

2017

BULGARIA

By Plamen Dimitrov

Socio-economic developments

Industrial relations

Forecasts

Annual Review

of Labour Relations and Social Dialogue

State policies

Tripartite social dialogue



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- Bulgaria is currently enjoying relatively stable GDP growth. The pace of real economic growth of 3.9 percent in 2016 continued also in 2017 and it is estimated that this level will be preserved in the upcoming years. Despite the economic growth, social indicators have not significantly improved. Bulgaria remains among the poorest countries in the EU. The Gini-coefficient (38.3 for 2016) is the highest in the EU and increased compared to the previous year.
- The labour market in 2017 recorded positive changes. Total employment rate grew by about 1-3 percentage points on an annual basis, while the unemployment rate fell below 8 per cent. But the unemployment rate for youth is above 13 per cent.
- The trend of increasing average monthly wages registered in 2016 continued in 2017; in the third quarter average wages increased by 10.2 per cent on an annual basis. Nevertheless, wages in Bulgaria are still the lowest in the EU. The minimum wage has been increased from the beginning of 2017 to BGN 460 (€215), but its increasing and even its existence are facing more and more intensive opposition from employers' organisations.
- The most significant event in the political scene, the early parliamentary elections in March 2017, resulted in the victory of the ruling party that time, Citizens for European Development of Bulgaria (GERB). However, GERB had to form a coalition government with a coalition of nationalist parties.
- There have not been significant internal changes regarding social partners' organisations. Membership in trade unions and employers' organisations is decreasing at a slower pace. The most significant event for the trade unions was the 8th Congress of CITUB.
- The environment for industrial relations and social dialogue development is worsening. Tripartite social dialogue is stagnating, 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 2017.
- 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 is decreasing, namely at the company level. The practice of extending sector/ branch collective agreements was completely 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. In October CITUB organised a protest rally under the slogan "Working Bulgaria wants higher wages".

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Socio-economic developments

The pace of real economic growth of 3.9 percent in 2016 continued also in 2017 – respectively 3.6 per cent in the first quarter, 3.9 per cent in the second and 3.8 per cent in the third. This is above the EU average. Analysis of the factors that contributed to this result in 2016 points out the main contribution of information and communication (growth by 16.7 per cent), industry (by 5.9 per cent) and agriculture (by 5.3 per cent), while the contribution of construction is negative (-6.8 per cent). From the viewpoint of GDP drivers, a significant contribution to the growth have been consumption and exports, while gross fixed capital formation continued its stagnation.

The low domestic investment activity goes along with a very weak flow of foreign direct investments (FDI). The FDI value was €1025.5 million (2.1 per cent of GDP) in the first nine months of 2016, while in the same period of 2017 FDI have further slowed down to only €744.2 million (1.5 per cent of GDP). The decline on an annual basis is by €281.3 million (or by 27.4 per cent). This is the main reason why economic growth is not adequately reflected in an increase of employment and creation of new jobs.

In 2016 a trend of improvement of the trade balance was recorded, expressed in an increase of the current account surplus. In January–September 2017 the trade balance was negative at the amount of €1469.6 million (2.9 per cent of GDP) while the deficit for the same period of 2016 was €608.3 million (1.3 per cent of GDP). In January–September 2017 the current account was positive and amounted to €2589.5 million (5.2 per cent of GDP), against a surplus of €2673.9 million (5.6 per cent of GDP) in the same period of 2016 and it means a trend of deterioration.

Fiscal balance in 2016 showed a positive value at +1.6 per cent of GDP and the public debt reached 24 per cent of GDP with a tendency of reduction. With the forecasted fiscal deficit target of 1.4 per cent in the 2017 budget a balanced budget 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 in 2016 was broken in 2017 as the inflation over the last seven months (April to October) was positive between 0.2 and 1.5 per cent. HICP is expected to reach 1.1 per cent for 2017 and then will accelerate over the next three years to reach 1.4 per cent, 1.7 per cent and 1.8 per cent respectively.

The average monthly wage (AW) reached BGN 948 (€485) in 2016 with nominal growth of 8.0 per cent over the previous year while the real increase was 8.8 per cent. This trend continued in 2017 as well; in the third quarter AW reached BGN 1037 (€530) with an increase of 10.2 per cent on annual basis. At the background of an overall increase of wages on an annual basis, in 2017 the gender gap declined to 17-18 percentage points. The minimum wage was increased from the beginning of 2017 to BGN 460 (€215), representing a 44.4 per cent of AW in the third quarter.

The labour market in 2016 and 2017 recorded positive changes. The total employment rate grew by about 1-3 percentage points on an annual basis and reached above 66 per cent. The employment rate was 72.2 per cent for men and 64.7 per cent for women (Q3 2017, population aged 15-64). The gender employment gap has shrunk to 7.5 percentage points. The unemployment rate for the first time since the beginning of the 2008 crisis fell below 8 per cent but the unemployment rate for youth is above 13 per cent. At the background 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 per cent 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-2016), 22.9 per cent of the population is at risk of poverty after social transfers (compared to 17.3 per cent for the EU28). Inequality is increasing. The Gini-coefficient (38.3 for 2016) is the highest in the EU and increased compared to the previous year (37.0).

State policies

After the last early parliamentary elections in March 2017, five parties and coalitions entered the 44th National Assembly - Citizens for European Development of Bulgaria (GERB) (33.54 per cent, 95 mandates); Bulgarian Socialist Party (BSP) (27.93 per cent, 80 mandates); UNITED PATRIOTS (9.31 per cent, 27 mandates); Movement for Rights and Freedoms (MRF) (9.24 per cent, 26 mandates) and VOLYA¹ (4.26 per cent, 12 mandates). The negotiation process for the formation of the new government lasted for more than a month, ending with a coalition agreement between GERB and UNITED PATRIOTS. The third government of Boyko Borisov since 2009 (referred to as the Borisov III Cabinet) could be hardly defined as centre-right as the UNITED PATRIOTS Coalition unites three nationalist parties with very contradictory views on Bulgaria's foreign and domestic policy, including with regard to the European Union, Russia and the Balkan countries.

The diverse interests, on the one hand, and the ambition to form a strong and successful government, on the other, were the reasons the Governmental Program 2017-2021 could be completed and publicly presented only at the beginning of September 2017. It contains 65 priorities in 20 areas, with targets (236) set for achieving and implementing measures (902) for each priority. The program is conceptually built on several foundations:

- The state establishes the rules and shapes the business environment, while the economy, employment and income are a function of the non-public sector.
- The role of the state is to maintain the existing economy and to attract new domestic and foreign investments.
- The development of demographic potential goes through the resolution of three important problems of the demographic crisis: a low birth rate, high mortality and migration regulation.
- In addition to the low taxes, which remain unchanged, the operational judicial system and a fast and competent administration are perceived as key elements of the environment.
- There is a trend towards relatively moderate fiscal consolidation and the achievement of a balance at the end of the period that should be maintained and even a positive budgetary balance is to be achieved.
- Concern about small and medium-sized enterprises is set as a special focus, which should lead to the strengthening of entrepreneurial spirit.
- There is a need for changing the technology of the functioning of the "state machine", i.e., accelerated introduction of e-governance, accessibility and transparency.

The Bulgarian presidency of the Council of the European Union in the first half of 2018 is one of the main government priorities, the expectations being 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.

The main benchmarks related to labour compensation set out in the Programme (minimum wage of BGN 650 and average wage of BGN 1500 at the end of the term) are attractive as an announcement and they are actually achievable considering anticipation of accelerating economic growth and increased labour demand. Considering the expected adoption of a mechanism for determining the minimum wage by the social partners, the government has speeded up the preparations for the ratification of ILO Convention 131, which is to take place by the end of 2017 or by early 2018.

Active labour market measures provide for diversified funding – through the budget and European programs – and cover different target groups: unemployed, inactive, students, employed, etc. Their main objective is to focus mainly on business needs and requirements, while such measures as "supported employment" and social economy have a complementary function as a corrective of the market principle. Most of the measures are specifically targeted and benchmarks for their implementation are set, e.g. reducing the number of long-term unemployed by at least 30 per cent.

The government announced its intentions for regulated labour import from third countries while not permitting social dumping and deviation from the minimum standards in force. These intentions were largely backed up by real actions to reduce fees, liberalize and ease the labour force import procedures through amendments to the Labour Migration and Labour Mobility Act. Under trade union pressure, however, the employers' proposal to eliminate the so-called market test was not accepted.

The market test obliges a company that hires a foreigner to place a job vacancy at the Employment Agency and to prove that there is no suitable Bulgarian for the position within a 15-day period. Currently, there is no market test only for seasonal workers with up to 90 days of employment (low skilled) and for 10 single groups of professions with proven shortage of Bulgarian skilled workers and remuneration at least 2 times the average wage for the last 12 months.

¹ Translated in English as WILL

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 EU ratio of direct and indirect taxes of 27:73 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.

Amendments and changes in labour and social legislation in 2017, e.g., related to posted workers, pension reform, social security, and others were mainly related to harmonisation with EU legislation.

Industrial Relations

The Bulgarian industrial relations system follows the general European trends of deregulation and decentralization. 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 of employers became more prominent during 2017.

The cooperative relationships between national social partners existing in the initial stage of the crisis worsen further in 2017. Negotiations for minimum social insurance income (MSII) in 2017 for a second consecutive year failed as the employer organisations refused to negotiate. The negotiations in the National Council for Tripartite Cooperation (NCTC) on procedure and mechanism for national minimum wage-setting are controversial and it is still unlikely to reach consensus in the near future. Employers also started a campaign against collective bargaining. On their part, CITUB and Podkrepa CL in a Joint Statement (February 2017) expressed their concern about the state and development of social dialogue at the national level and possible negative impact on the dialogue and collective bargaining at all other levels. They expressed also concern with the attacks of central employers' organisations on minimum wage and collective bargaining in times when the European institutions pay increasing attention to the role of social dialogue at the national and European level. According to the two representative trade unions, the employers' approach to social dialogue is provoking tension, while their appeal for restricting collective bargaining is leading to confrontation.

In July 2017 employer organisations demanded abolition of seniority pay and minimum social insurance income. The employers' messages further escalated when at a press conference in July, Bozhidar Danev (BIA) and Vassil Velev

(AICB) described the workers as "drones, lazy and criminals", while Kiril Domuschiev (CEIBG) said the unions are "harmful" and "obstructing the development of the country and the economy". In response to this attack, CITUB and Podkrepa CL have complained to the International Labour Organization (ILO), the European Commission and the European Economic and Social Committee, ETUC and ITUC about the "aggressive behaviour" of the employers. Bulgarian unions have been supported by European and international organisations and by many trade union confederations from EU member states against the unacceptable aggression of the leaders of employers' organisations in Bulgaria. In a joint letter, ITUC and ETUC leaders Sharon Burrow and Luca Visentini expressed their special support for CITUB and Podkrepa CL against the "irresponsible and unprofessional attitude of Bulgarian employers towards social dialogue".

Collective bargaining is one of the main elements of the new system of industrial relations established in the 1990s. The collective bargaining system is still bearing the consequences of the crisis and austerity measures. The trend towards decentralisation of collective bargaining continued. The number of collective agreements (CAs) registered with the Labour Inspection is decreasing, namely at the company level. Even more alarming is the fact that in most enterprises and companies there are not practically 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 completely abandoned. The downward trend is proved by the data on collective agreements in force in 2016.

² Includes also collective agreements of big establishments with national significance and agreements in public administration

The number of sectoral and branch CAs remains relatively stable. In 2016, there were nine sectoral and 54 branch CAs.² From 2012 to 2016, the number of CAs at the enterprise level decreased by nearly 18 per cent. The data show that a larger proportion of the CAs are in the public sector – 87.2 per cent (including 6.2 per cent in various public administration structures) and 12.8 per cent are in the private sector (including multinational companies and foreign enterprises at 3.7 per cent). By economic activities the largest number of CAs are in education (828), followed by health care and social work (288), manufacturing (124) and public administration (117).³

There are not 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 recent years.⁴

Protests and discontent of certain groups of public sector employees in 2017, e.g. of policemen, firefighters, prisons 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 draft 2018 budget. Protests and strikes were also organised throughout the year in some enterprises, driven by wage arrears for months. The miners from the Obrochishte manganese mine in north-eastern Bulgaria had been in a cycle of strikes for a month in April, protesting over unpaid wages. They also demanded a pay rise and a new collective agreement to address their claims. Miners from the Bobov dol mine also protested over unpaid wages.

On 27 October 2017 CITUB held a protest rally under the slogan “Working Bulgaria wants higher wages”. Despite the initial agreement to join the protest, Podkrepa CL refused to participate. More than 10,000 workers from all economic sectors protested in front of the Council of Ministers. The national protest delivered the Declaration of Working Bulgaria addressed to the government and employers calling for action on various key topics involving labour rights. CITUB’s main demands are higher wages (additional BGN 100 (about €50) to the monthly salary of every worker), decent pay for overtime and improvement of the rights of the workers. CITUB urges the Bulgarian government to join the Alliance for Upward Wage Convergence in EU, which is now being formed in Europe by the initiative of the ETUC. Among the other reasons for the protest are attempts to remove Bulgarian workers’

rights, such as the seniority bonus (according to length of service) and to cut sick leave pay for the first three days. The protestors urged employers to stop attacks against labour and to take a seat at the negotiating table.

On 1 November scientists from the Bulgarian Academy of Science and Agricultural Academy organised a rally to protest underfunding of science in the draft 2018 budget and the low wages of scientists, which are significantly less than the average for the country, with the starting wage for young scientist at the level of the minimum wage.

There were not significant internal or external changes related to the structures and organisation of the national representative social partners’ organisations in 2017. 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 Confederation of Labour Podkrepa (CL Podkrepa) with 79,567 members. Data in the Annex show 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.

The Confederation of Independent Trade Unions in Bulgaria (CITUB) held its 8th Congress in May 2017 and re-elected Plamen Dimitrov as President. The amended statute and a new programme under the title “Free Labour, Fair Income, Joint Protection” were also adopted. A special focus was the future of work and trade union strategies related to it.

There were also no major internal developments 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.

³ NICA (2017). Analysis of collective labour agreements and collective labour disputes in 2016 (in Bulgarian)

⁴ NICA (2016). Analysis of collective labour agreements and collective labour disputes in 2015 (in Bulgarian)
<http://www.nipa.bg/sites/default/files/2016%20CLA%26CLS%20Annual%20Report.pdf>

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. Political instability, frequent changes of governments in recent years, early elections in 2017, 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.

There are signs of stagnation and unproductiveness of the work of the National Council for Tripartite Cooperation (NCTC), where tripartite social dialogue takes place. Only four meetings of NCTC were held in 2017. Real and meaningful negotiations have been often frustrated by disputes over procedural issues. NCTC worked with variable intensity and controversial results. The social partners' opinions were often disregarded while the government continued to take unilateral decisions on issues related to labour and living standards while just informing

the social partners instead of consulting them. Some of the established sector/branch tripartite councils for social dialogue do not work on a regular basis as well.

The main points of controversy between the trade unions and employer organisations used to be the issues of social security and income policy. In January, the employers' organisations withdrew from the session of NCTC which was to discuss a minimum wage increase, claiming that rules of convening the NCTC were not being observed. Later, two organisations lodged a claim with the Supreme Administrative Court of Bulgaria (SAC) to recognise the NCTC decision as void. In May 2017, SAC repealed the decree for increasing the minimum wage from 1 January 2017. In the same vein in late 2017 when the 2018 draft budget was discussed in the NCTC the main points of controversy were again the issues of social security and minimum wage increase. The views of employers and trade unions diverge, with employers opposing the government's decision to increase the statutory minimum wage in 2018.

Forecasts

Despite the intent of the opposition in the face of BSP and MRF to put a non-confidence motion related to the government specific policies (corruption, health care) or to its overall policy, expectations are for political stability at least until the end of the Bulgarian EU Council presidency.

The mid-term forecast for annual GDP growth of 3.9 per cent in 2018, 2019 and 2020 would secure better prospects for rapid labour market recovery; however there is a need for a substantial increase in domestic investment, as well as for attracting significantly more FDI. Within the planned fiscal consolidation the budget deficit will be at -1 per cent in 2018, -0.5 per cent in 2019 and 0 per cent in 2020.

The average wage in Bulgaria will continue to grow under the pressure of strong demand for a 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 BGN 610 in 2020. However, CITUB considers that this growth is insufficient and should be accelerated to reach 48-50 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. As shown in the annex, however, the situation with collective agreements at company

level is not promising at all, as the number of concluded company CAs 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.



Annex - Information about:

- Collective bargaining system

Collective bargaining is one of the main elements of the new system of industrial relations established in the 1990s. The Labour Code stipulates that collective bargaining is a right of trade unions and an obligation of employers and a signed collective agreement is mandatory in nature. It is worth mentioning also that only a trade union organisation is entitled to conclude collective agreements. 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 the 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 a trade union organisation – party to the agreement – or are not trade union members at all can be covered by 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 has continued 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 became more significant in the period 2010-2012 when a clause for extension of the agreement 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, 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.

Information about valid collective agreements (CAs), 2008-2016

Year	Sectoral/branch CAs			CAs in company/enterprise		
	Total number	Of them:		Total number of CAs + annexes to CAs	Of them:	
		Sectoral CAs	Branch CAs*		CAs	Annexes
2008	67	10	57	1828	1493	335
2009	73	10	63	1499	1261	238
2010	71	10	61	1596	1321	278
2011	72	9	63	1616	1332	284
2012	64	8	56	1581	1308	273
2013	68	8	60	1439	1153	286
2014	67	8	59	1480	1220	260
2015	63	9	54	1228	987	241
2016	63	9	54	1404	1181	122

Source: General Labour Inspectorate and CITUB

The main level of collective bargaining remains at 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 was 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 light and 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 to 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 the 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 that 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 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, and so forth 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
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
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

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 Vocational Education and Training (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) 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 state educational standards for VET qualifications; strengthen the quality assurance; and introduce dual training. The pilot phase of the introduction of dual training is in progress and it is expected that the dual training would be a significant way to overcome labour market demand and supply mismatches. In the 2017-2018 schoolyear, 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 admission and 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 in 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 Government and the European commission adopted the Science and Education for Smart Growth Operational Programme which will be one of the key instruments for achieving the education and training targets adopted by Bulgaria under Europe 2020 in the coming years.

Trade union representatives participate in the activities of the 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 (%)

	2011	2012	2013	2014	2015	2016	2017- 1 st quarter	2017-2 nd quarter	2017-3 rd quarter
Population aged 15 years and over									
Total	46.6	46.6	46.9	48.0	49.1	49.3	50.0	52.2	53.2
Men	51.1	50.8	51.4	52.7	54.1	54.6	55.7	57.6	59.1
Women	42.4	42.6	42.8	43.6	44.5	44.3	44.7	47.2	47.8
Population aged 15-64									
Total	58.4	58.8	59.5	61.0	62.9	63.4	64.3	67.2	68.5
Men	61.2	61.3	62.1	63.9	65.9	66.7	68.1	70.5	72.2
Women	55.6	56.3	56.8	58.2	59.8	60.0	60.6	63.9	64.7
Population aged 20-64									
Total	62.9	63.0	63.5	65.1	67.1	67.7	68.6	71.7	73.0
Men	66.0	65.8	66.4	68.1	70.4	71.3	72.6	75.2	76.9
Women	59.8	60.2	60.7	62.0	63.8	64.0	64.6	68.1	69.0

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

- Unemployment rate

Unemployment rates (%)

Calculated on the basis:	2011	2012	2013	2014	2015	2016	2017- 1 st quarter	2017-2 nd quarter	2017-3 rd quarter
K ₁ : Population aged 15 years and over	11.3	12.3	12.9	11.4	9.1	7.6	6.9	6.3	5.8
K ₂ : Population aged 15-64	11.4	12.4	13.0	11.5	9.2	7.7	7.0	6.4	5.9
K ₃ : Population aged 15-24 (Youth unemployment)	25.0	28.1	28.4	23.8	21.6	17.2	12.8	13.2	13.9
K ₄ : Registered unemployed persons in the employment offices	10.1	11.1	11.3	11.2	10.1	8.7	8.1	7.2	6.6

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 €)

	2011	2012	2013	2014	2015	2016	2017- 1 st quarter	2017-2 nd quarter	2017-3 rd quarter
Total	351	374	396	420	449	485	514	532	530
Public sector	389	405	427	454	473	502	513	539	537
Private sector	338	363	386	409	441	480	514	530	528

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 (%)

	2011	2012	2013	2014	2015	2016	2017- 1 st quarter	2017-2 nd quarter	2017-3 rd quarter
Men	389	417	440	467	501	539	564	581	581
Women	313	331	353	373	395	430	464	483	478
Ratio w/m	80.5	79.4	80.2	79.9	78.8	79.8	82.3	83.1	82.3

Source: National Statistical institute, various years

- Monthly minimum wage

Monthly minimum wage in the country (in €)

from 1.9.2011	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
138	148	158	174	184	194	215	235	261

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 option of dismissing workers rather than looking for ways to maintain employment levels.

Average actual weekly working hours

	2011	2012	2013	2014	2015	2016	2017- 1 st quarter	2017-2 nd quarter	2017-3 rd quarter
Total	40.2	40.1	40.0	40.0	40.1	40.2	40.1	39.6	40.3
By Gender:									
Men	40.5	40.4	40.3	40.4	40.5	40.5	40.4	40.0	40.7
Women	39.9	39.8	39.6	39.6	39.7	39.8	39.8	39.2	39.7
By type of ownership:									
Private sector	40.7	40.6	40.4	40.5	40.6	40.6	40.5	40.0	40.7
Public sector	38.8	38.8	38.6	38.6	38.8	38.9	39.6	38.3	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 widespread 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 honest 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 %)

	2011	2012	2013	2014	2015	2016	2017- 1 st quarter	2017-2 nd quarter	2017-3 rd quarter
By the length of working time:									
Full time	98.2	98.0	97.8	97.9	98.1	98.2	98.1	97.8	98.1
Part time	1.8	2.0	2.2	2.1	1.9	1.8	1.9	2.2	1.9
By type of contract with the employer:									
Labour and civil service contract	97.5	97.5	97.0	97.0	97.1	97.0	97.5	96.5	96.3
Civil contract	0.9	1.0	1.2	1.1	1.0	0.9	0.9	0.9	1.0
Without any contract	1.6	1.5	1.8	1.9	1.9	2.1	1.6	2.6	2.7
By type of working activity:									
Permanent job	95.9	95.5	94.3	94.7	95.5	95.8	96.5	94.9	94.6
Temporary/ agency work	4.1	4.5	5.7	5.3	4.5	4.2	3.5	5.1	5.4

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

- Migration

*External migration by gender**

Number of persons	2013			2014			2015			2016		
	total	men	women	total	men	women	Total	men	women	total	men	women
Immigrants in the country	18570	10496	8074	26615	14712	11903	25223	13493	11730	21241	10941	10300
Emigrants from the country	19678	9841	9837	28727	15747	12980	29470	15360	14110	30570	15393	15177
Mechanical increase/decrease	-1108	655	-1763	-2112	-1035	-1077	-4247	-1867	-2380	-9329	-4452	-4877

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	2009	2010	2011	2012	2013	2014	2015
HDI – Value	0.767	0.773	0.774	0.776	0.777	0.782	0.794
Ranking (from 186 countries)*	...	...	...	57	58	59	56
Life expectancy at birth (years)	73.1	73.2	73.3	73.4	73.5	74.2	74.3
Mean years of schooling of adults (years)	10.5	10.6	10.6	10.6	10.6	10.6	10.8
Expected years of schooling of children (years)	13.9	14.2	14.3	14.3	14.3	14.4	15.0
Gross national income per capita (PPP \$ - 2011)	14,501	14,695	14,793	15,178	15,402	15,596	16,261

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	2009	2010	2011	2012	2013	2014	2015	2016
Bulgaria	33.4	33.2	35.0	33.6	35.4	35.4	37.0	38.3
EU-27	30.5	30.5	30.8	30.4	30.5	31.0	31.0	30.8
Ranking (BG in EU-27)	5	6	2	5	1	3	3	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)⁵.

Collective agreements coverage rate for employees (in %)

2008	2009	2010	2011	2012	2013	2014	2015	2016
30	32	35	38	29*	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 elaboration of a concept and procedure for setting the national minimum wage. 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, 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.

Most of the sector/branch collective agreements were renewed in 2015 and 2016 for a two-year term. Some sector/branch collective agreements were renegotiated in 2017 in: metallurgy; education (annex); road construction, agriculture (2 CAs within the Ministry of Agriculture, negotiations with the Agriculture Academy are ongoing).

The social partners in the brewing branch are ready to sign a new branch collective agreement for a new two-year period.

• 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 trade union membership is lower. When the number of 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 unions 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 remains, notwithstanding a slower pace of decline.

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

2008	2009	2010	2011	2012	2010	2012	2013	2014	2016
16.9	17.3	18.9	18.9	16.4	21.2*	21.9*	20.9**	20.9**	15.4

Source: Expert estimate – ISTUR of CITUB, *Data from National representative survey "Work-climate-index" (ISTUR of CITUB),

**Data from National representative survey "Syndibarometer" (ISTUR of CITUB). Data for 2008, 2012 and 2016 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.

⁵ NSI (2017). Structure of wages in 2014, p. 25

- Employers' organizations density

According to data from the census 2011-2012, the four employer 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 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 the representation can be realised through a general assembly or an 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 has been 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 worker/ employee 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 European Works Councils.

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. In total, 171 establishments/companies throughout the country were visited and the direct result was 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.

- 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 Водоснабител	National Branch Water-Supply Trade Union (NBTU Vodossnabditel)	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 (ITUFECCTCS)	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
			2012	2016	
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 2017

of Labour Relations and Social Dialogue

Bulgaria / By Plamen Dimitrov

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Imprint

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

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