements which is 1.8%. (Fulton 2011; ETUI).

In Lithuania the rules for interpreting collective agreements were not laid down in the Labour Code of the Republic of Lithuania until 1 July 2014 (Blaziene and Zabaraskaite, 2014). The suspension of strikes, for example, was previously governed by the general provisions of the Code of Civil Procedure which gave no legal grounds for stopping strikes, and employees' right to collective bargaining was therefore restricted. Thanks to new amendments to the Labour Code strike suspension is now regulated by defining in more detail those occupations that are of vital importance to the public, justifying suspension of industrial action by the courts in the public interest. A new article (101) stipulates that collective labour contracts and agreements shall be interpreted in accordance with the principles of the Labour Code and, where there is uncertainty about the provisions governing employment relations, those that are more favourable to employees shall apply.

In 2014 changes to dispute resolution were also introduced in Lithuania. The Third-Party Court has been abolished as a body for labour disputes resolution. The functions of the government in collective dispute resolution have been transferred to the Labour Arbitration system where final decisions will be made by impartial arbitrators.

This will also ensure that when collective disputes arise among public sector employees, the government – which is indirectly their employer – will not be involved in the objective resolution of such disputes (Blaziene and Zabaraskaite, 2014). Before the amendments came into force, the Labour Code absolutely prohibited strike action while there was a collective agreement in force. This prohibition is lifted and circumstances in which strikes are prohibited are clearly specified. First, employees of emergency medical services and other employees whose rights to strike are restricted on the grounds of public safety or interest are prohibited from calling a strike. Requirements or demands put forward by such employees shall be settled by the Labour Arbitration system. Second, while a valid collective agreement is in force, no strike can be called over the requirements or working conditions regulated by the agreement if its provisions have been complied with. The restriction on strikes shall not apply if bargaining permitted by the collective agreement ends in disagreement between the parties.

The areas of vital importance for the public in which employees' right to strike include railways and urban public transport, civil aviation enterprises, medical institutions, water, electricity, energy, heat and gas supply, sewage, waste collection and elevator companies. A court may postpone a proposed strike in any of these areas for 30-days, or suspend an on-going strike for the same period if there is a direct threat that the provision of minimum services necessary for vital public needs is threatened.

2.4 Social security systems

Population over 60 years, 2010

Country	% of total population
EE	23
LV	23
LT	22

Source: World Social security report 2013/2014, Help Age pension databasis

Average monthly old-age pension in Baltic states

Country; year	2008	2009	2010	2011	2012	2013 4q
EE	...	301.3	304.5	305.1	312.9	331.3
LV	200	230	250	254	258	264.20
LT	...	233	217	217	236	...

Source: Statistical offices of Estonia, Latvia and Lithuania

Lithuanian trade unions were the leading initiators of the amendments to the Labour Code and they are satisfied with them.

In March 2014 the Financial Sector Trade Union of Latvia and the Association of Estonian Financial Sector Employees signed a memorandum of cooperation. The goal of this memorandum was to develop cooperation and information exchange between the employees of the financial sector in Latvia and Estonia in order to create a stable, secure employment. (Baltic course, 03.04.2014).

2.3 System of tripartite social dialogue

According to the research carried out by Kallaste and Woolfson (2013), in **Estonia** in March 2009 there was a tripartite agreement on training and retraining for employed and unemployed. The trade union confederation (EAKL) argued, like their counterparts elsewhere in Europe that government should concentrate on increasing state revenues and enhancing the purchasing power of population as a way out of the crisis. Their key demand was that all future changes concerning social protection should be made through tripartite dialogue.

In **Latvia** in June 2009 there was agreement on how to cut the budget deficit by 500 million LVL (771.4 million EUR) (The Cabinet of Ministers of the Republic of Latvia 2009).

In **Lithuania** in October 2009 there was a social partners' agreement on planned austerity measures during economic crisis.

2.5 Education and vocational training

Participation in general and vocational education

Students in upper secondary general and vocational education as % of all upper secondary students, in 2011

Country; year	Students at ISCED level 3 general orientation as of % all students at ISCED level 3	Students at ISCED level 3 Vocational orientation as of % all students at ISCED level 3	Students at ISCED level 4 Vocational orientation as of % all students at ISCED level 4
EE	65.6	34.4	100
LV	62.2	37.8	100
LT	71.6	28.4	100

Source: CDEFOP, based on Eurostat, EU Labour force survey

Tertiary level attainment % of population 30-34, who have completed tertiary level education

Country; year	2008	2009	2010	2011	2012	Target 2020
EE	34.1	35.9	40.0	40.3	39.1	40
LV	27	30.1	32.3	35.7	37.2	34
LT	39.9	40.6	43.8	45.4	48.6	40

Source: CDEFOP, based on Eurostat, EU Labour force Survey

Adult participation in Lifelong Learning (persons aged 25 to 64 who stated that they received education or training in the four weeks preceding the survey) %

Country; year	2008	2009	2010	2011
EE	9.8	10.5	10.9	12
LV	6.8	5.3	5	5
LT	4.9	4.5	4	5.9

Source: CDEFOP, Eurostat, EU Labour force Survey

In Latvia LBAs chairs the expert advisory board of 12 sectors in vocational education and also life-long learning needs; however, life-long learning as vocational training for adults is a rather neglected area in Latvia.

Most difficulties in vocational training and life-long learning improvement are associated with the lack of financial means.

2.6 Employment rate

Employment rate age group 20-64 and by gender, 2013, Eurostat

Country	Total	Men	Women
EE	73.3	76.7	70.1
LV	69.7	71.9	67.7
LT	69.9	71.2	68.6

2.7 Unemployment rate

*Unemployment rate in the Baltic states, Eurostat**

Country	2009	2010	2011	2012	2013	2014f
EE	13.8	16.9	12.5	10.2	8.6	7.8
LV	18.2	19.8	16.2	14.9	12.2	11.3
LT	13.6	18.0	15.3	13.3	13.4	11.2

**Eurostat chosen for comparative reasons in three states*

2.8 Net average annual salaries

Country	2009	2010	2011	2012
EE	6,353.39	6,438.00	6,663.55	7,358.40
LV	5,137.18	5,095.70	5,315.83	5,624.47
LT	4,522.84	4,439.13	4,555.16	4,764.75

*net salary after taxes and with social allowances calculated as for a single parent without children allowances 50% of AW.

Average monthly net salary in Estonia in 2014 q2 was 841 EUR, in Latvia it was 566 in 2014 q3, while in Lithuania it was 1,868 LTL (540 EUR).

2.9 Gender pay gap

In 2011 the highest gender pay gap in EU occurred in Estonia with 27.3% whereas in Latvia 13.6% and Lithuania GPG stood at 11.9%. In

Estonia the highest GPG was found in industry, energy and construction.

Gender pay gap in unadjusted form in %, Eurostat

Country	2008	2009	2010	2011
EE	27.6	26.6	27.7	27.3
LV	11.8	13.1	15.5	13.6
LT	21.6	15.3	14.6	11.9

2.10 Net monthly minimum wage (1/4 page) (ND)

Gross minimum wages EUR/month

Country	2009	2010	2011	2012	2013	2014
EE	278	278	278	290	320	355
LV	255	254	282	286	285	320
LT	232	232	232	232	290	290/300

Monthly minimum wages as a proportion of the mean value of average monthly earnings %

Country	2008	2009	2010	2011	2012
EE	34.9	36.2	35.6	33.8	33.5
LV	36.2	40.9	42.2	45.1	43.8
LT	39.6	40.5	42.0	44.1	40.8

Source: Eurostat

2.11 Actual weekly working hours

Actual working hours in Estonia range between 37.8 hours per week to 39.5 hours per week,

while in Latvia it is 38.1 to 39.1 hours per week. In Lithuania actual weekly hours range from 38.0 to 39.0, according to Eurostat data.

2.12 Normal work / atypical work

There are no national definitions on precarious work; limited duration contracts and part-time is

considered as atypical work. Key typical work employment Statistics in the Baltic states:

Employees with contract of limited duration, (% of dependent employment) Eurostat

Country	2008	2009	2010	2011	2012
EE	2.4	2.5	3.7	4.5	3.7
LV	3.3	4.3	6.8	6.5	4.7
LT	2.4	2.2	2.4	2.8	2.6

Part-time employment (% of total employment by gender), 2013 Eurostat

Country	total	men	women
EE	10.2	6.2	14.2
LV	8.1	6.1	10.0
LT	9.0	7.1	10.8

2.13 Population size and Out-migration in Baltic states*

Country	Current population size, millions as of 1 January 2014
<i>Estonia</i>	1.32
<i>Latvia</i>	2.00
<i>Lithuania</i>	2.94

Sources: *Latvia Population census, Lithuania population census, Statistics Lithuania, Statistics Estonia*

*Population decreases mainly due to negative net migration and low birth rates; however, registered and unregistered return migration from the EU countries also takes place therefore population is fluctuating.

Latest population censuses in 2011 are the most reliable sources to estimate out-migration that is vast in all three countries, but especially in Lithuania and Latvia.

2.14 Human Development Index (HDI)*

Country	2009	2010	2011	2012	2013
EE	0.835	0.837	0.838	0.846	0.840
LV	0.798	0.802	0.805	0.818	0.810
LT	0.802	0.805	0.810	0.814	0.834

*Index is measured from 0 to 1, where 0 means underdevelopment and 1 is the highest development achieved.

2.15 Gini-coefficient on Income (Eurostat)

Country	2009	2010	2011	2012	2013
EE	31.4	31.3	31.9	32.5	32.9
LV	37.4	36.1	35.2	35.9	35.2
LT	35.5	36.9	32.9	32.0	34.6

2.16 Collective agreement coverage

Employees covered by wage bargaining agreements as a proportion of all wage and salary earners in employment with the right to bargaining, %

Country	2008	2009	2010	2011
EE	...	25	22	20
LV	25	...	...	...
LT	15	...	13	12

Source: Visser 2013 databases, Union coverage (AdjCov).

2.17 On-going important collective Bargaining agreements

The **Estonian** Seamen's Independent Union (EMSA) strike was held on 13 January 2014. ESMA's representatives demand fair pays for crew of those ships which sail with Estonian flags. However, currently the smallest wage totals 667 euros, which could be decreased by ten percent during a trial period. EMSA demands a pay rise by at least 15%.

EMSA comprises in excess of 2,000 members, of them more than 1400 work for Tallink Grupp

(Baltic course, 14.01.2014). By the end of January 2014 *Tallink* achieved 8.4% wage increase agreement with trade unions. (Eupolitics, 30.01.2014).

The **Latvian** Trade Union of Education and Science Employees held its largest protest on May 12, when more than 7,000 education and science workers from all over Latvia took part in a rally demanding higher state funding for

education. In November 2014 the Latvian Trade Union of Education and Science Employees considered to go again on strike as the EUR 3 million that the government has decided to allot for teachers' salaries is not sufficient, taking into account that Education and Science Ministry originally requested EUR 36 million (Baltic course, 13.11.2014). The Latvian government, however, said, it may consider publishing openly salaries of teachers to reveal that many receive decent income per month and to dismiss a myth of low earnings by teachers in Latvia.

Around 120 schools and 5,000 to 6,000 teachers participated in the strike in Vilnius, Kaunas and Klaipeda, Andrius Navickas, Chairman of **Lithuanian Education Employees' Trade Union (LSDPS)** said.

Among the teachers demands include calls for higher pay. Monthly salaries for teachers currently stand at 350 euros. Teachers want to raise it to 370 euros. Teachers also want to sign a collective labour agreement in order to retire at the age of 55 (Baltic times 01.12.2014. and Baltic course, 02.12.2014).

2.18 Trade union density

(percentage of employees who are members of a trade-union, please discriminate public from private sector)

Numbers of employees who are members of trade unions are declining in the Baltic states. See below tables of earners in employment in

comparison with members of trade unions and union density:

Wage and salary earners in employment (thousands)

Country; year	2008	2009	2010
EE	584,5	628,8	520,7
LV	965,2	840,7	...
LT	1318,7	1219,8	...

Source: Visser databases 2013, WSEE

Total and net numbers of employees who are members of a trade-union, thousands

Country	Total			Net		
	2008	2009	2010	2008	2009	2010
EE	52,8	51,5	51,0	42,5	42,0	42,0
LV	152,0	...	...	142,9*	...	...
LT	120,2	...	...	111,7	115,4	...

Source: Visser databases 2013 *8000 were retired members at LBAS.

Union density (UD). Net union membership as a proportion wage and salary earners in employment

Country	2008	2009	2010
EE	7.1	7.7	8.1
LV	14.8	...	...
LT	8.9	9.5	10

Source: Visser databases 2013

2.19 Employer's organizations density

Biggest trade associations of **Estonia** are represented in the Estonian Employers' Confederation. Unions in energy, education, medicine and maritime sectors are generally more active than others. According to Eurobarometer, only 3 percent of Estonian workforce is unionized. All together the Confederation represents over 1,500 Estonian enterprises, which in total employ around 145,000 workers. According to Estonian Employers' Confederation, it covers approximately 10% of Estonia's workforce. Also Estonian

Chamber of Commerce and Industry (Koda) is active in representing employers' interests'.

In **Latvia Employers' Confederation of Latvia (LDDK)** is the biggest organization representing the interests of employers. LDDK involves 42 branch and regional associations and federations, as well as enterprises that employ over 50 people. The members of LDDK employ at large 35% of employees in Latvia. Also Latvia's

Chamber of Commerce and Industry (LTRK) is a vocal player in support of employers' interests.

Lithuanian Confederation of Industrialists (LPK) - is a major business organization in Lithuania. The Confederation unites 37 branch and 9 regional business and industry associations which consist of over 2700 medium and large sized enterprises from various sectors. LPK unite over 35% of the Lithuanian work force.

Lithuanian Business Employers' Confederation (Lietuvos verslo darbdavių konfederacija, LVDK)

is an independent non-profit organization that operates in whole Lithuania, uniting small and medium business subjects - individual businessmen as well as regional and sectorial associations of SME's, more than 1800 enterprises and about 60 associated structures. The majority of the members (about 90 percent) of LVDK are representatives of small and medium business (the number of their employees does not reach 250).

2.20 Workplace representation

Estonia: The law provides for a dual-channel system of employee representation in companies; trade union representatives and employee trustees may be present in a single company at the same time. A trade union representative is elected among the trade union members working in the respective establishment, an employee trustee is elected by the employees' general meeting to represent all employees working in the company.

According to the Estonian Employees Representative Act, collective bargaining and collective dispute resolution are the privilege of the trade unions. If no trade union representative is present in the company, the employee trustee is entitled to conclude collective agreements or represent employees in collective dispute resolution (EIRO).

Latvia: Employee representation at the workplace is regulated by Section 10 of the Latvia's Labour Law on the Representation of Employees. It is regulated through the mediation of employee representatives. (1) In an enterprise where are at least five employees can elect a representative of a trade union who represents other workers in negotiations with an employer. (2) If there are

several trade unions, they shall authorise their representatives to participate in joint negotiations with an employer in proportion to the number of members of each trade union. If representatives of one employee trade union or representatives of several such trade unions and authorised employee representatives have been appointed for negotiations with an employer, they shall express a united view.

Lithuania: According to the Lithuania's Labour Code, in labour relations the rights and interests of employees may be represented and protected by the trade unions. Where a company, agency or organisation has no functioning trade union and the staff meeting has not transferred the function of employee representation and protection of employees to the trade union of the appropriate sector of economic activity, the workers shall be represented by the works council elected by secret ballot at a general staff meeting. The activities of works councils are regulated by the law on works councils. A works council shall be established for a term of three years, which shall begin when a works council starts its operations. The works council has the same rights and obligations in the company as the trade union, including the right to call a strike. (EIRO)

2.21 Trade union mapping - Latvia

2.20	in National Language	in English	
Name of TU Federation/ Confederation/Trade Union	Latvijas Brīvo arodbiedrību savienība (LBAS)	Free Trade Union Confederation of Latvia	
Founding Year	1990		
Sector/Branch	20 branches		
Cycle of Congresses/ Last Congress	Five years cycle; last 7 th Congress was held on 2 December, 2011		
Important Functionaries (Chairman, President, International Secretary, Youth Leader, etc.)	Name	Function	Homepage
	Pēteris Krīgers	Head of LBAS	www.lbas.lv
	Līvija Marcinkēviča	Deputy head of LBAS	
	Egils Baldzens	Deputy head of LBAS	
	Ieva Freiborne	Coordinator, cooperation between TUs	
Ruta Porniece	Youth council		
Number of Members (please comment on the official number applying a sensitive approach)	165,000 members (Source Trade Unions) According to Visser databases, 80 000 of members of these are retired. However, many pension-age trade unionists still continue working. All together with the retired members, trade unions covers about 10% of employees. According to Eurobarometer TUs cover about 9% of employees in Latvia.		
Finance (major sources of finance, please comment on the official figures applying a sensitive approach)	Membership fees, usually 1% of monthly wage; European Social Fund		
Cooperation in national committees	<ul style="list-style-type: none"> • Government; • Ministries; • Latvian Employers Confederation; • Union of Local Governments of Latvia; • Latvian Students' Association; • National Youth Council of Latvia; • Latvian Gender Equality Association; • State Labour Inspection; • State Employment service; • European Movement in Latvia; • Latvian Pensioners' Federation; • Political parties; • State Social Insurance agency; • Health Compulsory Insurance State Agency. 		
Memberships	Regional Umbrella Associations	Global Umbrella Associations	
	ETUC	ITUC	
	Baltic Sea Labour Network; BUSINESSEUROPE; CEEP;	UEAPME;	

Most important trade unions in Latvia:

Nursing and Health Care Personnel Trade Union

President Daina Brūvele

Education and Science Workers Trade Union

President Ingrīda Mikiško

Trade Union "Energija"

President Jevgenija Stalidzane.

Health and Social Care Workers Trade Union

President Valdis Keris

2.22 Trade union Mapping - Estonia

2.20	in National Language	in English	
Name of TU Federation/ Confederation/Trade Union	Eesti Ametiühingute Keskliitu	The Estonian Trade Union Confederation (EAKL)	
Founding Year	1990 (on the basis of Confederation of Estonian Trade Unions founded in 1927)		
Sector/Branch	The Estonian Trade Union Confederation comprises 20 branch unions.		
Cycle of Congresses/ Last Congress	Once every four years; last congress on 25 November 2011		
Important Functionaries (Chairman, President, International Secretary, Youth Leader, etc.)	Name	Function	Homepage www.eakl.ee
	<u>Peep Peterson</u>	Chairman	
	Andrei Vössoven	The Chairman of the Youth Committee	
Number of Members (please comment on the official number applying a sensitive approach)	47,500 according to Trade unions; covers about 7.5%, according to the Estonian Trade Union Confederation; according to Eurobarometer, covers only 3% of workforce but trade unions disagree with this survey (Postimees 22.03.2013)		
Finance (major sources of finance, please comment on the official figures applying a sensitive approach)	Membership fees; no other data available		
Cooperation in national committees	N/A		
Memberships	Regional Umbrella Associations	Global Umbrella Associations	
	ETUC	ITUC	

Most important trade unions in Estonia:

Education Workers' Trade Union

President Kalle Kalda

Railway Employees' Trade Union

President Oleg Tšubarov

www.evray.ee

Federation of Estonian

Healthcare Professionals' Unions

President Piret Kruuser

www.hot.ee/ettal

Estonian Union of Healthcare Professionals

President Ivi Luik

www.kutseliit.ee

Estonian Transport Workers' Union

Vice-President Jaan-Hendrik Toomel

www.etta.ee

Estonian Nurses' Union

President Ester Pruuden

www.ena.ee

2.23 Trade Union Mapping - Lithuania

2.20	in National Language	in English	
Name of TU Federation/ Confederation/Trade Union	Lietuvos profesinių sąjungų konfederacija (LPSK)	Lithuanian Trade Union Confederation	
Founding Year	2002		
Sector/Branch	26 branches		
Cycle of Congresses/ Last Congress	N/A		
Important Functionaries (Chairman, President, International Secretary, Youth Leader, etc.)	Name	Function	Homepage
	Artūras Černiauskas	President	http://www.lpsk.lt/en/
	Algirdas Kvedaravičius	Vice-President	http://www.lpsk.lt/en/
	Janina Matuizienė	Secretary General	
	Goda Neverauskaitė	International Secretary and President of Youth centre	
Number of Members (please comment on the official number applying a sensitive approach)	124,000, TUs cover about 15% of employees; according to Eurobarometer 2013 it is 9%.		
Political Orientation (short story in three lines)	In general, the overall political parties and views in Lithuania cannot be compared to e.g., old 'Western' traditions; even the most leftist parties are more to the right in Lithuania. The trade unions represent the left as it can be.		
Cooperation in national committees	Tripartite Council of the Republic of Lithuania		
Memberships	Regional Umbrella Associations	Global Umbrella Associations	
	ETUC	ITUC	
		Cooperates with ILO	

Most important trade unions in Lithuania:

Lithuanian Federation of Railway Workers Trade Unions
President Vilius Ligeika
www.lgpf.lt

Lithuanian Federation of Roads and Transport Workers Trade Unions
President Bronius Bučelis

Lithuanian Trade Union of Commercial and Cooperative Employees
President Regina Vaičiulionytė
www.profsajunga.lt

Lithuanian Teachers' Union
President Jūratė Voloskevičienė
www.lmps.lt

Lithuanian Nurses' Organization
President Danutė Mergelienė
www.lssso.lt

Lithuanian Building Workers Trade Union
President Vytautas Talmantas

Lithuanian Trade Union of Health Care Employees
President Aldona Baublytė
www.lsadps.lt

Federation of Lithuanian Education and Science Trade Unions
President Ričardas Bartkevičius
www.svietimoprofsajunga.lt

Lithuanian Federation of Agricultural Workers Trade Unions
President Regina Dapšytė
www.lzud.lt

2.24 Employers' Association Mapping - Latvia:

2.22	in National Language	in English	
Name of the association	Latvijas Darba devēju konfederācija (LDDK)	Employers' Confederation of Latvia	
Founding Year	1993		
Sector/Branch	68 branches/ more than 5000 employing more than 50 employees		
Cycle of Congresses/ Last Congress	N/A		
Important Functionaries (Chairman, President, Director, etc.)	Name	Function	Homepage
	Līga Mengēlsone	Director general	www.iddk.lv ; liga@iddk.lv
	Vitālijs Gavrilovs	president	www.iddk.lv
	Mārtiņš Bičevskis	Vice president, head of Association of Commercial banks	www.bankasoc.lv
Number of Members	Covers 37% of employees		
Cooperation in national committees	National Tripartite Council		
Memberships	Regional Umbrella Associations	Global Umbrella Associations	
	BUSINESSEUROPE	The Business and Industry Advisory Committee	
		<i>International Organisation of Employers; Global Compact, UN</i>	

2.25 Employers' Confederation Mapping - Estonia

2.22	in National Language	in English	
Name of the association	Eesti Tööandjate Keskliit	Estonian Employers' Confederation	
Founding Year	1997 (on historical basis of industrialist association funded in 1917)		
Sector/Branch	28 branches, which in total employ around 145,000 workers		
Cycle of Congresses/ Last Congress			
Important Functionaries (Chairman, President, Director, etc.)	Name	Function	Homepage
	Tarmo Kriis	Chairman	http://www.tooandjad.ee ;
	Eve Päärendson	Director of International Relations	
	Imbi Ernits-Kaljuste	Director of Communications	
	Anton Kuznetski	Advisor to chairman	
Number of Members	1500 enterprises		
Cooperation in national committees	National Tripartite council		
Memberships	Regional Umbrella Associations	Global Umbrella Associations	
	BUSINESSEUROPE		

2.26 Employers' Association Mapping – Lithuania

2.22	in National Language	in English	
Name of the association	Lietuvos pramonininkų konfederacija (LPK)	Lithuanian Confederation of Industrialists: http://www.lpk.lt/?q=en	
	Lietuvos Verslo Darbdaviu (LVD)	Lithuanian Business Employers' Confederation http://www.lvdk.eu	
	Lietuvos Respublikos žemės ūkio rūmai (ZUR)	Chamber of agriculture in Lithuania http://www.zur.lt	
Founding Year			
Sector/Branch	LPK, which is the most vocal confederation, comprises 35 unions and 9 regional branches. LVD comprises 24 small and medium sized enterprises. ZUR is an umbrella organisation of individual, small and medium agriculture entrepreneurs and enterprises.		
Cycle of Congresses/ Last Congress	LPK 5 years congress cycle; last congress was on 21 June 2012.		
Important Functionaries (Chairman, President, Director, etc.)	Name	Function	Homepage
	Robertas Dargis	President of LPK	http://www.lpk.lt
	Gediminas Rainys	Vicepresident	http://www.lpk.lt
	Dovilė Baškytė	Director Department of Business & Social Policy & Law	
	Gintaras Morkis	Deputy Director General	
Number of Members	2700 enterprises		
Cooperation in national committees	National Tripartite council		
Memberships	Regional Umbrella Associations	Global Umbrella Associations	
	Business Europe	ICIE (International Congress of Industrialists and Entrepreneurs) IOE (International organization of Employers)	

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