



Government of the Republic of Serbia

Monitoring Social Inclusion in Serbia

Overview and Current Status of Social Inclusion in Serbia
Based on Monitoring European and National Indicators

Belgrade, July 2010



Social Inclusion and Poverty Reduction Unit and the Republic Statistical Office

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LIST OF ACRONYMS

ALLSS	Adult Literacy and Life Skills Survey
CPI	Consumer Price Index
CSW	Centers for Social Welfare
EC	European Commission
EPSCO	Employment, Social Policy, Health and Consumer Affairs
ESSPROS	European system of integrated social protection statistics
EU	European Union
EUROSTAT	European statistics
EC	European Council
FAO	Food and Agriculture Organization
HBS	Household Budget Survey
IDP	Internally Displaced Persons
ILO	International Labor Organization
ISCED	The International Standard Classification of Education
ISIC 4	International Standard Industrial Classification – revision 4
JIM	Joint Inclusion Memorandum
LFS	Labor Force Survey
LSMS	Living Standards Measurement Survey
MDG	Millennium Development Goals
MICS	Multiple Indicator Cluster Survey
NES	National Employment Service
NGO	Non-governmental organization
OECD	Organization for Economic Development and Cooperation
OMC	Open Method of Coordination
PISA	Programme for International Student Assessment
PPS	Power Purchasing Standard
PwD	Persons with Disabilities
RSO	Republic Statistical Office
SILC	Statistics on Income and Living Conditions
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations Children's Fund
WHO	World Health Organization
MOE	Ministry of Education
MOI	Ministry of Interior

INTRODUCTION

The Republic of Serbia has signed the Stabilization and Association Agreement and submitted a request for accession to the EU. Consequently, the issues of social inclusion and poverty reduction shall become a mandatory component of EU integrations policy in the period to come. The Government of the Republic of Serbia is committed to fulfilling the requirements of the EU as defined at the Lisbon and Copenhagen summits, while at the same time it monitors all the decisions related to the adoption of the new EU development document: *Europe 2020*.

Serbia has identified active participation in the European Social Inclusion Process as one of the important tasks in the process of EU accession. This task includes development and advancement of policies, institutional framework and methodology for monitoring social inclusion of individuals and social groups in Serbia. At the invitation of the EU, the Republic of Serbia will develop a Joint Inclusion Memorandum as soon as it acquires the status of EU membership candidate country. This document is intended to update all the existing policies that only partly deal with the social inclusion issues, and to develop a strategic framework to take into account an entire spectrum of exclusion.

The initial step in establishing an institutional framework of development and implementation of social inclusion policies was taken by the Government of Serbia with the establishment of Social Inclusion and Poverty Reduction Unit at the Cabinet of the Deputy Prime Minister for European Integration in July 2009. The Unit is mandated with strengthening capacities of the Government to develop and implement social inclusion policies based on European good practices. Also, the Unit provides support to the Deputy Prime Minister of the Government for European Integration in coordinating, monitoring and reporting on the efforts of the Government of Serbia in the area of social inclusion.

The Government also founded a Working Group for Social Inclusion in early 2010. This Working Group involves the representatives of Government institutions with key responsibilities in defining, implementing and monitoring social inclusion policies. In addition, the Working Group for Social Inclusion cooperates and consults with the organizations and individuals dealing with social inclusion issues outside the Government and thus represents an important forum for advancement of dialogue between the governmental and non-governmental stakeholders. The Working Group is to develop proposals for active participation of Serbia in the Social Inclusion Process within the framework of EU integration, propose measures towards development and implementation of social inclusion policies and prepare the body of the annual report on social inclusion in the Republic of Serbia until the development of Joint Inclusion Memorandum as well as the body of the Joint Inclusion Memorandum, once Serbia is granted the status of an EU candidate country.

The Government of Serbia and the Republic Statistical Office invest efforts to embark upon the SILC survey which will improve the quality of data, ensure harmonization of monitoring of social inclusion indicators with the EU countries and provide basis for development of the Joint Inclusion Memorandum.

It is expected that the Republic of Serbia will to put the system of social inclusion monitoring in place, develop the Joint Inclusion Memorandum, strengthen and build state administration capacities for implementation and reporting on the Social Inclusion Process and establish a sustainable unit to coordinate implementation of the measures and report on the progress of social inclusion by end 2012. Social inclusion policies should become an integral part of regular activities of the relevant institutions at all levels. The processes to be developed shall be based on knowledge and good practices of European countries as well as on the experience of the Republic of Serbia in development and implementation of national policies.

The report *Monitoring Social Inclusion in Serbia*, prepared by the Social Inclusion and Poverty Reduction Unit and the Republic Statistical Office represents a contribution to establishing a system

for monitoring indicators of social inclusion and poverty reduction in the Republic of Serbia. The report identifies the existing resources for monitoring the commonly agreed social inclusion indicators at the EU level, maps gaps in data sources for measuring social inclusion and poverty indicators in Serbia and provides a framework and space for gaining insight into the current situation of social inclusion and poverty in our country. The methodology for monitoring social inclusion should ensure comparability of the key social inclusion indicators of EU Member States as well as the states currently in the EU accession process but also to give insight into the specificities of social inclusion problems stemming from the distinct transition process in Serbia.

This document provides a sound basis for monitoring and endorsement of quality policies of social inclusion and poverty reduction with a view to improving the quality of life of all Serbian citizens.

Social Inclusion and Poverty Reduction Unit and the Republic Statistical Office

1. Concept of Social Inclusion at EU Level

At the level of EU Member States, *social exclusion* is defined as a process whereby certain individuals are pushed to the margins of society and prevented from participating fully in the society by virtue of their poverty or lack of basic skills and possibilities for lifelong learning or as a result of discrimination. This distances the individual or groups of population from job, income and education opportunities as well as from inclusion and participation in social networks and community activities. The excluded individuals and/or groups have insufficient or inadequate access to institutions, state authorities and decision-making processes.

Some authors take social exclusion to mean a multi-dimensional process representing a combination of different forms of exclusion: taking no part in decision-making and political processes; limited access to jobs and financial; limited opportunities of individuals or groups for integration into the mainstream cultural processes.¹ Social exclusion may be considered a dynamic process of partial or full exclusion of individuals or groups from all the systems (social, economic, political, cultural) and these processes impede individuals and/or groups in exercising their civic, political or social rights.²

Social inclusion is defined as a process enabling those at risk of poverty and social exclusion to gain access to the opportunities and resources necessary to enable them to participate fully in economic, social and cultural life and enjoy a standard of living and well-being that is considered normal in the society in which they live. Social inclusion ensures that they have greater participation in decisions that affect their lives, and access to fundamental rights.

At the Lisbon Summit of the European Council held in March 2000, social cohesion was identified as one of the three key strategic objectives of the EU. Social cohesion is the capacity of a society to ensure the well-being of all its members, minimizing disparities and avoiding marginalization of individuals or social groups.³ In different contexts, it may be used to highlight: (1) common norms and values; (2) possession of common identity and belonging to a wider community; (3) feeling of stability; (4) existence of accountable institutions ensuring well-being of a society; (5) equal distribution of rights, opportunities and income; or (6) a strong civil society and active citizens.⁴ The common objectives in combating poverty and social inclusion were identified in Nice late that same year. A portfolio of indicators on the basis of which social inclusion is monitored in the European Union (Laeken indicators) were endorsed in the Belgian city of Laeken the following year.

An agreement was reached that implementation of national policies for monitoring of social inclusion be coordinated through development of National Action Plans for increasing social inclusion, to report regularly on the trends of commonly agreed indicators at the EU level, as well as on the trends of specific national indicators that each Member States develops within its own socio-economic context.

The European Commission working document published in late 2009, identifies the new strategy *EU 2020* as an „heir” and continuation of the *Lisbon Strategy*. This document emphasizes that the exit from the economic crisis is perceived as entry into new sustainable social and market economy, where prosperity would be a consequence of innovation and better use of resources with knowledge as a key

¹ Madanipour R (1998), *Social Exclusion and Space*

² Walker, R. (1995), *The dynamics of poverty and social exclusion*

³ Council of Europe, *Report of the High Level Task Force on Social Cohesion in the 21st century*

⁴ Andy Green, John Preston and Jan Germen Janmaat (2006), *Education, Equality and Social Cohesion – A Comparative Analysis*

input. These drivers would create new sources of sustainable growth and jobs that would reduce the unemployment levels. The document defines the following priorities of European societies by 2020⁵:

- Smart growth: developing an economy based on knowledge and innovation.
- Sustainable growth: promoting a more resource efficient, greener and more competitive economy.
- Inclusive growth: fostering a high-employment economy delivering social and territorial cohesion.

⁵ Commission of the European communities, Working document – Consultation on the future “EU2020” strategy Brussels, 24.11.2009, COM(2009)647 final, презеро са:
http://ec.europa.eu/eu2020/pdf/eu2020_en.pdf

2. Indicators of Social Inclusion

The first set of 18 statistical indicators of social exclusion allowing monitoring of the situation at the level of EU Member States in four important dimensions: financial poverty, employment, health and education, was endorsed in the Belgian city of Laeken in 2001. The proposed indicators included 10 primary and 8 secondary indicators. The primary and secondary indicators were agreed at the EU level. The Member States were given the possibility to monitor also country-specific indicators relevant to additional interpretation of primary and secondary indicators, allowing them to monitor some of the specific phenomena of social exclusion relevant in the context of individual Member States. The national indicators are not harmonized at the level of Member States.

Monitoring indicators and social exclusion resulted in highlighting the phenomenon of „multidimensionality” of social exclusion and the need to develop, in addition to the above mentioned dimensions and Laeken indicators, additional indicators allowing monitoring in the following areas: housing conditions, recurrent and occasional poverty, access to public and private services, in-work poverty, over-indebtedness, dependency on social and family assistance, etc.

The second priority aiming at improvement of the monitoring system refers to continuous advancement of statistical instruments for monitoring social exclusion in order to improve accuracy and comparability of data at the level of EU Member States. In line with that, and after definition of Laeken indicators, the work on advancement and update of the initial portfolio of indicators was continued.

In July 2003, the EU Social Protection Committee endorsed the first updated portfolio of indicators. The updated portfolio included 21 indicators (12 primary and 9 secondary). Three new indicators were introduced: At-risk-of-poverty by work intensity of members of household, low functional literacy performance of pupils (measured by PISA test) and in-work poverty. Two indicators were redefined: At-risk-of-poverty rate by the most frequent activity status and gender, and persons living in jobless households (as a consequence of a highlighted need to pay special attention to children and allow for research of poverty and social exclusion among children not only through one indicator of poverty but to adopt disaggregating by age in the situations when this distinction makes sense and is statistically robust).

In June 2006, the Social Protection Committee adopted a report on indicators to be used in the Open Method of Coordination (OMC)⁶ in the field of social welfare and social protection. Thus defined indicators cover the areas of social inclusion, pensions and health and therefore represent a set of indicators for monitoring social inclusion and social welfare. Four portfolio of indicators have been identified within the OMC indicators in the field of social inclusion and social welfare: a portfolio of overarching indicators⁷, as well as a portfolio of indicators within each of the three basic dimensions: social inclusion⁸, pensions and healthcare. The portfolio of social inclusion indicators, including some

⁶ European Commission, Employment, Social Affairs and Equal Opportunities DG, *Portfolio of overarching indicators and streamlined social inclusion, pension, and health portfolios*, Brussels, June 2006

⁷ Overarching indicators should reflect overarching objectives. Structural indicators have also been included in order to strengthen the link with the Lisbon Strategy and the Strategy of Sustainable Development.

⁸ The indicators used for monitoring the social inclusion dimension build on the portfolio of Laeken indicators in their existing form. Essentially, the methodological framework used in development of indicators was maintained. The agreed portfolio includes 11 primary, 3 secondary and 11 context indicators. The portfolio of primary indicators was streamlined to contain only the most relevant indicators describing different dimensions of poverty and social inclusion. Several indicators previously in the primary portfolio were moved into the portfolio of secondary indicators. At the same time, the portfolio of overarching indicators is extended to include other Laeken indicators either because they are believed to be more adequate for monitoring general social cohesion (in which case they are kept as contextual information only) or because they are considered key

amendments introduced up to 2009, covers the originally adopted social inclusion indicators in 2002 in Laeken.

On the basis of the new, commonly agreed portfolio of indicators whose aim is to monitor the European Strategy for Social Protection and Social Inclusion, the Commission received, in September 2006, the first set of harmonized strategies for the period 2006–2008 in the form of *National Reports on Social Protection and Social Inclusion Strategies*. In their national reports the Member States reported against the objectives endorsed in March 2006⁹.

The latest update of the portfolio of indicators for monitoring of the European Strategy for Social Protection and Social Inclusion¹⁰, implemented in 2009, resulted in introduction of additional indicators for monitoring social inclusion. Notable progress was made in the area of non-monetary interventions (indicators of material deprivation and housing were adopted).

The new framework for defining indicators builds on methodological principles agreed for the portfolio of Laeken indicators but deviates from this framework in two ways: in order to better reflect activity and impact of policies, the selection of indicators is not restricted to the indicators of outcome; also a certain degree of flexibility was introduced and the possibility to include “commonly agreed national indicators” in the portfolio – on the basis of commonly agreed definitions and assumptions.

indicators for monitoring social cohesion (and/or its interaction with employment and growth) as well as social exclusion and poverty (in this case they are included in both portfolios).

⁹ The objectives are defined for each portfolio of indicators in the document of the European Commission *Portfolio of Overarching Indicators and Streamlined Social Inclusion, Pension and Health Portfolios* as of June 2006 and subsequent revisions. As for the set of overarching indicators, indicators do not necessarily have to be linked to specific objectives, since there are indicators illustrating both overarching objectives (1. Improve social cohesion, gender equality, equal opportunities for all... 2. Establish more effective interaction between the Lisbon objectives relating to economic growth, creating new jobs and increasing social cohesion with the objectives of the EU Sustainable Development Strategy).

¹⁰ European Commission, Employment, Social Affairs and Equal Opportunities DG, *Portfolio of indicators for the monitoring of the European Strategy for the monitoring of the European Strategy for Social Protection and Social Inclusion – 2009 update*, Brussels, September 2009, see: <http://ec.europa.eu/social/main.jsp?catId=756&langId=en>

3. Measuring and Reporting on the Situation of Social Inclusion at EU Level

At the EU level, data on living conditions and social protection are collected from several key sources:

- Household Budget Survey (HBS);
- Labour Force Survey (LFS);
- Survey on Income and Living Conditions (SILC);
- Data on social protection at the administrative level (ESSPROS).

The Eurostat methodology based on the concept of objective relative poverty is used for calculation of social inclusion indicators. The measurement concept is considered objective as it relies on current income representing a measure of classification of household members to poor and those who are not poor. Also, the concept is relative since it establishes the poverty threshold on the basis of distribution and variations of income in the country and depends on the general level of social and economic development that differs considerably from one country to the other. The advantage of measurement of the relative poverty concept as compared to the absolute is in that it does not require definition of minimum acceptable living standards.

The EU level analysis is conducted by the European Commission, discussed with the Indicators Sub-Group of the Social Protection Committee and made available to the Member States prior to the preparation of the National Reports on Social Protection and Social Inclusion. In the years of full reporting, the Committee broadly reviews all the indicators (joint reports for 2007 and 2009), while the additional and specific analyses are conducted during the thematic years.¹¹

The novelties in reporting is the classification of indicator and information within the proposed dimensions:

- The commonly agreed EU indicators that allow for comparative assessment of progress made by Member States towards common objectives;
- The commonly agreed national indicators, based on commonly agreed definitions and assumptions providing key information to assess the progress of Member States in relation to certain objectives, but still *do not allow for direct cross-country comparisons* and which are to be interpreted in combination with the relevant baseline information (accurate definition, assumptions, representativeness) relevant to each country;
- Context information: each portfolio of indicators is assessed in light of the key context information, and by referring to the past, and where relevant, future trends. The list of context information is indicative and leaves room to additional information that would be most relevant to better frame and **understand the national context**.

This actually means that, within the scope of each dimension, there is a group of primary and secondary indicators and that within each of them an individual indicator may be defined as an EU indicator or national indicator, depending on the potential for direct comparisons among countries.

¹¹ Module on inter-generational transfer of poverty in 2005, module on social participation in 2006; on housing conditions in 2007 and on financial exclusion and overindebtedness in 2008; module on material deprivation in 2009; module on resource distribution within households in 2001. Read more at:

http://epp.eurostat.ec.europa.eu/portal/page/portal/living_conditions_and_social_protection/legal_bases/income_social_inclusion_living_conditions_sub

The latest update of the Social Protection Committee represents a significant step in the area of monitoring non-monetary interventions. Monitoring of two indicators of material deprivation and two contextual information in the domain of housing (housing costs, overcrowding of households and low quality of housing) has been suggested. Still, in order to agree on „primary indicators” in the area of housing further advancement of the quality of data is called for.

The major novelty in the updated indicators, lies in introduction of the pensions pillar while monitoring of the health of population has also been advanced.

4. Social Inclusion and Poverty Reduction in Serbia

An important task of Serbia in the process of EU accession is participation in the Social Inclusion Process. In order for this to be possible, further development and improvement of the institutional framework and methodology of monitoring social inclusion is required.

One of the first steps towards establishment of the concept and system for monitoring social inclusion in Serbia was development: *Monitoring Social Inclusion in Serbia*¹², giving an overview of the European strategic and legislative framework. The most important objective of the report is to identify key dimensions of social exclusion of the population, highlight and propose sets of indicators for monitoring the level of inclusion of certain groups in the relevant aspects, as well as to shed light on the existing sources of information about the given indicators or recommend their introduction into regular statistical collection of data or appropriate surveys. A proposal of national indicators of social inclusion was developed on the basis of the qualitative analysis of data obtained from the most vulnerable categories of population and the wide consultative process with the expert community.

Further to additional indicators, the monitoring of which is important at national level within dimensions: financial poverty, employment, education and health, the proposal includes two new dimensions of social inclusion that would be relevant in the immediate future: social participation and deprivation of basic needs. This report represents a framework for continuing development of the method of monitoring and outlines of policies that may contribute to increasing social cohesion in line with the European standards.¹³

By way of an initial step in establishing an institutional framework for development and implementation of social inclusion policies, the Government of Serbia has, in July 2009, established a Social Inclusion and Poverty Reduction Unit at the Cabinet of the Deputy Prime Minister with a European Integration portfolio. The Unit is mandated with strengthening capacities of the Government to develop and implement policies of social inclusion based on European good practices. Also, the Unit provides support to the Deputy Prime Minister for EU Integration in coordinating, monitoring and reporting on the efforts of the Government of Serbia in the area of social inclusion.

In early 2010, the Government established a Working Group for Social Inclusion. This Working Group involves the representatives of Government institutions with key responsibilities in defining, implementing and monitoring social inclusion policies. In addition, the Working Group for Social Inclusion cooperates and consults with the organisations and individuals dealing with social inclusion issues outside the Government and thus represents an important forum for advancement of dialogue between the governmental and non-governmental stakeholders. The Working Group is to develop proposals for active participation of Serbia in the Social Inclusion Process within the framework of EU integration, propose measures towards development and implementation of social inclusion policies and prepare the body of the annual report on social inclusion in the Republic of Serbia until the development of Joint Inclusion Memorandum as well as the body of the Joint Inclusion Memorandum, once Serbia is granted the status of an EU candidate country.

¹² The report was developed by the Social Inclusion and Poverty Reduction Unit in the Office of the Deputy Prime Minister for EU Integration, SECONS, CESID and the Republic Institute for Social Protection.

¹³ See Report at: www.inkluzija.gov.rs

5. Measuring Social Inclusion in Serbia

Introduction of systematic monitoring will provide basis for development of the Joint Inclusion Memorandum. The role of this document is: preparation of candidate countries for their full participation in the Open Method of Coordination / social protection and social inclusion after their accession into the European Union; identification of key challenges in fight against poverty and social inclusion; overview of the main strategic interventions taken in order to translate the EU common objectives into national policies; identification of key strategic problems for monitoring and assessment of the situation.

The monitoring methodology should, at the same time, ensure comparability of key indicators of inclusion in Serbia with the situation in the EU Member States and states in the process of EU accession. Also, the monitoring methodology is to ensure insight into specificities of the problem of social inclusion in Serbia. Standardisation of the measurement of social inclusion and poverty in Serbia will allow for statistical standardisation and approximation and harmonisation of various strategic documents regulating this area in Europe.

Currently, the main sources of data for calculation of social inclusion indicators are the Household Budget Survey (HBS) and the Labour Force Survey (LFS). Also, data from vital statistics and education statistics are used as collected by the Republic Statistical Office and the Ministry of Education, as well as data on health collected by the Serbian Public Health Institute „Dr. Milan Jovanović Batut.” Since 2003, the Household Budget Survey is conducted in accordance with the international standards and recommendations of Eurostat, ILO and UN, thus ensuring international comparability of data. This survey collects data on income, spending and consumption of households, data on the key elements of personal consumption as well as the more significant indicators of living standards (housing conditions, possession of durable goods, etc.).

The Household Budget Survey provides data on income but is primarily used for provision of appropriate context for calculation of expenditures. In calculating the social inclusion indicators obtained on the basis of HBS, Eurostat methodology and definition have been adjusted to the national data source. The calculation is based on the total household income. It is noteworthy that regularity in monitoring and satisfactory quality of data have been achieved in view of the specific features of Serbia and the problems related to household income measurement (both due to gray economy as well as to cash receipts from abroad that are not officially registered).

Serbia, being a non-EU member state, is not obliged to conduct SILC (Survey on Income and Living Conditions) regularly. The system of collection of data on social protection at administrative level is not harmonised with the EU standards.

The existing sources of data do not allow for measuring indicators which call for monitoring the same households in a longer time period (e.g. permanent at-poverty-risk rate). Also, only the data for overall population may be obtained for some indicators, a more detailed disaggregation of data being impossible. In order to pass accurate and quality conclusions about the situation of vulnerable groups and changes thereto, the changes in a society must be monitored over a considerably long period. Our statistics may not still provide a detailed classification of households by different criteria. A particular problem is encountered in cross-referencing several distribution criteria (eg. Detailed age distribution, gender distribution, overview by types of households region/municipality, level of education, ethnic affiliation, type of settlement, status of internally displaced persons /forced migrants, persons with disabilities...). Absence of statistical data was noted in the social participation dimension and information on the situation in that domain are obtained on the basis of individual surveys.

6. Improvement of the System for Measuring Social Inclusion in Serbia

Monitoring of social inclusion and adjustment of the measurement system to the EU standards represents one of the EU accession conditions. The Government of Serbia and the Republic Statistical Office invest efforts to launch the Survey on Income and Living Conditions (SILC) that would allow for advancement of the system of data collection and analysis of the situation of different socially excluded groups and individuals, alignment of monitoring of social inclusion indicators with the EU countries. Also, SILC will provide a basis for development of the Joint Inclusion Memorandum and improvement of interventions and policies aimed at improving the situation of the excluded and the poor categories of population.

The analysis of SILC data will allow for monitoring complexity of exclusion i.e. multifaceted determinism and length of duration of social exclusion. This is particularly important in order to adequately respond to the different aspects of social exclusion and resolving of this problem with specific vulnerable groups through interventions and policies created. SILC enables monitoring of the same population over a longer period of time which will allow for monitoring of the status of particular groups and individuals.

The system of monitoring social inclusion must include various aspects of disaggregation because the forms and intensity of exclusion are very unequally distributed per different social categories. Thus will the interventions and policies be easier to tailor in line with the characteristics of vulnerable groups. The report *Measuring Social Inclusion in Serbia* proposes certain criteria for data disaggregation: gender, age, education, employment, ethnic affiliation, forced migrant status, status of persons with disabilities, type of settlement, region of Serbia, income, education of the mother, employment of the mother, size of households, number of children in a household and physical isolation (prison sentence, army, hospital treatment).

SILC collects data on income generated in the previous calendar year and thus allows for monitoring the economic activity of persons during all the 12 months. Also, SILC ensures accurate measurement of poverty and reliable conclusions, particularly with respect to time series. It records events in all sample units continuously throughout the year.

In order to improve the system of monitoring and measuring all the social exclusion dimensions, the system of collection of social protection data at the administrative level (ESSPROS) needs to be aligned with the EU standards. The first step in harmonisation of the system is to conduct a comparative analysis rendering essential information on the current level of alignment/discrepancy of our administrative system and the EU standards and the additional capacity building and institutional solutions for establishment of the ESSPROS system.

In addition, it is very important to have clear guidelines for implementation of additional qualitative surveys in particular, in order to obtain as clear as possible an idea on specific indicators of social inclusion and additional definition of the system of monitoring country-specific indicators.

The improvement of the system of vital statistics and the promotion of coordination of various institutions of the system are also preconditions for establishment of a functional monitoring system in the country and alignment thereof with the EU Member States.

7. Data on Social Inclusion and Poverty in Serbia

Data on social inclusion and poverty represent a systematic and unbiased overview of the current situation in Serbia and are a basis for: establishment of the monitoring and assessment system; alignment of strategic frameworks and priorities in the relevant areas; development of future interventions for reduction of social exclusion and poverty in the country. Data are the basis for development of the national report on social inclusion and poverty in Serbia as part of the preparations for development of the Joint Inclusion Memorandum.

The analysis of the current situation of social exclusion and poverty in Serbia builds on Laeken indicators that reflect the situation in four basic dimensions: financial poverty, employment, education and health. Also, the recommendations of the report *Monitoring Social Inclusion in Serbia* related to the need to introduce additional indicators in these four dimensions were also used as well as indicators within the two new dimensions that need to be monitored at the national level: deprivation of basic needs and civic participation.

Pursuant to the update of the system for monitoring social exclusion that was proposed by the European Commission in 2009, this report contains a detailed portfolio of the latest indicators agreed at the EU level.

The main source of data are the official data of the Republic Statistical Office (Labour Force Survey and Household Budget Survey), data of vital statistics, as well as data of reference institutions for collection of data in the sectors of health and education.¹⁴

¹⁴ A full list of data sources is provided at the end of the document.

8. European and National Dimensions of Social Inclusion¹⁵

8.1. Financial poverty

In continuation, the document presents the values of European and national indicators of financial poverty as defined in the publication *Monitoring of Social Inclusion in Serbia*. The methodology and definitions of Eurostat have been adapted to the national data source (HBS) in calculation of indicators used on the level of EU. **The total income** is defined as total net income received by a household and all members of a household. It includes income of household members from non-independent work, income from self-employment, income from ownership, pensions (age and family), social transfers and other transfers received by a household from persons who are not members thereof, as well as income in kind. Income in kind is included in the overall income, both due to the specific situation in Serbia which implies that income in kind may represent a significant share in the overall income in some households, and due to the trends present on the EU level. To be more specific, poverty measurement in the EU is based on the overall disposable income. A detailed description of the comprising components is given in the document of the European Commission¹⁶, which indicates that income in kind has been calculated since 2007, yet is not included in the calculation of disposable income. The Final Decision of the Indicator Sub-Group (SIG) shall enable their entering the calculation of the overall disposable income¹⁷ in the EU countries. For this reason, the values of indicators provided further in the text are not fully comparable with the EU.

The total income does not include imputed rent of an owner of an apartment/house. **Equivalent income** (income per consumer unit) is calculated by dividing the total household income with the equivalent household size (number of consumer units). A modified OECD scale was used for establishing an equivalent household size. By applying this procedure comparisons of households differing in size and composition is made possible. Data on income are obtained from the Household Budget Survey (HBS), conducted in quarterly intervals by the Republic Statistical Office (RSO). A downside of HBS is in that it does not sufficiently disaggregate data on income, so some of the income sources may not be captured by chance (25 basic sources of income are monitored). Data for the permanent at-risk-of-poverty rate are lacking due to absence of panel data, as does the at-risk-of-poverty rate by labour intensity of members of a household, at-risk-of-poverty in work (full/part time) and at-risk-of-poverty rate anchored at a moment in time.

However, in order to obtain a comprehensible insight into poverty trends in Serbia, poverty should be monitored and presented according to different definitions and methodologies. Therefore it is very important for Serbia to also monitor the status of absolute poverty (measured based on consumption). Although absolute poverty in Serbia was halved in the period 2003–2007, thus achieving the goal of the Poverty Reduction Strategy, the downward trend was halted in 2008, and the financial crisis resulted in a new increase of the number of the poor in the country.

¹⁵ Portfolio of European indicators of social exclusion presented below, follows the portfolio of indicators agreed following the 2003 update. The national indicators are listed in accordance with the indicators agreed and defined in the study: *Monitoring Social Inclusion in Serbia*, published in 2009 (the Government of the Republic of Serbia, Poverty Reduction Strategy Implementation Unit of the Deputy Prime Minister), with addenda and changes clearly indicated in the situations when no data were available for development on a defined indicator.

¹⁶ ¹⁶ „Description of target variables: Cross-sectional and Longitudinal 2010 operation (Version February 2010)“, which may be downloaded at http://circa.europa.eu/Public/irc/dsis/eusilc/library?!=/guidelines_questionnaire/operation_guidelines_1&vm=detailed&sb=Title

¹⁷ Non-monetary income also has the status of a component which is monitored and calculated, yet does not enter the calculation of disposable income. It involves the services and goods which are obtained based on employment from the employer, at a price lower than the market price or free-of-charge. The component may not be obtained based on the HBS, and its calculation shall be enabled after the introduction of the SILC survey as in other EU countries.

1. FINANCIAL POVERTY		
EU INDICATORS OF SOCIAL INCLUSION	DEFINITION	SOURCE
▪ Primary indicators		
1. At-risk-of-poverty rate by gender and age	Share of persons with an income per consumer unit below 60% of the national median income per consumer unit. Income per consumer unit is calculated by dividing household income by the modified OECD scale (weight 1 assigned to the first adult, weight 0.5 to other adults over the age of 14 and weight 0.3 assigned to each child under 14). Thus each person in one household disposes of the same income be it a child or an adult. The indicator is monitored disaggregated by gender and age (0–15; 16–24; 25–49; 50–64; 65 ⁺) ¹⁸	HBS
1a. At-risk-of-poverty rate by household type	At-risk-of-poverty rate by different household types depending on the household size, number of adults and number of dependent children. ¹⁹ The indicator is monitored for: <ul style="list-style-type: none"> ▪ Single households, by age (under 30, 30–64 and 65⁺) and gender; ▪ Two adults, no dependent children (both under 65, minimum one adult 65⁺); ▪ Other households without dependent children; ▪ Two adults with one, two, three or more dependent children; ▪ Single parent households with one or more dependent children; ▪ Other households with dependent children. 	HBS
1b. At-risk-of-poverty rate by the work intensity of members of households	Work intensity of the household refers to the number of months that all working age household members have been working during the income reference year as a proportion of the total number of months that could theoretically be worked in a household.	-
1c. At-risk-of-poverty rate by the most frequent activity status at the labour market and gender	The most frequent activity status of members of the household aged 16+. On the basis of the most frequent activity status in the previous year (economic activity status lasting six or more months) the individuals are classified as economically active (employed, self-employed or unemployed) and economically inactive (pensioners and other inactive).	HBS
1d. At-risk-of-poverty rate by tenure status	With respect to the basis of use of apartment in which the household lives. Households are differentiated to those living in an apartment owned by one of the members, or where they live free of charge and households paying lease (rent) for housing.	HBS
2. At-risk-of-poverty threshold	60% of the median equivalised income of all the households in a population. This is the illustrative value of the poverty line above the defined poverty line. It is expressed in PPS, Euros and the national currency.	HBS

¹⁸ In line with the changes entered in 2010 and/or the adaptation of algorithms for calculating social inclusion indicators in harmony with the OMC, and which are specified in the European Commission document: “Algorithms to compute Social Inclusion Indicators based on EU-SILC and adopted under the Open Method of Coordination (OMC)”, Working Group meeting “Statistics on Living Conditions”, 10-12 May 2010, Eurostat-Luxembourg, certain indicators have been changed. Age groups have been amended (0–17; 18–64; 65⁺), as well as the monitored types of households, while the self-employed are not recognized as a separate category when it comes to the status at the labor market and are considered employed.

¹⁹ Dependent children under 16 and persons aged 16–24 living in households with parents or at least one of the parents and who are economically inactive.

	It needs to be monitored for the entire population, for single person households, households with two adults and two children.	
3. Inequality of income distribution, quintile ratio S80/S20	Quintile ratio S80/S20 compares the total equivalent income of the top and the lowest quintiles. The top quintile represents 20% of the population with the highest equivalent income, and the lowest quintile 20% population with the lowest income. It only measures the changes in the top and the lowest quintiles of equivalent income.	HBS
4. Persistent at-risk-of-poverty rate	Percentage of persons at risk of poverty in minimum two of the three previous years (condition: existence of panel data) Disaggregated by gender, and total for population.	-
5. Relative at-risk-of-poverty gap	Difference between median income per consumer unit and poverty line expressed as percentage of at-risk-of-poverty threshold. Disaggregated by gender, and total for population	HBS
▪ Secondary indicators		
6. Disperson around the at-risk-of-poverty-threshold	Share of persons with the income per consumer unit lower than 40%, 50% and 70% of the median national income per consumer unit. The indicator so defined explores the sensitivity of the risk of poverty and disperson around the at-risk-of-poverty-threshold.	HBS
7. At-risk-of-poverty rate anchored at a moment in time	Share of persons with income per consumer unit in the current year (t) below the poverty line effective three years earlier (t-3) (adjusted by price increase over the previous three years).	-
8. At-risk-of-poverty rate before social transfers	Calculated by deducting social transfers from the total disposable household income. Used in combination with standard at-risk-of-poverty rate to measure the impact of social transfers. Depending whether pensions are considered a social transfer, two definitions of disposable household income before social transfers are applied. Social transfers include: social welfare (financial assistance, cash grants), benefits and other receipts on the basis of social protection; receipts on the basis of unemployment benefit and for temporarily unemployed persons; alimonies, health insurance benefits; receipts and benefits from disability insurance; child allowance, scholarships of pupils and students as well as benefits for students of schools for qualified workers.	HBS
9. Inequality of income distribution – Gini coefficient	Measure of inequality of income taking into account the entire income distribution. The values are in the interval between 0 (when each person would dispose of the equal income – perfect equality) and 1 (when only one persons would dispose of the total income – full inequality), whereby the inequality of income distribution grows with the increase of the value of coefficient.	HBS
10. At-persistent-risk-of-poverty rate (50% of the median)	Share of persons with income per consumer unit below 50% of the median national income per consumer unit in at least two of the three previous years (condition: existence of panel data). Disaggregated by gender and total for population.	-
11. In-work poverty (full /part time)	Proportion of individuals classified as employed and who are at risk of poverty. This indicator needs to be analysed by personal characteristics, characteristics of the work place and household. It also needs to be analysed relative to at-risk-of-poverty faced by the unemployed and the inactive.	-
NATIONAL INDICATORS	DEFINITION	SOURCE
1. Absolute poverty	Persons of age whose consumption at a monthly level is below the	HBS

line	minimum required for food (nutritional minimum as defined by FAO) and other expenditures excluding food (except durable goods and imputed rent) are beneath the absolute poverty line.	
2. Relative poverty line	Defines poverty relative to the national level of living standards and is set as 60% of median average consumption per consumer unit.	HBS
3. Increase of income of the middle class relative to increase of income of the poor	Relative poverty line anchored in one year (60% of the median) adjusted for price increase. The middle class is defined relative to at-risk-of-poverty, and the boundaries of the middle class are anchored in the base year and adjusted for price increase	-
4. Household indebtedness rate	Ratio of the monthly loan installments and total household income. Monitoring by income deciles is required since the poor strata have difficulties in accessing loans. In order to define it on LSMS basis, in addition to bank loans all other debts of the household could be included.	-
5. Share of social transfers (other than pensions) in household income by income deciles	Indicator depicts the allocation of social transfers in population and share of social transfers in the income of the poor, but also in persons who are not poor.	HBS
6. Efficiency and effectiveness of social transfers	a) Efficiency of social transfers At-risk-of-poverty rates are compared before and after social transfers. An indicator defined in this way allows for measuring of the at-risk-of-poverty rate decrease as a consequent of social transfers. The second method of measuring efficiency of social transfers is to measure the percentage of social transfers distributed to population at risk of poverty. b) Effectiveness of social transfers Percentage of relative at-risk-of-poverty gap eliminated by social transfers. It shows the allocation of social transfers by the level of the household income and thus supports development of interventions in the domain of targeting of social transfers.	HBS
7. Self-perceived at-risk-of-poverty rate	Poverty line set on the basis of income of population – 60% of the median equivalent income – applied on the self-perceived assessment of respondents on the minimum sum required for a household to live in a satisfactory manner.	HBS
8. Inability to access financial services	Persons who do not have access to financial services and products and exclusion is a consequence of inadequate shaping of marketing, prices and products of the financial market.	-

At-risk-of-poverty rate by gender and age, %²⁰

	2006	2007	2008	2009
Gender				
Total	20.9	21.0	17.9	17.7
Male	20.1	20.7	17.7	17.7
Female	21.6	21.3	18.1	17.8
Age groups				
0–17				
Total	26.0	25.2	20.8	22.1
Male	24.6	24.8	20.8	22.2
Female	27.6	25.7	20.8	22.0

²⁰ All financial poverty indicators that are based on income are calculated by using the definition according to which income also includes income in kind.

18–24				
Total	21.0	19.1	17.0	16.7
Male	20.3	19.5	16.4	17.6
Female	21.9	18.7	17.7	15.9
25–54				
Total	19.4	19.5	16.5	16.6
Male	19.4	19.7	16.9	16.9
Female	19.3	19.3	16.0	16.2
55–64				
Total	17.3	17.2	15.8	16.0
Male	17.7	17.0	17.2	16.3
Female	16.9	17.4	14.5	15.7
65 +				
Total	21.8	23.9	20.2	18.2
Male	18.6	22.1	17.4	16.4
Female	24.3	25.2	22.2	19.5

Source: HBS

At-risk-of-poverty rate by type of household , %

	2006	2007	2008	2009
<i>All households without dependent children</i>	17.2	18.8	17.3	16.2
Single person households				
Total	22.9	30.5	29.5	24.7
Male	19.0	25.7	24.9	21.3
Female	24.3	32.8	31.7	26.2
under the age of 65	19.5	22.8	21.2	23.0
65 +	26.0	31.3	30.3	26.5
Two adults without dependent children				
both under the age of 65	14.1	17.4	12.5	17.7
at least one aged 65 and over	17.1	29.0	16.3	16.5
Other households without dependent children	13.5	13.3	14.7	13.0
<i>All households with dependent children</i>	23.3	22.6	18.4	18.9
Single parent, one or more dependent children	36.8	26.9	27.4	30.6
Two adults with one dependent child	16.3	13.3	14.0	15.0
Two adults with two dependent children	17.9	18.3	14.9	16.8
Two adults with three or more dependent children	35.8	37.5	27.7	32.7
Other households with dependent children	24.6	24.2	18.8	18.0

Source: HBS

At-risk-of-poverty rate by the most frequent status at the labour market and age, %

Economic activity of household members	2006	2007	2008	2009
Employed				
Total	15.3	16.5	13.5	13.6
Male	16.6	17.8	15.5	15.5
Female	13.4	14.5	10.9	11.0
Unemployed				
Total	36.6	33.4	31.1	30.5
Male	38.0	38.3	31.5	33.4
Female	35.5	29.5	30.7	28.0
Pensioners				
Total	15.6	15.4	14.1	12.9
Male	14.5	15.9	14.1	12.6
Female	16.6	15.1	14.1	13.2

Other inactive				
Total	50.8	48.3	46.0	47.4
Male	47.4	44.1	45.0	44.3
Female	53.8	51.2	46.7	50.2

Source: HBS

At-risk-of-poverty rate by type of tenure, %

	2006	2007	2008	2009
Owner/rent-free				
Total	20.8	20.7	17.9	17.9
Male	20.0	20.4	17.7	17.9
Female	21.5	21.1	18.2	17.9
Tenant				
Total	24.9	29.2	16.1	12.2
Male	24.6	30.5	17.2	12.8
Female	25.3	27.9	15.0	11.8

Source: HBS

Note: Data should be analysed in view of the fact that HBS, in this disaggregation, due to a limited number of respondents who do not own apartments, deviates from the expected pattern (higher at-risk-of-poverty rate with persons who rent apartments)

At-risk-of-poverty threshold, in RSD

	2006	2007	2008	2009
One person	8,388	9,900	11,520	12,828
Household with two adults and two children younger than 14	17,615	20,790	24,192	26,939

Source: HBS

Inequality of income distribution, quintile ratio S80/S20

	2006	2007	2008	2009
Quintile ration S80/S20	5.8	5.6	4.8	4.7

Source: HBS

Relative at-risk-of-poverty gap by age and gender, %

	2006	2007	2008	2009
Total				
Total	28.5	28.5	23.6	22.0
Male	28.5	28.1	24.4	24.0
Female	28.5	28.7	22.8	20.9
0 - 17				
Total	29.7	29.9	23.1	21.8
Male	30.1	27.9	25.3	26.5
Female	29.3	30.9	22.2	19.8
18 - 64				
Total	28.5	29.2	24.8	22.0
Male	28.5	29.7	25.3	22.9
Female	28.5	28.2	23.5	21.5
65 +				
Total	26.7	24.7	21.9	22.0
Male	25.2	21.4	20.7	22.0
Female	28.5	27.6	22.3	21.9

Source: HBS

Dispersion around poverty threshold

	2006	2007	2008	2009
40% of the national median income				
-at-risk-of-poverty threshold (in RSD)	5,592	6,600	7,680	8,552
-at-risk-of-poverty rate	9.1	8.7	6.2	6.0
50% of the national median income				
-at-risk-of-poverty threshold (in RSD)	6,990	8,250	9,600	10,690
-at-risk-of-poverty rate	14.4	14.4	11.5	10.8
70% of the national median income				
-at-risk-of-poverty threshold (in RSD)	9,786	11,550	13,440	14,966
-at-risk-of-poverty rate	27.4	27.8	25.5	26.4

Source: HBS

At-risk-of-poverty rate before social transfers, by gender and age, %

	2006	2007	2008	2009
Pensions included in income				
Total	22.0	22.3	19.1	19.1
Male	21.2	21.9	18.7	19.1
Female	22.7	22.7	19.4	19.1
0 - 17				
Total	28.2	28.0	23.5	24.5
Male	26.6	27.6	23.2	24.5
Female	30.0	28.5	23.9	24.4
18 - 64				
Total	20.2	20.3	17.4	17.7
Male	20.1	20.3	17.8	18.1
Female	20.3	20.2	17.0	17.4
65 +				
Total	22.1	24.0	20.6	18.9
Male	19.4	22.1	17.6	17.0
Female	24.2	25.5	22.8	20.3
Pensions excluded from income				
Total	32.1	31.3	30.7	31.9
Male	29.5	29.4	28.7	30.4
Female	34.6	33.0	32.6	33.3
0 - 17				
Total	25.1	22.9	19.4	20.3
Male	23.8	22.7	19.7	22.0
Female	26.5	23.0	19.2	18.5
18 - 64				
Total	24.7	23.6	22.9	23.5
Male	22.7	21.8	21.4	21.7
Female	26.6	25.4	24.4	25.2
65 +				
Total	63.3	62.0	64.1	67.2
Male	61.9	63.2	64.4	68.6
Female	64.3	61.1	64.0	66.1

Source: HBS

Inequality of income distribution, Gini coefficient

	2006	2007	2008	2009
Gini coefficient	32.9	32.0	30.2	29.5

Source: HBS

Absolute poverty line (CPI)

	2006	2007	2008	2009
Poverty line, RSD/month/consumer unit	6,221	6,625	7,401	8,022
% of the poor in RS	8.8	8.3	6.1	6.9
% of the poor by region:				
Belgrade	4.3	2.4	2.9	3.8
Central Serbia	10.7	9.0	7.0	9.3
Vojvodina	8.6	11.9	6.8	4.9
% of the poor by type of settlement:				
Urban area	9.5	10.1	5.0	4.9
Other area	20.6	17.6	7.5	9.6
% of the poor by type of household:				
Single-member	8.6	8.8	6.6	5.7
Two-member	8.7	9.2	5.5	5.6
Three-member	5.2	4.9	5.1	5.0
Four-member	5.7	5.3	4.7	4.7
Five-member	8.3	8.1	5.2	5.7
Six-member and over	17.3	14.4	10.0	14.2
% of the poor by age:				
Children up to the age of 13	11.6	11.2	7.3	9.8
Children 14–18	11.7	8.8	6.9	8.4
Adults 19–24	7.2	6.6	5.9	7.5
Adults 25–45	8.4	7.4	5.0	6.4
Adults 46–64	7.0	6.6	5.4	5.3
Elderly 65 and over	10.0	10.3	7.5	7.5
% of the poor by level of education of head of household:				
Incomplete primary school	21.0	18.1	9.0	14.8
Primary school	13.7	13.2	10.5	9.2
Secondary school	5.5	5.4	4.8	3.0
College	0.6	0.1	2.7	1.8
University	1.8	0.4	1.9	0.6
% of the poor by socio-economic status of head of household:				
Self-employed	10.2	10.9	5.1	6.0
Employed	5.2	5.3	3.9	4.6
Unemployed	14.7	10.9	16.9	17.5
Pensioners	8.8	7.6	5.7	6.1
Other inactive	28.2	24.2	15.5	29.3

Source: HBS

Note: Absolute poverty line defined on the basis of food line, raised for the amount of other expenditures (clothing, footwear, housing, health care, education, transport, sports, culture, other goods and services), computed in 2006 raised for the amount of inflation (Index of Consumer Prices) for each year.

Relative poverty line *

	2006	2007	2008	2009
Poverty line, RSD/month/consumer unit	7,171	7,747	8,923	9,583
% of the poor in RS	14.4	13.4	13.2	13.6
% of the poor by type of settlement:				
Urban area	9.5	10.1	10.9	9.1
Non-urban area	20.6	17.6	16.1	19.5

Source: HBS

**Relative poverty line* defines poverty in relation to the national living standards level and is defined as 60% of median of average consumption per consumer unit.

Median household income

	2006	2007	2008	2009
Median in RSD	13,980	16,500	19,200	21,379
index 2006=100	100.0	118.0	137.3	152.9
Chain index	-	118.0	116.4	111.4

Source: HBS

Share of social transfers (other than pensions) in household income by income decile

Decile	1	2	3	4	5	6	7	8	9	10
2006	10.1	6.6	3.4	3.8	2.6	2.0	2.0	1.4	1.2	1.7
2007	10.6	5.8	3.9	3.1	2.7	1.7	1.8	1.3	1.2	1.0
2008	8.7	6.9	2.8	2.5	2.2	1.3	1.6	1.1	0.7	0.5
2009	12.1	4.7	2.6	3.7	1.7	1.9	0.9	1.4	0.8	0.6

Source: HBS

Efficiency of social transfers, % - Decrease of at-poverty-risk rate as a consequence of social transfers

	2006	2007	2008	2009
<i>Total population</i>				
At risk of poverty (after social transfers)	20.9	21.0	17.9	17.7
At risk of poverty (before social transfers)	22.0	22.3	19.1	19.1
Decrease of at risk of poverty (after social transfers)	5.3	6.2	6.7	7.9
<i>Male</i>				
At risk of poverty (after social transfers)	20.1	20.7	17.7	17.7
At risk of poverty (before social transfers)	21.2	21.9	18.7	19.1
Decrease of at risk of poverty (after social transfers)	5.5	5.8	5.6	7.9
<i>Female</i>				
At risk of poverty (after social transfers)	21.6	21.3	18.1	17.8
At risk of poverty (before social transfers)	22.7	22.7	19.4	19.1
Decrease of at risk of poverty (after social transfers)	5.1	6.6	7.2	7.3

Source: HBS

Efficiency of social transfers, % - Percentage of social transfers (other than pension) distributed to population at risk of poverty

	2006	2007	2008	2009
% total realized social transfers (excluding pensions) distributed to population at risk of poverty	24.8	26.4	30.8	29.4

Source: HBS

Effectiveness of social transfers, %

	2006	2007	2008	2009
<i>Total population</i>				
Relative at-risk-of-poverty gap after social transfers	28.5	28.5	23.6	22.0
Relative at-risk-of-poverty gap before social transfers	31.7	29.8	27.0	24.6
Decrease of relative at-risk-of-poverty gap after social transfers	3.2	1.3	3.4	2.6
<i>Male</i>				
Relative at-risk-of-poverty gap after social transfers	28.5	28.1	24.4	24.0
Relative at-risk-of-poverty gap before social transfers	31.2	29.8	27.4	26.3
Decrease of relative at-risk-of-poverty gap after social transfers	2.7	1.7	3.0	2.3
<i>Female</i>				
Relative at-risk-of-poverty gap after social transfers	28.5	28.7	22.8	20.9
Relative at-risk-of-poverty gap before social transfers	31.7	29.8	26.7	23.4
Decrease of relative at-risk-of-poverty gap after social transfers	3.2	1.1	3.9	2.5

Source: HBS

Self-perceived at-risk-of-poverty rate

	2006	2007	2008	2009
Self-perceived at-risk-of-poverty rate, %	50.0	43.6	43.4	42.2

Source: HBS

8.2 Employment

Work is relevant for people not only as a source of income but also to enable their wider inclusion in the society (higher quality social contacts, links to the surroundings...). The remarkable significance of employment for people has been recognized and confirmed through establishment of an independent dimension of employment in the Social Inclusion Process at the EU level. Three primary and two secondary indicators agreed at EU level have been amended by a list of national employment indicators. The Labour Force Survey allows for collection of the majority of the required data but not those for employment rate by the most frequent activity status in the last year, household labour intensity, share of long-term informally employed persons and share of the unemployed who gave up on job search.

2. EMPLOYMENT		
EU INDICATORS OF SOCIAL EXCLUSION	DEFINITION	SOURCE
<ul style="list-style-type: none"> ▪ Primary indicators 		
1. Regional cohesion	Dispersion of regional employment rates represents a coefficient of variation of employment rates between regions of the Republic of Serbia. ²¹ Dispersion of regional employment rates is zero when the employment rates in all the regions are identical. it grows with the growth of differences in employment rates between regions	LFS
2. Long-term unemployment rate	Represents a proportion of persons unemployed for 12 months and longer in active population aged 15–64. Disaggregated per gender, and total for population.	LFS
3. Persons living in jobless households	Share of persons aged 0–65 living in these households relative to the total size of this age group. It is calculated in particular for: - population aged 0–60, in order to exclude the influence of pension regulations, - children (aged 0–17) living in jobless households, expressed as a percentage of the total number of children. In calculating indicators, students aged 18–24 living in households comprised of students only are not computed in the value of either numerator nor denominator	-
<ul style="list-style-type: none"> ▪ Secondary indicators 		
4. Share of long-term unemployed in total number of the unemployed	Proportion of persons unemployed for 12 months and longer in the total number of the unemployed, disaggregated by gender	LFS
5. Very long-term unemployment rate	Proportion of persons unemployed for minimum 24 months in active population (aged 15–64)	LFS
NATIONAL INDICATORS	DEFINITION	SOURCE
1. Activity rate	Share of the employed and unemployed population (both categories defined by ILO standards) relative to working age population (aged 15–64). This indicator is a measure of total offer of labour in the society over the observed period. It indicates the size and structure of human resources on the labour market, but individually does not show inclusion on the	LFS

²¹ For the time being, data are presented for Belgrade, Vojvodina and Central Serbia. At the RSO proposal, the Government of Serbia is expected to adopt a decision on statistical regionalization in 2010. This will allow monitoring of regional indicators at the level of statistical regions.

	labour market.	
2. Employment rate	Share of the employed persons (ILO definition) in the working age population (15–64). Also, it represents one of the key indicators of labour market that needs to be taken in combination with other indicators or disaggregated by gender, age, region, ethnic affiliation, labour status, etc. Taken independently, this indicator cannot provide accurate information on employment (the high employment rates in underdeveloped countries may indicate high engagement of population in informal, often agricultural, non-productive labour activities in order to survive in conditions of extreme poverty). Therefore, this indicator should be analysed in combination with additional indicators denoting type and quality of employment.	LFS
3. Employment structure by professional status	Represents the share of owners/co-owners of companies (institutions), owners/co-owners of a shop, free lancers or persons working on service contracts, individual farmers, employed workers and helping members of households in the total number of the employed. Disaggregation by gender, age, education, ethnic affiliation, type of settlement, forced migrant status is required.	LFS
4. Employment rate by the most frequent activity in the last year	Share of persons who stated they had been employed for more than 6 months in the previous year (not necessarily in continuity) relative to the working age persons. This indicator represents the strictest measure of employment whereby the persons who are within the reference one-year period are registered as the employed. In EU-SILC methodology, this indicator is not used independently but for disaggregation of at-risk-of-poverty rates. However, taken independently and in combination with other labour market indicators, it represents a good measure of relatively full employment at annual level. This indicator should also be disaggregated by gender, age, education, ethnic affiliation, forced migrant status as well as to be presented for the category of persons with disabilities.	-
5. Share of the employed with less than 15 work hours/week	The share of employed persons who work less than 15 hours during the working week in the total number of the employed. Indicates hidden unemployment in view of the extremely low labour intensity at individual level. The indicator should be used in combination with poverty indicators as well as with the indicator of labour intensity at the household level. Disaggregate by gender, age, education, ethnic affiliation, forced migrant status, and show for the category of persons with disabilities.	LFS
6. Household labour intensity	Represents the ratio of the total number of months that working age household members spent in employment during the previous year and the number of months that these members could have spent theoretically in employment. Shows full or low intensity of inclusion of the household in labour, may well indicate differences among households of certain categories of population as well as individual household members but also to allow insight into connections between labour intensity and aspects of financial poverty. This indicator has not yet been used in national labour market analyses.	-
7. Share of the informally employed (work „in the black market”)	Share of the employed who work without a labour contract, entrepreneurs and the self-employed without a registered enterprise, farmers without registered farms relative to the total number of employed persons. The indicator is particularly relevant for studying social inclusion at the labour market in Serbia (the latest living standards measurement survey shows high participation of the informally employed - 35% – Living Standards Measurement Survey, 2008). Disaggregate by gender, age, education, ethnic affiliation, forced migrant	LFS

	status, and show for the category of persons with disabilities.	
8. Share of long-term unemployment	Share of informally employed persons who have been in this status for two or more years. Allows insights into long-term aggravated access to the formal labour market. Disaggregate by gender, age, education, ethnic affiliation, forced migrant status, and show for the category of persons with disabilities.	-
9. Sectoral employment structure	Share of employment in individual sectors of economy relative to total employment. The indicator primarily describes the economic structure of the society through labour force distribution, but may at the same time show whether certain groups have been deprived of the possibility of inclusion in developmental sectors of economy or if certain groups concentrate in certain traditional, low productivity sectors as well as in those with explicitly unfavourable working conditions. Disaggregate by gender, age, education, ethnic affiliation, forced migrant status, and show for the category of persons with disabilities. Requires implementation of sector ISIC 4 classification.	LFS
10. Unemployment rate	Share of persons who were unemployed (ILO definition) in the reference period relative to the total number of active persons. A significant labour market indicator that, in combination with activity and employment rates and adequate disaggregation per gender, age, ethnic affiliation and some marginalized categories, may show dimensions of relative exclusion from employment.	LFS
11. Share of the unemployed who gave up on job search	Share of dependent persons who gave up on job search and moved into inactive status. Shows the effects of long-term unemployment, the „discouraged” unemployed who withdraw from the labour market, and should also identify reasons for this withdrawal (long-term impossibility to find employment, care of family, etc). Disaggregate by gender, age, education, ethnic affiliation, forced migrant status, and show for the category of persons with disabilities.	-
12. Share of the unemployed not registered with the NES	Share of persons who, according to the ILO definition, are unemployed or are not registered with the NES in the total number of the unemployed. Shows exclusion from services of mediation of the national institution in charge of employment. Disaggregate by gender, age, education, ethnic affiliation, forced migrant status, and show for the category of persons with disabilities.	LFS
13. Share in active employment programmes	Share of the unemployed who were included in the active labour market measures of NES in the course of the previous year in the total number of the unemployed. This indicator should provide insight into access to employment support services, disaggregated by gender, age, education, ethnic affiliation, forced migrant status, and show for the category of persons with disabilities.	NES
14. Number of approved start-up loans	The number of approved start-up loans paid from the state budget for the unemployed relative to the number of the unemployed. Monitor by gender, age, education, ethnic affiliation, forced migrant status, and show for the category of persons with disabilities.	Фонд за развој

Regional cohesion

	April 2008	October 2008
Variations in unemployment rates by region	0.029	0.017

Source: LFS

Long-term unemployment rate

	April 2008	October 2008	April 2009	October 2009
Men	8.19	8.49	8.83	10.18
Women	11.11	11.73	11.65	11.82
Total	9.49	9.91	10.08	10.91

Source: LFS

Share of long-term unemployed in the total number of the unemployed

	April 2008	October 2008	April 2009	October 2009
Men	69.89	70.34	61.91	66.53
Women	73.21	71.03	67.37	64.41
Total	71.58	70.70	64.58	65.50

Source: LFS

Very long-term unemployment rate²²

	April 2008	October 2008	April 2009	October 2009
Men	6.00	6.38	6.56	5.98
Women	8.70	9.04	9.27	7.73
Total	7.20	7.54	7.76	6.77

Source: LFS

Activity rate

	April 2008	October 2008	April 2009	October 2009
Men	71.12	71.27	69.0	68.4
Women	54.80	54.07	52.8	52.8
Total	62.81	62.56	60.8	60.5

Source: LFS

Employment rate

	April 2008	October 2008	April 2009	October 2009
Men	62.29	62.22	58.7	57.4
Women	46.00	44.70	43.3	42.7
Total	54.00	53.35	50.8	50.0

Source: LFS

Employment structure by professional status

	April 2008	October 2008	April 2009	October 2009
owner/co-owner of an enterprise (institution)	2.72	2.51	2.7	5.3
owner/co-owner of a shop	4.51	4.45	4.5	1.9
Free lancer, work on service contract	4.03	4.18	3.8	3.2
Individual farmer	14.80	12.41	10.1	9.9
Employed worker	64.51	67.86	71.4	72.0
Unpaid helping member in family business	9.43	8.59	7.5	7.7

Source: LFS

²² Definition of indicator: Share of very long-term unemployed persons (according to ILO definition, persons who are unemployed for a period exceeding two years) in total active population. In addition to share for total population, it is also monitor disaggregated by gender.

Share of the employed with less than 15 working hours per week

	April 2008	October 2008
Men	1.46	1.39
Women	2.15	1.21
Total	1.76	1.31

Source: LFS

Share of the informally employed

	April 2008	October 2008	April 2009	October 2009
Men	21.24	24.27	20.7	19.2
Women	26.75	25.40	24.1	22.3
Total	23.63	23.03	22.2	20.6

Source: LFS

Unemployment rate

	April 2008	October 2008	April 2009	October 2009
Men	11.72	12.07	14.27	15.31
Women	15.18	16.52	17.29	18.36
Total	13.25	14.01	15.60	16.65

Source: LFS

Share of the unemployed not registered with the NES

	April 2008	October 2008	April 2009	October 2009
Men	19.44	19.23	24.6	23.6
Women	14.65	12.61	13.8	15.4
Total	17.01	15.82	19.3	19.6

Source: LFS

Number of provided services²³ by type of active labour market programme in 2009

	No. of services provided	No. of provided services as a % of the number of persons at the NES registries
Career guidance and counselling		
Group informing	324,785	43.5
Assessment of employability and individual employment plans	471,676	63.2
Active job search training	35,243	4.7
Additional education and training		
Trainings	3,049	0.4
interns – RS budget	9,324	1.2
Interns – AP Vojvodina budget	7,582	1.0
Functional primary education	72	0.0
Employment programmes		

²³ Data refer to the number of services offered and not to the number of persons who benefited active labour market programmes. One persons registered may benefit several services so the total number of the services offered (sum) does not equal the total number of persons encompassed by the programmes. For the time being, NES cannot provide an information on the number of persons encompassed by ALMPs, but development of an application to provide these data is expected in the first quarter of 2010. The NES services extended in 2009 may be classified into four programmes: career guidance and counseling, additional education and training, employment programmes and mandatory social insurance contributions. The table gives an overview of the selected services.

Self-employment	5,248	0.7
New employment	6,915	0.9
Public works	10,346	1.4
Severance to job	390	0.1
Payments of one-time cash benefits	638	0.1
Incentives for employment of cash benefit beneficiaries	10	0.0
Mandatory social insurance contributions		
Under the age of 30	2,941	0.4
Interns, under the age of 30	467	0.1
Persons with disabilities	95	0.0

Source: NES

Number of approved start-up loans

	Total	Entrepreneurs	Legal entities	Number of approved start-up loans relative to the number of the unemployed	Number of approved start-up loans at 1,000 unemployed
2008	2,279	1,761	518	0.50	5.0
2009	2,824	1,967	857	0.55	5.5

Source: Development Fund

8.3 Health

The EU had difficulties to select the indicators of health although the significance of health in social exclusion was recognized at a very early stage of the development of indicators. Many comparable data relevant for health existed but few very strictly focused on poverty and social exclusion. The portfolio of primary indicators includes two indicators (life expectancy and self-perceived health status by level of income) despite the noted limitations of these. Absence of life expectancy is the impossibility to ascribe the differences in values between the countries to the differences in social exclusion. The differences in life expectancy may result from distinct nutrition habits, smoking or other behavioural differences that need not be directly linked to social exclusion in the country²⁴. Mortality defined in this way is not central to the context of social exclusion, unlike the differing mortality rates (and differences in medical status) according to the socio-economic characteristics. The objective of the second primary indicator is to capture all these differences in health. Still, it is to yet to be seen to what extent can an indicator defined in this way accurately reflect differences between the countries and quintiles in a country. The capacity of the indicator to capture differences in health over time has yet to be proved. These two indicators have been excluded from the portfolio of primary and secondary indicators of social exclusion after the 2006 update, and the context indicator was healthy life years (at birth and at the age of 65) by socio-economic status. At the level of Serbia, monitoring of 8 additional health indicators was recommended, the majority of which is in the updated portfolio of EU indicators, in the special module referring to the health of population (divided in three groups by objective). Data for the indicator measuring impossibility to access health care (visit to doctors and dentists) lack for financial reasons, indicator – impossibility to purchase prescribed medications, medical treatment or orthopaedic aids for lack of funds, and the number of persons with long-term chronic illness limiting their daily activities and who are not proclaimed disabled. Instead of the absent indicator on the number of women who have not visited gynecologist over the past two years, several indicators that may show the health status of women indirectly have been given.

3. HEALTH		
EU INDICATORS OF SOCIAL EXCLUSION	DEFINITION	SOURCE
▪ Primary indicators		
1. Life expectancy	<ul style="list-style-type: none"> At birth – by gender – average number of years that an infant is expected to live (assuming his life is subject to current mortality conditions). At the age of 1 – by gender – average number of years that a 1 year old child is expected to live (assuming his life is subject to current mortality conditions). <p>At the age of 60 – by gender – average number of years that a 60 year old person is yet expected to live (assuming his life is subject to current mortality conditions).</p>	RSO
2. Self-perceived medical status by income level	<p>Share of population aged over 16, in the lowest and the highest quintile of income distribution who report their health to be „bad” or „very bad”.</p> <p>Indicator was adopted in 2001 and it was then that it was calculated as a ratio of proportions of the lowest and the highest quintile group. The definition was changed and limited only to presentation of share of such persons in both quintiles without representing of their relationship.</p> <p>The 2007 indicator may be obtained from LSMS since module 4 Health and Health Care contains the question „How do you assess your health in</p>	Survey of „Batut” and the World Bank

²⁴ E. Marlier, A.B. Atkinson, B. Cantillon and B Nolan, *The EU and social inclusion – Facing the challenges*, The Policy Press University of Bristol, 2007.

	<p><i>general?</i>” and offers possible answers: bad and very bad. It has been included into surveys of Institute „Batu” and the World Bank (<i>Survey of the Health Status of the Population in Serbian, April 2007</i>).</p> <p>Indicator should be monitored disaggregated by gender and age groups (1. 16⁺, 2. 16–64, 3. 65⁺) for both quintiles.</p>	
NATIONAL INDICATORS	DEFINITION	SOURCE
1. Rate of non-coverage by health insurance	<p>Share of persons without health insurance in total population, disaggregated by gender, age, region, income, type of settlement, forced migrant status.</p> <p>The indicator for 2007 may be obtained from LSMS, module 4 - Health and Health Care. The question „accessibility of health care”, allows for the question as to the reason of failure to use the health care services in the previous month to be answered by – absence of health insurance. Accordint to LSMS data, <i>6% of the Serbian population do not have health insurance.</i>²⁵</p>	LSMS
2. Impossibility to acces health care (visits to doctors and dentists) for financial reasons	<p>Share of persons who stated that they had given up from the visits to the doctor, dentist, diagnostic treatment or therapy minimum 10 times during the previous year due to lack of money. Disaggregation by gender, age, region, income, type of settlement, region, forced migrant status is required.</p> <p>The indicator was verified in the survey conducted in 2006 (Institute „Batu” and the World Bank) which proved significant differences between the general population and 20% of the poor.</p>	-
3. Impossibility to obtain prescribed medications, medical treatment and orthopaedic aids for lack of funds	<p>Share of persons who were unable to purchase medications and/or orthopaedic aids due to lack of funds during the previous year. Disaggregation by gender, age, region, income, type of settlement, region, forced migrant status is required.</p> <p>The Living Standards Measurement Survey showed that chronic patients below the poverty line do not take adequate medications regularly. By cross-referencing answeres to the question <i>Are you in regular therapy for this/those chronic illnesses?</i> and the question related to the level of income, a connection between the regularity of treatment and living standards may be concluded. However, lack of funds for medical therapy must be monitored with all persons who had a need for it, and not only with chronic patients.</p>	-
4. Persons with a chronic illness limiting them for a long term in daily activities but who do not have a status of persons with disabilities	<p>Percentage of persons who have an officially diagnosed illness on the basis of which and pursuant to the law, a certain degree of disability is accorded, but whose disability has not been recognised (relevant for the disability status ensures access to specific resources and services, regulates specific rights in the area of work, employment, social benefits and health care of persons with disabilities).</p> <p>This indicator was not included in surveys to date and its inclusion in future surveys is important. In LSMS, module 4 Health and Health Care, there is a question: <i>Has the disability been recognised by some committee who passed an appropriate decision?</i>, as well as questions: <i>How would you describe this /gravest illness?</i>, <i>Does this health problem /disability prevent you from the following?...</i> which could provide insight into the percentage of persons who have a decision on disability as well as into the percentage of persons who have a self-perceived impression of a grave illness.</p>	LSMS

²⁵ RS Government, PRS Implementation Unit of the Deputy Prime Minister (2009), *Monitoring Social Inclusion in Serbia*

5. Rate of underfed /obese children	Share of children who, according to the World Health Organisation, are categorised as underfed/obese in the total population of that age. Monitor disaggregated by income of households with children, type of settlement, region.	MICS
6. Mortality rate of infants and children up to the age of 5	<ul style="list-style-type: none"> Share of children who died before turning one relative to the total population of children up to the age of one. The value is expressed per 1000 live births Share of children who died by the age of 5 relative to 1000 live births Monitor disaggregated by income of households with children, type of settlement, region.	RSO
7. Coverage by vaccination	Share of children duly vaccinated relative to the total population of children. The data of vaccination may be obtained in the publication <i>Health and Statistical Almanach of the Republic of Serbia 2008, Public Health Institute of Serbia „Dr. Milan Jovanović Batut”, in the chapter Contagious Diseases in RS, table 5.12 Results of Vaccination in RS, pp. 249</i>	„Batut”
8. Share of women aged 15 and over who have not visited a gynecologist during the past two years	<p>Share of women aged 15 + who have not visited a gynecologist during the past two years in the total population of women aged 15+. Monitor disaggregated by age, education, type of settlement, region, level of income.</p> <p>The Living Standards Measurement Survey registers only visits to gynecologist during the previous month, because the question has been formulated in that way. According to it, 2.2% of women aged 15+ visited a gynecologist during the previous month. A question defined like this is too restrictive and does not provide a good picture on the extent of health prevention of women. Instead of it, different indicators providing a picture of health care of women may be monitored.</p>	-

- Data for **life expectancy** in Serbia are collected by RSO and published in statistical yearbooks and the publication as *Municipalities in Serbia* and the Institute of Public Health of Serbia „Dr. Milan Jovanović Batut”. The values are presented both for the entire Republic of Serbia as well as by municipality so regional comparisons are possible.

Life expectancy

	2001–2003	2007	2008
Total	72.37	73.40	73.65
Male	69.73	70.70	71.06
Female	75.05	76.16	76.23

Source: RSO

- Self-perceived medical status per level of income** is assessed as bad/very bad by 32% of the population in the lowest quintile and 12% of the population in the top quintile.²⁶
- Rate of underfed/obese children** was computed in a survey conducted by UNICEF – Multiple Indicator Cluster Survey (MICS).

Rate of underfed and obese children, 2005

		Republic of Serbia
Prevalence of underweight (moderate and severe)		
Age of children		
Total < 5		1.6

²⁶ Republic Development Institute, 2009, 2009 Development Report on the basis of the research of the World Bank and the Institute „Batut”

Total < 5 (only Roma in Roma settlements)	7.7
Total < 5 (excluding Roma in Roma settlements)	1.4
Up to 6 months	1.2
6-11 months	1.7
12-23 months	0.9
24-35 months	2.3
36-47 months	2.2
48-59 months	1.3
Prevalence of obesity (moderate and severe)	
Age of children	
Total < 5	15.3
Total < 5 (only Roma in Roma settlements)	2.8
Total < 5 (excluding Roma in Roma settlements)	15.8
Up to 6 months	8.6
6-11 months	12.8
12-23 months	19.2
24-35 months	15.2
36-47 months	16.5
48-59 months	15.2

Source: UNICEF – Multiple Indicator Cluster Survey (MICS)

- **Infant mortality rate** is a complex measure of risk of death and includes risk of death in **neonatal period** (first 28 days of life), decreasing with an improved access of neonatal medical care and risk of death in **postneonatal period** (as of 28th day to first birthday), decreasing with an improved education of mothers, better sanitary care, nutrition, improved capture of infants by vaccination and more successful treatment of respiratory diseases at this age. Postneonatal mortality indicates the threatening effect of exogenous factors on the health of infants. Disaggregation of these two mortality rates would give a much more detailed insight into the risk of infant mortality. The major share in infant mortality is that of the death of infants in the first week of life, as indicated by the values of the rate of **perinatal mortality**. This rate represents a sum of foetal deaths (over 1000g) plus deaths in the first week of life (0–6 days) per 1000 live births. Further to being an indicator of the effect of endogenous factors on the health of the foetus, in countries with organised perinatal medical care (health care of pregnant women), it represents at the same time a good indicator of the quality of provided medical services to mothers with children for it happens at times of intensive supervision of their health by medical services. Therefore, its monitoring in future is recommended.

Infant mortality rate

	Total	Male	Female
2008			
Republic of Serbia	6.7	7.4	6.0
Central Serbia	6.9	7.8	6.1
Vojvodina	6.1	6.3	5.8
2007			
Republic of Serbia	7.1	8.2	6.0
Central Serbia	8.0	8.9	7.0
Vojvodina	4.7	6.1	3.1
2006			
Republic of Serbia	7.4	8.5	6.2
Central Serbia	7.6	8.8	6.3
Vojvodina	6.8	7.7	5.9
2005			
Republic of Serbia	8.0	9.6	6.3
Central Serbia	8.4	10.1	6.6
Vojvodina	7.0	8.3	5.6
2004			
Republic of Serbia	8.1	9.2	6.9

Central Serbia	8.5	9.5	7.3
Vojvodina	7.1	8.2	5.9

Source: UNICEF - Multiple Indicator Cluster Survey (MICS)

Rate of mortality of children by the age of 5

	Total	Male	Female
2008			
Republic of Serbia	7.8	8.3	7.3
Central Serbia	7.9	8.6	7.2
Vojvodina	7.6	7.6	7.5
2007			
Republic of Serbia	8.3	9.5	6.9
Central Serbia	9.2	10.3	8.0
Vojvodina	5.8	7.5	4.0
2006			
Republic of Serbia	8.7	9.8	7.6
Central Serbia	8.8	9.8	7.7
Vojvodina	8.5	9.6	7.4
2005			
Republic of Serbia	9.2	11.0	7.4
Central Serbia	9.7	11.6	7.7
Vojvodina	7.9	9.2	6.6
2004			
Republic of Serbia	9.4	10.8	7.9
Central Serbia	9.7	11.0	8.2
Vojvodina	8.6	10.1	6.9

Source: UNICEF - Multiple Indicator Cluster Survey (MICS)

- **Results of vaccination** may be monitored as a capture of vaccinated children at birth (BCG vaccine), which is the most frequently used indicator of capture of children by vaccination, but the number of vaccinated children at the age of 1, 2, 7, 12 and 14 (vaccines DRP, OPVZ, HepB, Hib and planned revaccinations) may also be used as indicators. The number of duly vaccinated children by the age of 14 could also be used as an indicator.

Vaccination results (2008)

Age of the children vaccinated and type of vaccine	coverage %
At birth, BCG vaccine	98,5

Source: *Health and Statistical Almanach of the Republic of Serbia 2008,2007, 2006* Public Health Institute of Serbia „Dr. Milan Jovanović Batut

Also, influenza vaccination of adults over 65 as a percentage of persons over 65 who got vaccinated against influenza in the last year could also be used as an indicator.

- The indicators that could render a picture about health care, instead of the currently missing national specific indicator on the **number of women who have not visited a gynecologist over the past two years**, may also be:
 - *maternal mortality rate* – mortality of women due to illnesses and conditions during pregnancy, at delivery and six week after delivery, which is an important indicator for assessment of medical status of women in the generative period as well as the quality of provided medical care,
 - *number of abortions at 1000 live births*,

- number of abortions at 1000 live births, mothers aged up to 20,

Number of abortions at 1000 live births, mothers aged up to 20

	2004	2005	2006	2007
Number of abortions performed at 1000 live births, mothers up to the age of 20	184.36	166.6	196.47	191.86

Source: World Health Organisation

- number of abortions at 1000 live births, mothers aged over 35,

Number of abortions at 1000 live births, mothers aged over 35

	2004	2005	2006	2007
Number of abortions performed at 1000 live births, mothers over the age of 35	1,411	1,314	1,253	1,189

Source: World Health Organisation

- number of children born with Down syndrome and congenital abnormalities at 100,000 live births,

Number of children born with Down syndrome and congenital abnormalities at 100,000 live births

	2004	2005	2006	2007
Number of children born with Down syndrome at 100,000 live births	12.79	13.85	30.99	4.41
Number of children born with congenital abnormalities at 100,000 live births	514.16	1478.25	1400.06	883.97

Source: World Health Organisation

- use of contraceptives among married women aged 15–49 (presented as a percentage of women from that group who use them),

**Use of contraceptives among married women aged 15–49
(% of women from that group who use them)**

	2005
Use of contraceptives among married women aged 15–49, any method	41.2

Source: World Health Organisation

-breast cancer incidence at 100,000 women,

Breast cancer incidence at 100,000 women

	2004	2005
Breast cancer incidence at 100,000 women	70.16	68.46

Source: World Health Organisation

- Early detection breast cancer screening programme – is defined as a percentage of women aged 50–59 that were screened for breast cancer using a mammography over the past year,

- breast cancer survival rate – percentage of persons still alive 5 years after the disease has been diagnosed compared to a non-diseased group of similar age structure.

- cervical cancer incidence,

Cervical cancer incidence

	2004	2005
Cervical cancer incidence at 100,000 women	25.22	24.8

Source: World Health Organisation

Source of data is the World Health Organisation, Europe Office <http://data.euro.who.int/hfad/>. Data may also be found in the Health and Statistical Yearbook of the Public Health Institute of Serbia „Dr. Milan Jovanović Batut ” (on deliveries and abortions in chapter 7, number of newly diagnosed cases of cancer, women, in chapter 7. Non-contagious Health Disturbances).

- *early detection cervical cancer screening programme* – is defined as a percentage of women aged 20–69 who were examined for cervical cancer over the past three years. Conducted in 2009.

- *cervical cancer survival rate* – percentage of women still alive 5 years after the disease has been diagnosed, compared to a non-diseased group of similar age structure (relative rates).

8.4 Education

The position to education and significance it bears in the EU is visible from the citation of the draft new EU 2020 Strategy: Education is a driver of sustainable growth and investment into education is one of the most effective ways of fighting inequality and poverty.²⁷ The importance of early leaving of the school system is particularly highlighted as a way to prevent both exclusion from the labour market and the wider social exclusion in the future.

The first portfolio of social exclusion indicators agreed in 2001 covered education with two indicators: one primary (early school leavers not in training) and one secondary (persons with low level of education). The following update (July 2003) introduced one more primary indicator – low functional literacy of pupils (as measured by the PISA test). In 2006 update another indicator was placed on the portfolio of secondary indicators. Serbia adopted also 10 national specific indicators of education relevant to social inclusion, that should allow for a more accurate picture of the status of education of the population. Still, the problem is absence of adequate education statistics, that would mean consolidation of data of the Republic Statistical Office and the Ministry of Education, as well as the absence of data for vulnerable groups, for children with developmental problems, Roma... there are also difficulties in capture of university education, collection of data related to drop outs from secondary education and indicators of education of adults that are not computed in Serbia (functional literacy of adults and lifelong learning of adults). In addition to indicators of education in the context of social inclusion, there are indicators of the European Commission *Education and Training 2020*²⁸, that emerged as a result of various initiatives of Member States and the European Commission. With a view to cooperating in the domain of education and training, a new strategic framework for European cooperation in the domain of education and training (“ET 2020”) was adopted in May 2009.

4. EDUCATION		
EU INDICATORS OF SOCIAL EXCLUSION	DEFINITION	SOURCE
<ul style="list-style-type: none"> ▪ Primary indicators 		
1. Early school leavers not in training	Share of persons aged 18–24 in the total number of persons aged 18–24 who have completed elementary education or less (the highest level of education or training attained is 0.1 or 2 according to ISCED-97) and who have not attended any training or education in the period of four weeks preceding the survey.	LFS
2. Low functional literacy of pupils (PISA)	Literacy expressed as a low result of pupils in PISA test. The test measures knowledge and skills of 15-year olds (reading, math knowledge, scientific literacy), from the aspect of functional literacy and capability for real life.	MOE/Institute for Psychology of the Faculty of Philosophy
<ul style="list-style-type: none"> ▪ Secondary indicators 		
3. Persons with low level of education	Share of adults (aged 25+) whose highest level of completed education or training ISCED -97 is 0.1 or 2.	LFS
NATIONAL INDICATORS	DEFINITION	SOURCE
1. Coverage of children by preschool education	Share of children involved in preschool education programmes relative to the total number of children of the adequate age. Monitoring disaggregated by three sub-indicators is called for: <ul style="list-style-type: none"> ▪ Capture of children by mandatory preparatory preschool 	MOE

²⁷ Commission of the European Communities, Working document – Consultation on the future “EU2020” strategy Brussels, 24.11.2009, COM(2009) 647 final

²⁸ http://ec.europa.eu/education/lifelong-learning-policy/doc36_en.htm

	<p>programme,</p> <ul style="list-style-type: none"> ▪ Capture of 4-year old children, ▪ Capture of children 5-5.5. 	
2. Coverage of children 7-14 by primary education	<p>Monitor by two rates:</p> <ul style="list-style-type: none"> ▪ Share of children aged 7 enrolled in primary schools relative to the total number of children of that age, ▪ Share of children aged 7–14 attending any class of primary school relative to the total number of children of that age. <p>Monitor disaggregated by level of income of the household, type of settlement, ethnic affiliation, level of education of the mother, employment status of the mother, forced migrant status, status of PwD, gender and region.</p>	MOE
3. Primary education drop-out rate	<p>Number of pupils of a certain generation who completed primary schools relative to the number of children from that generation who enrolled into primary schools decreased by the number of children who are still in education for repeating a class. The indicator should be monitored disaggregated by gender, ethnic affiliation, type of settlement, status of PwD and level of education of the mother. A central register of pupils is required for reliable monitoring since pupils change schools and repeat classes occasionally.</p>	MOE
4. Coverage of children aged 15-18 by secondary education	<p>Monitor by two rates:</p> <ul style="list-style-type: none"> ▪ Share of children aged 15 enrolled in secondary schools relative to the total number of children of that age, ▪ Share of children aged 15-18 attending any class of secondary school relative to the total number of children of that age. <p>Monitor disaggregated by level of income of the household, type of settlement, ethnic affiliation, status of PwD and level of education of the mother.</p>	MOE
5. Secondary education drop-out rate	<p>Number of pupils of a certain generation who completed secondary schools relative to the number of children from that generation who enrolled into primary schools decreased by the number of children who are still in education for repeating a class.</p> <p>This indicator is not monitored systematically in Serbia. It could be obtained from official statistics, similar as the dropout in primary education.</p> <p>Monitor disaggregated by gender, type of settlement, ethnic affiliation, level of income of the household, status of PwD and the level of education of the mother. The estimated rate is 1.95%.²⁹</p>	-
6. Functional literacy of adults	<p>Share of persons 15+ who have not completed primary education and are unable to read half a page text on the topic from everyday life relative to the total number of inhabitants 15+. The indicator should be monitored disaggregated by age, gender, type of settlement, status of PwD and ethnic affiliation.</p>	-
7. Coverage by university education	<p>Share of persons enrolled into basic studies relative to the total number of persons of the same age (monitor a wider age interval (e.g. 18–30) in order to capture potential pauses between secondary and university education).</p>	RSO
8. University education drop-out rate	<p>Number of persons of a certain generation who graduated a faculty relative to the number of students of that generation who enrolled the faculty decreased by the number of students still in education due to repeating a year or whose faculty studies last longer.</p>	-

²⁹ RS Government, Poverty Reduction Implementation Unit of the Deputy Prime Minister (2009), *Monitoring Social Inclusion in Serbia*

	Attention should be paid to the fact that students often interrupt studies at one faculty in order to enroll at another.	
9. Electronic literacy	Share of persons over 15 who are capable of independently using one computer programme relative to the total number of persons over 15. The skills of using Internet access programmes are of particular importance. This indicator may be monitored in combination with equipment of households with computers.	RSO
10. Lifelong education of adults	Share of persons 25–64 who attended a training in the period of four weeks preceding the survey.	-

Early school leavers not in training aged 18–24

	April 2008	October 2008	April 2009	October 2009
Men	38.5	39.0	33.7	35.9
Women	23.9	26.3	23.8	23.3
Total	31.3	32.7	28.8	30.0

Source: *LFS 2008*

Low functional literacy of pupils – literacy expressed as a poor result of pupils at a PISA test (Programme for International Assessment of Attainment of Pupils). PISA test measures functional literacy (mathematical, reading, scientific literacy), i.e. who well are the young people „equipped” for life in a modern society, the quality and fairness of education and factors linked to educational attainment. PISA focuses on the capability of youth to use their knowledge and skills in facing challenges in real life, and not only to the degree in which they have mastered certain curricula. Therefore the results of the test are widely used as an indicator of future perspectives at the labour market. The target group are students aged 15 (end of the first year of secondary school).

Quality of education in Serbia, PISA test

	Mathematical literacy				Scientific literacy				Reading literacy			
	2003		2006		2003		2006		2003		2006	
	Serbia	OECD	Serbia	OECD	Serbia	OECD	Serbia	OECD	Serbia	OECD	Serbia	OECD
Educational attainment	437	500	435	498	436	500	436	500	412	494	401	492
Quality of education	445	500	440	500	445	500	440	500	420	500	406	500
% of the functionally illiterate	42	21	43	21	-	-	38	19	47	19	52	20
Gender disparities (m versus f)	1	11	5	11	-5	6	-5	2	-43	-34	-42	-38

Source: *Quality and Fairness of Education in Serbia Mirrored by PISA*, D. Pavlović-Babić, A. Baucal

The testing in Serbia has been conducted since 2003 with a very good response from the pupils. The results of 2009 testing are expected in late 2010.

*Interpretation of PISA test results*³⁰: the scale is constructed so that the average result in OECD countries is 500 in all the three areas (mathematics, science, reading), where about two thirds of pupils attain between 400 and 600 points (standard deviation is 100 points), with weighted data to ensure equal participation of each Member State. Still, due to new states acceding in OECD, the average of PISA test has been modified somewhat and it deviates from 500, the standard deviation being 100. The levels of knowledge in mathematics are 1–6 (level 6 is for the points over 669), in reading 1–5

³⁰ Explaining Student Performance, Evidence from the international PISA, TIMSS and PIRLS surveys, Danish Technological Institute, November 2005, <http://www.pisa.oecd.org/dataoecd/5/45/35920726.pdf>

(level 5 is for points over 625). In view of the fact that one year of education weighs 38 points, the 15-year olds in Serbia lag by almost two years of education relative to their peers in mathematical and scientific literacy and more than two years in reading literacy. The gender disparities in mathematical literacy in Serbia are lower than the OECD average, differences between the two testing having increased in favour of boys. Notwithstanding, with respect to scientific and particularly reading literacy, the girls record significantly better results.

Share of population aged 25 + with a **low educational attainment** may be obtained from the LFS.

Persons aged 25 + who completed primary education only

	April 2008	October 2008	April 2009	October 2009
Men	17,3	17,9	17,6	18,1
Women	22,1	21,0	21,3	20,9
Total	19,8	19,6	19,6	19,6

Source: *LFS*

The data for **Coverage of children by preschool education** may be found in the announcement DD20 – Institutions for Preschool Children. The table 2 thereof presents data on the number of children who attended these institutions. This data are not accurate, for a preparatory preschool programme is mandatory at the age of 5.5-6.5 (as a zero class), so the data of the Ministry of Education being more accurate are used.

Coverage of children by kindergardens (%), school year 2008/2009

No. of children in kindergardens	No of children aged up to 7	Coverage of children by kindergardens (%)
183,651	449,087	40.9

Source: *RSO, announcement DD20, tab. 3, Health and Statistical Yearbook of the Republic of Serbia, 2008. Public Health Institute of Serbia „Dr. Milan Jovanović Batut” table 1.2 Population in RS by age groups as per 2008 estimate.*

Coverage of children by mandatory preschool programme may serve as a useful indicator of the inclusion of preschool children in the educational system. This data may be obtained from DD20 RSO – Institutions for Preschool Children, table 3. It presents capture of children by mandatory preschool programme introduced in 2006.

Coverage of children by mandatory preschool programme (%), school year 2008/2009

No. of children covered by full day and half-day attendance	No. of live births March '02–February '03.	Coverage of children by mandatory preschool programme (%)
71,444	77,822	91.80

Source: *RSO, announcement DD20, table 3*

Preschool education, school year 2007/2008

Age of children	No. of born children	Capture		Percentage of capture	
		Kinder-garden	School	Kinder-garden	School
01.09.2004–01.09.2006, nursery (1–3)	150,904	24,842	-	16.5	
01.03.2002–01.09.2004, kindergarden (3–5,5)	196,531	92,186	-	46.9	
01.03.2001–01.03.2002, preparatory preschool programme (5,5–6,5)	78,477	72,382	5,037	92.2	6.4
01.03.2001–01.09.2006, nursery, kindergarden, PPP	425,912	189,410			44.47

Source: *Ministry of Education*

Coverage of children by preparatory preschool programme, school year 2008/2009

School year	No. of children covered by programme	Percentage of coverage
2008/2009	75,992	97.6

Source: Republic Statistical Office

Coverage of children aged 7-14 by primary education

- Share of children aged 7 who enrolled into primary schools relative to the total number of children of that age

Coverage of children aged 7 by primary education, school year 2008/2009

No. of children enrolled in the first class of primary school	No. of children aged 7	Coverage of children aged 7 by primary education (%)
72,328	73,397	98.5

Source: RSO, RSO, announcement DD20, table 3. RSO assessment for the number of inhabitants in 2008*

- Share of children aged 7–14 who attend primary school relative to the total number of children of that age

Coverage of children aged 7-14 by primary education, school year 2008/2009

No. of primary school pupils	No. of children aged 7–14	Coverage of children 7–14 by primary education (%)
598,108	610,644	97.9

Source: RSO, announcement DD20, tab. 3, Health and Statistical Yearbook of the Republic of Serbia, 2008. Public Health Institute of Serbia „Dr. Milan Jovanović Batut” table 1.2 Population in RS by age groups as per 2008 estimate.

According to the data of the Ministry of Education, the coverage by primary education after school year 2002/2003 is presented in the table below.

Coverage by primary education

School year	Total students	class							
		I	II	III	IV	V	VI	VII	VIII
2002/3	680,440	84,096	82,804	83,120	82,710	87,408	85,666	85,841	88,795
2003/4	667,570	81,045	82,828	82,423	82,938	83,778	85,445	84,807	84,306
2004/5	659,543	80,219	80,286	82,416	81,992	83,813	82,473	84,840	83,504
2005/6	641,612	71,633	79,556	79,421	81,904	82,665	82,079	81,323	83,031
2006/7	622,562	69,051	70,972	78,905	78,885	82,665	80,974	81,365	79,745
2007/8	610,078	72,009	68,847	70,405	78,524	80,132	80,541	79,957	79,663
2008/9	598,108	72,328	71,867	68,076	70,124	79,996	77,639	79,516	78,562

Source: Ministry of Education

Rate of coverage by primary education

School year	Coverage (%)	Drop-out rate (%)	Completion rate (%)	Education continuation rate (%)
2002/3	96.10	0.39	91.80	96.96
2003/4	97.74	1.94	98.02	99.99
2004/5	99.03	0.52	99.11	97.59
2005/6	98.41	0.36	95.00	97.33
2006/7	99.01	0.45	99.18	98.13
2007/8	98.81	0.51	99.46	98.60
2008/9	98.46	0.36	99.24	98.45

Source: Republic Statistical Office

Pupil drop-out rate in the eighth class

School year	No. of eighth class pupils	No. of pupils who completed primary schools (eighth class)	Drop-out in eighth class	Drop-out rate in the eighth class (%)
2002/3	88,795	88,298	497	0.56
2003/4	84,306	83,807	499	0.59
2004/5	83,504	82,761	743	0.89
2005/6	83,031	82,514	517	0.62
2006/7	79,745	79,091	654	0.82
2007/8	79,663	79,229	434	0.54
2008/9	78,562	78,026	532	0.68

Source: Ministry of Education

Primary school drop-out rate

School year	Class								No. of pupils who completed primary school (eighth class)	Drop-out between two classes		Drop-out rate between two classes (%)	Drop-out rate in the eighth class (%)	Drop-out rate in the generation School year 2000/1–2007/8. (%)
	I	II	III	IV	V	VI	VII	VIII		class	No. of pupils			
2000/1	85,226													
2001/2														
2002/3			83,120							1–3	2,106	2.5		
2003/4				82,938						3–4	182	0.2		
2004/5					82,813					4–5	125	0.2		
2005/6						82,079				5–6	734	0.9		
2006/7							81,365			6–7	714	0.9		
2007/8								79,663		7–8	1,702	2.1		
2007/8									79,229	8	434		0.54	
Generation school-year 2000/1–2007/8.										1-8	5,997			7.04 ³¹

Source: Ministry of Education

Note: Drop-out rate of pupils in a generation is calculated on the basis of the difference between the number of pupils who completed primary education and the number of pupils who enrolled into the first class eight years earlier and does not fully correspond to the definition of indicators of primary education drop-out rate (it represents the number of pupils of a certain **generation** who completed primary education relative to the number of children of that generation who enrolled into primary schools reduced for the number of pupils who are still in education due to repetition of classes)

▪ Coverage of children aged 15-18 by secondary education

Coverage of children aged 15-18 by secondary education, school year 2008/2009

No. of pupils enrolled into the first class of secondary schools, aged 15	Estimated no. of inhabitants aged 15, 2008	Net enrollment rate into the first class of secondary schools (%)
74,238	83,764	88.63

Source: RSO, excluding data for KiM

³¹ At the level of one generation (school years 2000/2001–2007/2008) the number of pupils who dropped out from the regular education system (abandoned schools) is 5,997 or approximately 7.04% relative to the number of children enrolled into the first class. The children who leave regular education are most often from marginalized categories (Roma) who do not pursue education or pursue it in schools for adult education.

Coverage of children aged 15-18 by secondary education, school year 2008/2009

No. of pupils enrolled into the first class of secondary schools, aged 15-18	Estimated no. of inhabitants aged 15-18, 2008	Net enrollment rate into the first - fourth class of secondary schools (%)
282,500	344,197	82.08

Source: RSO, excluding data for KiM

Coverage by secondary education

School year	Total no. of pupils enrolled in the first class of secondary schools
2005/6	80,468
2006/7	80,855
2007/8	78,004
2008/9	77,452

Source: Ministry of Education

Secondary education drop-out rate, school year 2007/2008

4-year education	Territory	First	Second	Third	Fourth	Completed schools	Average 1 - 4 class
2007/8	Central Serbia	46,787	44,981	43,157	40,792	39,769	
	Vojvodina	15,633	15,099	14,231	12,930	12,867	
	Serbia	62,420	60,080	57,388	53,722	52,636	
2008/9	Central Serbia	47,792	44,839	43,679	41,763		
	Vojvodina	16,058	14,847	14,743	13,967		
	Serbia	63,850	59,686	58,422	55,730		
repeaters 2008/9	Central Serbia	899	617	447	92		
	Vojvodina	397	269	145	20		
	Serbia	1,296	886	592	112		
rates (%)							
pass		94.20	96.25	96.92	97.98		96.34
repeat		2.08	1.47	1.03	0.21		1.20
drop-out		3.72	2.27	2.05	1.81		2.46
3-year schooling							Average 1 - 3 class
2007/8	Central Serbia	13,450	12,885	12,517		11,307	
	Vojvodina	5,464	5,205	5,032		4,727	
	Serbia	18,914	18,090	17,549		16,034	
2008/9	Central Serbia	12,482	11,479	11,936			
	Vojvodina	5,195	4,577	4,755			
	Serbia	17,677	16,056	16,691			
repeaters 2008/09	Central Serbia	832	439	172			
	Vojvodina	429	198	40			
	Serbia	1,261	637	212			
rates (%)							
pass		86.79	85.23	91.37			87.80
repeat		6.67	3.52	1.21			3.80
drop-out		6.54	11.24	7.42			8.40

Source: RSO, excluding data for KiM

Note: The indicators developed as per UNESCO methodology: Unesco Institute for Statistics, Education Indicators, Technical guidelines, November 2009

- **Adult functional literacy** – Adult functional literacy is not measured in Serbia. Data on the number of the illiterate on the basis of the 2002 Census (may be found in the publication Population, RSO, Level of Education and Literacy) may be used albeit as a relatively poor replacement. The illiterate are disaggregated by gender, age and place of residence.

Illiterate population, 2002

Literacy rate (%)	No. of the illiterate	Age of illiterate persons												
		10-14	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65 and over	unknown
96.6	232,925	3,023	3,338	3,146	2,822	2,865	3,287	4,282	5,481	5,719	7,103	15,231	172,738	3,890

Source: RSO, Level of Education and Literacy, on the basis of 2002 Census

The same publication may provide data on persons over 15 who have not completed primary education and the illiterate, disaggregated by gender and place of residence.

Population aged 15 +, by level of education and literacy, 2002

Without education – illiterate	1-3 class of primary school – the illiterate	Share of the illiterate aged 15, with incomplete primary school	Share of the illiterate over 15, with incomplete primary school
227,039	2,863	3.6	96.4

Source: RSO, Level of Education and Literacy, on the basis of 2002 Census

- **Coverage by university education** – For the first time this year, RSO publishes data on newly enrolled students of the first year of studies in the school year 2009/2010 in colleges and faculties in the form of announcement AS10. It presents data on students in state and private faculties and colleges per university, method of financing and gender of students.

Newly enrolled students into the first year of studies, school year 2009/2010

	No. of freshmen
Republic of Serbia	54,510

Source: RSO, announcement AS10– Newly enrolled students

No. of students per school year

School year 2006/2007	238,710
School year 2007/2008	237,598
School year 2008/2009	235,940

Source: Ministry of Education

- **Enrolled into different levels of education**

Enrolled into different levels of education

	ISCED 0	ISCED 1 i 2	ISCED 3	ISCED 5	ISCED 6
School year 2006/2007	150,651	653,649	291,978	238,710	-
School year 2007/2008	154,444	641,034	289,766	236,534	1,064
School year 2008/2009	157,566	628,517	289,746	233,016	2,924

Source: Ministry of Education

Also, the same RSO publication Level of Education and Literacy (on the basis of the 2002 Census) may render data on the number of persons with college and university education.

Persons with college/university education, 2002

College	University	Share of persons with college and university education in total population
285,056	411,944	11.0

Source: RSO, Level of Education and Literacy, on the basis of 2002 Census

- The data on **electronic literacy** in Serbia may be obtained in the publication „Use of information and communication technologies in the Republic of Serbia, 2009” According to this survey, 46.8% households own a computer, and 36.7% an Internet connection. 49.3% of the respondents – more than 2,850,000 persons - gave an affirmative answer to the question as

to whether they had used the computer in the last three months. Computer users are disaggregated by level of education, employment status and gender. As many as 73% of persons who used computer in the last three months used it on a daily basis. It may be assumed that persons who use computers also know at least one computer programme.

- **Lifelong learning of adults** faces several key problems (still inadequate social attitude to education, restrictive financial support, absence of regulations and standards, *absence of systematic monitoring of the adult education sector*, unregulated status of teachers in adult education). The Ministry of Education has developed a National Report on Development and Situation of Adult Education³², submitted to UNESCO as part of preparations for the international conference CONFITEA VI held in April 2009.

³²http://www.unesco.org/fileadmin/MULTIMEDIA/INSTITUTES/UII/confintea/pdf/National_Reports/Europe%20-%20North%20America/Serbia.pdf

8.5 Deprivation of basic needs

Deprivation of basic needs is a country specific dimension of social exclusion involving three groups of indicators – indicators of housing, equipment of households with durable goods and indicators of fulfilment of basic needs. Of the eight indicators of housing, we dispose of the data for four, the source being the Household Budget Survey (HBS). By updating the portfolio of indicators for monitoring European Strategy of Social Protection and Social Inclusion³³, in the part relating to commonly agreed portfolio of social exclusion indicators, two secondary indicators and two indicators of context in the domain of housing were adopted. The first secondary indicator of housing in EU: *Indicator of housing expenditures*, corresponds to the national indicator *Financial burden imposed by housing-related costs*, and the second secondary EU indicator in the domain of housing: *Indicator of overcrowding* corresponds to the national indicator *Density/overcrowding*. Indicators of context in the area of housing are: *Housing deprivation* and *Share of housing costs in the total disposable household income*.

The equipment of households with durable goods is also computed on the basis of HBS, while the three indicators of fulfilment of basic needs may be replaced, in part, on the basis of data of the Public Health Institute of Serbia „Dr. Milan Jovanović Batut” (indicator of the quality of nutrition).

5. DEPRIVATION OF BASIC NEEDS (MATERIAL DEPRIVATION)		
NATIONAL INDICATORS	DEFINITION	SOURCE
5.1 HOUSING		
1. Housing status	Share of persons relative to the basis of use of the apartment in which the household lives. Distinctions are made between households living in the apartment owned by one of the household members or live free of charge and households who pay rent for the apartment. This indicator is calculated by size of household, type of settlement, income intervals and number of children up to the age of 18 who live in the household.	HBS
2. Households / persons who used to be homeless	Share of persons who had no housing relative to the total population. Allows insight into extent of experience of homelessness, primarily among persons who are in insecure housing situations (collective accommodation, accommodation with friends or illegal status). The indicator should be monitored disaggregated by age, gender, education, size of household and number of children, level of income of a household, ethnic affiliation and forced migrant status. Data on the housing status of a household in Serbia that are available through the Census and LSMS.	-
3. Access to infrastructure	One of the key indicators of assessment of minimum quality of housing. Represents a proportion of households by with running water and power. Households differ by: <ul style="list-style-type: none"> • Living in apartments equipped with running water and power installations, • Living in apartments without running water and power installations, • Living in apartments equipped with running water installations but without power, and • Living in apartments equipped with power installations but 	HBS

³³ European Commission, Employment, Social Affairs and Equal Opportunities DG, *Portfolio of indicators for the monitoring of the European Strategy for the monitoring of the European Strategy for Social Protection and Social Inclusion – 2009 update*, Brussels, September 2009.

	<p>without running water.</p> <p>The second method of representation is: share of households whose apartments do not have basic installations in the following dimensions: power, running water, connection to public water supply, toilet, connection to public sewage, bathroom (all that are under the average score on the summary scale). On the basis of the score per individual dimensions the scale of exclusion is constructed that could distinguish between households without any infrastructural equipment (neither power nor running water), those that have only power, but no running water, to those that have both power and the running water but remain outside of the systems of public water supply and sewage. The indicator should be monitored disaggregated by age, gender, size of household and the number of children, level of income of households, ethnic affiliation, status of person with disabilities, and forced migrant status.</p> <p>Included in HBS and LSMS.</p>	
4. Density/overcrowding	<p>This indicator is also one of the key indicators of assessment of minimum quality of housing. It is computed as a proportion of households that have less than 8–10m² per member and as a proportion of households that have more than two members per room.</p> <p>Disaggregate by gender, age, size of households and the number of children in households, education, level of income of households, ethnic affiliation, type of settlement, forced migrant status, status of person with disabilities.</p>	HBS
5. Quality of housing and maintenance problems	<p>The indicator may be defined as a proportion of households whose apartment has three or more of the following problems:</p> <ul style="list-style-type: none"> • Insufficient space for all household members, • The apartment is damp, • Leaking roof, • Dilapidated walls/floors, • Rot in joinery (doors, windows), • Inadequate daily lighting, • Not heated in winter due to lack of money, • Inadequate for persons with mobility problems (the elderly, PwD), <p>The indicator should be disaggregated by gender, age, number of children in households, level of income of households, ethnic affiliation, type of settlement, forced migrant status, status of person with disabilities.</p> <p>The Living Standards Measurement Survey covers all the elements of the indicator except heating that is included in HBS.</p>	HBS
6. Financial burden imposed by housing related costs	<p>Share of households where the total housing costs (rent, utilities, power, etc.) exceed 50% of the total disposable income of the household.</p> <p>The indicator should be disaggregated by gender, age, employment status, education, level of income of households, ethnic affiliation, type of settlement, forced migrant status, status of person with disabilities.</p> <p>The Living Standards Measurement Survey covers only certain elements of this indicator (outstanding utility and power supply bills).</p>	HBS
7. Barriers in securing better housing conditions	<p>Share of households that do not have qualifications or necessary information to apply for one of the housing benefits (social housing, subsidised housing costs).</p> <p>Disaggregate indicator by gender, age, size of households and the number of children in the household, employment status, education, level of income of households, ethnic affiliation, type of settlement, forced migrant status, status of person with disabilities.</p> <p>Not identified in any programme of systemic registration.</p>	-

8. Quality of housing neighbourhood	<p>Defined as a proportion of households who face one of the below problems in their surroundings:</p> <ul style="list-style-type: none"> • High levels of water, air and/or soil pollution due to vicinity of industry, waste dumps and storages of hazardous materials or due to traffic, • High frequency of crime, • High noise levels, • Absence of social and economic infrastructure (schools, health care centres, shops, jobs), • A of public transport, • surroundings not suited to the special needs of persons with disabilities. <p>Some of the above elements were monitored in the HBS until 2006 (surrounding infrastructure, transportation). The indicator should be disaggregated by gender, age, number of children in households, employment status, education, level of icome of households, ethnic affiliation, type of settlement, forced migrant status, status of person with disabilities.</p>	
5.2 POSSESSION OF DURABLE GOODS		
1. Possession of household appliances	<p>May be computed as a proportion of households who have a score on the summary scale of appliances (stove, air conditioner, washing machine, dishwasher, microwave oven, refrigerator, deep freeze, vacuum cleaner, TV set, radio and other music devices, personal computer, passenger vehicle and DVD) below the average or as a proportion of households wherein the value of appliances is below the average. The content of the standard list of appliances varies between the countries and in time.</p> <p>The indicators is computer by gender, age, size of households, type of settlement, income intervals and the number of children up to 18 who live in the household.</p>	HBS
5.3 FULFILMENT OF BASIC NEEDS		
1. Quality of nutrition – inadequate nutrition for lack of money	<ul style="list-style-type: none"> • Share of households that cannot afford two meals a day due to lack of funds. • Share of households that cannot afford a meal with meat or a replacement for meat minimum twice a week due to lack of funds. <p>Disaggregate by gender, age, size of households, number of children in the househould, education, employment status, level of income of households, ethnic affiliation, type of settlement, forced migrant status, status of person with disabilities.</p> <p>HBS and LSMS provide an insight into the objective situation on the basis of a consumption log and an indirect conclusion may be drawn that this type of nutrition is a consequence of the lack of funds as there is no direct question to that effect.</p>	Survey „Social Exclusion in Serbia – Intensity, Causes and Types”
2. Quality of clothing – inadequate clothing	<p>Share of households that cannot afford clothing and footwear when needed by a member of household.</p> <p>Disaggregate by gender, age, size of households, number of children in the househould, education, employment status, level of income of households, ethnic affiliation, type of settlement, forced migrant status, status of person with disabilities.</p> <p>The information needed cannot be obtained from the LSMS for it does not give insight into the ratio of needs and purchase of non-food items.</p>	Survey „Social Exclusion in Serbia – Intensity, Causes and Types”
3. Hygiene	<p>Share of households that cannot afford adequate quantities of basic (non-luxurious) daily hygiene products (soap, shampoo, toothpaste, female hygienic items, washing powder) for all members of the household.</p>	Survey „Social Exclusion

	Disaggregate by gender, age, size of households, number of children in the household, education, employment status, level of income of households, ethnic affiliation, type of settlement, forced migrant status, status of person with disabilities.	in Serbia – Intensity, Causes and Types”
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Housing status, 2008.

By household size	1 member	2 members	3 members	4 members	5 members	6 and more members				
Owner/ rent free	96.7	97.2	96.4	96.2	97.4	98.8				
Tenant (in a part or the entire apartment)	3.3	2.8	3.6	3.8	2.6	1.2				
By household type	Total		Urban area		Non-urban area					
Owner/ rent free	97.1		56.6		43.4					
Tenant (in a part or the entire apartment)	2.9		78.1		21.9					
By income interval, in RSD	Up to 10.000	10.001–20.000	20.001–30.000	30.001–40.000	40.001–50.000	50.001–60.000	60.001–70.000	70.001–80.000	80.001–90.000	90.001 and more
Owner/ rent free	4.4	12.7	14.7	15.4	12.9	11.5	8.3	5.9	4.0	10.2
Tenant (in a part or the entire apartment)	1.8	9.3	17.9	25.0	13.8	10.6	11.0	4.4	1.9	4.4
Total	4.4	12.6	14.8	15.7	12.9	11.4	8.4	5.9	3.9	10.0
By no. of children up to 18 who live in the household	No children		1		2		3 and more			
Owner/ rent free	50.7		20.0		22.5		6.8			
Tenant (in a part or the entire apartment)	41.9		20.9		27.0		10.2			
Total	50.4		20.1		22.6		6.9			

Source: HBS

Housing status, 2009.

By household size	1 member	2	3	4	5	6 and more				
Owner/ rent free	97.3	97.1	95.9	96.3	97.8	99.4				
Tenant (in a part or the entire apartment)	2.7	2.9	4.1	3.7	2.2	0.6				
By household type	Total		Urban area		Non-urban area					
Owner/ rent free	97.3		56.6		43.4					
Tenant (in a part or the entire apartment)	2.7		87.3		12.7					
Per income interval, in RSD	Up to 10.000	10.001–20.000	20.001–30.000	30.001–40.000	40.001–50.000	50.001–60.000	60.001–70.000	70.001–80.000	80.001–90.000	90.001 and more
Owner/rent free	4.3	12.9	13.9	14.7	12.8	9.4	7.9	7.4	5.6	11.1
Tenant (in a part or the entire apartment)	1.0	7.1	15.4	14.9	18.4	20.2	5.9	4.9	4.5	8.0

Total	4.2	12.8	13.9	14.7	13.0	9.7	7.9	7.4	5.6	11.0
By no. of children up to 18 who live in the household	No children			1		2		3 and more		
Owner/rent free	51.2			18.6		22.2		8.0		
Tenant (in a part or the entire apartment)	37.0			23.5		33.3		6.2		
Total	50.9			18.8		22.5		7.9		

Source: HBS

Access to infrastructure

	2008	2009
Neither power nor running water	0.02	0.1
With power and running water	99.98	99.7
With power but no running water	0.29	0.2
Without power but with running water	0.16	0.0

Source: HBS

Density/overcrowdness, 2008.

By household size	1 member	2 members	3 members	4 members	5 members	6 members				
Up to 10m ² per member of household	-	3.2	7.5	24.8	27.6	36.9				
Two or more persons per room	-	-	21.7	16.2	35.0	27.0				
Total	6.3	16.6	19.1	23.1	17.1	17.8				
By household type	Total		Urban area			Non-urban area				
Up to 10m ² per member of household	4.49		67.4			32.6				
Two or more persons per room	9.08		66.1			33.9				
By income interval, in RSD	Up to 10,000	10,001 – 20,000	20,001– 30,000	30,001– 40,000	40,001– 50,000	50,001– 60,000	60,001– 70,000	70,001– 80,000	80,001– 90,000	90,001 and over
Up to 10m ² per member of household	2.7	16.0	13.8	16.3	19.6	8.7	7.7	3.2	3.1	8.9
Two or more persons per room	1.9	13.0	12.9	17.2	15.3	11.5	9.6	4.3	4.0	10.3
Total	4.4	12.6	14.8	15.7	12.9	11.4	8.4	5.9	3.9	10.0
By no. of children up to 18 who live in the household	No children	1		2		3 and more				
Up to 10m ² per member of household	19.0	14.9		39.0		27.0				
Two or more persons per room	24.7	22.4		33.2		19.6				
Total	50.4	20.1		22.6		6.9				

Source: HBS

Density/overcrowding, 2009

By household size	1 member	2 members	3 members	4 members	5 members	6 and more members				
Up to 10m ² per member of household	-	3.2	9.2	28.5	25.0	38.5				
Two or more persons per room	-	-	17.4	16.3	35.8	30.5				
Total	6.9	17.6	17.0	24.3	15.6	18.6				
By household type	Total		Urban area			Non-urban area				
Up to 10m ² per member of household	4.1		66.3			33.7				
Two or more persons per room	8.3		66.2			33.8				
By income interval, in RSD	Up to 10,000	10,001–20,000	20,001–30,000	30,001–40,000	40,001–50,000	50,001–60,000	60,001–70,000	70,001–80,000	80,001–90,000	90,001 and over
Up to 10m ² per member of household	2.5	12.4	16.4	20.6	12.8	13.0	7.5	5.3	3.5	6.1
Two or more persons per room	2.2	11.0	16.1	18.9	11.5	9.9	7.0	7.4	5.7	10.3
Total	4.2	12.8	13.9	14.7	13.0	9.7	7.9	7.4	5.6	11.0
By no. of children up to 18 living in the household	No children		1		2		3 and more			
Up to 10m ² per member of household	14.1		18.3		37.7		29.9			
Two or more persons per room	18.4		23.0		32.7		25.8			
Total	50.9		18.8		22.5		7.9			

Source: HBS

Financial burden imposed by housing-related costs, 2008

By type of settlement	Total			Urban area			Non-urban area			
Housing costs exceed 50% of household income	6.57			45.0			55.0			
By income interval in RSD	Up to 10,000	10,001–20,000	20,001–30,000	30,001–40,000	40,001–50,000	50,001–60,000	60,001–70,000	70,001–80,000	80,001–90,000	90,001 and over
Housing costs exceed 50% of household income	34.1	33.2	17.4	10.3	2.7	1.2	0.7	-	-	0.3
Total	4.4	12.6	14.8	15.7	12.9	11.4	8.4	5.9	3.9	10.0

Source: HBS

Financial burden imposed by housing-related costs, 2009

By type of settlement	Total			Urban area			Non-urban area			
Housing costs exceed 50% of the household income	6.6			44.7			55.3			
By income interval, in RSD	Up to 10,000	10,001–20,000	20,001–30,000	30,001–40,000	40,001–50,000	50,001–60,000	60,001–70,000	70,001–80,000	80,001–90,000	90,001 and over
Housing costs exceed 50% of the household income	32.7	34.9	14.9	11.0	2.7	2.0	0.8	0.3	0.4	0.4
Total	4.2	12.8	13.9	14.7	13.0	9.7	7.9	7.4	5.6	11.0

Source: HBS

Possession of durable goods, 2008

By household size	1 member	2 members	3 members	4 members	5 members	6 and more members
Stove	19.0	25.3	19.3	17.6	10.4	8.4
Washing machine	15.3	24.8	20.4	19.3	11.3	9.0
Air conditioner	9.5	19.6	24.9	23.9	12.9	9.2
Dishwasher	8.8	19.2	23.5	26.3	12.6	9.5
Microwave oven	9.1	14.3	24.5	24.9	15.0	12.1
Refrigerator	18.5	25.2	19.5	17.9	10.5	8.4
Deep freezer	14.7	25.5	19.9	18.8	11.7	9.4
Vacuum cleaner	15.7	24.5	20.5	19.5	11.3	8.6
TV set	18.6	25.1	19.6	17.7	10.6	8.4
Radio and other music appliances	16.6	23.4	20.1	19.3	11.8	8.8
Personal computer	3.9	10.4	24.6	30.9	17.3	12.8
Passenger vehicle	3.8	19.3	22.1	25.6	15.4	13.8
DVD	5.0	12.7	23.3	26.7	17.9	14.4
By household type	Total		Urban area		Other area	
Stove	99.5		59.4		40.6	
Washing machine	86.4		64.0		36.0	
Air conditioner	16.2		80.1		19.9	
Dishwasher	5.8		76.0		24.0	
Microwave oven	15.5		73.9		26.1	
Refrigerator	96.4		60.2		39.8	
Deep freezer	81.9		56.4		43.6	
Vacuum cleaner	82.1		64.8		35.2	
TV set	96.2		59.8		40.2	
Radio and other music appliances	59.6		59.5		40.5	
Personal computer	31.9		72.1		27.9	
Passenger vehicle	46.0		58.0		42.0	
DVD	27.3		64.3		35.7	

By income interval, in RSD	Up to 10,000	10,001 – 20,000	20,001– 30,000	30,001 – 40,000	40,001– 50,000	50,001– 60,000	60,001– 70,000	70,001– 80,000	80,001 – 90,000	90,001 and over
Stove	7.7	19.0	16.9	15.0	11.3	9.3	6.5	4.5	2.9	7.0
Washing machine	4.0	16.3	17.1	16.4	12.5	10.3	7.3	5.0	3.1	7.9
Air conditioner	1.3	6.9	10.3	11.3	11.1	13.2	9.5	10.3	6.0	20.3
Dishwasher	1.0	5.7	5.1	7.4	12.2	11.1	15.4	10.8	7.7	23.4
Microwave oven	1.3	4.5	11.5	11.2	15.8	12.4	12.7	9.9	5.0	15.6
Refrigerator	7.1	18.3	17.1	15.2	11.6	9.4	6.6	4.6	2.9	7.2
Deep freezer	6.0	17.9	17.5	15.4	11.6	9.9	6.8	4.6	3.0	7.3
Vacuum cleaner	4.4	15.8	16.9	16.3	12.4	10.4	7.4	5.1	3.3	8.0
TV set	7.2	18.8	17.2	15.1	11.4	9.4	6.5	4.4	2.9	7.0
Radio and other music appliances	6.1	17.0	16.7	15.0	12.2	10.1	7.3	4.9	3.1	7.7
Personal computer	1.3	5.0	10.4	14.6	13.5	13.6	11.1	8.1	5.5	16.7
Passenger vehicle	2.0	7.1	13.0	16.4	14.4	13.4	10.0	6.8	4.3	12.5
DVD	1.7	5.9	12.1	14.5	14.7	13.5	11.6	8.2	5.5	12.2

Source: HBS

Possession of durable goods, 2009

By household size	1 member	2 members	3 members	4 members	5 members	6 and more members
Stove	20.7	26.2	17.0	18.2	9.3	8.5
Washing machine	17.1	26.3	17.7	20.0	10.1	8.9
Air conditioner	7.3	21.8	21.7	29.0	12.4	7.8
Dishwasher	2.9	22.8	22.9	31.8	11.3	8.4
Microwave oven	5.2	19.6	22.9	28.6	12.5	11.3
Refrigerator	20.2	26.3	17.1	18.5	9.4	8.5
Deep freezer	16.8	26.1	17.2	19.7	10.1	10.0
Vacuum cleaner	16.8	26.2	17.7	20.3	10.1	8.9
TV set	20.3	26.3	17.1	18.4	9.4	8.6
Radio and other music appliances	18.9	25.5	17.4	19.4	10.3	8.5
Personal computer	3.4	11.7	22.9	33.3	16.8	11.8
Passenger vehicle	3.4	20.3	20.0	28.0	15.2	13.1
DVD	3.7	16.1	21.5	29.8	15.4	13.5
By household type	Total		Urban area		Non-urban area	
Stove	99.5		59.7		40.3	
Washing machine	88.3		63.6		36.4	
Air conditioner	18.0		80.9		19.1	
Dishwasher	6.1		74.4		25.6	
Microwave oven	15.4		69.9		30.1	
Refrigerator	97.4		60.4		39.6	
Deep freezer	80.1		55.9		44.1	
Vacuum cleaner	84.5		64.2		35.8	
TV set	97.1		60.3		39.8	
Radio and other music appliances	59.9		58.7		41.3	
Personal computer	35.9		72.3		27.7	
Passenger vehicle	45.2		59.4		40.6	

DVD	32.5			64.7				35.3		
By income interval, in RSD	Up to 10,000	10,001–20,000	20,001–30,000	30,001–40,000	40,001–50,000	50,001–60,000	60,001–70,000	70,001–80,000	80,001–90,000	90,001 and over
Stove	6.5	19.7	16.1	14.6	11.5	8.0	6.7	5.4	4.0	7.5
Washing machine	3.9	17.0	16.3	15.3	12.4	8.8	7.5	6.0	4.4	8.4
Air conditioner	1.0	5.8	8.7	10.7	10.5	12.6	11.8	10.4	8.2	20.2
Dishwasher	0.9	4.9	6.6	9.6	8.1	8.3	11.5	9.0	9.2	31.9
Microwave oven	0.7	6.5	10.2	11.0	13.1	12.0	10.3	11.5	8.3	16.3
Refrigerator	6.0	19.2	16.2	14.7	11.7	8.1	6.8	5.5	4.1	7.6
Deep freezer	5.6	18.6	15.9	15.1	12.0	8.1	6.7	5.7	4.3	8.1
Vacuum cleaner	3.8	16.6	16.1	15.4	12.6	9.1	7.3	5.9	4.5	8.5
TV set	6.2	19.4	16.2	14.9	11.5	8.1	6.8	5.4	4.0	7.6
Radio and other music appliances	7.1	18.2	15.3	14.5	11.7	7.9	7.0	6.0	4.3	8.0
Personal computer	0.9	6.2	8.9	13.1	13.5	12.6	10.1	11.0	7.8	16.0
Passenger vehicle	2.4	7.2	10.6	15.0	13.7	11.4	10.1	9.0	6.8	13.8
DVD	2.4	7.7	10.3	13.5	14.4	11.9	9.6	9.5	7.0	13.7
By no. of children up to 18 who live in the household	No children	1			2		3 and more children			
Stove	68.3	14.3			13.5		3.9			
Washing machine	65.9	15.7			14.7		3.7			
Air conditioner	56.7	19.0			20.1		4.4			
Dishwasher	52.3	20.3			21.2		6.4			
Microwave oven	46.6	24.1			23.5		5.9			
Refrigerator	68.1	14.4			13.7		3.8			
Deep freezer	67.1	14.7			14.5		3.8			
Vacuum cleaner	66.0	15.7			14.6		3.7			
TV set	68.1	14.5			13.6		3.7			
Radio and other music appliances	67.4	14.2			14.5		3.9			
Personal computer	45.9	25.3			23.7		5.3			
Passenger vehicle	53.7	19.5			22.2		4.6			
DVD	47.3	22.8			24.0		5.9			

Source: HBS

The indicator **Quality of nutrition – inadequate nutrition for lack of money** may be monitored according to the data of the Institute for Public Health of Serbia „Dr. Milan Jovanović Batut”, but somewhat differently from the definition of the indicator. The number of persons who have breakfast every day or have all three meals a day may be monitored. Still, since these indicators are presented relative to the financial status they indicate that the poorest (just as the oldest and persons who live in non-urban areas) take meals more regularly than the persons who are better off (the younger population, urban population), most probably because they do not have funds to eat outside their homes, it is better to use the indicator: Share of persons who use animal fat for food preparation. It indicates significant differences in financial status of persons.

Percentage of persons who use animal fat in preparation of food, 2006

The poorest	58.3
The poor	44.7
Middle class	34.0
Wealthy	22.3
The wealthiest	9.0

Source: Health and Statistical Yearbook of the Republic of Serbia, 2008, Public Health Institute of Serbia „Dr Milan Jovanović Batut”

Similarly, in view of the high sensitivity of indicators: persons who take whole grain, rye and similar kinds of bread, relative to financial status and its monitoring, could indicate the level of vulnerability of the part of population. This indicator may be expressed in combination with the indicator: share of persons who eat fresh fruit every day, share of persons who eat fish less than once a week... and that may be obtained in the publication Health and Statistical Yearbook of the Republic of Serbia, 2008, Public Health Institute of Serbia „Dr Milan Jovanović Batut”, whereby it would be possible for us to monitor quality of nutrition by different criteria.

	Percentage of persons who ...		
	eat whole grain, rye and similar kinds of bread	Eat fresh fruit every day	Eat fish less than once a week
The poorest	5.4	32.6	64.4
The poor	9.2	39.9	62.4
Middle class	12.7	45.3	51.6
Wealthy	19.1	50.0	39.6
The wealthiest	27.9	52.6	35.0

Source: Health and Statistical Yearbook of the Republic of Serbia, 2008, Public Health Institute of Serbia „Dr Milan Jovanović Batut”, pp. 355

The survey „Social Exclusion in Serbia – Intensity, Causes and Types”³⁴ conducted within the framework of the project „Promotion of Debate on Social Inclusion in Serbia” headed by the Ministry of Labour and Social Policy of the Republic of Serbia provides data on the level of fulfilment of basic needs. The survey was conducted in May 2009 on a representative sample covering 3,571 respondents on the entire territory of Serbia without Kosovo and Metohija. The respondents were persons aged over 15, and data were collected in direct interviews.

Quality of nutrition ³⁵ , 2006	%
We are hungry often, and we cannot afford the minimum of food	3
We are not hungry but our meals are poor	12
We mostly eat the food that is cheap	20
We have enough but not for expensive food stuffs	51
We can afford any food we want	14
Total	100

Source: „Social Exclusion in Serbia – Intensity, Causes and Types ”

³⁴ **Research team:** Srećko Mihailović (team manager), Miloš Mojsilović, Đorđe Vuković, Bojan Klačar, Ivo Čolović

³⁵ Conclusions on nutrition as a dimension of social exclusion were made on the basis of statements of respondents on sufficiency and quality of food, and this self-assessment of food quality is highly correlated with the frequency of meat and fish in diet.

Quality of clothing, 2006	%
We wear old clothes, mend and receive from others	6
We buy second hand clothes and footwear	3
We buy on the market, flea market, „ in Chinese shops ”	29
We buy in shops, boutiques	42
We buy branded clothes and footwear	20
Total	100

Source: „Social Exclusion in Serbia – Intensity, Causes and Types ”

Hygiene quality, 2006	%
I have neither a habit nor money to do all that is needed	26
I do not have a habit to do all that is needed	8
I have no money to do all that is needed	8
I do as much as I think should be done	45
Other	13
Total	100

Source: „Social Exclusion in Serbia – Intensity, Causes and Types ”

8.6 Social participation

Social participation is also a country specific dimension of social exclusion and includes nine indicators the objective of which is to cover wide areas of cultural, civic, political participation, accessibility of justice system, incidence of family violence, but also the self-perceived assessment of social exclusion. Still, the availability of official data for this dimension is very low and the report uses indicators that do not correspond to the definitions of indicators for the sole reason of gaining a general insight into this important dimension of social exclusion.

6. SOCIAL PARTICIPATION		
NATIONAL INDICATORS	DEFINITION	SOURCE
1. Possession of personal documents	Share of persons who do not have citizenship certificates and the birth certificate. disaggregated by country of birth and ethnic affiliation. The document that is especially relevant for women in order to exercise right to property or family pension – marriage certificate so it would be pertinent to monitor also the share of persons married but who do not hold marriage certificates.	LSMS
2. Possibility to exercise rights to social protection in case of need	Share of persons who justly requested but did not obtain social protection relative to the total number of persons who obtained this protection. disaggregated by age, education, gender, ethnic affiliation and type of settlement (urban/rural). The only form of social protection for which there is an information on reasons of failure to exercise social welfare.	LSMS
3. Level of cultural participation	Share of persons who did not get involved in any cultural event over the last 3 months among the persons aged over 14. disaggregated by age, education, gender, type of settlement, ethnic affiliation, forced migrant status, status of PwD, status of physical isolation (serving a prison sentence, army service, hospital treatment). Cultural events are all forms of exhibiting cultural content requiring at least a minimum level of activation of the beneficiary (arrival to a play, involvement in internet forum, purchasing special printed editions etc., but not watching TV, reading papers, etc.).	Survey „Social Exclusion in Serbia – Intensity, Causes and Types ”
4. Level of political participation	Share of citizens over the age of 25 who have the right to vote and who did not take part in any level of political elections over the past 8 years. total and disaggregated by age, education, gender, status of PwD and type of settlement.	RSO, Survey „Social Exclusion in Serbia – Intensity, Causes and Types ”
5. Level of civic participation	Share of citizens of age who are not members of any civil society organisation (association of citizens, trade union, political party, professional association, sports association, school board, etc.). total and disaggregated by type of settlement, education, age, gender, status of PwD, employment status and ethnic affiliation Monitored since 1997 in several sociologic surveys.	Survey „Social Exclusion in Serbia – Intensity, Causes and Types ”
6. Accessibility of justice	Share of persons of age whose property, civil, marital, etc. rights have been violated and who have given up from initiating court proceedings for lack of funds, ignorance of the justice system, pressures, etc. Monitor disaggregated by gender, age, employment status, status of PwD and ethnic affiliation.	-
7. Intensity of social networking at micro-level	Share of persons of age who have had social contacts with neighbours/relatives/friends less than once a week in the last year, disaggregated by age, education, type of settlement, gender, ethnic affiliation and forced migrant status.	Survey, „Social Exclusion in Serbia – Intensity, Causes and Types”

8. Incidence of family violence	Specific indicator depicting the problem of exclusion in the immediate social environment. The share of persons – victims of family violence relative to the total number of persons living in households with more than 1 member. Database that will capture data from the relevant institution (Ministry of Interior, centres for social welfare) is under construction.	RSO
9. Self-perceived assessment of social exclusion ³⁶	<ul style="list-style-type: none"> ▪ The feeling of loneliness and lack of family/friends support. ▪ Share of citizens of age who declared a strong intensity of this feeling. ▪ Perception of discrimination based on real experience. ▪ Share of persons aged 14+ who declare that they have been unjustly prevented from exercising their right to: work, health care, social protection or free movement in the last year (on the account of their age, gender, ethnic affiliation, sexual orientation, religion, race, etc.). ▪ Perception of impossibility to influence important decisions about community life at micro level. ▪ Share of citizens of age who declare a perception of very feeble influence on important decisions about community life. ▪ Perception of not belonging to any social group/community except the immediate family. ▪ Share of persons aged over 15 who declare this perception relative to the total number of inhabitants aged over 15 (this indicator denotes the most generalised form of social (non) participation). <p>Analyse by age, gender, education, type of settlement, ethnic affiliation, forced migrant status and status of PwD.</p> <p>Measured sporadically in independent surveys.</p>	Survey „Social Exclusion in Serbia – Intensity, Causes and Types ”

Level of cultural participation – may be monitored, in a limited way, through data on **visits to cinemas** available in the publication *Municipalities in Serbia*. This publication provides an insight into the number of visitors to cinemas during one year disaggregated by Serbian municipalities. Nevertheless, this information says nothing on the number of persons who went to cinemas but rather how many cinema tickets had been sold.

Level of cultural participation	
Visits to cinemas, 2007	
No. of tickets sold	1,393,610

Source: RSO, *Municipalities in Serbia*, 2008, chapter 17. Culture

Level of political participation - may be monitored, in a limited way, by comparing the number of voters registered in the voting lists and the number of persons who actually voted. The RSO publication **2008 Local Elections** provides these information. The number of persons who voted can be established unlike the number of persons who never came to polls during the past 8 years.

³⁶ As a self-perceived assessment, not relevant as an independent indicator, but provides a more complete image of the reference framework in which individuals build their social action in combination with objective indicators.

Level of political participation (voters at 2009 local elections)		
Voters registered in voting lists	Voted	Share of the voted
5,548,606	4,008,071	61.20

Source: RSO, 2008 Local Elections

Self-perceived assessment of social exclusion was analysed in the earlier mentioned survey “Social Exclusion in Serbia – Intensity, Causes and Types”.

Self-perception of influence on the life of local community	%
No influence	68
Weak influence	17
Moderate influence	11
Strong influence	3
Very strong influence	1
Total	100

Source: Survey „Social Exclusion in Serbia – Intensity, Causes and Types” within the framework of the project „promotion of Debate on Social Inclusion in Serbia”

Cultural activity	%
Passive ³⁷	14
Very low level of cultural activity	38
Low level of cultural activity	30
Moderate level of cultural activity	14
High level of cultural activity	4
Total	100

Source: Survey „Social Exclusion in Serbia – Intensity, Causes and Types” within the framework of the project „promotion of Debate on Social Inclusion in Serbia”

Political activity³⁸	%
Passive	13
Very low level of political activity ³⁹	26
Low level of political activity	34
Moderate level of political activity	19
High level of political activity	8
Total	100

Source: Survey „Social Exclusion in Serbia – Intensity, Causes and Types” within the framework of the project „promotion of Debate on Social Inclusion in Serbia”

³⁷ The group that, at best, only occasionally watches TV (61% of them), others not even as much (38%).

³⁸ Conclusion drawn on the basis of frequency of informing oneself about political topics from the media, discussions about political topics in the surroundings, voting at elections, monitoring electoral campaigns and participation in electoral campaigns.

³⁹ Reduced to following politics in the media or voting at elections.

Social participation – formal networks⁴⁰	%
Not involved in formal networks (absence of any contact)	84
Weakly involved in formal networks	12
Moderately involved in formal networks	2
Strongly involved in formal networks	1
Very strongly involved in formal networks	1
Total	100
Social participation – informal networks	%
Not involved in informal networks	1
Weakly involved in informal networks	2
Moderately involved in informal networks	15
Strongly involved in informal networks	52
Very strongly involved in informal networks	30
Total	100

Source: Survey „Social Exclusion in Serbia – Intensity, Causes and Types” within the framework of the project „promotion of Debate on Social Inclusion in Serbia”

Perception of belonging to social groups⁴¹	%
Perception of exclusion from social groups	1
Perception of weak belonging to social groups	7
Perception of moderate belonging to social groups	29
Perception of considerable belonging to social groups	37
Perception of full belonging to social groups	26
Total	100

Source: Survey „Social Exclusion in Serbia – Intensity, Causes and Types” within the framework of the project „promotion of Debate on Social Inclusion in Serbia”

Incidence of family violence measured by the number of persons registered for this criminal act is on the increase over the years, but this information has to be taken with caution as it may mean that the number of victims contacting the police is rising over the years. Namely, the victims of family violence often do not contact the police and therefore their full capture is a problem.

Family violence – Registered persons of age⁴² for the criminal act of family violence

	2004	2005	2006	2007	2008
Total	1,009	1,397	2,191	2,550	3,276
Men	953	1,312	2,049	2,377	3,016
Women	56	85	142	173	260
Charges rejected	251	366	473	636	845
Investigation interrupted	0	1	5	3	17
Investigation suspended	46	39	41	129	125
Charges filed	712	991	1,672	1,782	2,289

Source: RSO, on the basis of final decisions of public prosecutor's office and effective verdicts /court decisions

Family violence – Convicted persons of age⁴³ for criminal act of family violence and victims

⁴⁰ The conclusion on involvement in formal networks drawn on the basis of frequency of contacts with political parties, church societies, trade unions and non-governmental organisations.

⁴¹ Highly developed feeling of belonging to social groups (family, quarter/street, place of residence, nation and profession) is a consequence of almost total identification with belonging to the family.

⁴² A registered person of age is a person against which the proceedings for criminal charges filed and the previous procedure was completed.

	Total convicted	Total convicted (data on victim submitted)	Victims of criminal act of family violence		
			Total	Gender	
				Male	Female
2007	1,274	1,143	1,488	313	1,175
2008	1,645	1,506	1,931	404	1,527

Source: RSO, on the basis of final decisions of public prosecutor's office and effective verdicts /court decisions

⁴³ Charged and convicted person of age is a charged person of age the criminal procedure against which has been effectively completed.

Annex 1 – PORTFOLIOS OF INDICATORS

Portfolio of social inclusion indicators adopted in December 2001

PRIMARY INDICATORS:

1. At-risk-of-poverty rate
 - 1a At-risk-of-poverty rate by age and gender
 - 1b At-risk-of-poverty rate by the most frequent activity status
 - 1c At-risk-of-poverty by household type
 - 1d At-risk-of-poverty rate by tenure status
 - 1e At-risk-of-poverty threshold
2. Inequality of income distribution, S80/S20 quintile share ratio
3. At-persistent-risk-of-poverty
4. Relative at-risk-of-poverty gap
5. Regional cohesion
6. Long term unemployment rate
7. People living in jobless households
8. Early school leavers not in education or training
9. Life expectancy at birth
10. Self-defined health status by income level

SECONDARY INDICATORS:

11. Dispersion around at-risk-of-poverty threshold
12. At-risk-of-poverty threshold rate anchored at a moment in time
13. At-risk-of-poverty threshold rate before social transfers
14. Inequality of income distribution, Gini coefficient
15. At-persistent-risk-of-poverty rate (50% median)
16. Long term unemployment share
17. Very long term unemployment rate
18. Persons with low educational attainment

Note: The detailed methodology of calculation of indicators with the definition of each of them is presented in the European Commission document: **The Laeken indicators: Detailed calculation methodology**, see: <http://www.cso.ie/eusilc/documents/Laeken%20Indicators%20-%20calculation%20algorithm.pdf>.

Portfolio of social inclusion indicators following the July 2003 revision⁴⁴

PRIMARY INDICATORS:

1. At-risk-of-poverty rate
 - 1a At-risk-of-poverty by household type
 - 1b **new** At-risk-of-poverty by work intensity of members of household
 - 1c * At-risk-of-poverty rate by the most frequent activity status
 - 1d At-risk-of-poverty rate by tenure status
2. At-risk-of-poverty threshold
3. Inequality of income distribution, S80/S20 quintile share ratio
4. At-persistent-risk-of-poverty
5. Relative at-risk-of-poverty gap
6. Regional cohesion
7. Long term unemployment rate
8. People living in jobless households
 - 8a * Persons living in jobless households: children
 - 8b * Persons living in jobless households: adults
9. Early school leavers not in education or training
10. **new** Low functional literacy performance of pupils (measured by PISA test)
11. Life expectancy (at birth, at 1, and at 60)
12. Self-defined health status by income level

SECONDARY INDICATORS:

13. Dispersion around at-risk-of-poverty threshold
14. At-risk-of-poverty threshold rate anchored at a moment in time
15. At-risk-of-poverty threshold rate before social transfers
16. Gini coefficient
17. At-persistent-risk-of-poverty rate (50% median)
18. **new** In-work poverty
19. Long term unemployment share
20. Very long term unemployment rate
21. Persons with low educational attainment

Note: Redefined indicators as compared to those initially agreed upon (2001) are marked with *, and the indicators introduced after the update are marked with the word „new” in front of the title of indicator.

⁴⁴ European Commission, Eurostat, *Continuity of indicators between end-ECHP and start-SILC Algorithms to compute cross-sectional indicators of poverty and social inclusion adopted under the open method of coordination*, August 2005.

Portfolio of social protection and social inclusion indicators, September 2009⁴⁵

OVERARCHING INDICATORS

1. 1a At-risk-of-poverty rate + Illustrative threshold value
- 1b Relative median poverty risk gap
2. Inequality of income distribution, S80/S20 quintile share ratio
3. Healthy life expectancy
4. Early school leavers not in education or training
5. Persons living in jobless households
6. Projected Total Public Social Expenditures⁴⁶
7. Pensions adequacy
- 7a Median relative income of elderly persons⁴⁷
- 7b Aggregate replacement ratio⁴⁸
8. Self-reported unmet need for medical care
9. At-risk-of-poverty rate anchored at a fixed moment in time (possibly replaced or supplemented in future by material deprivation or consistent poverty indicators)
10. Employment rate of older workers
11. In-work poverty risk
12. Activity rate (possibly replaced or supplemented in future by MWP indicators)
13. Regional cohesion
14. Total health expenditure per capita

CONTEXT INDICATORS:

1. GDP growth
2. Employment rate, by sex. Unemployment rate, by sex and key age groups. Long term unemployment rate, by sex and key age groups
3. Life expectancy at birth and at 65
4. Old age dependency ratio, current and projected
5. Distribution of population by household types, including collective households
6. Public debt, current and projected, % of GDP
7. Social protection expenditure, current, by function, gross and net
8. Jobless households by main household types
9. Making work pay indicators (unemployment trap, inactivity trap (especially second earner case), low-wage trap)
10. Net income of social assistance recipients as a % of at-risk-of-poverty threshold for 3 types of jobless households⁴⁹

⁴⁵ European Commission, Employment, Social Affairs and Equal Opportunities DG, *Portfolio of indicators for the monitoring of the European Strategy for Social Protection and Social Inclusion – 2009 update*, Brussels, September 2009.

⁴⁶ Projections of total public expenditures on social protection (pensions, health care, long term care, unemployment benefits), current level is expressed as a percentage of GDP and the projected change of GDP participation expressed in percentage points.

⁴⁷ Median of equivalent disposable income of persons aged 65 and over as a ratio of income of persons aged 0–64.

⁴⁸ Median income from pensions in the age group 65–74 relative to the median wages of persons in the age group 50–59, not including other social benefits.

⁴⁹ This indicator refers to the income of persons living in households relying only on the „last resort” – social benefits (including housing benefits) and who have no other source of income at their disposal (of other social protection benefits – e.g. programmes for unemployed persons or persons with disabilities – or from work). The aim of indicators is assessment of whether the safety nets ensured for the households most excluded from labour market suffice for them to rise from poverty. This indicator is calculated on the basis of tax exemption models developed by OECD and the European Commission. It is calculated only for the countries where uncategorised social benefits exist and for three types of jobless households: single-person households, single parents with two

11. At-risk of poverty rate before social transfers (other than pensions), 0–17, 18–64, 65+⁵⁰
12. Change in the projected theoretical replacement ratio⁵¹ for base case 2004–2050 accompanied by information on type of pension scheme, and change of projected public pension expenditures 2004–2050

SOCIAL INCLUSION PORTFOLIO

The goal of the social exclusion pillar is to exert “decisive impact on eradicating poverty and social exclusion”

PRIMARY INDICATORS:

1. At-risk-of-poverty rate + Illustrative threshold values
2. Persistent at-risk-of-poverty rate
3. Relative median poverty risk gap
4. Long term unemployment rate
5. Population living in jobless households
6. Early school leavers not in education or training
7. Employment gap of immigrants
8. Material deprivation rate⁵²
9. Housing
10. Self-reported unmet need for medical care
11. Child well-being – to be developed

SECONDARY INDICATORS:

1. At-risk-of-poverty rate
 - 1a. At-risk-of-poverty by household type
 - 1b. At-risk-of-poverty by work intensity of members of household
 - 1c. At-risk-of-poverty rate by the most frequent activity status
 - 1d. At-risk-of-poverty rate by tenure status
 - 1e. Dispersion around at-the-risk-of-poverty threshold
2. Persons with low educational attainment
3. Low reading literacy performance of pupils
4. Depth of material deprivation
5. Housing costs⁵³

children and a couple with two children. This indicator is particularly relevant in the MWP (make work pay) analysis.

⁵⁰ This indicator is used for comparing the identified risk of poverty with hypothetical measure of risk of poverty in absence of all social transfers (except pensions), when all is at the same level. In particular, household and labour market structures are left unchanged. This measure does not take into account other types of transfers affecting disposable income of households such as transfers in kind and tax reductions.

⁵¹ Definition: Change of the theoretical level of pensions at the moment of transition related to income from work in the last year preceding retirement for a hypothetical worker (base case) expressed in percentage points for the period 2004–2050 with information on type of pension plan and changes in public spending on pensions as share of GDP for the period 2004–2050. This information can only collectively form an indicator entitled Projected Theoretical Replacement Ratio. The results refer to the current and projected, gross (public and private) and total net replacement ratios, and should be accompanied by information on representativeness and assumptions (contributions rates and rate of coverage, public and private).

⁵² Share of population living in households lacking minimum 3 of the following 9: the household could not afford: i) unexpected costs, ii) one week of vacations outside of the place of residence, iii) to pay debts (mortgage or rent, utility bills or rent/purchase installment), iv) a meal with meat, chicken or fish once in two days, v) adequate heating of home or the household could not have afforded (even if they wished): vi) a washing machine, vii) colour TV, viii) telephone, ix) private car.

⁵³ Defined as a percentage of population living in a household where the total housing costs (costs of housing after deduction of housing benefits, if any) exceed 40% of the total available income of the household (excluding housing benefits, if any). The costs of housing include payment of mortgage installments (after tax benefits, if any) for owners, rent for lease holders, mandatory services and costs (sewage, waste disposal, etc.), regular maintenance and repair, taxes and utility services costs (water, power, gas and heating). Payment of the principal of mortgage holders is not considered housing cost. Housing benefits include assistance in rent payment and assistance to owners living in their own apartments. Assistance for payment of rent – subsidized rents are transfers that a state authority grants to lease holders on the basis of examination of their property status, occasionally or at long term, in order to help them with payments of rent. Benefits paid to the owners

6. Overcrowding⁵⁴
 1. Income quintile ratio (S80/S20)
 2. Gini coefficient
 3. Regional cohesion
 4. Healthy life expectancy and Life expectancy at birth, at 65, (*by socio-economic status when available*)
 5. At-risk-of-poverty rate anchored at a moment in time
 6. At-risk-of-poverty rate before cash transfers (other than pensions)
 7. Jobless households by main household types (breakdown of secondary indicator 1a)
 8. In-work poverty risk, breakdown full-time/part-time
 9. Making work pay indicators (unemployment trap, inactivity trap (especially second earner case), low-wage trap)
 10. Net income of social assistance recipients as a % of at-risk-of-poverty threshold for 3 types of jobless households(single, lone parent with two children, couple with two children)⁵⁵
 11. Self-reported limitations in daily activities by income quintiles, by sex, by age (0–17, 18–64, 65+)
 12. Housing deprivation⁵⁶
 13. Share of housing costs in total disposable household income⁵⁷

PENSIONS PORTFOLIO

First streamlined objective – adequate pensions

„Ensure adequate retirement incomes for all and access to pensions which allow people to maintain, to a reasonable degree, their living standards after retirement, in the spirit of solidarity and fairness between and within generations”

PRIMARY INDICATORS:

1. At-risk-of-poverty rate of older people

who live in their own apartments represent transfers that a state authority grants to lease holders on the basis of examination of their property status, in order to reduce their current housing costs; in practice, it is often assistance for mortgage repayment. The proposal is for the indicator to be monitored disaggregated by: gender, age, income quintile, status poor/not poor, tenure status (4 categories: full tenure, owner continues to pay mortgage; lease holders at market prices; lease holders at subsidized prices or rent-free), urbanisation level, type of household.

⁵⁴ The person is considered to live in an overcrowded household when the household does not dispose of minimum: one room for the household, one room for each couple, one room for each single person aged 18+, one room for two single persons of the same gender aged 12 - 17, one room for each single person of different gender aged 12 - 17, one room for two persons under the age of 12. Single-headed households considered deprived are the household where one person lives in a studio where the bedroom is not separate from the living room.

⁵⁵ This indicator refers to the income of persons living in households relying only on the „last resort” – social benefits (including housing benefits) and who have no other source of income at their disposal (of other social protection benefits – e.g. programmes for unemployed persons or persons with disabilities – or from work). The aim of indicators is assessment of whether the safety nets ensured for the households most excluded from labour market suffice for them to rise from poverty. This indicator is calculated on the basis of tax exemption models developed by OECD and the European Commission. It is calculated only for the countries where uncategorised social benefits exist and for three types of jobless households: single-person households, single parents with two children and a couple with two children. This indicator is particularly relevant in the MWP (make work pay) analysis.

⁵⁶ Defined as a percentage of population deprived in each of the quality-of-housing elements, as well as the percentage of population deprived by several quality-of-housing elements. The following problems related to the quality of housing are taken into account: *leaking roof, damp walls or foundations, or rotting windows or floors, no bathroom or shower in the apartment; no toilet in the apartment solely at the disposal of the household; insufficient daily life in the apartment.* Categorized by gender, age (0–17; 18–64; 65+).

⁵⁷ Median distribution share of housing costs (excluding housing subsidies) in the total disposable income (excluding housing subsidies) among individuals in the entire population. *Disaggregated by: gender, age (0–17; 18–64; 65+), status poor/not poor; urbanisation level.*

2. Median relative income of older people
3. Aggregate replacement ratio
4. Change in the projected theoretical replacement ratio⁵⁸ for base case 2006–2046 accompanied by information on type of pension scheme, and change of projected public pension expenditures 2006–2046

SECONDARY INDICATORS:

1. At-risk-of-poverty rate of older people
2. Median relative income of older people (60+)
3. Aggregate replacement ratio (incl. other social benefits)
4. Income inequality – (S80/S20) among population aged 65+
5. Risk of poverty gap of elderly people
6. Risk of poverty gap of pensioners
7. Incidence of risk of elderly poverty by the housing tenure status
8. Risk of poverty calculated at 50% and 70% of the median national equivalised income for the elderly

CONTEXT INDICATORS:

1. Composition of income by source (pensions, other social benefits, earnings from work, other sources) and by income quintile for people aged 60+, 65+, 75+

Second streamlined objective pensions – sustainable pensions

„Ensure the financial sustainability of public and private pension schemes, bearing in mind pressures on public finances and the ageing of populations, and in the context of three-pronged strategy for tackling the budgetary implications of ageing, notably by: supporting longer working lives and active ageing, by balancing contributions and benefits in an appropriate and socially fair manner, and by promoting the affordability and the security of funded and private schemes”

PRIMARY INDICATORS:

1. Total current pension expenditure (% of GDP)
2. Employment rate – persons aged 55–64 represents a key dimension of sustainability
3. Effective labour market exit age
4. Projections of pension expenditure, public and total, 2004–2050 (% of GDP)

SECONDARY INDICATORS:

5. Total social protection expenditures (% of GDP)
6. Decomposition of the projected increase in public pension expenditure (Decomposition with the old age dependency ratio, the employment effect, the take-up ratio and the benefit ratio)

CONTEXT INDICATORS:

1. Old-age dependency ratio (Current and projected for 2010, 2030, 2050)
2. Evolution of life expectancy at birth and at ages of 60 and 65, by sex (current and projected)
3. Pension system dependency ratio (Number of pensioners relative to contributors, current and projected by 2050)
4. Contribution to public and private pension schemes (Pension contributions to public pension schemes as a share of GDP, current and projected by 2050)

Third streamlined objective pensions – modernized pensions

„Ensure that pension systems are transparent, well adapted to the needs and aspirations of women and men and the requirements of modern societies, demographic ageing and structural change, that people receive the information they need to plan their retirement and that reforms are conducted on the basis of the broadest possible consensus”

PRIMARY INDICATORS:

1. Gender differences in the risk of poverty (0–65, 65+, total, women/men living alone)

⁵⁸ Definition: Change of the theoretical level of pensions at the moment of transition related to income from work in the last year preceding retirement for a hypothetical worker (base case) expressed in percentage points for the period 2004–2050 with information on type of pension plan and changes in public spending on pensions as share of GDP for the period 2004–2050. This information can only collectively form an indicator entitled Projected Theoretical Replacement Ratio. The results refer to the current and projected, gross (public and private) and total net replacement ratios, and should be accompanied by information on representativeness and assumptions (contributions rates and rate of coverage, public and private).

2. Gender differences in the relative income of older people
3. Gender differences in aggregate replacement ratio

SECONDARY INDICATORS:

1. Gender differences in the relative income of older people

HEALTH PORTFOLIO – PRELIMINARY LIST

Indicators regarding access to care (including inequality in access to care) and inequality in outcomes (objective 1)

PRIMARY INDICATORS:

1. Total self-reported unmet need (reasons for the unmet need: financial barriers + waiting times + too far to travel)
2. Self-reported unmet need for dental care (reasons for the unmet need: financial barriers + waiting times + too far to travel)
3. Proportion of population covered by health insurance (public and private)
4. 4a Life expectancy – at birth, at 45 and at 65
- 4b Life expectancy by socio-economic status (socio-economic status such as level of education or income quintile, at birth = socio-economic status of parents)
- 5a. Healthy life years – at birth, at 45 and at 65
- 5b. Life expectancy by socio-economic status

SECONDARY INDICATORS:

1. Self-perceived limitations in daily activities
2. Self-perceived general health
3. 3a Infant mortality rate
- 3b Infant mortality rate by socio-economic status

Indicators regarding quality of care: effectiveness, safety and patient centeredness (objective 2)

PRIMARY INDICATORS:

6. Vaccination coverage in children
7. Cervical cancer screening
8. Cervical cancer survival rates
9. Colorectal cancer survival rates
10. Satisfaction with health care services

SECONDARY INDICATORS:

4. Influenza vaccination for adults over 65+
5. Breast cancer screening
6. Breast cancer survival rates
7. Perinatal mortality (number of foetal deaths (over 1000 g) + neonatal deaths (0–6 days) per 1000 live births)

Indicators regarding long-term sustainability of systems: expenditure and efficiency (objective 3)

PRIMARY INDICATORS:

11. Total health expenditure per capita
12. Total health care expenditure as a % of GDP
13. Total long-term care expenditure as a % of GDP
14. Projections of public expenditure on health care as a % of GDP
15. Projections of public expenditure on long-term care as a % of GDP
16. Hospital inpatient discharges
17. Hospital daycases
18. Obesity

SECONDARY INDICATORS:

8. Sales of generics
9. Acute care bed occupancy rates
10. Hospital average length of stay
11. Regular smokers
12. Alcohol consumption

CONTEXT INDICATORS:

1. Physicians
2. Nurses and midwives
3. Public and private expenditure as a % of total health expenditure
4. Total expenditure on main types of activities or functions of health care (services of curative care and services of rehabilitative care, ancillary services to health care, medical goods dispensed to outpatients, prevention and public health as a % of total current health care expenditure)

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