

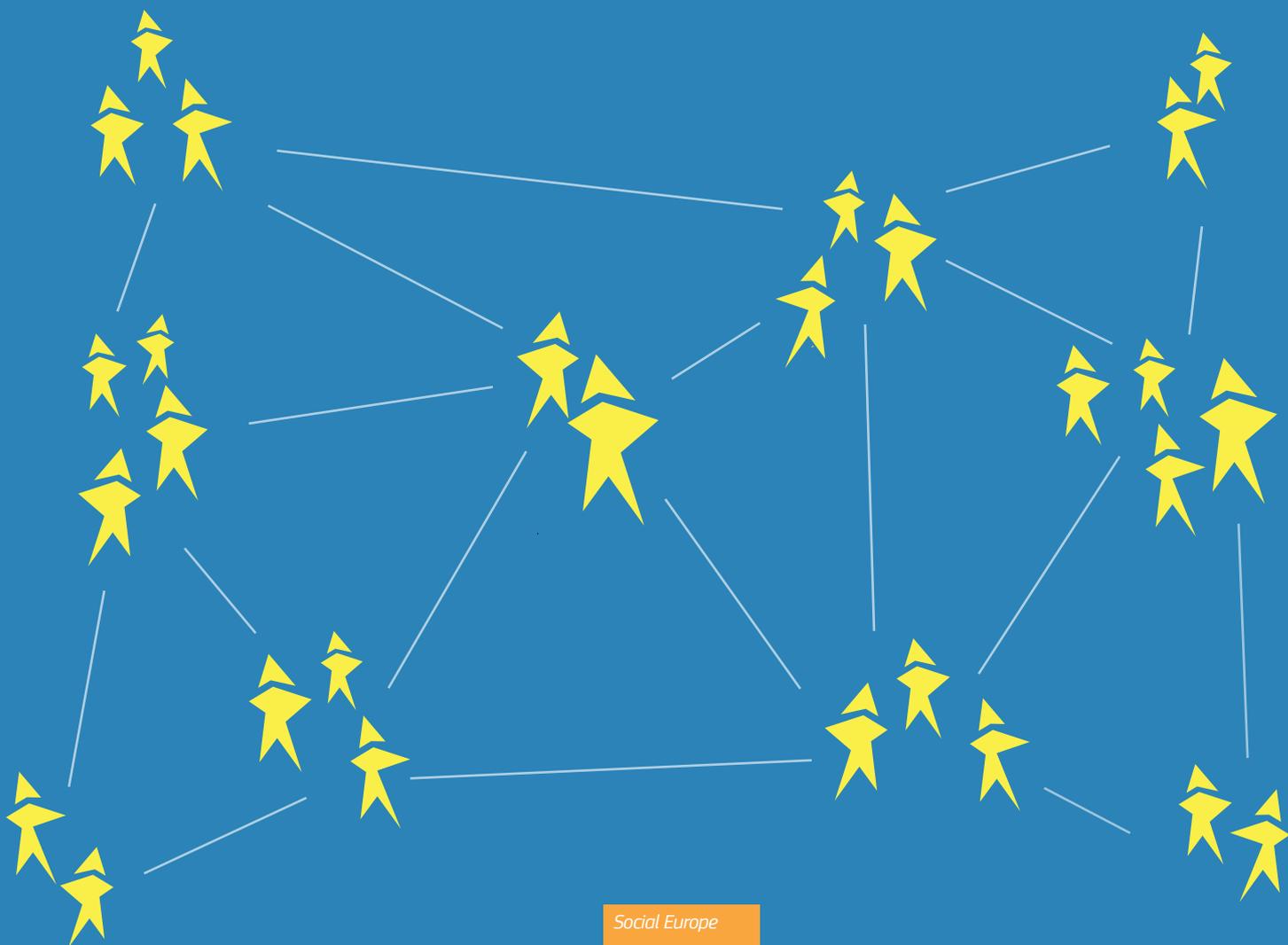


EUROPEAN SOCIAL POLICY NETWORK (ESPN)

Social protection for people with disabilities

Serbia

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Social Europe

EUROPEAN COMMISSION

Directorate-General for Employment, Social Affairs and Inclusion
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European Social Policy Network (ESPN)

ESPN Thematic Report on Social protection for people with disabilities

Serbia

2022

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Manuscript completed in September 2022

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QUOTING THIS REPORT

Pejin Stokić Ljiljana, Bajec Jurij (2022). *ESPN Thematic Report on Social protection for people with disabilities – Serbia*, European Social Policy Network (ESPN), Brussels: European Commission.

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Summary

This report analyses some important cash and in-kind social protection provisions available to adults with disabilities (i.e. aged 18 or above). There are other important provisions available to them in other areas not covered in this report. In line with Article 1 of the UN Convention on the Rights of Persons with Disabilities, "people with disabilities" should be understood as "*those who have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others*".

Social protection of people with disabilities in Serbia is regulated by the Law on Pension and Invalidity Insurance, the Social Protection Law, and the Law on Rights of Veterans, Military Invalids, Civilian Invalids of War and Members of Their Families. The entitlement to social cash benefits not related to war is to some extent conditioned by the social insurance contribution history of the beneficiary, which also affects the cash benefit levels. For these reasons, the *Novčana naknada za pomoć i negu drugog lica* (financial compensation for assistance and care of another person) is calculated differently if people have no contribution history, even though the disability levels are the same. The eligibility conditions for the *Invalidska penzija* (invalidity pension) take into account the contribution history and disability causes, namely whether disability is work-related or not. Such rules discriminate against the younger population, who tend to have an inadequate contribution history due to the high unemployment rates and their high participation in informal employment. The adequacy of all cash benefits is rather low considering the additional needs imposed by disability status.

The law that regulates benefits related to war was adopted in 2020 (previously this area was covered by several different laws). In general, these cash benefits are higher than those not related to war or military service.

Healthcare coverage is adequate, as full coverage is secured either by the regular compulsory insurance scheme or from central budget funding, and exemption from all participation payments is applied. The provision of assistive technology is regulated by the Health Insurance Law, and beneficiaries have to pay the difference in price if they opt for more advanced devices. Personal services are provided by local communities and are rather underdeveloped, with a low coverage. There are no housing benefits for adapting living spaces.

At the beginning of the COVID-19 pandemic there was evidence that the needs of people with disabilities were not adequately considered in the measures adopted. In response to these shortcomings, at the end of 2020 the Red Cross organisations from the five Balkan countries, supported by international aid, initiated a programme for strengthening the resilience of old people and people with disabilities during the COVID-19 pandemic and future disasters.

In March 2020 a new strategy for improving the status of people with disabilities for 2020-2024 was adopted. The strategy set rather extensive objectives, including mainstreaming disability issues in all public policy documents. The document did not appropriately address the high at-risk-of-poverty rates for people with disabilities, and there were no targets for reducing them.

In February 2022, the Law on Social Entrepreneurship was adopted after more than a decade of debate and preparation. The law opens the door to the creation of a more suitable business environment for people with disabilities, and for improved inclusion in the labour market.

There is a need to improve data-collection and the use of the available official statistics in this area. More advanced statistics would enable policy-makers to develop timely responses to the most important issues, and increase the effectiveness of social assistance for people with disabilities.

1 Access to disability-specific income support

1.1 Disability-specific benefits/pensions available to working-age people

The *Novčana naknada za pomoć i negu drugog lica* (financial compensation for assistance and care of another person) is the only non-contributory disability assistance scheme that covers all people with disabilities.

1.1.1 Disability-specific benefits/pensions available to working-age people not related to military service or war

1.1.1.1 *Novčana naknada za telesno oštećenje prouzrokovano povredom na radu ili, odnosno profesionalnom bolešću* (Cash compensation for impairment caused by a work injury, and/or by occupational disease)

a) Eligibility conditions

The *Novčana naknada za telesno oštećenje prouzrokovano povredom na radu ili, odnosno profesionalnom bolešću* (cash compensation for impairment caused by a work injury, and/or by occupational disease) is a contributory benefit for all people covered by compulsory invalidity insurance against injury at work: employees, pensioners, students on vocational training, voluntary workers, and people engaged in assistance work during disasters.

Disability-related qualifying criteria: At least 30% degree of disability.

Age: None (i.e. there are no age requirements for accessing the compensation).

Nationality and/or residency: None (i.e. there are no nationality or residency requirements for accessing the compensation).¹

Waiting period: None (i.e. it is granted from the moment the disability is certified).

Contributory history: A person is entitled if employed, irrespective of the duration of employment.

Level of financial resources: Access is not conditional on a person's (or household's) level of financial resources.

Other: None.

Gaps and/or obstacles: No evidence (reports, papers...) was identified on gaps/obstacles related to this benefit.

b) Disability assessment framework

Type of assessment: A medical assessment of the disability, in accordance with the official Barema list (MoH, 2008). The level of disability is categorised according to eight degrees: the lowest (8) is 30%, and the highest (1) is 100% (Government of Serbia, 2021a).

Responsible authorities: The accredited expert body at the Pension and Invalidity Fund (hereafter the PIO Fund) (PIO Fund, 2019).

Method: Documentary medical evidence, and (when necessary) personal interaction.

Supporting evidence: The medical documents issued by the general practitioner, and a medical examination by professionals from the PIO Fund expert body when necessary.

Assessor: The PIO Fund expert body team (medical doctors and legal expert).

¹ This applies to EU and non-EU nationals as well as to people with refugee status.

Decision-maker: The PIO Fund branch office. The procedure for reporting a work-related injury or disease is regulated by a rulebook: this specifies the template to be filled in by the employer, which includes the report by the physician who has examined the worker. The employer submits the template for verification to the Health Insurance Fund, and following verification to the PIO Fund, with one copy given to the worker. The whole procedure should be completed within seven days.

Critical analysis: The contributory requirement excludes all informally employed workers, even though many of them work in arduous jobs, such as construction or agriculture. The prevalence of informal employment has been a longstanding problem in the Serbian labour market, although it fell from 22.0% in 2016 to 13.2% in 2021 (RSO, 2022, 2017).

c) Benefit entitlements

Level of the benefit: Depending on the disability degree, the compensation is calculated as a percentage of a defined basis. In November 2021 the average monthly benefit was 1,817 RSD (€15.40) (PIO Fund 2021a). The benefit is very low: the net minimum wage in the same month was 32,371 RSD (€275.50). The compensation is indexed according to the Swiss formula.²

Duration of the benefit: As long as disability is present; when necessary, a re-examination is scheduled.

Interactions with other income or other income related-benefits: The compensation is included in the household income calculation used to determine eligibility for means-tested social cash benefits – the *Novčana Socijalna Pomoć* (financial social assistance) and child allowance (Government of Serbia, 2011).

Challenges: No evidence (reports, papers...) was identified on adequacy challenges related to this benefit.

1.1.1.2 Naknada po osnovu smanjenja zarade zaposlenih II kategorije invalidnosti za rad sa skraćenim vremenom ili po osnovu III kategorije invalidnosti za smanjenu zaradu na drugom odgovarajućem poslu (Compensation on the grounds of reduced earnings by employees with category II disability working part time, or on the grounds of category III disability for employees working in other appropriate jobs)

a) Eligibility conditions

Disability-related qualifying criteria: The second (II) disability degree is confirmed if the beneficiary can be employed under the general working conditions (without adapting the working process and/or the working environment); and the third (III) disability degree is confirmed if the beneficiary can be employed under specific working conditions (with adaptation of the working process and/or the working environment).

Age: None (i.e. there are no age requirements for accessing the compensation).

Nationality and/or residency: None (i.e. there are no nationality or residency requirements for accessing the compensation).³

Waiting period: None (i.e. it is granted from the moment the disability is certified).

Contributory history: None (i.e. no minimum contributory record is required).

Level of financial resources: Access is not conditional on the person's (or household's) level of financial resources.

² The formula reflects 50% of the national consumer price index and 50% of the national average wage growth from the previous calendar year.

³ This applies to EU and non-EU nationals as well as to people with refugee status.

Other: None.

Gaps and/or obstacles: No evidence (reports, papers...) was identified on gaps/obstacles related to this benefit.

b) Disability assessment framework

Type of assessment: A functional capacity assessment of ability to work, in accordance with the principles defined by the international classification of functioning, disability and health (MoLEVSP, 2013).

Responsible authorities: The National Employment Service (hereafter the NES) and the PIO Fund.

Method: Documentary medical evidence, and (when necessary) personal interaction.

Supporting evidence: The medical documents, a psychological and social profile of the beneficiary (education, previous work, housing conditions, household status, etc.) and an assessment of current labour market demands.

Assessor: The expert body at the PIO Fund (medical doctors and legal expert).

Decision-maker: The NES.

Critical analysis: Not documented.

c) Benefit entitlements

Level of the benefit: For part-time employment, the *Naknada po osnovu smanjenja zarade zaposlenih II kategorije invalidnosti za rad sa skraćenim vremenom ili po osnovu III kategorije invalidnosti za smanjenu zaradu na drugom odgovarajućem poslu* (compensation on the grounds of reduced earnings by employees with category II disability working part time, or on the grounds of category III disability for employees working in other appropriate jobs) equals the top-up for full-time employment. For employment in other appropriate jobs, the compensation equals the difference between previous earnings (average of the last three years) and current earnings. The payments are indexed according to the Swiss formula.

Duration of the benefit: Until the beneficiary meets the conditions for the *Invalidska penzija* (invalidity pension).

Interactions with other income or other income-related benefits: The compensation is included in the personal/household income used to determine eligibility for means-tested social cash benefits (the financial social assistance and child allowance).

Challenges: No evidence (reports, papers...) was identified on adequacy challenges related to this benefit.

1.1.1.3 Privremena naknada po osnovu II I III kategorije invalidnosti za nezaposlene korisnike (Temporary compensation payment on the grounds of category II and III disability for unemployed beneficiaries)

a) Eligibility conditions

Disability-related qualifying criteria: The second (II) disability category is confirmed if the beneficiary can be employed under the general working conditions (without adapting the working process and/or the working environment); and the third (III) category is confirmed if the beneficiary can be employed under the specific working conditions (with adaptation of the working process and/or the working environment).

Age: None (i.e. there are no age requirements for accessing the compensation).

Nationality and/or residency: None (i.e. there are no nationality or residency requirements for accessing the compensation).⁴

Waiting period: None (i.e. it is granted from the moment the disability is certified).

Contributory history: Same as for invalidity pension (Section 1.1.1.4).

Level of financial resources: Access is not conditional on the person's (or household's) level of financial resources.

Other: Registration at the NES is compulsory.

Gaps and/or obstacles: No evidence (reports, papers...) was identified on gaps/obstacles related to this benefit.

b) Disability assessment framework

Type of assessment: A functional capacity assessment of ability to work, in accordance with the principles defined by the international classification of functioning, disability and health (MoLEVSP, 2013).

Responsible authorities: The NES and the PIO Fund.

Method: Documentary medical evidence, and (when necessary) personal interaction.

Supporting evidence: The medical documents (no self-assessment), a psychological and social profile of the beneficiary (education, previous work, housing conditions, household status, etc.), and an assessment of current labour market demands.

Assessor: The expert body at the PIO Fund (medical doctors and legal expert).

Decision-maker: The NES.

Critical analysis: Not documented.

c) Benefit entitlements

Level of the benefit: Prior to 2003, the *Privremena naknada po osnovu II I III kategorije invalidnosti za nezaposlene korisnike* (temporary compensation payment on the grounds of category II and III disability for unemployed beneficiaries) was calculated as 50% of the sick leave payment stipulated by the Health Insurance Law. Since 2003 the benefit has equalled 50% of the corresponding invalidity pension under the Pension and Invalidity Law.

Duration of the benefit: Until the beneficiary meets the conditions for the invalidity pension or *Starosna penzija* (old-age pension).

Interactions with other income or other income-related benefits: The compensation is included in the personal/household income calculation used to determine eligibility for means-tested social cash benefits (the financial social assistance and child allowance).

Challenges: No evidence (reports, papers...) was identified on adequacy challenges related to this benefit.

1.1.1.4 Invalidska penzija (Invalidity pension)

a) Eligibility conditions

Disability-related qualifying criteria: A permanent loss of working ability that cannot be reversed by healthcare interventions (in the case of police workers, a permanent inability to perform professional tasks).

Age: In case of a work-related injury and/or occupational disease, there are no age restrictions. In case of a non-work-related injury or disease, an individual is eligible provided that the loss of working ability occurred before reaching the statutory

⁴ This applies to EU and non-EU nationals as well as to people with refugee status.

retirement age for the old-age pension (65 for men, and 63 years and two months for women, in 2021).

Nationality and/or residency: None (i.e. there are no nationality or residency requirements for accessing the pension).⁵

Waiting period: None (i.e. it is granted from the moment the disability is certified).

Contributory history: None for a work-related injury or occupational disease. For a non-work-related injury or disease, five years of service. For young people under 30, the following rules apply according to the disability onset date: (1) under 20 – one year; (2) 20-25 – two years; and (3) 25-30 – three years.

Level of financial resources: Access is not conditional on the person's (or household's) level of financial resources.

Other: None.

Gaps and/or obstacles: The contributory requirement is particularly discriminatory for young people, considering their low labour force participation due to regular education. In 2020 only 28% of young people (15-24) participated in the labour market.⁶ Young people (15-30) are also faced with difficulties in employment: in 2020 26% were informally employed, while only 20.2% were formally employed (Ninamedia research, 2020).⁷ It is also discriminatory against people with a contribution history of less than five years, bearing in mind that a number of occupational diseases are not always easy to confirm and document. Consequently, they cannot claim the occupational disease as a reason for retirement. One example is neoplastic diseases; in 2020 32% of new invalidity pensioners were retired on the grounds of a cancer diagnosis (PIO Fund, 2021b).

b) Disability assessment framework

Type of assessment: Functional capacity assessment of ability to work.

Responsible authorities: The PIO Fund.

Method: Documentary evidence and/or personal interaction.

Supporting evidence: Medical notes, medical examinations if necessary.

Assessor: The expert body at the PIO Fund (medical doctors and legal expert).

Decision-maker: The PIO Fund.

Critical analysis: Not documented.

c) Benefit entitlements

Level of the benefit: The pension calculation formula is the same for all insured beneficiaries, and combines the previous earnings and the pensionable years of service. Additional years of service are regulated in the following manner: (1) for a work-related disability, 40 years of service is computed; and (2) for a non-work-related disability, the years of service granted depend on the disability onset date, as follows. For people under 53, two thirds of the missing years of service are added until the claimant reaches 53. For people aged 53 or over, the years of service granted are: (a) for male claimants, half of the missing years of service until 63; and (b) for female claimants, half of the missing years of service until 58. For women, the calculated years of service are increased by 6%. The added service for non-work-related disabilities cannot exceed 40 years. People with disabilities are also entitled to added years of service in the following cases: (1) when a person with a disability of 30% or more was employed for at least

⁵ This applies to EU and non-EU nationals as well as to people with refugee status.

⁶ <https://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>, accessed on 11 February 2022.

⁷ https://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=ifsi_emp_a&lang=en, accessed on 11 February 2022.

five years in selected occupations (arduous and hazardous jobs, or at age-restricted posts), a maximum extension of 50% is computed; and (2) for people with 70% disability or more (including blind people, and people with dystrophy and similar musculoskeletal diseases) a 25% extension is awarded for every 12 months of employment (of any kind). Additional years of service are granted to all women beneficiaries (of both old-age and invalidity pensions) in relation to child-bearing: six months for one child, 12 months for two children, and 24 months for three or more children. The guaranteed minimum invalidity pension equals 27% of the average net wage from the previous year. All pensions are indexed according to the Swiss formula. In November 2021 the average monthly invalidity pension was 27,426 RSD (€237), which was 86.8% of the average old-age pension (PIO Fund, 2021). Although the average invalidity pension is close to the value of the average old-age pension, its adequacy can be considered as rather low for two reasons. First, the aggregate replacement rate for pensions in Serbia is low; in 2019 it was 0.42. Second, the living expenses of people with disabilities are higher than for the general population and place an additional burden on household budgets.

Duration of the benefit: Until the beneficiary reaches the statutory age for old-age retirement. Payment is suspended while the beneficiary is engaged in temporary work, and the beneficiary will be invited to a follow-up examination.⁸

Interactions with other income or other income-related benefits: The benefit is included in the personal/household income calculation used to determine eligibility for means-tested social cash benefits (the financial social assistance and child allowance).

Challenges: No evidence (reports, papers...) was identified on adequacy challenges related to this benefit.

1.1.1.5 *Novčana naknada za pomoć i negu drugog lica* (Financial compensation for assistance and care of another person)

a) Eligibility conditions

Disability-related qualifying criteria: Inability to live independently and to perform daily activities (dressing, washing, etc.). The conditions are the same for all beneficiaries.

Age: None (i.e. there are no age requirements for accessing the compensation).

Nationality and/or residency: Serbian nationality and residence status.

Waiting period: None (i.e. it is granted from the moment the disability is certified).

Contributory history: None (i.e. no minimum contributory record is required).

Level of financial resources: Access is not conditional on the person's (or household's) level of financial resources.

Other: None.

Gaps and/or obstacles: No evidence (reports, papers...) was identified on gaps/obstacles related to this benefit.

b) Disability assessment framework

Type of assessment: A functional capacity assessment of the ability to perform daily activities.

Responsible authorities: The compensation is regulated by two separate laws, and administered through the two different public funds: (i) employees and pensioners are covered in accordance with the Pension and Invalidity Law, and payments are administered by the PIO Fund; and (ii) uninsured people receive benefits from the central budget in accordance with the Social Protection Law, and payments are

⁸ Invalidity pensioners are entitled to engage in temporary work (service contract or author contract).

administered by the Ministry of Labour, Employment, Veterans and Social Policy (hereafter the MoLEVSP).

Method: Documentary medical evidence, and (when necessary) personal interaction.

Supporting evidence: The medical documents, and a psychological and social profile of the beneficiary (education, previous work, housing conditions, household status, etc.).

Assessor: The expert body at the PIO Fund (medical doctors and legal expert).

Decision-maker: The PIO Fund.

Critical analysis: In 2020 only 0.5% of the population received this benefit (including children), whereas the estimated number of people with disabilities was 8-12% of the population (RSO, 2021).

c) Benefit entitlements

Level of the benefit: In 2021 the average monthly compensation covered by the PIO Fund was 20,211 RSD (€172): there are two kind of benefits covered by the central budget, the basic monthly compensation at 12,600 RSD (€107), and the increased benefit (for beneficiaries with 100% disability of one organ, or 70% disability of at least two organs) at 31,506 RSD (€269).⁹ The adequacy of the payment is questionable for unemployed beneficiaries who do not have other sources of income.

Duration of the benefit: As long as the eligibility criteria are met.

Interactions with other income or other income-related benefits: The compensation is not included in the personal/household income calculation used to determine eligibility for means-tested social cash benefits (the financial social assistance and child allowance).

Challenges: No evidence (reports, papers...) was identified on adequacy challenges related to this benefit.

1.1.2 Disability-specific benefits/pensions available to working-age people related to military service or war

Disability-specific benefits related to military service or war are regulated by the Law on Rights of Veterans, Military Invalids, Civilian Invalids of War and Members of Their Families (Government of Serbia, 2020a). Military personnel and civilians with invalidities from the war are classified according to their degree of bodily injury and/or incapacity. Military personnel with disabilities are classified according to 10 disability groups: from group I (100% disability) to group X (20% disability). Civilians with disabilities from the war are classified according to seven disability groups: from group I (100% disability) to group VII (50% disability). Veteran (wartime) status is assigned to a member of the Serbian armed forces who was engaged in military or other war-related activities, or in peacetime military activities carried out for the defence of the country's sovereignty, during 1941-1999. Disability medical assessment is carried out by the medical commissions appointed by the Ministry of Defence. The Minister for Defence regulates the regional distribution of medical commissions.

1.1.2.1 Invalidski dodatak ratnog vojnog invalida u radnom odnosu (Invalidity allowance for employed military war invalids)

a) Eligibility conditions

Disability-related qualifying criteria: At least 20% disability caused by a wound, injury or disease.

Age: 18 or over.

⁹ <https://www.pio.rs/sr/novchane-naknade>, accessed on 10 February 2022.

Nationality and/or residency: Serbian nationality and residency.

Waiting period: None (i.e. it is granted from the moment the disability is certified).

Contributory history: The person is entitled if employed, irrespective of the duration of employment.

Level of financial resources: Access is not conditional on the person's (or household's) level of financial resources.

Other: Veteran status.

Gaps and/or obstacles: No evidence (reports, papers...) was identified on gaps/obstacles related to this benefit.

b) Disability assessment framework

Type of assessment: Medical assessment of the disability in accordance with the rulebook (MoLEVSP, 2021).

Responsible authorities: Local administration and the MoLEVSP (MoLEVSP, 2020).

Method: Medical examinations.

Supporting evidence: Medical documents.

Assessor: A medical commission (medical doctors).

Decision-maker: The MoLEVSP.

Critical analysis: Not documented.

c) Benefit entitlements

Level of the benefit: The basis for assessing the *Invalidski dodatak ratnog vojnog invalida u radnom odnosu* (invalidity allowance for employed military war invalids) is the national average net wage from the previous two months. The allowance for full-time employment equals the difference between the basis and the wage received. For part-time employment, it equals the difference between the base calculated for part-time work and the wage. The allowance cannot be lower than the guaranteed minimum wage. For people who are temporarily unemployed, the allowance equals the wage received in the month prior to temporary unemployment.

Duration of the benefit: During employment. People who are temporarily unemployed are eligible during the period of receipt of unemployment benefits from the NES (the duration of unemployment benefits depends on the contribution history).

Interactions with other income or other income-related benefits: The allowance is included in the personal/household income calculation used to determine eligibility for means-tested social cash benefits (the financial social assistance and child allowance). The benefit is exempted from any income tax payments.

Challenges: No evidence (reports, papers...) was identified on adequacy challenges related to this benefit.

1.1.2.2 Invalidski dodatak nezaposlenog ratnog vojnog invalida (Invalidity allowance for unemployed military war invalids)

a) Eligibility conditions

Disability-related qualifying criteria: For military war veterans with at least 20% disability caused by a wound, injury or disease.

Age: 18 or over.

Nationality and/or residency: Serbian nationality and residency.

Waiting period: None (i.e. it is granted from the moment the disability is certified).

Contributory history: None (i.e. no minimum contributory record is required).

Level of financial resources: Access is not conditional on the person's (or household's) level of financial resources. Other: Veteran status; must be unemployed and able to work, registered at the NES, and not receiving unemployment benefits.

Gaps and/or obstacles: No evidence (reports, papers...) was identified on gaps/obstacles related to this benefit.

b) Disability assessment framework

Type of assessment: Medical assessment of the disability in accordance with the rulebook (MoLEVSP, 2021).

Responsible authorities: Local administration and the MoLEVSP (MoLEVSP, 2020)

Method: Medical examinations.

Supporting evidence: Medical documents.

Assessor: A medical commission (medical doctors).

Decision-maker: The MoLEVSP.

Critical analysis: Not documented.

c) Benefit entitlements

Level of the benefit: The basis for assessing the *Invalidski dodatak nezaposlenog ratnog vojnog invalida* (invalidity allowance for unemployed military war invalids) is the national average net wage from the previous two months. The allowance is a monthly amount calculated as a percentage of the base per classified category. The highest payment is 180% of the base (group I); and the lowest is 24% of the base (group V).

Duration of the benefit: No limits.

Interactions with other income or other income-related benefits: The allowance is included in the personal/household income calculation used to determine eligibility for means-tested social cash benefits (the financial social assistance and child allowance). The benefit is exempted from any income tax payments.

Challenges: No evidence (reports, papers...) was identified on adequacy challenges related to this benefit.

1.1.3 Other disability-specific schemes related to military service or war

1.1.3.1 Lična invalidnina (Personal invalidity payment)

a) Eligibility conditions

Disability-related qualifying criteria: For military war veterans with at least 20% disability caused by a wound, injury or disease. For military personnel in peacetime: 20% disability caused by an injury or wound, or 60% disability caused by disease (10 disability groups for military disabilities). For civilians with disabilities from the war: 50% disability caused by a wound or injury (seven disability groups).

Age: None (i.e. there are no age requirements for accessing the payment).

Nationality and/or residency: Serbian nationality and residency. A foreigner¹⁰ is eligible if it is not possible to claim this right in their native country.

Waiting period: None (i.e. it is granted from the moment the disability is certified).

Contributory history: None (i.e. no minimum contributory record is required).

¹⁰ This applies to EU and non-EU nationals.

Level of financial resources: Access is not conditional on the person's (or household's) level of financial resources.

Other: For military war veterans, military personnel on active duty in peacetime, and for civilians with disabilities from the war.

Gaps and/or obstacles: No evidence (reports, papers...) was identified on gaps/obstacles related to this benefit.

b) Disability assessment framework

Type of assessment: Medical assessment of the disability in accordance with the rulebook (MoLEVSP, 2021).

Responsible authorities: Local administration and the MoLEVSP (MoLEVSP, 2020)

Method: Medical examinations.

Supporting evidence: Medical documents.

Assessor: A medical commission (medical doctors).

Decision-maker: The MoLEVSP.

Critical analysis: Not documented.

c) Benefit entitlements

Level of the benefit: The basis for assessing the *Lična invalidnina* (personal invalidity payment) is the national average net wage from the previous two months. The payment is a monthly amount calculated as a percentage of the base per disability group. The highest payment is 188% of the base (group I); and the lowest is 19% of the base (group X).

Duration of the benefit: No limits.

Interactions with other income or other income-related benefits: The payment is included in the personal/household income calculation used to determine eligibility for means-tested social cash benefits (the financial social assistance and child allowance). The payment is exempted from any income tax payments.

Challenges: No evidence (reports, papers...) was identified on adequacy challenges related to this benefit.

1.1.3.2 Dodatak za negu (Addition for care)

a) Eligibility conditions

Disability-related qualifying criteria: For military war veterans with at least 20% disability caused by a wound, injury or disease. For military personnel in peacetime: at least 20% disability caused by an injury or wound, or at least 60% disability caused by a disease. For civilian war casualties, at least 50% disability caused by a wound or injury.

Age: None (i.e. there are no age requirements for accessing this benefit).

Nationality and/or residency: Serbian nationality and residency.

Waiting period: None (i.e. it is granted from the moment the disability is certified).

Contributory history: None (i.e. no minimum contributory record is required).

Level of financial resources: Access is not conditional on the person's (or household's) level of financial resources.

Other: For military veterans, military personnel in peacetime, and civilians with disabilities from the war.

Gaps and/or obstacles: No evidence (reports, papers...) was identified on gaps/obstacles related to this benefit.

b) Disability assessment framework

Type of assessment: Medical assessment of the disability in accordance with the rulebook (MoLEVSP, 2021).

Responsible authorities: Local administration and the MoLEVSP (MoLEVSP, 2020).

Method: Medical examinations.

Supporting evidence: Medical documents.

Assessor: A medical commission (medical doctors).

Decision-maker: The MoLEVSP.

Critical analysis: Not documented.

c) Benefit entitlements

Level of the benefit: The basis for assessing the *Dodatak za negu* (addition for care) is the national average net wage from the previous two months. Beneficiaries are classified according to five categories (degrees of need) according to the disability group. The allowance is a monthly amount calculated as a percentage of the base per classified category. The highest payment (group I) is 180% of the base; and the lowest (group V) is 24% of the base.

Duration of the benefit: No limits.

Interactions with other income or other income-related benefits: The benefit is included in the personal/household income calculation used to determine eligibility for means-tested social cash benefits (the financial social assistance and child allowance). The benefit is exempted from any income tax payments.

Challenges: No evidence (reports, papers...) was identified on adequacy challenges related to this benefit.

1.1.3.3 Invalidski dodatak ratnog vojnog invalida koji je navršio 65 godina života (Invalidity allowance for military war invalids who have reached 65)

a) Eligibility conditions

Disability-related qualifying criteria: Military personnel with disabilities from the war, with disability levels from I to IV.

Age: 65 or over.

Nationality and/or residency: Serbian nationality and residency.

Waiting period: None (i.e. it is granted from the moment the disability is certified).

Contributory history: None (i.e. no minimum contributory record is required).

Level of financial resources: Access is not conditional on the person's (or household's) level of financial resources.

Other: For military personnel with disabilities from the war. A person who is not a pensioner is not eligible if: they are an entrepreneur or a member of a profitable organisation; they are engaged under temporary work contracts; they are in receipt of unemployment benefits; or if a previous employment was terminated on their account.

Gaps and/or obstacles: No evidence (reports, papers...) was identified on gaps/obstacles related to this benefit.

b) Disability assessment framework

Type of assessment: Medical assessment of the disability in accordance with the rulebook (MoLEVSP, 2021).

Responsible authorities: Local administration and the MoLEVSP (MoLEVSP, 2020).

Method: Medical examinations.

Supporting evidence: Medical documents.

Assessor: A medical commission (medical doctors).

Decision-maker: MoLEVSP.

Critical analysis: Not documented.

c) Benefit entitlements

Level of the benefit: The basis for assessing the *Invalidski dodatak ratnog vojnog invalida koji je navršio 65 godina života* (invalidity allowance for military war invalids who have reached 65) is the national average net wage from the previous two months. For pensioners, it is the difference between the pension and the basis; for beneficiaries who do not receive a pension, it is 100% of the basis.

Duration of the benefit: No limits.

Interactions with other income or other income-related benefits: The allowance is included in the personal/household income calculation used to determine eligibility for means-tested social cash benefits (the financial social assistance and child allowance). The allowance is exempted from any income tax payments.

Challenges: No evidence (reports, papers...) was identified on adequacy challenges related to this benefit.

1.1.3.4 Borački dodatak (Veterans' allowance)**a) Eligibility conditions**

Disability-related qualifying criteria: Veterans in disability groups I, II and III.

Age: 60 or over.

Nationality and/or residency: Serbian nationality and residency. A foreigner¹¹ is eligible if it is not possible to claim this right in their native country.

Waiting period: None (i.e. it is granted from the moment the disability is certified).

Contributory history: None (i.e. no minimum contributory record is required).

Level of financial resources: Access is not conditional on the person's (or household's) level of financial resources. Other: Veteran status. Claims are not eligible if the claimant or a member of their household is: employed or self-employed (except for farmers with up to five hectares of arable land or forest); a pensioner; insured through the compulsory social insurance scheme; a beneficiary of a monthly allowance subject to the law; or a beneficiary of the social protection minimum income scheme.

Gaps and/or obstacles: No evidence (reports, papers...) was identified on gaps/obstacles related to this benefit.

b) Disability assessment framework

Type of assessment: Medical assessment of the disability in accordance with the rulebook (MoLEVSP, 2021).

¹¹ This applies to EU and non-EU nationals.

Responsible authorities: Local administration and the MoLEVSP (MoLEVSP, 2020)

Method: Medical examinations.

Supporting evidence: Medical documents.

Assessor: A medical commission (medical doctors).

Decision-maker: MoLEVSP.

Critical analysis: Not documented.

c) **Benefit entitlements**

Level of the benefit: The basis for assessing the *Borački dodatak* (veterans' allowance) is the minimum pension derived from employment, two months earlier. The allowance is a monthly amount calculated as a percentage of the base per veterans' category.¹² The highest payment (category I) is 100% of the base; and the lowest (category III) is 60% of the base.

Duration of the benefit: No limits.

Interactions with other income or other income-related benefits: The allowance is included in the personal/household income calculation used to determine eligibility for means-tested social cash benefits (the financial social assistance and child allowance). The benefit is exempted from any income tax payments.

Challenges: No evidence (reports, papers...) was identified on adequacy challenges related to this benefit.

1.2 Disability-specific old-age pension schemes

There are no disability-specific old-age schemes.

1.3 Income support aimed at covering disability-related healthcare and housing expenses

1.3.1 Healthcare

In cases where a person with disability is not covered by the compulsory healthcare insurance scheme, the compulsory contributions are covered by the central budget. People with disabilities are excluded from any participation payments for healthcare services and prescription drugs.

1.3.2 Housing

There are no housing benefits.

2 Access to some key general social protection cash benefits

2.1 Old-age benefits

2.1.1 *Starosna penzija* (Old-age pension)

a) Eligibility conditions

There is no difference in eligibility conditions for people with disabilities compared with people without disabilities.

¹² Classification of categories is done according to the duration of engagement in military operations: 200 days or more - category I; 46-200 days - category II; 45 days or less - category III.

b) Additional amount/compensation included and adequacy issues

There are no additional amounts or compensation for people with disabilities.

c) Gaps/obstacles

The current regulation for calculating the old-age pension does not take into account any impact of inequalities which people with disabilities encounter in the labour market. The strategy for improving the status of people with disabilities for 2020-2024 emphasised the fact that most people with disabilities faced problems in finding a job (Government of Serbia, 2020b). It is reasonable to assume that for this reason most of them are entitled to receive the temporary compensation payment on the grounds of category II and III disability for unemployed beneficiaries (see Section 1.1.1.3). This benefit is very low and is the basis for calculating the old-age pension. The strategy also pointed out that people with disabilities have a much lower education attainment than the general population; this fact also influences the level of wages and consequently the level of pensions.

2.2 Unemployment benefits**2.2.1 *Novčana naknada za nezaposlenost* (Financial compensation for unemployment)****a) Eligibility conditions**

The administration of unemployment benefits is regulated by the Law on Employment and Unemployment Insurance (Government of Serbia, 2021b). An unemployed person is entitled to *Novčana naknada za nezaposlenost* (financial compensation for unemployment) if previously covered by unemployment insurance continuously for 12 months (with pauses of 30 days or less), or for 12 months over the past 18 months with pauses longer than 30 days. The duration of payments depends on the length of previous employment; the longest period is 12 months. These regulations do not cover unemployment benefits for people with disabilities, which are regulated by the Law on Pensions and Invalidity Insurance (Government of Serbia, 2021a). Differences between people with and without disability relate to the duration of the benefit. People with disabilities are eligible to receive benefits for as long as their unemployment status continues, until they meet the conditions for the old-age pension or invalidity pension.

b) Additional amount/compensation included and adequacy issues

The level of the compensation for people with disabilities is 50% of the corresponding invalidity pension, whereas people without disabilities receive compensation calculated on the basis of their previous earnings relative to the annual average wage.

c) Gaps/obstacles

None.

2.3 Guaranteed minimum income schemes and other social assistance benefits**2.3.1 *Novčana Socijalna Pomoć* (Financial social assistance)****a) Eligibility conditions**

Financial social assistance is a non-contributory means-tested benefit, and the same conditions apply for all beneficiaries.

b) Additional amount/compensation included and adequacy issues

The assistance is increased by 20% for single-parent households, and for households where all household members cannot work – which includes people with a disability

according to the PIO Fund evaluation, and people who have reached the statutory retirement age.

c) Gaps/obstacles

The level of the assistance is very low: in 2021 it was 8,781 RSD (€75.90) for single-member households, and 13,171.50 RSD (€113.80) for two-member households. Consequently, all beneficiaries of the invalidity pension who live in single- or two-member households were not eligible, since in 2021 the minimum guaranteed pension was 16,219.70 RSD (€140.20).¹³

3 Provision of assistive technology and personal assistance

People with disabilities are entitled to assistive technology in accordance with the Health Insurance Law and with the rule on medical assistive devices secured by the compulsory health insurance system (Government of Serbia, 2019; MoH, 2020). Exemption from participation payments extends to the following categories: military personnel and civilians with disabilities from the war, and people who are blind, have permanent immobility, or receive carers' cash benefits.

Indications for the prescription of medical assistive devices include a medical diagnosis and data on age and living conditions that are relevant to the use of the device (housing conditions, smoking habits, library membership, etc.). The prescription is completed by the general practitioner or by the physical medicine specialist. It is commonly necessary for a first-time prescription to be approved by the medical commission at the Health Insurance Fund office. The list of devices covers: prosthesis, orthosis, orthopaedic shoes, wheelchairs, walking mobility aids (crutches, canes, walkers, etc.), visual aids (eyeglasses, contact lenses, prosthetic eye, etc.), assistive technology for blind and partially sighted people, hearing aids, speaking aids, and products for people who are completely immobile (beds, mattresses, etc.). If a person would like to acquire a more advanced device, they must cover the price difference (for example an electric wheelchair is only prescribed to people aged 16 or over who cannot operate a manual wheelchair, due to total paralysis of lower, and partial paralysis of upper, extremities).

Delivery of personal social services is under the jurisdiction of local communities. The homecare service assists people with disabilities and frail older people with activities of daily living (eating, dressing, household work, shopping) and provides similar cognitive or psycho-social support. It is the most prevalent social care service in the country, but still has rather low coverage. In 2018 (the latest data) 85% of local communities provided this service to 16,678 people (0.23% of the population) (SIPRU, 2020). Traditionally, family members and relatives provide support and assistance.

4 National debates, reforms and recommendations

4.1 National debates

The COVID-19 pandemic created a number of obstacles for people with disabilities in their daily living, especially at the beginning. During the state of emergency (15 March to 7 May 2020) homecare services were reduced or completely interrupted in most local communities (ESPN, 2021). The curfew restricted movement and reduced visits from family members and relatives, who traditionally provide assistance to people with disabilities. The relevant ministry prescribed complicated procedures for obtaining movement permits, which were difficult to access. At the very beginning of the pandemic, organisations of people with disabilities alerted the relevant government officials to the problems being caused, some of which were later resolved. The National Organisation of People with

¹³ RS Official Gazette 39/2021.

Disabilities conducted an analysis of the impact of the COVID-19 pandemic on the status of people with disabilities in Serbia and published a report in 2021 (NOOIS, 2021). The main conclusions presented in the report were: (a) at the beginning of the pandemic the measures and regulations introduced were not sufficiently inclusive, since people with disabilities were not recognised as being particularly exposed to the risk of infectious diseases; (b) protection and mitigation measures taken at the beginning of the pandemic often did not include people with disabilities, or did not take into account adjustments necessary for people with disabilities; (c) information and communications about the epidemiological preventive measures were not sufficiently accessible; and (d) the situation improved after the intervention of organisations for people with disabilities and independent human rights institutions – the law was amended, and measures were somewhat adapted to be more inclusive of people with disabilities.

A national debate was initiated in 2018 by a number of war veterans' associations. They argued that the legal status of veterans who participated in military operations in the 1990s was not appropriately recognised, and that their social protection rights were regulated by several different laws. In March 2020 the government adopted the Law on Rights of Veterans, Military Invalids, Civilian Invalids of War and Members of Their Families (Government of Serbia, 2020a). Overall, the response to the law was positive; the representatives of veterans' organisations expressed their hope that further improvements could be introduced once this law was adopted.

4.2 Recent reforms and reforms currently in the pipeline

In March 2020 the government adopted the strategy for improving the status of people with disabilities for 2020-2024 (Government of Serbia, 2020b) – the previous strategy, adopted in 2007, had expired in 2015. One year later, the action plan for 2021 and 2022 was adopted. The main limitation of the new strategy is the inadequate assessment of the actual socio-economic status of the people with disabilities. The latest data presented on the estimated number of people with disabilities come from the 2011 census, and no research has been undertaken to update the information.

The fact that people with disabilities are at greater risk of poverty was acknowledged in the strategy; however, the officially available poverty statistics were not presented, and there were no targets for reducing poverty risks. In 2015 53% of people with some or severe activity limitations were at risk of poverty in Serbia; by 2020 it had fallen to 45.6%, but it was still 18.8 percentage points higher than for people with no limitations, and 16.7 points above the EU27 average.¹⁴

The previous 2007 strategy did set a specific objective for improving the standard of living of people with disabilities through the provision of adequate financial support. However, this objective was not included in the new strategy. The general objective of the new strategy is equal participation by people with disabilities in all life spheres: social, political, economic, spiritual and cultural. Three specific objectives are defined: (1) increased social inclusion; (2) achieving full business potentials, and preventing any form of discrimination, violence and abuse; and (3) mainstreaming disability policies in all public documents.

After more than a decade of debate and preparation of the legal regulations for social enterprises, the Serbian parliament adopted the Law on Social Entrepreneurship in February 2022 (Government of Serbia, 2022). The first working group for drafting the act was formed in 2010 and the second one in 2012. The delay was caused by the disagreement of the civil sector with the draft proposals, and also by elections over the period, which disrupted parliament's work. The main difference between the previous proposals and the ones adopted is that the law embraced the concept of social entrepreneurship, while the earlier versions only regulated social enterprises. The law

¹⁴ Eurostat, [People at risk of poverty or social exclusion by level of activity limitation, sex and age](#), accessed on 16 February 2022.

defines the term solidarity economy and the conditions for acquiring the status of a solidarity company – all entities operating in this area would be enabled to acquire that status, as a prerequisite to receive financial support from the state, municipalities and other potential financiers, and to get tax relief and recognition in public procurement procedures. The major positive impact envisaged is on creating a better environment for the employment of vulnerable population groups, with an increased allocation of the necessary resources.

4.3 Good practice and recommendations on how to tackle gaps and obstacles

In November 2020 a consortium was established for the implementation of the project “Strengthening the resilience of older people and people with disabilities during COVID-19 and future disasters”.¹⁵ The members of the consortium are the national Red Cross organisations from the six Balkan countries, several civil society organisations, the AGE Platform Europe and the European Disability Forum. It is a three-year programme initiative supported by the European Union, the Austrian Development Agency and the Austrian Red Cross. The activities cover four thematic areas: (1) mental health; (2) relief/cash and voucher assistance; (3) strengthening local communities; and (4) research/public policy/advocacy.

The Serbian Association of Blind People has a long tradition: it was founded in 1946, and presently has 12,000 members. Among several activities, the association manages the “Dr Milan Budimir” library (founded in 1975), which publishes and stores books and publications in audio and braille formats. The library possesses around 6,000 titles in braille, and 7,000 titles (50,000 copies) in audio recording. The importance of library services to students who are blind or have visual impairments, and to the general public, is immense. Students may bring in printed copies of schoolbooks, which are then transferred into audio. Members may receive and return publications by the post free of charge.¹⁶ The publications are also available to members who live outside Serbia. The association initiated the adoption of the Marrakesh Treaty, which facilitates access to published works for people who are blind, visually impaired, or otherwise “print disabled”, and the treaty was adopted by the Serbian Parliament in January 2020 (Government of Serbia, 2020c).¹⁷ The adoption of the treaty allows an expansion of the library fund.

There is a need to improve data-collection and the utilisation of the available official statistics in this area. Data-collection mechanisms should be strengthened, ensuring that comprehensive, reliable and disaggregated data on disability and people with disabilities are collected, in line with Article 31 (statistics and data collection) of the UN Convention on the Rights of Persons with Disabilities.

The latest available data on the number of people with disabilities come from the 2011 census. A new census is scheduled for October 2022, and it would be useful to plan for a more detailed questionnaire on population disability status. At the same time data from the presently available official statistics, the EU Survey on Income and Living Conditions, are not adequately included in the relevant policy documents. When the social card system and the patient’s e-card become operational, they could also serve as a valuable source of information. More advanced statistics would enable policy-makers to develop timely

¹⁵ [Strengthening resilience of older persons and persons with disabilities during COVID-19 and future disasters - Nacionalna organizacija osoba sa invaliditetom Srbije \(NOOIS\)](#), accessed on 16 February 2022.

¹⁶ The postal service for *secogram* (a written notification, cliché or publication for blind people in raised print, as well as audio cassette) is free of charge (the Law on Postal Services, 2019).

¹⁷ The Marrakesh Treaty was adopted on 27 June 2013 in Marrakesh, and forms part of the body of international copyright treaties administered by the World Intellectual Property Organisation. It has a humanitarian and social development dimension, and its main goal is to create a set of mandatory limitations and exceptions for the benefit of people who are blind, visually impaired, or otherwise “print disabled”.

responses to the most important issues, and to increase the effectiveness of social assistance for people with disabilities.

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