

Trends and Causes of High At-Risk-of-Poverty Rate in Serbia*

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Summary: *Poverty is a complex concept that encompasses a number of dimensions such as standard of living, health, level of education, quality of workplace, access to housing, food security and other unmet basic personal needs. This term can be defined most simply as a multi-dimensional concept that measures the level of deprivation of individually observed persons, households or communities. The aim of this article is to determine the trend, causes and implications of poverty in Serbia, as well as to point out the difficult social landscape that burdens its population. In the article, the methods of desk research, analysis, synthesis and comparison were applied, which, by tracing the at-risk-of-poverty rate, indicated that Serbia is in the group of European countries with one of the highest values of this indicator. Although this indicator has been declining recently, pointing to significant gender differences, it seems that the difficult social situation will continue in the foreseeable future, with the risk of increasing the number of poor people and those at risk of poverty and social exclusion.*

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INTRODUCTION

Today, poverty cannot be described straightforwardly by using simplified and trivialized descriptions and definitions since, along with the development of society, this phenomenon has been constantly changing, fundamentally evolving and becoming more complex. Instead of its simplified determinants such as hunger and lack of wealth, the meaning of the concept of poverty has been expanded in such a way that today it includes a wide range of dimensions such as material living standards (material wealth, personal income, personal consumption, etc.), poor health condition, low level of education, the (in)quality of workplace, access to housing, food insecurity, political commitment, social connections and relationships, environment, economic or physical insecurity, as well as other unmet basic personal needs.

Development Initiatives (2016) defines poverty as a multidimensional concept that tends to measure the level of deprivation of individuals, households or communities. In its most general sense, poverty is considered a measure of deprivation in satisfying the basic necessities of personal life, household or community, otherwise necessary for reaching an elementary standard of living. At the same time, deprivation can be measured either from the aspect of lack of material resources (income, property, material things, etc.), from the aspect of lack of abilities (such as knowledge, skills, technology, etc.), or from both of these aspects (5).

However, there is still no single definition of poverty. This phenomenon has a whole range of meanings, interconnected by a large number of its similar appearances. Thus, for example, Spicker (22, pp. 230-237) analysed poverty from the aspect of unsatisfied need for a concrete product or service, pattern of deprivation, limited financial resources and other means, then from the aspect of living standards, prevailing social inequalities, belonging to some social class, dependence on social benefits and other forms of assistance, as well as from the point of view of lack of basic security, lack of basic human rights, social exclusion, and even from moral condemnation. All these analysed dimensions can be classified together into a group of economic, social and material determinants of the phenomenon of poverty. Finally, the World Bank treats poverty as a pronounced deprivation of well-being, while simultaneously treating it from both the income and the consumption side. From the consumption point of view, poverty can appear in the form of lack of available food, good health, income, elementary housing conditions, basic abilities, level of education, and even in the form of political and basic freedoms (2).

In this way, in its broadest sense, the concept of poverty approaches the very concept of social exclusion. Although broad, comprehensive and still rather nebulous, the concept of social exclusion refers to the process in which certain individuals are pushed to the edge of society and thus prevented from full economic, social, political and cultural participation, either because of their poverty, or because of the lack of their basic competences, skills and opportunities for lifelong learning, or because of discrimination made. This situation distances them from decent jobs, workplaces, social networks, and even

from various chances and opportunities, as well as from other socially desirable activities and outcomes. Social exclusion or social marginalization is a term that is widely used in European countries in order to denote a process in which a person is prevented from contributing to and benefiting from overall economic and social progress (7).

People facing poverty also tend to experience a higher risk of social exclusion and vice versa (25). The attempt to methodologically monitor, evaluate and quantify the phenomenon of social exclusion required the creation of a wide range of indicators. For the purpose of monitoring social inclusion in the territory of the European Union (EU), it was necessary to formulate the so-called 18 Laeken indicators classified in the following four dimensions (19, p. 99): a) financial poverty, b) employment, c) health status, and d) education level. This is a set of common European statistical indicators of poverty and social inclusion that were introduced in December 2001, being a subject to constant innovation and continuous monitoring. These indicators were developed as part of the Lisbon Strategy, requiring the coordination of EU social policies at the national level (18, p. 23).

AT-RISK-OF-POVERTY OR SOCIAL EXCLUSION (AROE) RATE

The main indicator used to monitor the implementation of the Europe 2020 strategy in the area of social inclusion and poverty reduction is at-risk-of-poverty or social exclusion (AROE) rate. This indicator was created in 2010 as a new and expanded main indicator of poverty and social exclusion with the aim of better statistical coverage of broader intangible aspects of poverty and social exclusion from the labour market, as well as improving the assessment of the multidimensional problem of poverty and social exclusion. This indicator was created as a product of social and political compromise, representing a combination, i.e. the integration of the following three important indicators (14): a) previously used at-risk-of-poverty rate in the narrower sense, b) rate of severe material deprivation, and c) rate of very low work intensity.

The European Commission defines the at-risk-of-poverty rate as the share of the population that earns an equivalent disposable income, which is lower than the defined risk-of-poverty threshold of 60% of the average disposable income at the national level after deduction of social transfers. This indicator does not necessarily measure the level of wealth or poverty in a society, but indicates a person's low income in relation to the income of its other inhabitants, without necessarily indicating a low standard of living (8). Unlike it, AROPE is a broader indicator since it shows the percentage of people who are at immediate risk of poverty, or who are extremely materially and socially deprived, or who live in households with an extremely low level of work intensity.

According to the adopted convention, severely materially deprived are all those people who, due to lack of funds, cannot afford at least four of the following nine items: a) adequate heating of their living spaces, b) a vacation lasting one week, c) a meal with meat or

fish every other day, d) dealing with unforeseen expenses, e) paying utility bills and loan instalments regularly, f) a telephone, g) a colour television, h) a washing machine and/or, i) a car. On the other hand, living in a household with zero and very low work intensity refers to the adult population who worked less than 20% of the total number of months, otherwise in which they had the opportunity to work during the reference period (14). In other words, a household with very low work intensity is a household in which the total actual participation in work of its able-bodied members (from 18 to 64 years of age) expressed in months is less than 20% of their maximum possible participation in work during the previous calendar year (4).

AROPE is a key indicator used to measure relative income poverty. According to the definition of the EU Statistics of Income in Living Conditions (SILC), household members experience material and social deprivation if, based on their self-assessment, at least five of the 13 available criteria of material deprivation are met, while they experience severe material and social deprivation if at least seven of 13 available deprivation criteria are met (4).

Poverty is usually measured by comparing the income of the observed person or family with a pre-defined poverty threshold or with the minimum amount of income necessary to cover basic every day human needs. In practice, in addition to the basic official measures of poverty, additional measures are often used with the aim of gaining a better insight into the social well-being of the country's population. Calculations of official poverty indicators are mainly based on available cash income, defined poverty thresholds and family size, while supplementary measures of poverty are usually calculated by taking into account broader features of modern life, including contemporary social and economic realities, as well as ongoing governmental policies (15).

In this way, supplementary poverty measures take into account the wider life and social context, they are more realistic and they are not as restrictive as the official poverty measures. The threshold or poverty line is a critical level of income below which individuals are classified as poor. At the moment, the international threshold of poverty amounts to 2.15 dollars per person per day, while anyone who lives on less than this amount per day can be said to be extremely poor. The World Bank (WB) estimates that in 2019 alone, 701 million people in the world lived in extreme poverty, while numerous factors such as the recent *COVID-19* pandemic, the current war conflicts, global climate change, smouldering energy crisis, growing global trend of food insecurity, negative effects of climate change, etc. contributed to this figure and the growing trend of pronounced inequalities in the world (26).

IMPLICATIONS OF A HIGH AT-RISK-OF-POVERTY RATE

Contemporary sociological theory suggests that there are two theoretical approaches in explaining the phenomenon of poverty (13, pp. 321-323): a) the first one, which considers that individuals themselves are responsible for their poverty, and b) the second one, which

claims that social forces generate and reproduce the phenomenon of poverty. The first theoretical direction searched for the roots of poverty in the shortcomings or pathologies of individuals, in the lack of their expertise, in the lack of their moral and physical strength, as well as in the absence of appropriate motivation and below-average abilities that prevented them from achieving social success. Such attitudes were especially revived during the 1970s and 1980s, when the political emphasis of the then neoliberal economy was placed on entrepreneurship, the absence of state intervention, personal initiative, as well as on personal ambitions and goals. In contrast to it, the second theoretical approach emphasizes broader social processes that generate conditions for the appearance of poverty, which individuals cannot overcome. In accordance with this attitude, structural factors of poverty such as belonging to some class, gender, ethnicity, profession, the level of education, level of personal income, etc. influence the allocation of income and resources in a society. Therefore, this theoretical direction advocates the payment of a minimum wage, guaranteed personal income, child allowance, and other forms of social assistance with the aim of correcting prevailing social inequalities.

Risks of poverty are characteristic of poorer societies and mainly include low level of education, unemployment, single parenthood, and youth of the head of the household. At the same time, poverty is generally lower and rarer in those countries that are characterized by more generous welfare states, while the risks of poverty are also less pronounced in such countries. Research by Ryan Finnigan (12), based on the Luxembourg Income Study (LIS), indicated that poverty in the United States (US) in 2013 was more than double that of many European countries, including Poland, Switzerland, the Netherlands, Denmark, Austria and many other states. Of the 29 analysed countries, the US had a lower poverty rate only than Israel, suggesting that the prevalence of risk factors is not necessarily the reason for higher poverty rates. Higher poverty rates are rather largely determined by the nature of the political system, the generosity of the country's social assistance policy, and by its welfare system.

Regardless of the cause of poverty, it has devastating consequences for all people living in this condition. So far, numerous studies have been conducted on the effects of poverty on the lives of poor people, while many of them have focused on the lifelong consequences of childhood poverty. In general, poor children are more likely to continue to live in poverty, to drop out of high school, to become young parents, and to have problems with employment and crime. Conducted research unequivocally suggests that the most significant negative effects of poverty include family problems, including divorce and domestic violence; life in stress, uncertainty and anxiety; lack of financial resources; various health problems including infant mortality, higher adult mortality and mental illness, inadequate medical care, low levels of education and schooling, lack of health insurance, smoking, poor nutrition and poor health; housing problems and the risk of homelessness; lack of job opportunities and good education; danger of committing street crime (murders, robberies, burglaries and the like); danger of victimization by street crime, etc. (17).

AT-RISK-OF-POVERTY RATE IN SERBIA

According to the official data of the Statistical Office of the Republic of Serbia (SORS), in Serbia in 2023 the at-risk-of-poverty rate amounted to 19.9% and was 0.3% lower compared to the previous year. On the other hand, the at-risk-of-poverty or social exclusion (AROPE) rate amounted to 27.2% and was by 1.8 percentage points lower than in the previous year (21). In 2023, the poverty risk threshold averaged 29,100 dinars per month for a one-person household, 52,380 dinars for a household with two adults and one child under 14 years of age, while it amounted to 61,110 dinars for a household with two adults and two children under 14 years of age. The most exposed to the risk of poverty were persons aged 65 and over (23.5%) and persons aged 55 to 64 (23%), while persons of working age between the ages of 25 and 54 had the lowest at-risk-of-poverty rate (16.8%). The data from the survey also indicated that 50.9% of unemployed adults were exposed to the risk of poverty, that self-employed persons (12.9%) had a higher at-risk-of-poverty rate than persons employed by employers (4.9%), while in the case of retired persons this indicator amounted to 20.3% (3).

The World Bank estimates that in 2023, Serbia achieved success in its economic progress and continued reduction of poverty due to accelerated economic growth, especially during the second half of 2023, due to excellent performance of its agriculture and the construction sector, strong recovery of the energy sector, strong industrial production and services, increased net exports and, to a lesser extent due to the growth of consumption. Also, the economic growth of Serbia from the post-pandemic era, and improved conditions on the labour market have significantly contributed to the reduction of poverty (27). The at-risk-of-poverty rate has only recently begun to be more seriously covered in a statistical sense, while with the exception of Turkey there are still incomplete data for most countries. The following Table 1 provides a comparative overview of at-risk-of-poverty rates in Serbia, as well as in its neighbouring Western Balkan (WB) countries for which there are available data.

Table 1. At-risk-of-poverty rate in the Western Balkan countries, as of 2012 (in %)

Year	Serbia	Montenegro	N. Macedonia	Albania	Turkey	EU-27
2012	-	-	26,2	-	23,7	16,9
2013	24,5	25,2	24,2	-	23,1	16,8
2014	25	24,1	22,1	-	23,0	17,3
2015	26,7	24,4	21,5	-	22,5	17,4
2016	25,9	24,0	21,9	-	22,8	17,5
2017	25,7	23,6	22,2	23,7	22,2	16,9
2018	24,3	23,8	21,9	23,4	22,2	16,8
2019	23,2	24,5	21,6	23,0	22,4	16,5
2020	21,7	22,6	21,8	21,8	23,0	16,7
2021	21,2	21,2	-	22,0	22,4	16,8
2022	20,0	20,3	-	-	22,4	16,5
2023	19,9	-	-	-	20,7	16,2
Average value	23,46	23,37	22,6	22,78	22,53	16,86

Source: (9)

Although all the observed countries of the Western Balkans had similar levels and decreasing tendencies of the at-risk-of-poverty rate, it can be observed that among them, in the period from 2012, Serbia led the way with the highest recorded average rate of this indicator, in the amount of 23.46%. On the other hand, the least poverty was observed in Turkey, where the average value of this indicator was at the level of 22.53% (Figure 1). Based on Figure 1, it follows that all the countries of the Western Balkans recorded significantly higher at-risk-of-poverty rates compared to the EU-27 average, which was at the level of 16.86%. In addition, it can be seen that Serbia had the highest at-risk-of-poverty rate until 2018, while in recent years, Montenegro, Albania and Turkey had higher rates.

However, these comparisons should still be taken with a certain caution, given that the Statistical Office of the Republic of Serbia has started to apply a revised methodology of covering indicators of poverty, social exclusion and inequality in disposable income in Serbia since 2018. Namely, it is possible to doubt the comparability of statistical data from the population Survey on Income and Living Standards (SILC) for Serbia and EU countries due to methodological specificities and limitations of the Serbian version of SILC related to the treatment of income in kind, then on the treatment of negative and extreme income values, as well as on the underestimated number of beneficiaries of social assistance and child allowance in the SILC sample for Serbia (1, pp. 90-93). If it were not for these established methodological shortcomings, we could reasonably assume that the at-risk-of-poverty rates for Serbia would be even higher.

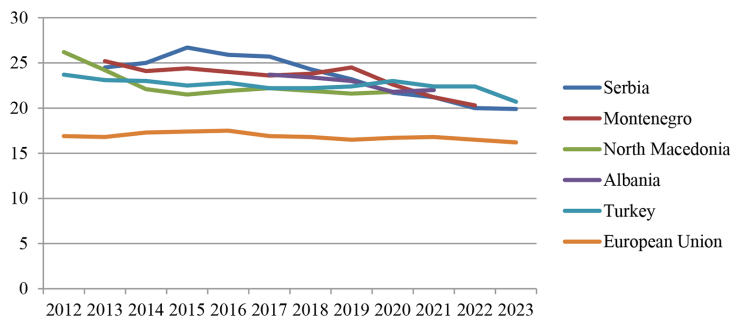


Figure 1. At-risk-of-poverty rate in the Western Balkan countries, as of 2012 (in %)

Source: (9)

Based on the available data, the conclusion follows that Serbia ranks among the European countries with the highest at-risk-of-poverty rates, as well as being in the group of European countries with the highest recorded social stratification and social inequalities, indicating the unsustainability of its economic and social development. At the same time, recent global events such as the *COVID-19* coronavirus pandemic, the war in Ukraine, the disruption of global value chains and the global inflation of food and energy prices have additionally slowed down the reduction of poverty and of social inequalities in the country. Therefore, there is a need to implement more effective economic, fiscal and social policy

measures against poverty (24). At the same time, the social protection policy and social inclusion in Serbia are considered to be its critical and most problematic points in the context of the European Pillar of Social Rights, as well as its potential accession to the EU.

Hence, compared to European countries, the at-risk-of-poverty rate in Serbia is generally high and is one of the highest in Europe. More precisely, Serbia is in eighth place according to the level of this indicator among the 30 analysed European countries in which this indicator is measured according to the EU-SILC methodology (Figure 2). Higher at-risk-of-poverty rates in 2022 were recorded only in Bulgaria, Estonia, Latvia, Romania, Lithuania, Spain and Italy.

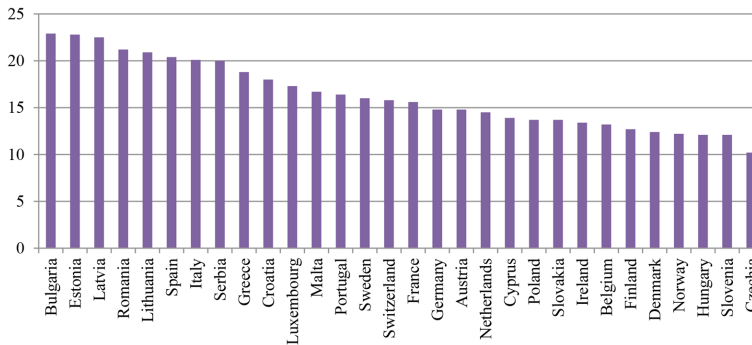


Figure 2. At-risk-of-poverty rate after deduction of social transfers in 2022 (in %)

Source: (9)

In Serbia, there are also significant gender differences in the at-risk-of-poverty rate (Figure 3). The data indicate a consistently higher at-risk-of-poverty rate among women compared to men, as well as a growth, but later a slower decline in this rate, especially from 2017 onwards, with a pronounced growth of the gender gap. The feminization of poverty is contributed by the increase in the share of households headed by women, which are on average poorer than households headed by men, all due to the unfavourable position of women on the labour market compared to men (6, p. 6).

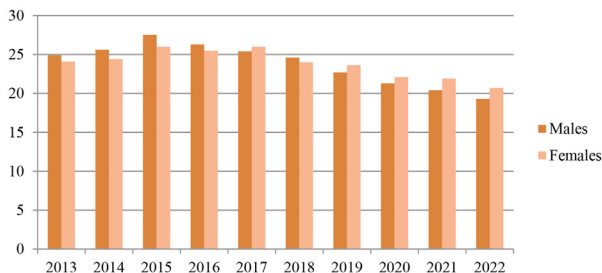


Figure 3. At-risk-of-poverty rate by gender (in %)

Source: (10)

When it comes to the trend of the at-risk-of-poverty rate of employed people, from 18 to 64 years of age, it can be stated that this indicator for Serbia in the period from 2013 to 2022 was in constant decline, with its drop from 14.6% to 6.1%, pointing to the improvement of living conditions of the working population (11).

INSTEAD OF CONCLUSION

Serbia is one of the European countries with the highest at-risk-of-poverty and social exclusion rates, as well as the highest observed social and income inequalities. At the same time, the mentioned global challenges only made it difficult and slowed down the decline of poverty and pronounced social inequalities in the country. The Government of Serbia from time to time, including the pandemic year of *COVID-19* 2020 and especially pre-election periods, provides financial aid to its population and economy with the aim of securing their support, preserving their income or mitigating the effects of the crisis. However, its social assistance policy measures generally do not include the most vulnerable populations such as poor children, undocumented persons and the homeless. On the other hand, aid measures intended for the economy generally do not target informally and temporarily employed individuals, thus deepening otherwise pronounced and prolonged social inequalities in the country.

Meanwhile, in March 2022, Serbia introduced a digital register of Social Cards for its population in the already inadequate social assistance system, exacerbating already existing problems and further limiting people's access to social protection. This system led to a decrease in the number of recipients of social assistance, pointing to shortcomings in the implementation of the new Law on the Social Card. Thus, cases of people being removed from social assistance who were engaged in the collection and sale of secondary raw materials became widely known to the public. At the same time, the sudden drop in the number of recipients of social assistance due to the introduction of the Law is negatively correlated with high rates of absolute poverty, which are at the level of 7% of the total population. This further means that almost half a million people live below the poverty line on a monthly basis and are unable to meet their basic needs. The introduction of the register of Social Cards further had a negative impact on people's rights to social protection, equality and non-discrimination, as well as on their standard of living and adequate access to basic health services. Furthermore, the Social Card Law does not provide access to an adequate right to a legal remedy as guaranteed by the European Convention on Human Rights or access to citizens' right to information recognized by the International Convention on Civil and Political Rights. This situation is further aggravated by the fact that the decisions of social workers are now based on a computer algorithm, at the same time changing their very role and the use of their own judgment in evaluating potential recipients of social assistance (16).

At the same time, the labour market in Serbia does not offer the majority of people the opportunity to experience dignified and safe work. The employment rate of the

working-age population is one of the lowest in Europe, while Serbia's unemployment rate is among the highest in the group of European countries. The imbalance between supply and demand for labour results in high underemployment and leads to the collapse of the quality of existing jobs – insecure and occasional forms of work are increasingly prevalent, while wages do not allow most employees to live a decent life. In addition, men and women in Serbia do not have equal employment opportunities, while the gender gap is present in all employment indicators (activity rates, employment rates, unemployment rates and inactivity rates) and in all regions, with a pronounced tendency to exclude women from the labour market (20, pp. 8-9).

In addition, the gradual economic recovery during the post-pandemic year 2021 was additionally slowed down by the impact of global economic issues, but also by the inflation of food and energy prices. In the second half of 2022, Serbia faced a record inflation rate in the last 15 years in the amount of 15.1%, which had a particularly negative impact on the purchasing power of materially disadvantaged households with lower incomes, who spend most of their monthly income on food and energy sources. In addition, the costs of living in Serbia are growing faster than income, while it is estimated that only in 2022, the effect of wage growth was almost completely cancelled by high inflation. In addition, the causes of high poverty and large pronounced social inequalities in the country lie in insufficiently efficient tax, social and redistributive policies, while Serbia itself is among the countries with a high level of share of public spending in its gross domestic product (GDP). And while social policy measures allocate limited funds for materially disadvantaged households, in recent years there has been a decrease in funds intended for the entire social protection system, and therefore for poverty reduction. Also, the low progressiveness of income tax in Serbia has a much smaller effect on the reduction of income inequalities than is the case with EU countries (6, pp. 3-15). More precisely, the regressiveness of the tax system in Serbia burdens the lower income strata of the population to a greater extent, while not promising to solve these pressing social and economic problems in the foreseeable future.

It seems that the difficult social landscape of Serbia will continue in the foreseeable future, with the risk of an increase in the number of poor people and those who are at risk of poverty and social exclusion, and with a special emphasis on members of marginalized communities such as members of the Roma population, people with disabilities, women, the poor children, undocumented persons and the homeless. Although the total allocations of the Government of Serbia for social protection are relatively high compared to other countries in the region, and are almost at the same level as in EU countries, its budget is largely dominated by pensions, which make up over 70% of total social protection funds, while allocations for social assistance is still very low and amounts to only 5% of expenditures for social protection, which is significantly below the EU average of 12% (16).

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Kretanje i uzroci visoke stope rizika od siromaštva u Srbiji*

ORIGINALNI NAUČNI RAD

UDK 364.662(497.11)

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Apstrakt: *Siromaštvo je složen koncept koji obuhvata niz dimenzija poput životnog standarda, zdravlja, nivoa obrazovanja, kvaliteta radnog mesta, pristupa stanovanju, prehrambene bezbednosti i drugih nezadovoljenih osnovnih ličnih potreba. Ovaj pojam se najjednostavnije može definisati kao multidimenzionalni koncept koji meri nivo lišavanja pojedinačno posmatranih osoba, domaćinstava ili zajednica. Cilj ovog rada je da utvrdi trend kretanja, uzroke i implikacije siromaštva u Srbiji, kao i da ukaže na tešku socijalnu sliku koja opterećuje njeno stanovništvo. U radu su primenjene metode desk istraživanja, analize, sinteze i komparacije koje su praćenjem stope rizika od siromaštva ukazale na činjenicu da se Srbija nalazi u grupi evropskih zemalja sa jednom od najviših vrednosti ovog pokazatelja. Iako je ovaj pokazatelj opadao u poslednje vreme, ukazujući i na značajne rodne razlike, čini se da će se teška socijalna situacija nastaviti i u dogledno vreme, uz rizik od povećanja broja siromašnih ljudi i onih koji su u opasnosti od siromaštva i socijalne isključenosti.*

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UVOD

Danas se siromaštvo ne može opisati jednostavnim korišćenjem simplifikovanih i trivializovanih opisa i definicija jer se uporedo sa razvojem društva ovaj fenomen stalno menjao i suštinski usložnjavao. Umesto njegovih uprošćenih determinanti poput gladi i neposedovanja bogatstva, dolazi do širenja značenja koncepta siromaštva na taj način da ovaj pojam danas obuhvata širok spektar dimenzija poput materijalnog životnog standarda (materijalnog bogatstva, ličnog dohotka, lične potrošnje i tome slično), zdravlja, nivoa obrazovanja, (ne)kvaliteta radnog mesta, pristupa stanovanju, prehrambene bezbednosti, političke opredeljenosti, društvenih veza i odnosa, okruženja i ekonomske ili fizičke nesigurnosti i drugih nezadovoljenih osnovnih ličnih potreba.

Development Initiatives (2016) definiše siromaštvo kao multidimenzionalni koncept koji teži ka tome da izmeri nivo deprivacije pojedinačno posmatranih osoba, domaćinstava ili zajednica. U svom najopštijem smislu, siromaštvo se smatra merom lišavanja zadovoljavanja osnovnih životnih potreba nekog lica, domaćinstva ili zajednice, inače neophodnih za dostizanje osnovnog životnog standarda. Pri tome se deprivacija može meriti bilo sa aspekta nedostatka materijalnih resursa (dohotka, imovine, stvari i dr.), bilo sa aspekta nedostatka sposobnosti (poput znanja, veština, tehnologije i slično), ili pak sa oba ova aspekta (5).

Međutim, još uvek nema jedinstvene definicije pojma siromaštva. Ovaj fenomen ima čitav niz značenja, međusobno povezanih velikim brojem sličnosti. Tako ga, na primer, Spicker (22, str. 230–237) analizira sa aspekta nezadovoljene potrebe za proizvodom ili uslugom, obrasca lišavanja, ograničenih finansijskih resursa i drugih sredstava, zatim sa aspekta standarda života, preovlađujućih društvenih nejednakosti, pripadništva društvenoj klasi, zavisnosti od socijalnih davanja i drugih oblika pomoći, nedostatka osnovne sigurnosti, nedostatka osnovnih ljudskih prava, društvenog isključivanja, pa čak i sa stanovišta moralne osude. Svi ovi analizirani aspekti se zajedno posmatrano mogu klasifikovati na grupu ekonomskih, socijalnih i materijalnih determinanti fenomena siromaštva. Konačno, Svetska banka siromaštvo tretira kao izraženo lišavanje blagostanja, dok ga istovremeno posmatra i sa dohodovne strane i sa strane potrošnje. Sa aspekta potrošnje, siromaštvo se može pojaviti u obliku nedostatka hrane, zdravlja, dohotka, uslova stanovanja, osnovnih sposobnosti, nivoa obrazovanja, pa čak i političkih i osnovnih sloboda (2).

Na ovaj način se u svom najširem smislu pojam siromaštva približava i samom pojmu socijalnog isključivanja. Iako širok, sveobuhvatan i još uvek prilično maglovit, koncept socijalne isključenosti označava proces u kojem se izvesni pojedinci guraju do ruba društva i na taj način sprečavaju u potpunoj ekonomskoj, socijalnoj, političkoj i kulturnoj participaciji, bilo zbog svog siromaštva bilo zbog nedostatka osnovnih kompetencija, veština i mogućnosti doživotnog učenja ili pak zbog sačinjene diskriminacije. Ovakva situacija ih udaljava od poslova, radnih mesta, društvenih mreža, raznih šansi i prilika i drugih društveno poželjnih aktivnosti i ishoda. Socijalno isključivanje ili društvena marginalizacija je termin koji se naširoko koristi u evropskim zemljama sa ciljem da označi proces u kojem je osoba onemogućena da doprinosi i ima koristi od privrednog i društvenog napretka (7).

Ljudi koji se suočavaju sa siromaštvom obično doživljavaju i veći rizik od društvenog isključivanja i obrnuto (25). Pokušaj da se u metodološkom smislu pr prati i kvantifikuje fenomen društvene isključenosti zahtevao je stvaranje velikog broja širokog spektra pokazatelja. Sa svrhom praćenja društvene uključenosti na teritoriji Evropske unije (EU), bilo je potrebno formulisati takozvanih 18 Laeken indikatora klasifikovanih u sledeće četiri dimenzije (19, str. 99): a) finansijsko siromaštvo, b) zaposlenost, c) zdravstveno stanje i d) nivo obrazovanja. Ovo je skup zajedničkih evropskih statističkih pokazatelja siromaštva i društvene inkluzije koji su bili uvedeni u decembru 2001. godine i koji predstavljaju predmet stalnog inoviranja i kontinuiranog praćenja. Ovi pokazatelji su bili razvijeni u sklopu Lisabonske strategije zahtevajući i koordinaciju socijalnih politika EU na nacionalnom nivou (18, str. 23).

STOPA RIZIKA OD SIROMAŠTVA ILI SOCIJALNOG ISKLJUČENJA (AROE)

Glavni pokazatelj koji se koristi za praćenje primene strategije Evropa 2020 u oblasti socijalnog uključivanja i smanjenja siromaštva je stopa rizika od siromaštva ili socijalnog isključivanja (at-risk-of-poverty or social exclusion rate-AROE). Ovaj pokazatelj je bio kreiran 2010. godine kao novi i prošireni glavni pokazatelj siromaštva i društvenog isključivanja sa ciljem boljeg statističkog obuhvata širih nematerijalnih aspekata siromaštva i društvenog isključivanja sa tržišta rada, kao i unapređivanja procene multidimenzionalnog problema siromaštva i društvene isključenosti. Ovaj pokazatelj je nastao kao proizvod društvenog i političkog kompromisa, predstavljajući kombinaciju, to jest intergaciju sledeća tri bitna pokazatelja (14): a) ranije korišćene stope rizika od siromaštva u užem smislu, b) stope teške materijalne uskraćenosti i c) stope veoma niskog intenziteta rada.

Evropska komisija definiše stopu rizika od siromaštva kao udeo stanovništva koji zarađuje ekvivalentan raspoloživi dohodak, koji je niži od definisanog praga rizika od siromaštva i koji se najčešće javlja na nivou od 60% prosečnog raspoloživog dohotka na nacionalnom nivou po odbitku socijalnih transfera. Ovaj pokazatelj ne meri nužno nivo bogatstva ili siromaštva u jednom društvu, već ukazuje na nečiji nizak dohodak u odnosu na dohodak njegovih ostalih stanovnika, ne morajući nužno da ukazuje i na nizak životni standard (8). Za razliku od njega, AROE je širi pokazatelj jer ujedno pokazuje i procenat lica koja su u neposrednom riziku od siromaštva, ili koja su izrazito materijalno i socijalno uskraćena, ili koja pak žive u domaćinstvima izuzetno niskog nivoa intenziteta rada.

Prema usvojenoj konvenciji, teško materijalno uskraćeni su svi oni ljudi koji zbog nedostatka novca sebi ne mogu da priušte najmanje četiri od sledećih devet stvari: a) adekvatno grejanje svojih stambenih prostora, b) godišnji odmor u trajanju od jedne nedelje, c) obrok sa mesom ili ribom svakog drugog dana, d) suočavanje sa nepredviđenim troškovima, e) redovno plaćanje računa za komunalije i rata za otplatu kredita,

f) telefon, g) televizor u boji, h) mašinu za veš i/ili i) automobil. S druge strane, život u domaćinstvu sa nultim i veoma niskim intenzitetom rada podrazumeva odraslo stanovništvo koje je radilo manje od 20% ukupnog broja meseci, a u kojima su imali mogućnost da rade tokom referentnog perioda (14). Drugim rečima, domaćinstvo bez posla je ono domaćinstvo u kojem je ukupno stvarno učešće u radu njegovih radno sposobnih članova (od 18 do 64 godina starosti) izraženo u mesecima manje od 20% maksimalno mogućeg učešća u radu tokom prethodne kalendarske godine (4).

AROPE predstavlja ključni pokazatelj koji se koristi za merenje relativnog dohodovnog siromaštva. Prema EU definiciji Statistike dohotka i uslova života (SILC), članovi domaćinstva doživljavaju materijalno i društveno lišavanje ako je na bazi njihove samoprocene ispunjeno najmanje pet od raspoloživih 13 kriterijuma materijalne deprivacije, a doživljavaju tešku, odnosno ozbiljnu materijalnu i socijalnu deprivaciju ako je ispunjeno najmanje sedam od raspoloživih 13 kriterijuma deprivacije (4).

Siromaštvo se obično meri poređenjem dohotka posmatrane osobe ili porodice sa unapred definisanim pragom siromaštva ili sa minimalnim iznosom dohotka neophodnim za pokrivanje svakodnevnih osnovnih ljudskih potreba. U praksi se često pored osnovnih zvaničnih mera siromaštva koriste i dodatne mere sa ciljem sticanja boljeg uvida u društveno blagostanje stanovništva jedne zemlje. Kalkulacije zvaničnih indikatora siromaštva se uglavnom zasnivaju na raspoloživom novčanom dohotku, definisanom pragu siromaštva i veličini porodice, dok se dopunske mere siromaštva obično izračunavaju uzimanjem u obzir širih karakteristika savremenog života, uključujući i savremenu društvenu i ekonomsku realnost, kao i tekuću politiku vlade (15).

Na taj način dopunske mere siromaštva uzimaju u obzir širi životni i društveni kontekst, realnije su i nisu u tolikoj meri restriktivne kao što je to slučaj sa zvaničnim merama siromaštva. Prag ili linija siromaštva je kritičan nivo dohotka ispod kojeg se pojedinci kalsifikuju kao siromašni. U ovom trenutku međunarodni prag siromaštva iznosi 2,15 dolara po osobi na dnevnom nivou, dok se za svakog ko živi sa manje od ovog iznosa dnevno može reći da je ekstremno siromašan. Svetska banka (SB) procenjuje da je samo tokom 2019. godine 701 milion ljudi u svetu živelo u ekstremnom siromaštvu, dok su ovom broju i rastućim izraženim nejednakostima u svetu doprineli brojni faktori kao što su nedavna pandemija virusa COVID-19, aktuelni ratni sukobi, globalne klimatske promene, tinjajuća energetska kriza, rastući trend prehrambene nebezbednosti u svetu, negativni efekti klimatskih promena i dr. (26).

IMPLIKACIJE VISOKE STOPE RIZIKA OD SIROMAŠTVA

Savremena sociološka teorija sugeriše da postoje dva teorijska pristupa u objašnjavanju fenomena siromaštva (13, str. 321–323): a) prvi, koji smatra da sami pojedinci snose odgovornost za svoje siromaštvo i b) drugi, koji tvrdi da društvene sile generišu i reprodukuju pojavu siromaštva. Prvi teorijski pravac je korene siromaštva video u

nedostacima ili patologijama kod pojedinaca, u pomanjkanju njihove stručnosti, u nedostatku moralne i fizičke snage, kao i u odsustvu odgovarajuće motivacije i ispotprosečnim sposobnostima koje su sprečavale pojedince u ostvarivanju društvenih uspeha. Ovakvi stavovi su posebno oživeli tokom 1970-tih i 1980-tih kada je politički naglasak tadašnje neoliberalne ekonomije bio stavljen na preduzetništvo, odsustvo državne intervencije, ličnu inicijativu, kao i na lične ambicije i ciljeve. Za razliku od njega, drugi teorijski pristup ističe šire društvene procese koji generišu uslove za pojavu siromaštva, a koje pojedinci ne mogu da prevladaju. U skladu sa ovim stanovištem, strukturalni faktori siromaštva poput pripadnosti klasi, roda, etniciteta, profesije, nivoa obrazovanja, nivoa ličnog dohotka i drugog utiču na alokaciju dohotka i resursa u jednom društvu. Stoga ovaj pravac zagovara isplatu minimalne nadnice, zagarantovanog ličnog dohotka, dečjeg dodatka i drugih oblika socijalne pomoći sa ciljem ispravljanja društvenih nejednakosti.

Rizici od siromaštva su karakteristični za siromašnija društva i u njih uglavnom spadaju nizak nivo obrazovanja, nezaposlenost, samohrano roditeljstvo i mladost starijih članova domaćinstva. Pri tome je siromaštvo uglavnom niže i ređe u onim zemljama koje se karakterišu kao izdašnije države blagostanja, dok su i rizici od siromaštva manje izraženi u takvim zemljama. Istraživanje koje je sproveo Ryan Finnigan (12), zasnovano na Luksemburškoj studiji o dohotku (Luxembourg Income Study-LIS), ukazalo je na to da je siromaštvo u Sjedinjenim Američkim Državama (SAD) 2013. godine bilo više nego dvostruko veće nego u mnogim zemljama Evrope, uključujući i Poljsku, Švajcarsku, Holandiju, Dansku, Austriju i mnoge druge države. Od 29 analiziranih zemalja, SAD su imale nižu stopu siromaštva samo od Izraela, što je dovelo i do zaključka da prevalencija faktora rizika ne mora nužno da bude razlog viših stopa siromaštva. Više stope siromaštva su radije u većoj meri uzrokovane prirodom političkog sistema, velikodušnošću politike socijalne pomoći i sistema blagostanja zemlje.

Nezavisno od uzroka siromaštva, ono ima razorne posledice za sve ljude koji žive u ovom stanju. Do sada su sprovedena brojna istraživanja o efektima siromaštva na život siromašnih ljudi, dok su mnoga od njih bila usmerena na doživotne posledice siromaštva u detinjstvu. Generalno posmatrano, veća je verovatnoća da će siromašna deca i ubuduće živeti u siromaštvu, da će napustiti srednju školu, da će postati mladi roditelji, kao i da će imati problema sa zapošljavanjem i kriminalom. Sprovedena istraživanja nedvosmisleno govore o tome da u najznačajnije negativne efekte siromaštva spadaju porodični problemi, uključujući i razvod i nasilje u porodici; život u stresu, neizvesnosti i anksioznosti; nedostatak finansijskih sredstava; razni zdravstveni problemi, uključujući i smrtnost novorođenčadi, veću stopu smrtnosti odraslog stanovništva i mentalne bolesti, neadekvatnu medicinsku negu, nizak nivo obrazovanja i snalaženja u školi, nedostatak zdravstvenog osiguranja, pušenje, lošu ishranu i slabo zdravstveno stanje; probleme sa stanovanjem i rizik od beskućništva; nedostatak prilika za posao i dobro školovanje; opasnost od činjenja uličnog kriminala (ubistava, pljački, provala i tome slično); opasnost od viktimizacije od strane uličnog kriminala i dr. (17).

STOPA RIZIKA OD SIROMAŠTVA U SRBIJI

Prema zvaničnim podacima Republičkog zavoda za statistiku, u Srbiji je 2023. godine uža stopa rizika od siromaštva iznosila 19,9% i bila je za 0,3% niža u odnosu na prethodnu 2022. godinu. S druge strane, stopa rizika od siromaštva ili socijalne isključenosti (AROPE) iznosila je čak 27,2% i bila je za 1,8 procentnih poena niža nego u prethodnoj 2022. godini (21). Prag rizika od siromaštva je u 2023. godini u proseku iznosio 29.100 dinara mesečno za jednočlano domaćinstvo, 52.380 za domaćinstvo sa dve odrasle osobe i jednim detetom do 14 godina starosti, a 61.110 dinara za domaćinstvo sa dvoje odraslih i dvoje dece mlađe od 14 godina. Najviše izložena riziku od siromaštva bila su lica starosti od 65 i više godina (23,5%) i lica starosti od 55 do 64 godine (23%), dok su radno sposobna lica između 25 i 54 godine starosti imala najnižu stopu rizika od siromaštva (16,8%). Podaci iz ankete su takođe ukazali i na to da je 50,9% punoletnih nezaposlenih lica bilo izloženo riziku od siromaštva, da su samozaposlena lica (12,9%) imala veću stopu rizika od siromaštva od lica zaposlenih kod poslodavaca (4,9%), dok je u slučaju penzionera ovaj pokazatelj iznosio čak 20,3% (3).

Svetska banka procenjuje da je u 2023. godini Srbija ostvarila uspeh u svom napretku i nastavljenom smanjivanju siromaštva usled ubrzanog privrednog rasta, posebno tokom druge polovine ove godine, odličnih performansi poljoprivrede i sektora građevinarstva, snažnog oporavka energetskog sektora, snažne industrijske proizvodnje i usluga, povećanog neto izvoza i u manjoj meri usled rasta potrošnje. Takođe su i njen privredni rast iz postpandemijske ere i poboljšani uslovi na tržištu rada u značajnoj meri doprineli smanjivanju siromaštva (27). Stopa rizika od siromaštva je tek odnedavno počela ozbiljnije da se obuhvata u statističkom smislu, dok, sa izuzetkom Turske, za većinu zemalja još uvek ne postoje potpuni podaci. Naredna Tabela 1 daje komparativni prikaz stopa rizika od siromaštva u Srbiji, kao i u njenim balkanskim susedima za koje postoje raspoloživi podaci.

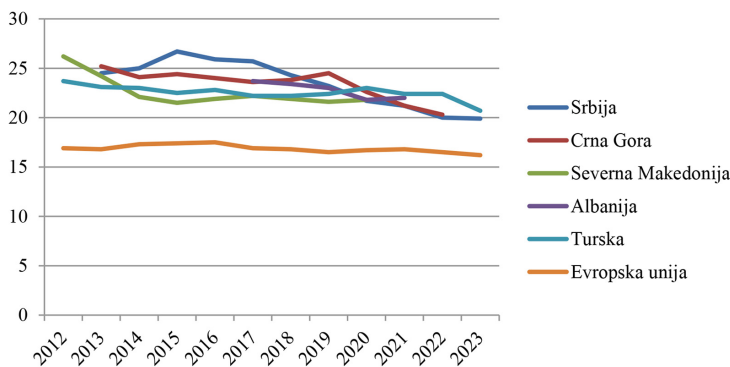
Tabela 1. Stopa rizika od siromaštva u balkanskim zemljama, od 2012. godine (u %)

Godina	Srbija	Crna Gora	S. Makedonija	Albanija	Turska	EU-27
2012	-	-	26,2	-	23,7	16,9
2013	24,5	25,2	24,2	-	23,1	16,8
2014	25	24,1	22,1	-	23,0	17,3
2015	26,7	24,4	21,5	-	22,5	17,4
2016	25,9	24,0	21,9	-	22,8	17,5
2017	25,7	23,6	22,2	23,7	22,2	16,9
2018	24,3	23,8	21,9	23,4	22,2	16,8
2019	23,2	24,5	21,6	23,0	22,4	16,5
2020	21,7	22,6	21,8	21,8	23,0	16,7
2021	21,2	21,2	-	22,0	22,4	16,8
2022	20,0	20,3	-	-	22,4	16,5
2023	19,9	-	-	-	20,7	16,2
P. vrednost	23,46	23,37	22,6	22,78	22,53	16,86

Izvor: (9)

Iako su sve posmatrane zemlje zapadnog Balkana imale slične nivoe i tendencije pada stope rizika od siromaštva, uočava se ipak da je među njima u periodu od 2012. godine prednjačila Srbija sa najvećom zabeleženom prosečnom stopom rizika od siromaštva u iznosu od 23,46%. S druge strane, najmanje siromaštvo je bilo uočeno u Turskoj u kojoj se prosečna vrednost ovog pokazatelja kretala na nivou od 22,53% (Slika 1). Na osnovu Slike 1 sledi i da su sve zemlje Zapadnog Balkana zabeležile znatno više stope rizika od siromaštva u odnosu na prosek EU-27 koji je bio na nivou od 16,86%. Pored toga se uočava i da je Srbija do 2018. godine imala najvišu stopu rizika od siromaštva, dok su u poslednjim godinama višu stopu imale Crna Gora, Albanija i Turska.

Međutim, ova poređenja ipak treba uzeti sa izvesnim oprezom s obzirom na to da je Republički zavod za statistiku od 2018. godine počeo da primenjuje revidiranu metodologiju obuhvata indikatora siromaštva, socijalne isključenosti i nejednakosti u raspoloživom dohotku u Srbiji. Naime, moguće je dovesti u pitanje uporedivost statističkih podataka iz Ankete o dohotku i životnom standardu stanovništva (SILC) za Srbiju i zemlje EU zbog metodoloških specifičnosti i ograničenja srpske verzije SILC-a koja se odnose na tretman dohotka u naturi, zatim na tretman negativnih i ekstremnih vrednosti dohotka, kao i na potcenjen broj korisnika socijalne pomoći i dečjeg dodatka u uzorku SILC-a za Srbiju (1, str. 90–93). Da nema ovih utvrđenih metodoloških manjkivosti mogli bismo da pretpostavimo da bi stope rizika od siromaštva u Srbiji bile još veće.



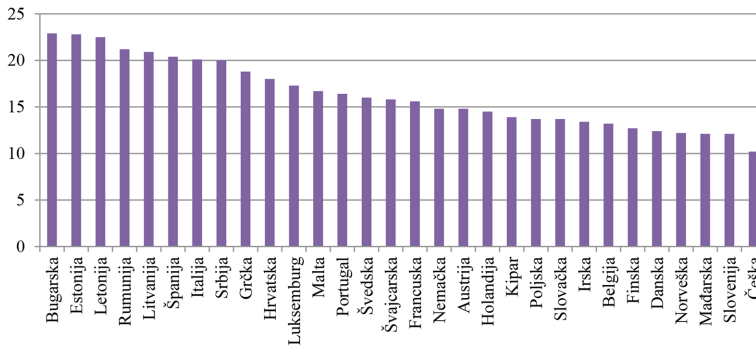
Slika 1. Stopa rizika od siromaštva u balkanskim zemljama, od 2012. godine (u %)

Izvor: (9)

Na osnovu raspoloživih podataka sledi zaključak da se Srbija svrstava u evropske zemlje sa najvećim rizikom od siromaštva, kao i da je u grupi evropskih zemalja sa najvećim zabeleženim socijalnim raslojavanjima i društvenim nejednakostima, ukazujući na neodrživost njenog privrednog i društvenog razvoja. Pri tome su nedavni globalni događaji poput pandemije virusa COVID-19, rata u Ukrajini, prekida globalnih lanaca vrednosti i globalne inflacije cena hrane i energenata dodatno zaustavili i usporili smanjenje siromaštva i društvenih nejednakosti u zemlji. Stoga se javlja potreba za sprovođenjem efikasnijih mera ekonomske, fiskalne i socijalne politike protiv siromaštva (24). Pri tome se politika socijalne zaštite i socijalna inkluzija procenjuju kao kritične i

najproblematičnije tačke Srbije u kontekstu Evropskog stuba socijalnih prava, kao i njenog potencijalnog pristupanja EU.

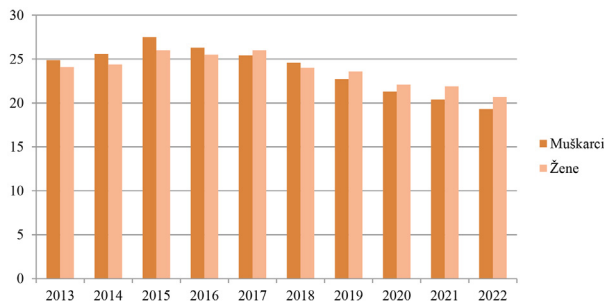
Dakle, u poređenju sa evropskim zemljama stopa rizika od siromaštva u Srbiji je generalno visoka i jedna je među najvišim u Evropi. Preciznije, Srbija se nalazi na osmom mestu prema visini svoje stope rizika od siromaštva među 30 evropskih država u kojima se ovaj indikator meri prema EU-SILC metodologiji (Slika 2). Viša stopa rizika od siromaštva u 2022. godini bila je zabeležena još samo u Bugarskoj, Estoniji, Letoniji, Rumuniji, Litvaniji, Španiji i u Italiji.



Slika 2. Stopa rizika od siromaštva po odbitku socijalnih transfera u 2022. godini (u %)

Izvor: (9)

U Srbiji su takođe prisutne i značajne rodne razlike u stopi rizika od siromaštva (Slika 3). Podaci ukazuju na dosledno višu stopu rizika od siromaštva kod žena u odnosu na muškarce, kao i na rast, a kasnije i na sporije opadanje ove stope, posebno od 2017. godine pa nadalje, uz izraženi rast rodnog jaza. Feminizaciji siromaštva doprinosi povećanje udela domaćinstava čiji su nosioci žene, a koja su u proseku siromašnija od domaćinstava čiji su nosioci muškarci, a sve usled nepovoljnijeg položaja žena na tržištu rada u odnosu na muškarce (6, str. 6).



Slika 3. Stopa rizika od siromaštva prema polu (u %)

Izvor: (10)

Kada je pak reč o kretanju stope rizika od siromaštva zaposlenih ljudi, u rasponu od 18 do 64 godine starosti, može se konstatovati da je ovaj pokazatelj za Srbiju u periodu od 2013. do 2022. godine bio u konstantnom padu, sa 14,6% na 6,1%, ukazujući i na poboljšanje uslova života zaposlenog stanovništva (11).

UMESTO ZAKLJUČKA

Srbija je jedna od evropskih država sa najvišim stopama rizika od siromaštva i socijalne isključenosti, kao i sa najvećim uočenim društvenim i dohodovnim nejednakostima. Pri tome su pomenuti globalni izazovi samo otežali i usporili pad siromaštva i izraženih društvenih nejednakosti u zemlji. Država s vremena na vreme, uključujući i pandemijsku COVID-19 2020. godinu i posebno predizborne periode, obezbeđuje finansijsku podršku svom stanovništvu i privredi sa ciljem obezbeđivanja njihove podrške, očuvanja njihovog dohotka ili ublažavanja efekata krize. Međutim, mere njene politike socijalne pomoći uglavnom ne obuhvataju najugroženije stanovništvo poput siromašne dece, osoba bez dokumenata i beskućnika. S druge strane, ni mere pomoći namenjene privredi uglavnom ne ciljaju neformalno i privremeno zaposlena lica, produbljujući na taj način inače izražene i prolongirane društvene nejednakosti u zemlji.

U međuvremenu je Srbija u martu 2022. godine uvela i digitalni registar Socijalnih karata za svoje stanovništvo u ionako neadekvatan sistem socijalne pomoći, pogoršavajući već postojeće probleme i dodatno ograničavajući ljudima pristup socijalnoj zaštiti. Ovaj sistem je doveo do smanjenja broja primalaca socijalne pomoći, ukazujući na manjkavosti u primeni novog Zakona o Socijalnoj karti. Tako su u javnosti postali široko poznati slučajevi skidanja lica sa socijalne pomoći koja su se bavila prikupljanjem i prodajom sekundarnih sirovina. Pri tome je nagli pad broja primalaca socijalne pomoći usled uvođenja Zakona negativno koreliran sa visokim stopama apsolutnog siromaštva, koje se kreću na nivou od 7% ukupne populacije. To dalje znači da skoro pola miliona ljudi živi ispod granice siromaštva na mesečnom nivou i da nije u stanju da zadovolji svoje osnovne potrebe. Uvođenje registra Socijalnih karata je dalje imalo negativan uticaj na prava ljudi na socijalnu zaštitu, jednakost i nediskriminaciju, a ujedno i na životni standard i adekvatan pristup građana osnovnim zdravstvenim uslugama. Štaviše, Zakon o Socijalnoj karti ne obezbeđuje pristup adekvatnom pravu na pravni lek kao što je zagarantovano Evropskom konvencijom o ljudskim pravima ili pristup pravu građana na informacije koje je priznato Međunarodnim paktom o građanskim i političkim pravima. Ovu situaciju dodatno pogoršava i činjenica da se odluke socijalnih radnika sada zasnivaju na kompjuterskom algoritmu, ujedno menjajući i samu njihovu ulogu i korišćenje sopstvenog rasuđivanja u proceni potencijalnih primalaca socijalne pomoći (16).

Istovremeno, tržište rada u Srbiji većini ljudi ne pruža mogućnost za ostvarivanje dostojanstvenog i sigurnog rada. Stopa zaposlenosti radno sposobnog stanovništva je jedna od najnižih u Evropi, dok je stopa nezaposlenosti Srbije među najvišima u grupi

evropskih zemalja. Debalans između ponude i tražnje za radnom snagom ima za posledicu visoku podzaposlenost i dovodi do urušavanja kvaliteta postojećih radnih mesta – sve su zastupljeniji nesigurni i povremeni oblici rada, dok zarade većini zaposlenih ne omogućavaju pristojan život. Pri tome muškarci i žene u Srbiji nemaju jednake mogućnosti zapošljavanja, dok je rodni jaz prisutan kod svih indikatora zaposlenosti (stope aktivnosti, stope zaposlenosti, stope nezaposlenosti i stope neaktivnosti) i u svim regionima, sa izraženom tendencijom isključivanja žena sa tržišta rada (20, str. 8–9).

Osim toga je i postepeni privredni oporavak tokom postpandemijske 2021. godine bio dodatno usporen delovanjem globalnih ekonomskih problema, ali i inflacijom cena hrane i energenata. Srbija se u drugoj polovini 2022. godine suočila sa rekordnom stopom inflacije u poslednjih 15 godina u iznosu od 15,1%, što se posebno negativno odrazilo na kupovnu moć materijalno ugroženih domaćinstava sa nižim dohotkom koja najveći deo svojih mesečnih prihoda upravo izdvajaju za hranu i energente. Pored toga, i troškovi života u Srbiji rastu brže od prihoda, dok se procenjuje da je samo u 2022. godini efekat rasta plata gotovo u potpunosti bio poništen visokom inflacijom. Uzroci visokog siromaštva i velikih izraženih društvenih nejednakosti u zemlji leže u nedovoljno efikasnoj poreskoj, socijalnoj i redistributivnoj politici, dok je sama Srbija među državama sa visokim nivoom učešća javne potrošnje u svom bruto domaćem proizvodu (BDP). I dok se merama socijalne politike izdvajaju ograničena sredstva za materijalno ugrožena domaćinstva, u poslednjim godinama se beleži smanjenje sredstava namenjenih celokupnom sistemu socijalne zaštite, pa samim tim i smanjenju siromaštva. Takođe i niska progresivnost poreza na dohodak u Srbiji znatno manje utiče na smanjenje dohodovnih nejednakosti nego što je to slučaj sa zemljama EU (6, str. 3–15). Preciznije, regresivnost poreskog sistema u Srbiji u većoj meri opterećuje slojeve stanovništva sa nižim dohotkom, ne obećavajući u dogledno vreme rešavanje ovih gorućih socijalnih i ekonomskih problema.

Čini se da će se teška socijalna slika Srbije nastaviti i u dogledno vreme, uz rizik od povećanja broja siromašnih ljudi i onih koji su u opasnosti od siromaštva i socijalne isključenosti, sa posebnim naglaskom na pripadnike marginalizovanih zajednica poput Roma, osoba sa invaliditetom, žena, siromašne dece, osoba bez dokumenata i beskućnika. Iako su ukupna izdvajanja Vlade Srbije za socijalnu zaštitu relativno visoka u poređenju sa drugim zemljama u regionu, i gotovo na istom nivou kao u zemljama EU, u njenom budžetu u velikoj meri dominiraju penzije, koje čine preko 70% ukupne socijalne zaštite, dok su izdvajanja za socijalnu pomoć i dalje veoma niska i iznose svega 5% rashoda za socijalnu zaštitu, što je znatno ispod proseka EU od 12% (16).

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