KEY POLICY DEVELOPMENTS IN EDUCATION, TRAINING AND EMPLOYMENT – MONTENEGRO 2023

EXECUTIVE SUMMARY

On 30 October 2023, Montenegro installed a new government after a period of changes and ongoing institutional restructuring. The appointment of the new government is expected to be accompanied by changes in leading positions in the ministries.

Throughout the year, inflation and the higher living costs linked with geopolitical developments continued to fuel uncertainty. The aftermaths of the cyberattack on public and private institutions in August 2022 continue to affect the work of state institutions and the reliability and availability of data.

In 2023, Montenegro continued to express commitment towards European policy objectives and standards, however with little evidence in implementation. The education sector review carried out with the support of UNICEF was concluded and approved by the government. Its recommendations point to an increase in the efficiency of the school network for quality education. An important focus will be on equipment delivery by the EIB: The recommendations of the European Commission's (EC) assessment of Montenegro's Economic Reform Programme 2022-2024 and the EC Annual Enlargement Package 2023 reiterate the need for a multi-year education strategy and costed action plan, as well as further developments in work-based learning. Like the other Western Balkan economies, Montenegro benefits from the EU Economic and Investment Plan for the Western Balkans, whose focus in 2023 was on funding investment in energy. In autumn 2023, the European Union launched a new Growth Plan for the Western Balkans to accelerate economic reforms and convergence with the European Union. There is a reinforced strategic priority consisting of cooperation with international financial institutions, such as the EIB, the EBRD, the World Bank and UN institutions, such as UNICEF in education.

The Montenegrin authorities have been part of the regional dialogue on the Western Balkans Agenda on Innovation, Research, Education, Youth, Culture and Sport. The Ministry of Education has followed up on its commitment to the Osnabrück Declaration and the European Council Recommendation on VET for sustainable competitiveness, social fairness and resilience in response to the National Implementation Plan 2020. The 2023 progress report points to limited progress due to the unstable political situation. While the VET Strategy 2020-2024 was not accompanied by an 2022-2023 action plan, it was partly implemented at operational level, thanks to committed individuals. The Ministry of Labour and Social Welfare (MoLSW) finalised the draft Implementation Plan for Youth Guarantee in July 2022, which is due for approval by the new government.

Progress in the area of higher education, in particular with regard to the revised strategy (2022-2026) and the law, has been at a standstill. The Erasmus+ office has been active in relation to the enhanced partnership with Western Balkan countries, including the European Universities' initiative and the Teacher Training Academy. The office also promoted information on the opportunities for vocational education and training. In the area of research and innovation, the Association Agreement for Horizon Europe with the Ministry of Science and Technological Development is the framework for cooperation with the EU. Montenegro has continued to move ahead with the implementation of the smart specialisation strategy (approved in 2022), its operational programme 2021-2024, and the operationalisation of the Innovation Council.

Regarding regional policy dialogue, Montenegro has remained an active partner in the Berlin Process and the Common Regional Market. This relates to activities under the EU Digital Agenda for the Western Balkans and to membership in the Steering Committee for Digital Skills Strategies, which is managed by the Regional Cooperation Council (RCC). The Montenegrin Government has continued participating in RCC initiatives such as the Youth Lab and the Employment and Social Affairs Platform. The Ministry of Education and the VET Centre continue to contribute to the regional activities of ERI SEE (Education Reform Initiative of South Eastern Europe) in teacher training and qualification development, and in particular to the reform regional initiative financed by the Austrian Development Agency. Montenegro is part of the regional IPA project EU4Green, with a component on green skills development and the use of micro-credentials for skills recognition. Skills for green jobs are a cross-

cutting issue in all curricula to raise awareness of climate change and sustainable development (Osnabrück Monitoring Report 2023).

1. KEY POLITICAL, DEMOGRAPHIC, ECONOMIC AND SOCIAL CHARACTERISTICS

Political developments

2023 was characterised by political instability. In autumn 2023, a new government was appointed with restructuring ongoing. The commitment to the EU accession process and the enlargement agenda has remained. However, the European Commission's (EC) Enlargement Assessment Report 2023 points to limited progress, very much linked to the political instability in the country. The cyberattack on government institutions in 2022 destroyed data and information, making it challenging to provide evidenced analysis (Sub-Committee October 2023).

Demographics

Montenegro is the smallest of the Western Balkan countries in terms of area and population, with a total of 627 082 inhabitants in 2022 (MONSTAT). This is a 0.12% decline from 2021. 67.6% of the population is urban.

Like other countries in the region, Montenegro faces both internal and external migration flows. People move primarily from the northern region to the central and southern parts of the country, as well as from rural to urban areas, causing depopulation in the northern municipalities. Outward migration to the European Economic Area and Switzerland tripled in the last decade (OECD, 2021), and the trend is expected to continue. Inward migration, from Ukraine and Russia, continues to increase steadily and is mainly linked to geopolitical developments.

Key economic developments

The Montenegrin economy performed well in first half of 2023, growing by 6.5%, mainly due to boosting household consumption, a strong tourist season and investments in hotel facilities and the energy sector. The real GDP increased by 4.1% in 2019, dropped by 15.3% in 2020 due to the COVID-19 pandemic, grew again by 13% in 2021 and 6.4% in 2022, and the forecast for 2023 is either a 4.5% increase (wiiw.ac.at, Montenegro 2023) or a 3.5% increase (EBRD, September 2023). Tourism accounts for 25% of GDP.

'Europe Now' is Montenegro's overall reform programme, which includes increased pensions and salaries and puts further challenges on the economy, the state and individual budgets.

SMEs make up 99% of the Montenegrin economy. However, their contribution and participation in the global value chain and their export orientation to high-value activities remain limited. The OECD (SME Policy Index, OECD, 2022) states that there has been progress, in particular with regard to business support services, women in entrepreneurship and self-employment, and policy documents and financing tools to assist the green transition. The main areas where further efforts are needed include the skills development and access to finance for SMEs. The EC's European Innovation Scoreboard 2023 for Montenegro defines the country as an emerging innovator, with a performance at 47% of the EU average. The gap to the EU is becoming larger, linked to scarce government support for research and development for the business sector and a small number of doctorate graduates. In 2020, spending on research and innovation was 0.4% of the GDP.

The Council for Innovation and Smart Specialisation and the Innovation Fund are key for the implementation of activities in the priority economic sectors. A working group for the development of a research strategy for 2023-2027 was formed in 2023. The Innovation Strategy for 2023-2027 was adopted in August 2023.

The findings of the study by the EU's Joint Research Centre (JRC, 2021) on value chains in the region remain valid, and are also mirrored in the smart specialisation strategy 2021-2024 and have a focus on the tourism and agricultural sectors. Montenegro continues its strive to a green and digital

transition, as also highlighted in the EBRD's country strategy for Montenegro (EBRD, 2021). An IPA II grant scheme is available to support improved links between science and industry.

The evaluation of Montenegro's previous Research Strategy (UNDP, 2021) points to the need for further investment in research and development, and is confirmed by the EC's assessment of 8 November 2023. The new strategy for 2022-2026 will increase public and private investment in research. The Science and Technology Parks in Podgorica and Nikšić are key to further cooperation between research and businesses and reaping the benefits of IPA support.

The informal economy in Montenegro, which accounts for around 30% of GDP (World Bank, 2022), remains among the largest in the region. The Economic Reform Programme 2023-2025, under reform measure 15, seeks to strengthen mechanisms for formalising the grey economy. In 2022, 12.6% of workers were in vulnerable employment (Eurostat).

Households continue to depend heavily on remittances, which are one of the most important sources of income. Net remittance inflows amounted to 6.1% of GDP in 2021 and are among the highest in the region. They dropped due to COVID-19 restrictions, and are projected to have decreased to 5% in 2022 (World Bank, 2022).

Key social issues

According to the latest data available (MONSTAT, SILC, 2021), 38.9% of the population is at risk of poverty and social exclusion. While the risk impacts women and men equally, young people (up to 18 years old) are disproportionately affected (45.5%, 2021, MONSTAT). 20% of the population in the 18-59 age group lives in households with very low work intensity. Employment is a safeguard against poverty risk, with unemployed and inactive persons registering the highest at-risk-of-poverty rates (MONSTAT, SILC 2021).

Roma people remain among the hardest hit by poverty and social exclusion. The Strategy on Roma Inclusion 2021-2025 and the Action Plans address education and labour-market issues, and there has been slow but steady implementation. Montenegro is also committed to the Poznan Declaration, and steps have been taken to implement this.

2. EDUCATION AND TRAINING

2.1 Trends and challenges

Education strategy and legal framework for education

The ongoing discussion on the need for sector-wide education reforms in primary and secondary education has continued, however with limited implementation. In a first phase and with a delay of 2 years, the procurement of equipment with a loan from the EIB has been launched. Some schools will receive equipment in 2024. The national consultation report (Government of Montenegro, 2022) that complements the recommendations of the UNICEF education sector analysis (UNICEF, 2022) are the basis for the planned reforms. The main recommendations propose a renewed school infrastructure combined with pre- and in-service teacher training in view of the digital and green transition. As a follow up, the preparation of an action plan and dialogue with key stakeholders moved slowly in 2023, to prepare for action with the support of future IPA funding.

Education expenditure

In 2020, education as a percentage of GDP stood at 3.8%, compared to the EU goal of 4.6% by 2030.

Access, participation and early school leaving

Participation in early childhood education and care stood at 66% in 2020, compared to the EU target of 87%. Take-up is much lower in the north. The Strategy and Action Plan for Early and Preschool Education 2021-2025 aims to reinforce attendance in line with international developments. In 2023, enrolment was done online, and new teaching and medical staff were recruited.

In 2020/21, the share of VET students in upper secondary education was 69.3%, a small increase compared to previous years. As in the other Western Balkan economies, the overall tertiary education attainment of the population is increasing, standing at 23.3% with high-level attainment in 2022.

Participation in adult learning (lifelong learning) increased from to 2.7% in 2020 to 5.2% in 2021, (MONSTAT, 2021) before decreasing significantly to 3.2% in 2022. This percentage is low compared to the EU average of 10.8% in 2022. Slightly more women than men participate in lifelong learning. Adult learning takes place mainly outside the formal education systems and as part of publicly funded active labour-market measures.

For several years, Montenegro has been a high performer both in the region and compared to EU Member States regarding the early school leaver (ESL) rate, which decreased from 5.0% in 2019 to 3.6% in 2020, but significantly increased to 6.7% in 2021 (MONSTAT), most probably due to the impact of the pandemic on education and training. Although the ESL rate decreased again to 5.2% in 2022, it has not reached pre-pandemic levels. The EU average was 9.6% in 2022 (Eurostat), The ESL rate decreased in 2022 compared to the previous year. Therefore, the ESL rate among young women went up to 9.3% in 2022 – almost double that of pre-pandemic levels (4.9% in 2019) and three times the male ESL rate. This gender gap and worrying trends for young women fuel significant gender gaps in labour-market participation, and require more efficient and holistic policy measures to prevent school leaving among girls in Montenegro. In 2023, the priority of the Montenegro Government remained to enable students to return to school and university.

PISA results

The government has continued to prioritise improving the quality of the education system. The poor PISA results in 2018 made the need for comprehensive reforms even more imperative. One of the main challenges remains tackling underachievement in key competences, including mathematics (46%), reading (44%) and science (48%). The figures suggest no improvement since 2009, and

remain rather stable for 40-50% of students aged 15. Montenegro also participated in PISA 2022[1], with average results down compared to 2018 in mathematics (40%), reading (47%) and science (45%).

UNICEF (UNICEF Education Sector Analysis, 2022) also identifies this in its recommendations, and suggests solutions for the entire teaching and learning environment. In response, in 2023, programmes with a focus on teaching natural sciences were delivered to 95% of elementary schools (students in grades 6 to 9) and secondary schools (grades 1 to 3). Further teacher training is planned.

PIRLS (Progress in International Reading Literacy Study) 2021 saw the publication of the international results in May 2023. The Montenegrin report is in preparation. Montenegro participated in TIMSS (Trends in International Mathematics and Science Study) in 2023 and plans to join TALIS (Teaching and Learning International Survey) in 2024.

Young people not in employment, education or training (NEET)

As in other countries in the region, the high number of NEETs is a concern in Montenegro for society as a whole. In 2022, the proportion of NEETs aged 15 to 29 was 23.2%, a decrease after the COVID-19 shock but still above pre-pandemic levels. The EU average was 11.7% (Eurostat, 15-29 age group). NEET rates among upper secondary and university graduates are worryingly high. Overall, men are slightly more exposed to becoming NEETs, at 24.6% compared to 21.7.% for women (2022, 15-29 age group).

School-to-work transition continues to be difficult, with a shift to inactivity and ongoing skills mismatch. To address these challenges, in July 2022 the government submitted the Implementation Plan to introduce the EU Youth Guarantee Scheme. In 2023, the approval of the plan was delayed while Montenegro awaited a new government. Both the education and labour-market policy sectors will need to address this important challenge, while taking on board the needs of young people, in particular NEETs.

2.2   Initial VET and adult learning

Strategic and legal framework for initial VET and adult learning

The Montenegrin VET Strategy 2020-2024 is in place, but in 2023 this had not been followed by an approved Action Plan. The document is in line with the priorities of the EU's Copenhagen Declaration on VET and the skill needs of the economic sectors identified in the Montenegrin Smart Specialisation Strategy 2021-2024. In view of institutional memory and strategic planning, it is important to note that there was high staff turnover in 2023, in particular due to retirements in both the Ministry and the VET Centre.

The VET Centre is leading the implementation of the Strategy for Adult Education of Montenegro 2015-2025 and related annual plans, and is an active member of EPALE (Electronic Platform for Adult Learning in Europe). An important task includes the accreditation of institutions. The courses to be offered will be provided mainly via the Public Employment Services.

Montenegro's Entrepreneurial Lifelong Learning Strategy 2020-2024 is a follow-up to the 2015-2019 strategy. The OECD assessment (OECD, 2022) praised the implementation of entrepreneurial learning principles in education as a success. Entrepreneurial competences are an integral part of the new key competence framework, which covers the whole education sector and is being implemented at all levels of education.

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[1] The PISA 2022 results for Montenegro were released on 5 December 2023, and are available at Montenegro | Factsheets | OECD PISA 2022 results

Digital and green skills are the focus of VET reforms, with the Education System Digitalization Strategy 2022-2027 and the Bureau for Education Services being involved in the Eco-Schools initiative as an overarching framework for green schools (Osnabrück Monitoring Report 2023).

VET governance and financing arrangements

Governance and finance reforms remain important challenges and are part of the recommendation of the EC Annual Enlargement Package 2023. UNICEF (2022) and ETF (2019) suggestions that players from the world of work, as well as regional and local players, be more systematically involved in Montenegro's VET governance and financing model, remain valid. This will need to be reflected in a costed Action and Monitoring Plan for implementing the Montenegrin Education Sector Strategy 2030, which was delayed again in 2023.

The challenge remains that this does not include interventions in non-formal VET and adult learning, which are primarily financed through active labour-market budgets. Neither does it refer to higher education, where funding also mainly comes from the state budget.

Qualifications, validation and recognition

Developing qualifications that respond to the needs of the labour market continue to be on the reform agenda in view of the green and digital transition. There was support from the IPA (SOPES 2015-2017), which was concluded in 2022. The involvement of Sector Committees that are relevant for the Montenegrin economy saw continuous cooperation with social partners such as the Chamber of Economy and trade unions (Osnabrück Monitoring Report 2023). In the progress report of the National Implementation Plan for the Osnabrück Declaration, it is a reconfirmed priority, together with the validation and recognition of prior learning. Despite the fact that Montenegro has well-established procedures for validating and recognising learning outcomes, the latter has received little attention.

Quality and quality assurance

The quality of the whole education system has been a concern and priority for the Montenegrin Government for many years (ETF Torino Process Montenegro 2023). Skills mismatch continues to be a key challenge. Employers and students complain that qualifications and skills in the field of VET and higher education lack relevance for labour-market demands. The limited links between education and training and research aggravate the situation. A major concern remains students' lack of practical learning and experience in schools and universities. Links between education and businesses remain limited.

A catalogue of professional development programmes is available for VET teachers. A substantial amount of training has been delivered in the past decade on topics such as learning outcomes, new teaching methodologies and key competences. Teachers' digital skills are key and will need to be further developed. The UNICEF 2022 education review also points to this.

Montenegro is part of EQAVET (European Quality Assurance in Vocational Education and Training) and applies its quality assurance principles and tools in general secondary, vocational and higher education. The Bureau for Education Services, the Bureau for VET (VET Centre) and the Agency for Control and Quality Assurance of Higher Education are responsible for this. The IPA SOPES 2015-2017 project helped to revise external and internal quality assurance procedures and to develop staff capacities at secondary education level. The new methodology for assessing the quality of educational work in primary and secondary education was approved in 2021. Evaluations are carried out by joint teams of the VET Centre and the Bureau for Education Services. In 2022, the VET Centre carried out an external evaluation of seven VET schools and one CVET provider (Policy Academy). Competence standards for external evaluators were submitted to the National Council in 2023.

Work-based learning arrangements

Work-based learning remains high on the government agenda, and the EC's regular progress report recommendations 2023 point to its importance in both VET and higher education. However, feedback

suggests little progress. In 2021/22 there were 538 students, 20 VET schools and 223 employers, while in 2022/23 there were around 500 students (Osnabrück Progress Monitoring Report 2023) in dual education, all mainly in 3-year VET programmes. In 2022/23, nearly all schools were granted permission to employ a practical training organiser. The ongoing regional project with the Austrian Academic Exchange Service (OeAD) will come up with a regional manual, tailored to country needs, on organising quality work-based learning, including guidance to companies and schools. The findings of the evaluation to improve the quality and relevance of programmes (ETF and ILO, 2020), as well as its related reviews, remain valid. This includes the 2020 internal review (Ministry of Education, 2020) and the survey on the 'Perceptions of employers participating in the dual training system' (Ministry of Education, 2021). The evaluations recommend a need for stronger involvement of, and financial incentives for, the business sector. In Montenegro, the first 2 years of work-based learning are paid for by the Ministry of Education, and the third year is financed by the government. This often leads to students and companies dropping out in the third year. The evaluations recommend adequate payment and working conditions for students, which is a major challenge for the labour market and the SME sector in Montenegro (ETF publication on financing of WBL, 2022) .

Digital education and skills

As in the other Western Balkan countries, UNICEF provided a comprehensive learning platform for teachers, learners and parents, the so-called Digital School concept (www.digitalnaskola.edu.me). All the lessons that were recorded as part of 'Learn at home' are uploaded there. A training programme for creating teaching and learning materials has been designed in support of digital learning. In 2023, quality standards for digital textbooks and instructional digital materials were published.

An online enrolment system that was developed during the COVID-19 period is still operational. However, there were many challenges regarding online teaching, including limited internet access in remote areas, the lack of equipment in schools, teachers' digital skills, and suitable online learning materials.

Digital skills remain a government priority also under the EU Digital Agenda for the Western Balkans (EC, 2018) as part of the EU enlargement process. Montenegro has been a member of the Regional Cooperation Council's working group on the development of digital skills strategies since April 2020. The country contributed to the Western Balkans Digital Summit in Sarajevo in October 2023, where digital skills were high on the agenda.

SELFIE is an EU tool to promote the digitisation of school-based and work-based learning. In 2020, Montenegro took part in the EU SELFIE pilot on work-based learning. The government carried out a SELFIE school assessment series in 2021.

With funding from the European Investment Bank and in response to findings of the Education Sector Review, the government launched the 'Digital Classroom' project by digitising content for primary education and upgrading the infrastructure throughout the country. However, the initiative has been delayed, in particular due to the political situation in Montenegro. The first tenders for equipment were launched in 2023.

Statistics on education and training

As a candidate country, the Statistical Office of Montenegro (MONSTAT) provides data on education and training on a regular basis to the EC. In 2022, due to the cyberattack in Montenegro, this was not possible. This situation continued in 2023. The relevant department in the Ministry of Education plays an important role and is contributing to restore this through its Education Management Information System.

The VET Centre undertook an analysis of a survey tracking VET students after completing the 2019/2020 school year. The ILO (2021) recommended setting up a graduate tracking system; however, there has been no further progress in this.

The efforts to link the Education Management System of the Ministry of Education, the Labour Market Information System of the Ministry of Labour and Social Welfare and social security data, have slowed down because of the cyberattack and its consequences.

The ETF also has relevant data on the reform process based on the long-standing cooperation with MONSTAT.

3. LABOUR MARKET AND EMPLOYMENT

3.1 Trends and challenges

Labour-market characteristics

The consequences of both the pandemic and the war in Ukraine continue to have an important impact on the labour market. The most vulnerable groups in the labour market remain women, young people and people with low skills, while long-term unemployment continues to be a structural challenge. However, 2022's figures show a slight improvement in the situation.

The activity rate (age 15+) stood at 50.9% in 2021 and increased to 58.9% in 2022. The employment rate (15+) has significantly reduced due to the COVID-19 crisis, falling to 42.4% in 2021, compared to 48.7% in 2019. In 2022, the employment rate bounced back to 50.3% as effect of post-pandemic recovery, investments and support from the international community. The recovery was particularly strong in the service tourism and construction sectors.

Unemployment (age 15-74) decreased to 16.6% in 2021, compared to 17.9% in 2020. In 2022, unemployment stood at 14.7%. High long-term unemployment persists, at 11% in 2021, with 70% of all unemployed people being long-term unemployed. The unemployment rate among women in 2022 (12.8%) is lower than that for men (16.2%), and seems to be linked to a lower activity rate (66.0% male, 52.1% female). The gender employment gap remains high, at 45.4% for women compared to 55.3% for men in 2022 (EUROSTAT, 2022).

The consequences of the pandemic and the geopolitical situation are having a significant negative impact on labour-market indicators for young people. Youth employment (15-24) decreased from 27.3% in 2019 to 18.7% in 2021. Youth unemployment (15-24) increased from 25.2% in 2019 to 36% in 2020. In 2021, the youth unemployment rate stood at 37.1% (Eurostat, 2022), while the EU average in 2021 was 16.6%. While the highest share of unemployed people (15-74 age group) continues to be those with lower educational attainment, there is a significant percentage of young NEETs among those with upper secondary and higher education. Youth joblessness, including overall NEET incidence by education attainment, indicates that there are difficulties in transitioning from education to employment, paired with a skills mismatch.

The skills mismatch remains a significant challenge for the labour market for both youth and adult workers. The 2022 SME Policy Index assessment and the 2023 findings from the ETF analysis on skills in the agri-food sector (ETF, 2023) highlight the lack of SME skills as a critical factor for the economy. The vertical mismatch continues to affect workers with a tertiary level of education, with around 15% of these workers employed in jobs requiring qualifications below their level of education. The same type of mismatch affects only 8% of employed people with medium-level educational attainment (ETF, 2022). Many young people transition from VET to higher education or other programmes with less relevance for the labour market, which contributes to further discrepancies. Tertiary educational attainment stands at 41.3% of the total population, and is in line with the EU average in 2021. There continues to be an oversupply of tertiary education graduates from fields such as business and humanities, while medical and STEM graduates are lacking (ETF, 2020).

Geographical disparities remain large, with the north of Montenegro being the most disadvantaged and being exposed to significantly higher poverty and social exclusion risks. Roma and people with disabilities receive attention from the government but face additional challenges in integrating into the labour market, despite support for employment and education programmes targeting these groups.

Statistics on the labour market and employment

A labour market information system is being developed. The Statistical Office of Montenegro continues to provide labour-force data in line with EUROSTAT methodologies. The consequences of

the 2022 cyberattack for data delivery, policymaking and monitoring remain and have to be addressed.

3.2 Employment policy and institutional settings

Strategy and legal framework in the employment policy field

The National Employment Strategy for 2021-2024 and the related Action Plans are the framework documents for reforming the labour market. The priorities therein are particularly relevant for addressing the regional differences in the Montenegrin labour market. The documents also reflect 'Europe Now', the Montenegrin reform programme.

In line with Chapter 19 for accession, the Labour Law was adopted by the Parliament on 23 December 2019 (Official Gazette of Montenegro, No 74/19) and is revisited to reflect the *acquis communautaire*.

The legislative framework for innovation incentivises start-ups and the participation of female entrepreneurs. The law on encouraging research exempts start-ups from mandatory social security contributions. The overall aim is to foster employment.

Initiatives to boost employment

As in other economies in the region, most active labour market measures implemented have been subsidised employment schemes, while the regular provision of (re)training and start-up incentives remains scarce, mainly due to underfunding and limited contribution from the private sector. In 2023, 4% (EUR 4 million) have been available, which is an increase in allocations (Ministry of Labour and Social Welfare, 2023).

The government continues making efforts to provide ALMPs adequate to assist jobseekers in finding sustainable, long-term employment, and/or to continue to focus on re- and upskilling. Except for some reviews with the support of the RCC, there is a lack of comprehensive monitoring and impact assessment of the effectiveness of ALMPs, including following up on the number of beneficiaries that remain employed in the long term. This issue makes it difficult to adjust policies, which would allow quality training offers for unemployed people. The reviews of ALMPs by the RCC under ESAP II (Employment and Social Affairs Platform) (RCC, 2021) and the one by the ILO (ILO, 2022) point to missing data and digitised feedback loops to enable monitoring and inform reforms.

In July 2021 the government committed to the Youth Guarantee scheme, in line with flagship investment No 10 of the Economic and Investment Plan. Together with the European Commission (DG EMPL and DG NEAR), the ILO and the ETF continue to support the country in this endeavour. In 2022, Montenegro prepared an Implementation Plan and submitted a revised version in November 2022. The YG working group includes ministries, NGOs, social partners, trade unions and young people. Due to political instability in Montenegro, the document was not approved in 2023.

In drawing up concrete Youth Guarantee training offers, the government has revised the professional training programme for higher education, which has been in place and critically viewed for several years. The revised programme will give graduates a smoother transition into the labour market through practical experience.

As regards active labour market programmes implemented for jobseekers, the Employment Agency of Montenegro (EAM) continued implementing specific labour-market services and measures[2]. In 2022, a total of 48 428 people were registered as unemployed, a slight decrease from the previous year. Since 2019, the expenditure on active employment policy measures has been on the decrease, from almost EUR 3 million to EUR 2.1 million in 2022.

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[2] The information and data presented in the subsequent paragraphs are based on ETF ALMP data collection (2023) using publicly available sources (published activity reports and statistics), or data collected from public employment services in the EU neighbouring countries.

In 2022, the EAM delivered 382 277 individual consultations aimed at monitoring the implementation of the Individual Employment Plan. This was fewer than in 2021, reflecting the decrease in the total number of people registered as unemployed. Consultation sessions are organised at least every 45 days (each unemployed person receives more than one consultation session). Mediation in employment is a labour-market service that is becoming increasingly used since 2020. In 2022, there were 4 035 participants, while counselling (consultation) services were provided to 27 743 persons. In general, more women than men participate in these two types of services. Professional orientation refers to cumulative data on career services for unemployed persons with a primary and secondary education and was provided to 7 567 people in 2022, roughly the same number as in the past few years.

Provision of, and hence participation in, labour-market measures remains modest, covering only 1 024 jobseekers in 2022 (a number that has been declining since 2019). Among the causes is the limited financial resources available for active labour market programmes. Training was the category with the biggest number of participants in 2022 (321) with women making up the majority of beneficiaries (240). By educational level, it was used most by persons with a medium level of education (196). The second biggest measure is public works, with 320 participants in 2022. Most were women, were over 29 years old and had a medium level of education. Employment incentives were used by 135 people in 2022, a significant increase since 2021 (66). This measure was popular among those who are under 29 years old and those with a high educational level. Other programmes, like 'Activating Women' and youth employment support projects, registered a decrease in participants, from 510 in 2021 to 248 in 2022.

In 2022, 34.4% of people registered as unemployed transited from unemployment into employment (16 649 persons), with a relatively balanced gender representation (35.1% of men and 33.9% of women). Transition to employment is also higher for those under 29 years old. By level of educational attainment, the percentage of registered unemployed people who transited from unemployment into employment in 2022 is the highest for those with a tertiary education (80.5%) and very low for those with low levels of education (12.1%).

As regards the economic context and labour demand in which the Montenegrin public employment service operates, the total number of vacancies reported in 2022 was 27 997, a number that has been growing since 2020. By economic activity, the largest numbers of vacancies were reported for (i) education; (ii) accommodation and food services and (iii) wholesale and retail trade; repair of motor vehicles and motorcycles. The lowest numbers of vacancies were observed for (i) activities of the extraterritorial organisations and bodies; (ii) activities of the household as an employer; undifferentiated goods and service activities of the household for own use; and (iii) mining and ore extraction.

By major ISCO occupational group, the highest demand is for elementary occupations (ISCO group 9), with almost 17 000 vacancies registered in 2022; professionals (ISCO group 2), with around 6 000 vacancies; and occupations in services and trade (ISCO group 5), with just over 2 100 vacancies. The ISCO distribution of vacancies available in Montenegro reveals the significant challenge of unattractive employment opportunities (i.e. mainly occupations requiring no/low level of professional skills and low salaries) negatively impacting the overall activity and employment levels, as well as the school-to-work transition of young people.

Initiatives to increase the capacity of the public employment services

Employment policy is implemented by the Employment Agency of Montenegro (EAM). Additionally, the EAM's work experienced serious constraint and challenges in 2022 in terms of staffing, budgeting and infrastructure.

The IPA twinning arrangement for the EAM started in 2023 and is planned to unblock the problematic situation. In addition, further IPA support has been available since 2023 to prepare Montenegro for the implementation of the European Social Fund.

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STATISTICAL ANNEX – MONTENEGRO

The Annex includes annual data from 2010, 2015, 2019, 2020, 2021 and 2022 or the last available year.

	Indicator		2010	2015	2019	2020	2021	2022
1	Total Population (000) [1]		619.4	622.2	622.0	621.3	619.2	616.2
2	Relative size of youth population (age group 15-24 and denominator age 15-64, %) [1] C		21.1	20.1	19.5	19.2	19.0	18.9
3	GDP growth rate (%)		2.7	3.4	4.1	-15.3	13.0	6.1
4	Gross value added by sector (%)	Agriculture	7.7	8.1	6.4	7.6	6.5	6.3
		Industry	17.1	14.4	16.1	17.3	14.8	13.0
		Services	58.6	60.3	58.7	58.0	59.9	60.7
5	Public expenditure on education (as % of GDP)		M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
6	Public expenditure on education (as % of total public expenditure)		M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
7	Adult literacy (%) C		98.4[5]	M.D.	98.8[8]	M.D.	99.0	M.D.
8	Educational attainment of total population (aged 15-74) (%)	Low[2]	25.5[5]	22.0	19.1	19.3	20.4	18.4
		Medium[3]	58.4[5]	58.4	59.5	59.3	58.3	58.2
		High[4]	16.1[5]	19.7	21.4	21.3	21.3	23.3
9	Early leavers from education and training (aged 18-24) (%)	Total	7.2[5]	5.7	5.0	3.6	6.7	5.2
		Male	7.6[5]	4.9[9]	5.2[9]	3.6	5.4	2.7
		Female	6.6[5]	6.6[9]	4.9[9]	3.7	8.7	9.3
10	NET enrolment rates in secondary education (ISCED level 2-3) (%)		M.D.	90.1[7]	89.3	89.4	90.1	M.D.
11	Share of VET students in upper secondary education (ISCED level 3) (%)		68.2	67.2	68.2	68.9	69.3	M.D.
12	Low achievement in reading, mathematics and science – PISA (%)	Reading	49.5[6]	41.9	44.4[8]	N.A.	N.A.	N.A.
		Mathematics	58.4[6]	51.9	46.2[8]	N.A.	N.A.	N.A.
		Science	53.6[6]	51.0	48.2[8]	N.A.	N.A.	N.A.
13	Activity rate (aged 15+) (%)	Total	49.8	53.7	57.4	53.3	50.9	58.9
		Male	57.9	60.1	65.2	60.6	57.7	66.0
		Female	42.2	47.6	49.9	46.4	44.4	52.1
14	Inactivity rate (aged 15+) (%)	Total	50.2	46.3	42.6	46.6	49.1	41.1

	Indicator		2010	2015	2019	2020	2021	2022
		Male	42.1	39.9	34.7	39.4	42.3	34.0
		Female	57.8	52.4	50.1	53.6	55.6	47.9
15	Employment rate (aged 15+) (%)	Total	39.0[5]	44.3	48.7	43.8	42.4[11]	50.3
		Male	45.1[5]	49.4	55.7	50.0	47.8[11]	55.3
		Female	33.2[5]	39.4	42.1	37.9	37.3[11]	45.4
16	Employment rate by educational attainment (aged 15-74) (%)	Low[2]	14.3[5]	17.1	21.2	16.5	13.3	16.2
		Medium[3]	46.2[5]	49.8	53.9	48.1	44.0	52.1
		High[4]	68.4[5]	73.5	73.4	69.7	66.6	73.3
17	Employment by sector (%)[10]C	Agriculture	5.5[5]	7.7	7.1	7.5	6.4	4.3
		Industry	19.6[5]	17.5	19.4	18.4	16.9	19.0
		Services	74.9[5]	73.9	73.1	73.5	76.7	76.7
18	Incidence of self-employment (%)C		16.8	20.9	20.6	21.5	19.0	18.8
19	Incidence of vulnerable employment (%)C		9.6[5]	11.9	13.3	13.8	12.7	12.6
20	Unemployment rate (aged 15-74) (%)	Total	19.7[5]	17.6	15.2	17.9	16.6	14.7
		Male	19.3[5]	17.8	14.7	17.5	17.0	16.2
		Female	20.1[5]	17.3	15.7	18.4	15.9	12.8
21	Unemployment rate by educational attainment (aged 15-74) (%)	Low[2]	30.3[5]	28.3	26.0	33.6	28.0	20.2
		Medium[3]	20.5[5]	19.3	15.4	18.1	17.4	16.0
		High[4]	13.2[5]	10.3	11.3	13.2	12.3	11.1
22	Unemployment rate (aged 15-24) (%)	Total	36.6[5]	37.6	25.2	36.0	37.1	29.4
		Male	35.4[5]	39.9	25.8	33.6	40.0	34.1
		Female	38.4[5]	34.5	24.3	39.7	32.7	22.3
23	Proportion of people aged 15-24 not in employment, education or training (NEETs) (%)	Total	18.3[5]	19.1	17.3	21.1	20.2	20.0
		Male	18.4[5]	19.9	18.8	21.5	24.2	21.6
		Female	18.1[5]	18.3	15.8	20.6	15.9	18.2
	Proportion of people aged 15-29 not in employment, education or training (NEETs) (%)	Total	M.D.	23.4	21.3	26.6	26.5	23.2
		Male	M.D.	22.8	21.0	26.2	28.3	24.6
		Female	M.D.	24.1	21.5	26.9	24.6	21.8

	Indicator		2010	2015	2019	2020	2021	2022
24	Participation in training / lifelong learning (% aged 25-64)	Total	2.4[5]	3.0	2.5	2.7	5.2	3.2
		Male	2.6[5]	3.4	2.1	2.6	5.0	3.0
		Female	2.3[5]	2.5	3.0	2.8	5.4	3.4
25	Human Development Index		0.808	0.822	0.837	0.826	0.832	M.D.

Notes:

[1] Estimation.

[2] Low – ISCED 0-2.

[3] Medium – ISCED 3-4.

[4] High – ISCED 5-8.

[5] Applies to 2011.

[6] Applies to 2009.

[7] Applies to 2016.

[8] Applies to 2018.

[9] Unreliable.

[10] Totals do not add up to 100 due to economic activities not allocated by sector; Services (TOTAL and FEMALE) do not include 'Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use' and 'Activities of extraterritorial organisations and bodies'; Services (MALE) do not include 'Real estate'; FEMALE – Industry and construction includes only 'Construction activities' and 'Manufacturing activities' and 'Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use' and 'Activities of extraterritorial organisations and bodies'.

[11] 2021 from additional indicators table.

Legend:
C = ETF calculations
N.A. = Not applicable
M.D. = Missing data

Annex: definitions of Indicators

	Description	Definition
1	Total population (000)	The total population is estimated as the number of people having their usual residence in a country on 1 January of the respective year. When information on the usually resident population is unavailable, countries may report legal or registered residents.
2	Relative size of youth population (age group 15-24) (%)	This is the ratio of the youth population (aged 15-24) to the working-age population, usually aged 15-64 (or 15-74 or 15+).
3	GDP growth rate (%)	Annual percentage growth rate of GDP at market prices based on constant local currency. Aggregates are based on constant 2010 US dollars. GDP is the sum of gross value added by all resident producers in the economy, plus any product taxes and minus any subsidies not included in the value of the products. It is calculated without making deductions for depreciation of fabricated assets or for depletion and degradation of natural resources.
4	Gross value added by sector (%)	The share of value added from agriculture, industry and services. Agriculture corresponds to ISIC divisions 1-5 and includes forestry, hunting, fishing, crop cultivation and livestock production. Value added is the net output of a sector after adding up all outputs and subtracting intermediate inputs. It is calculated without making deductions for depreciation of fabricated assets or depletion and degradation of natural resources. The origin of value added is determined by the International Standard Industrial Classification (ISIC), revision 3 or 4. Industry corresponds to the International Standard Industrial Classification (ISIC) tabulation categories C-F (revision 3) or tabulation categories B-F (revision 4), and includes mining and quarrying (including oil production), manufacturing, construction, and public utilities (electricity, gas, and water). Services correspond to ISIC divisions 50-99 and include value added in wholesale and retail trade (including hotels and restaurants), transport, government, and financial, professional and personal services such as education, healthcare, and real estate services. Also included are imputed bank service charges, import duties, any statistical discrepancies noted by national compilers, and discrepancies arising from rescaling.
5	Public expenditure on education (as % of GDP)	Public expenditure on education expressed as a percentage of GDP. Generally, the public sector funds education either by directly bearing the current and capital expenses of educational institutions, or by supporting students and their families with scholarships and public loans, as well as by transferring public subsidies for educational activities to private firms or non-profit organisations (transfer to private households and enterprises). Both types of transactions together are reported as total public expenditure on education.
6	Public expenditure on education (as % of total public expenditure)	Public expenditure on education expressed as a percentage of total public expenditure. Generally, the public sector funds education either by directly bearing the current and capital expenses of educational institutions, or by supporting students and their families with scholarships and public loans, as well as by transferring public subsidies for educational activities to private firms or non-profit organisations (transfer to private households and enterprises). Both types of transactions together are reported as total public expenditure on education.
7	Adult literacy (%)	Adult literacy is the percentage of the population aged 15 years and over who can both read and write a short simple statement on their everyday life, and can understand it. Generally, 'literacy' also encompasses 'numeracy' – the ability to make simple arithmetic calculations.
8	Educational attainment of total population (aged 15+) (%)	Educational attainment refers to the highest educational level achieved by individuals, expressed as a percentage of all persons in that age group.

	Description	Definition
		This is usually measured in terms of the highest educational programme successfully completed, which is typically certified by a recognised qualification. Recognised intermediate qualifications are classified at a lower level than the programme itself.
9	Early leavers from education and training (aged 18-24) (%)	Early leavers from education and training are defined as the percentage of the population aged 18-24 with at most lower secondary education who were not in further education or training during the 4 weeks preceding the survey. Lower secondary education refers to ISCED 1997 levels 0-2 and 3C short (i.e. programmes lasting under 2 years) for data up to 2013, and to ISCED 2011 levels 0-2 for data from 2014 onwards.
10	NET enrolment rates in secondary education (ISCED level 2-3) (%)	This indicator covers enrolment in a given level of education of children/youths belonging to the official age group corresponding to the given level of education.
11	Share of VET students in upper secondary education (ISCED level 3) (%)	Total number of students enrolled in vocational programmes at a given level of education (in this case, upper secondary), expressed as a percentage of the total number of students enrolled in all programmes (vocational and general) at that level.
12	Low achievement in reading, maths and science – PISA (%)	Low achievers are 15-year-olds who fail to reach level 2 on the PISA scale for reading, mathematics and science.
13	Activity rate (aged 15+) (%)	The activity rate is calculated by dividing the active population by the population of the same age group. The active population (also called 'labour force') is defined as the sum of employed and unemployed people. The inactive population consists of all people who are classified as neither employed nor unemployed.
14	Inactivity rate (aged 15+) (%)	The inactivity/out-of-the-labour-force rate is calculated by dividing the inactive population by the population of the same age group. The inactive population consists of all people who are classified as neither employed nor unemployed.
15	Employment rate (aged 15+) (%)	The employment rate is calculated by dividing the number of employed people by the population of the same age group. Employed people are all people who worked at least 1 hour for pay or profit during the reference period or were temporarily absent from such work. If a different age group is used, this should be indicated.
16	Employment rate by educational attainment (aged 15+) (%)	The employment rate is calculated by dividing the number of employed persons by the population of the same age group. Employed persons are all persons who worked at least 1 hour for pay or profit during the reference period or were temporarily absent from such work. If a different age group is used, this should be indicated. Educational levels refer to the highest educational level successfully completed. Three levels are considered: Low (ISCED level 0-2), Medium (ISCED level 3-4) and High (ISCED 1997 level 5-6, and ISCED 2011 level 5-8).
17	Employment by sector (%)	This indicator provides information on the relative importance of different economic activities with regard to employment. Data is presented by broad branch of economic activity (i.e. agriculture/industry/services) based on the International Standard Industrial Classification of All Economic Activities (ISIC). In Europe, the NACE classification is consistent with ISIC.
18	Incidence of self-employment (%)	The incidence of self-employment is expressed by the number of self-employed people (i.e. employers + own-account workers + contributing family workers) as a proportion of the total employed population.
19	Incidence of vulnerable employment (%)	The incidence of vulnerable employment is expressed by the number of own-account workers and contributing family workers as a proportion of the total employed population.

	Description	Definition
20	Unemployment rate (aged 15+) (%)	The unemployment rate represents unemployed people as a percentage of the labour force. The labour force is the total number of people who are employed or unemployed. Unemployed people comprise those aged 15-64 or 15+ who were without work during the reference week; are currently available for work (were available for paid employment or self-employment before the end of the 2 weeks following the reference week); are actively seeking work, i.e. had taken specific steps in the 4-week period ending with the reference week to seek paid employment or self-employment; or had found a job to start later (within 3 months).
21	Unemployment rate by educational attainment (aged 15+) (%)	The unemployment rate represents unemployed people as a percentage of the labour force. The labour force is the total number of people who are employed or unemployed. Unemployed people comprise those aged 15-64 or 15+ who were without work during the reference week; are currently available for work (were available for paid employment or self-employment before the end of the 2 weeks following the reference week); are actively seeking work (had taken specific steps in the 4-week period ending with the reference week to seek paid employment or self-employment; or had found a job to start later (within 3 months)). Educational levels refer to the highest educational level successfully completed. Three levels are considered: Low (ISCED level 0-2), Medium (ISCED level 3-4) and High (ISCED 1997 level 5-6, and ISCED 2011 level 5-8).
22	Unemployment rate (aged 15-24) (%)	The unemployment rate represents unemployed people as a percentage of the labour force. The labour force is the total number of people who are employed or unemployed. Unemployed people comprise those aged 15-24 who were without work during the reference week; are currently available for work (were available for paid employment or self-employment before the end of the 2 weeks following the reference week); are actively seeking work, i.e. had taken specific steps in the 4-week period ending with the reference week to seek paid employment or self-employment; or had found a job to start later (within 3 months).
23	Proportion of people aged 15-24 not in employment, education or training (NEETs) (%)	The indicator provides information on young people aged 15-24 who meet the following two conditions: first, they are not employed (i.e. unemployed or inactive according to the ILO definition); and second, they have not received any education or training in the 4 weeks preceding the survey. Data is expressed as a percentage of the total population of the same age group and gender, excluding respondents who have not answered the question on participation in education and training.
24	Participation in training / lifelong learning (% aged 25-64)	Participants in lifelong learning refers to persons aged 25-64 who stated that they received education or training in the 4 weeks preceding the survey (numerator). The denominator is the total population of the same age group, excluding those who did not answer the question on participation in education and training. The information collected relates to all education or training, whether or not it is relevant to the respondent's current or possible future job. If a different reference period is used, this should be indicated.
25	Human Development Index	The index is a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and having a decent standard of living.

KEY DONOR PROJECTS IN EDUCATION, TRAINING AND EMPLOYMENT

Donor support to education and VET for young people and adults

The EU continues to be the major donor to Montenegro (EC Enlargement Package 2023, Montenegro Fiche). In 2023, the twinning agreement for the employment office and on developing active labour market measures, including the Youth Guarantee Programme, starting being operational. The IPA II education and labour-market component of SOPES (2015-2017) was concluded in 2022. Support under IPA III is underway, with a focus on energy in 2023 and 2024 for finalisation. The education sector review, with the support of UNICEF, was approved in 2023 and is expected to inform the IPA III / 2024/25 education strategy planning.

The Erasmus+ programme is another important tool for supporting education and VET for young people in Montenegro, which is an associated country at this moment in time.

The German KfW Bank, through its Western Balkans Challenge Fund for VET, brings together companies and training providers for infrastructure and skills development in the countries in the region. Montenegro is an active player in this programme, and the Chamber of the Economy is the lead partner of the initiative in the country.

Bilateral donors include the Austrian Development Agency with OeAD and the regional project for dual education, as well as Norway.

In the area of labour-market developments, the ILO and UNDP are working particularly closely with the government institutions, using both their own funds and EU Funds. The World Bank has also recently been involved in work in this area.

ABBREVIATIONS

ALMPs	Active labour market policies
EAM	Employment Agency of Montenegro
EBRD	European Bank for Reconstruction and Development
EC	European Commission
EIB	European Investment Bank
ERI SEE	Education Reform Initiative of South Eastern Europe
ESL	Early school leavers
ETF	European Training Foundation
EU	European Union
EURES	European employment services
GDP	Gross domestic product
ILO	International Labour Organization
IPA	Instrument for Pre-accession Assistance
ISCED	International Standard Classification of Education
ISCO	International Standard Classification of Occupations
JRC	Joint Research Centre
MoLSW	Ministry of Labour and Social Welfare
MONSTAT	Statistical Office of Montenegro
NEET	Not in employment, education or training
OeAD	Austrian Academic Exchange Service
OECD	Organisation for Economic Co-operation and Development
PIRLS	Progress in International Reading Literacy Study
RCC	Regional Cooperation Council
SILC	Survey on Income and Living Conditions
SME	Small and medium-sized enterprise
SOPES	Multi-annual Action Programme for Montenegro on Employment, Education and Social Policies
STEM	Science, technology, engineering and mathematics
TIMSS	Trends in International Mathematics and Science Study
UNDP	United Nations Development Programme
UNICEF	United Nations International Children's Emergency Fund

VET	Vocational education and training
YG	Youth Guarantee

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