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for Employment, Education
and Social Welfare



Mid-term evaluation of the Grant Scheme aimed at training and education activities for deficit occupations and for boosting employability of RE population

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• 1.6.2 Conducting the assessment of identified activities and providing recommendations for improvements of the programming / implementation of future programmes in the sector)

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The findings, conclusions and interpretations expressed in this document are those of the authors alone and should in no way be taken to reflect the policies or opinions of the European Commission.



Table of Content

List of acronyms and abbreviations.....	4
Executive Summary.....	5
Introduction.....	12
Objective of the evaluation.....	12
Scope of the evaluation.....	12
Stakeholders map.....	16
Methodology.....	17
Key methodological elements.....	17
The intervention logic.....	17
Limitations identified at the evaluation cut-off date.....	23
Responses to the evaluation questions.....	23
EQ1 – Relevance: To what extent has the Grant Scheme support been clear and consistent with the country needs, valid in terms of design and implementation of the SOPEES, country momentum, reform records and institutional needs?.....	23
EQ2 – Effectiveness: To what extent the Grant Scheme assistance contributed/ is expected to contribute to tangible improvements in employment sector?.....	27
EQ3 – Efficiency: To what extent was the preparation and implementation of the Grant Scheme managed adequately?.....	29
EQ 4 – Efficiency: To what extent the Grant Scheme made good use of the (financial and human) resources?.....	34
EQ 5 – Sustainability: To what extent are the envisaged outcomes of the Grant Scheme likely to produce effects after the end of EU funding?.....	37
EQ6 – Impact: To what extent has the assistance under the Grant Scheme contributed to increased employment in Montenegro?.....	39
EQ7 – EU Added Value: What is the added value of the EU intervention to support “Training and education activities for deficit occupations and for boosting employability of RE population in Montenegro” compared to interventions by member states, and/or other donors?.....	41
EQ8 – Complementarity: To what extent is the scope of the EU support to deficit occupations and RE employability aligned with/ complements other interventions of other donors?.....	42
Conclusions.....	43
Recommendations.....	49
Annexes.....	53
Annex 1 Evaluation matrix.....	53
Annex 2 Further details on the methodology.....	53
Annex 3 List of People Interviewed.....	56
Annex 4 List of main documents consulted.....	56
Annex 5 Other evaluation related documents.....	57



List of acronyms and abbreviations

CA	Contracting Authority
CFCU	Central Finance and Contract Unit
CfP	Call for Proposals
CN	Concept Notes
DAC	Development Assistance Committee (OECD)
DEU	Delegation of the European Union to Montenegro
EAM	Employment Agency of Montenegro
EBIT	Entrustment of budget implementation tasks
EC	European Commission
EIO	European Integration Office
EQ	Evaluation Questions
ERP	Economic Reform Programme
FA	Financing Agreement
FAF	Full Application Forms
GB	Grant Beneficiary/ies
GfA	Guidelines for Applicants
GS	Grant Scheme
IL	Intervention Logic
ISP	Indicative Strategy Paper
JC	Judgment Criteria
LLL	Life Long Learning
MED	Ministry of Economic Development
MFSW	Ministry of Finance and Social Welfare
MLSW	Ministry of Labour and Social Welfare
MS	Member State
NIPAC	National IPA Coordinator
OS	Operating Structure
PIU	Project Implementation Unit
RE	Roma and Egyptian
ROM	Results Oriented Monitoring
SOPEES	Sector Operational Programme for Employment, Education and Social Welfare
ToR	Terms of Reference

Executive Summary

Objectives and context of the evaluation

This mid-term result oriented evaluation is conducted in frame of the Multi-annual Action Programme for Montenegro on Employment, Education and Social Policies (IPA II 2015-2017) under the project “Technical Assistance to the Operating Structure for SOPEES”. The objective of this mid-term evaluation is the assessment of the on-going Grant Scheme “Training and education activities for deficit occupations and for boosting employability of RE population”¹ (in the text referred to as Grant Scheme 1 or Grant Scheme) to determine the extent to which the grants approved are so far meeting the objectives both in terms of the Grant Scheme contribution to objectives of SOPEES programme and related sector reforms and developments in accession process in scope of related negotiation chapters. In addition, the evaluation assesses the Grant Scheme 1 complementarity with other donors’ assistance and assesses the need for future programming of EU support in the sector concerned.. The cut-off date for analysed information is end of May 2021. In scope of the Grant Scheme “Training and education activities for deficit occupations and for boosting employability of RE population”, the following grant contracts were subject of evaluation:

- Contribution to social inclusion of the Roma and Egyptians from the Konik area through education and employment activities (GB: Montenegro Red Cross)
- Learn, work and earn (GB: GURU PLAST)
- Improved access to the labour market for women and youth in the Northeast of Montenegro (GB: Help - Hilfe zur Selbsthilfe)
- Boosting employability – creating sustainable solutions for RE population in the Northern region of Montenegro (GB: Help - Hilfe zur Selbsthilfe)
- Knowledge and skills in the function of better employability in hospitality industry (GB: PEI Hotel Education Center – Training Center Gastronom Club of Vuko Mitrovic)
- RE open Doors (GB: Capital City of Podgorica)
- Successful Measures for the Integration to the Labour Market (GB: PaMark)
- The Right Approach to Educate (GB: ZOPT)
- Empowering RE population to access the labour market (GB: CIN CG)

Methodology

The DAC evaluation criteria (relevance, effectiveness, efficiency, sustainability and impact) have been applied as an underlying basis. In addition, the evaluation team assesses the donors coordination (Complementarity/Coordination) and EU Added value. The evaluation is evidence based. The

¹ For the purpose of the evaluation, it includes the 1st and the 2nd Call for Proposals



Evaluation Questions were identified in the inception note and have given rise to a number of Judgment Criteria and associated indicators. The evaluation is indicator-based. For all EQs, data collection included a mixture of desk review of documents and semi-structured online/ face-to-face interviews with relevant stakeholders.

Responses to the Evaluation Questions

EQ1 on Relevance: *To what extent have the Grant Scheme support been clear and consistent with the country needs, valid in terms of design and implementation of the SOPEES, country momentum, reform records and institutional needs?*

EU support under the Grant Scheme has been clear and consistent with the country needs, valid in terms of design and implementation of the SOPEES as well as the reforms and institutional needs.

The Grant Scheme support relied on a comprehensive set of EU and national policies and strategy documents, which have been internally consistent. The objectives of the Grant Scheme correspond to the employment policy needs. The first priority policy need for Montenegro is to improve the regulatory environment and conditions for job creation, as well as increase employment opportunities for those who are inactive in the labour market. The individual grants' objectives are well aligned with the policy needs and focus on addressing issues like: reducing regional disparities, focus on increasing employment opportunities for youth and women, addressing deficit occupations (hospitality and tourism sector, construction sector) and focus on unemployed RE population. The relevance of the Grant Scheme was strengthened by the following approaches (1) possibility of receiving diploma/ certification (2) employers having a possibility to receive equipment to provide new services/ products. The Grant Scheme timing is relevant from the point of evolution of the needs of RE. The assistance focused initially on supporting adjustments in the legal system in relation to the status of foreigners, then on improving living conditions and now is starting to focus on increasing employment. There is good consistency between the GS objectives and the accession priorities in relation to reducing regional disparities, focus on increasing employment opportunities for youth and women, addressing deficit occupations (hospitality and tourism sector) and focus on employment of RE population. The quality of design of individual grants is adequate in terms of intervention logic and definition of indicators. The logical approach and indicators were used from the design phase and throughout the implementation of the grants.

The GS priorities remain valid in relation to the current policy needs. EC Progress Reports note the considerable regional disparities (North of Montenegro) affecting women and young people. There is a need for introducing better quality employment measures aiming at young people, women, disabled people and minorities.

However, the National Employment Strategy 2021-2025 was not adopted in 2020 as planned, but in December 2021, and therefore the validity of the GS priorities with the new strategy could not be assessed.

EQ2 on Effectiveness: *To what extent the Grant Scheme assistance contributed/ is expected to contribute to tangible improvements in employment sector?*

At the midterm of Grant Scheme implementation, its contribution to improvements in employment sector is visible. The expected results were achieved (for completed projects) or are expected to be achieved (for ongoing projects).

In the area of deficit occupations, the expected results were achieved or are expected to be achieved. RE population participating in the GS was empowered to enter labour market. The anticipated results were achieved, and in several cases exceeded the target values. Overall, the skills, knowledge and attitudes developed are proven by the official certifications and actual employment of the trainees of the grants. Based on the analysis of information available at the evaluation time, approximately 230 people received formal certificates/ training completion and out of which approximately 82 persons got employed/self-employed.

Effectiveness of the support was increased by using the following approaches: (1) measuring people's motivation before the application process, (2) going beyond technical skills development (e.g., soft skills), (3) nominating mentor for theory and practice for each trainee, (4) development of motivational tools, e.g., workshops for the target group to attract and motivate candidates, (5) organising workshops for employers, (6) adjusting to COVID restrictions, e.g., smaller groups of trainees, (7) using RE assistants to support trainees.

Grant Beneficiary organisations to a great extent remained in contact with many trainees and followed up their employment history. At the time of evaluation, Grant Beneficiary organisations confirmed that majority of trainees stayed on the job, e.g., all welders and mechanics were working, trainees in the media stayed in the media business and some of them started own business in the media sector and will continue education. Feedback from the employers (e.g., hospitality industry) confirms that they were very satisfied with the trainees' knowledge and skills.

EQ 3 on Efficiency: *To what extent was the preparation and implementation of the Grant Scheme managed adequately?*

Preparation and implementation of the Grant Scheme was managed adequately to some extent.

Preparation of GS and implementation of grant actions management shows room for improvements. There was significant time elapsed between programming (i.e., date of SOPEES approved by CID) and tendering (first Cfp for the GS launched) – 3.2 years and between programming and contracting – 4.15 years. Limited efficiency in the preparation and implementation of grant actions can be attributed to the process of assessment of the Montenegrin administration for indirect management of SOPEES, with ex-ante controls by DEU. 27 months passed from the submission of the request for EBIT until the signing of the FA which was pre-conditioned by the EC positive assessment of the readiness of the Montenegrin administration for indirect management of SOPEES programme. There were some delays in ex-ante control of GfA for the first Cfp, which was due to the quality of tender documents.



As the amount of funds originally planned for the award of grant through the GS was much higher than the amount of grant awarded to selected Grant Beneficiaries, the beneficiary proposed that another CFP for deficit occupations is launched in scope of the GS, for the amount that remained available after the first CFP. It took 12 months between the proposal for FA Addendum and the launch of the second CFP and in November 2021, the evaluation report was not approved yet. Regarding the “n+5” rule that applies for SOPEES, it is worth noting that planned 12 month implementation period of grant actions selected under the second CFP might enter in the year 2023 and generate ineligible cost for SOPEES programme if the contracts with selected GBs do not get signed by the end of 2021 and the actions completed by 2022. The COVID pandemics had a great impact on efficiency of the grants implementation. Deviations from work plans of grant actions have occurred in all nine grant projects. The main and generic reason for delays and changes in the implementation timelines relate to COVID-19 pandemic as the root cause. However, the grant actions’ progress was not endangered by delays due to proactive measures taken by the Grant Beneficiaries to reduce its impact. GBs have modified their originally planned organisation strategy and adjusted their approach to the respective target groups in the manner, which to the maximum extent possible ensured the implementation of activities within the extended implementation period. The GBs managed the risk mitigations strategies addressing the new risks due to COVID-19 situation.

Grant actions awarded under the first CFP were completed. The perspectives for the award and completion of selected grant actions of the second CFP are positive, provided that contracts get signed before the end of 2021 and the actions are completed by the end of 2022.

EQ 4 on Efficiency: *To what extent the Grant Scheme made good use of the (financial and human) resources?*

Grant actions will absorb the majority of grant contracted for selected grant actions and to a great extent made a good use of financial and human resources.

Grant Beneficiaries were entitled to receive pre-financing amount after the signature of the contract (e.g., 80% pre-financing of contracted grant amount). There were delays in payment of pre-financing (for three contracts) for almost five months, as some GBs faced problems in ensuring bank guarantees for pre-financing. In one case, this caused delays in implementation of some activities. Disbursements by GBs to large extent followed the work plan implementation in terms of timeliness related to project duration and the majority of GBs expected to receive the amount of grant contracted. However, for some grants the final amount of eligible cost recognised by the CA to some extent differed from the total amount of actual cost declared by GB. The deductions by the CA extend from app 3% to 11% of cost declared by GBs.

Adjustments in the implementation of grant actions were necessary, in order to ensure grant actions’ progress of implementations in spite of COVID-19 situation. Addenda to contracts were signed for extended project implementation beyond originally planned duration of 12 months for eight grant contracts out of nine.

All awarded grants were implemented in the crisis situation requiring risk management. Grant Beneficiaries discussed regularly the risks and risk mitigation strategies were in place.. Awarded GBs

were required to report on a quarterly basis on their progress through Monitoring Information, which inter-alia included a section on risks identified during reporting period and corrective measures, either planned or undertaken by GB.

Standard EU visibility requirements were respected by all awarded GBs in scope of the GS. At programme level, SOPEES programme website exists, with a separate section on each GS financed in scope of the programme.

A good balance on gender equality was achieved. However, awarded GBs reported on challenging traditional issues in this regard, e.g., Roma girls do not obtain education and their early marriages by tradition, and some occupations are traditionally more interesting for men than for women.

Green economy aspects were not taken into account beyond the Grant Beneficiaries' own procedures (e.g., less printing).

EQ 5 on Sustainability: *To what extent are the envisaged outcomes of the Grant Scheme likely to produce effects after the end of EU funding?*

At the midterm, there are good prospects that the envisaged outcomes of Grant Scheme are likely to produce effects after the end of EU funding.

Sustainability issues were taken into account at the design phase of the interventions and followed up to the final reports on the implementation.

All Grant Beneficiary organisations remained in operation after the project completion (or during the final stages of implementation). No evidence was found that any of the GBs will have difficulties to be operational and adequately staffed after grant financing closure.

The GBs plan follow up actions, e.g., developing a regional centre for training on tourism and there is a need for continuation of support, e.g., in other municipalities. Majority of GBs plan developing proposals to continue support to employment.

Future sustainability of the GS's outcomes is linked to the following issues: (1) comprehensive inter-sectoral approach including social housing, education and strategy for SMEs (self-employed), (2) key role of education supporting employment, (3) role of community centres to support GS and to interconnect services at local level.

EQ 6 on Impact: *To what extent has the assistance under Grant Scheme contributed to increased employment in Montenegro?*

The assessment of impact of the GS on increased employment is limited at the mid-term. There is a good level of achievement performance measured by indicators and reported, thus the outputs and expected outputs will contribute to increased employment.



The expected outputs of the completed grant actions (at the time of the evaluation cut-off date) will contribute to increased employment of persons trained for deficit occupations and increased number of members of RE population that received training. Approximately 82 people found employment or became self-employed.

The GS also contributes to the EU negotiation process priorities under chapter 19 as there is a need for introducing quality employment measures aimed at young people, women, disabled people and minorities.

Impact on the outreach to general public was noted, e.g., 150,000 people watched Vijesti with information on the GS and thus assisted in changing the perception on RE.

EQ 7 on EU Added Value: *What is the added value of the EU intervention to support “Training and education activities for deficit occupations and for boosting employability of RE population in Montenegro” compared to interventions by member states, and/or other donors?*

To some extent there was an added value of EU support compared to other donors.

The added value of the EU support was noted in regards to clear rules and transparency of EU support; EU assistance covers a lot of issues and tries to think in a comprehensive way to cover various issues; the added value of EU support is in its approach to minority rights, position of the RE population, working with disabilities and the importance of the rule of law. At the same time, it was noted that the reporting under the EU support is challenging, requiring time and human resources effort as compared to other donors and the duration of the grants (one year) is shorter as compared to other donors (e.g., two years with German assistance) for the same area of assistance covered.

In the future, the EU could make a difference with (1) including private sector in the grant scheme calls, (2) supporting policy dialogue on the need for the tax exemptions for employers, (3) allowing for time needed to invest in the target group – enhancing missing skills (writing, literacy, local language, financial skills).

EQ 8 on Complementarity: *To what extent is the scope of the EU support to deficit occupations and RE employability aligned with/ complements other interventions of other donors?*

The Grant Scheme assistance is complementary to other donors interventions to some extent.

The EU support to deficit occupations and RE employability was complementary to other assistance as noted in the relevant programming documents. There is limited evidence on sector donor coordination practices. The overall coordination has been performed by the Office of the Prime Minister, which has prepared and maintained the database for donor coordination purposes. A good experience with the working group under the Strategy for Roma inclusion was noted. In the working group, there are representatives of all institutions such as ministry of health, finance, education, and employment.

Key recommendations

Recommendations have been organised in two clusters: Cluster 1 – operational level recommendations and Cluster 2 - system level recommendations. Their brief summary is presented below. In detail, the recommendations are presented in the chapter on recommendations.

Cluster 1: Operational level recommendations

1. Close monitoring of timeline for the second Cfp implementation	MED and CFCU should closely monitor the timeline of implementation of the grants under the second Cfp of the GS. The “n+5” rule that applies for SOPEES implies that all grants contracted under the second Cfp (in 2021) have to be completed by the end of 2022. Costs generated in 2023 will be ineligible.
2. Guidance on eligible costs	MED (and CFCU) to provide timely identification of ineligible costs in order to avoid deductions of the final grant amounts.
3. Stronger involvement of the private sector	To ensure greater involvement of the private sector (employers) in the GSs implementation.
4. Guidance on green economy	MED to provide more guidance on green economy aspects to be taken into account during GSs implementation.
5. Exchange of good practices and lessons learnt	There is a need for supporting exchange of good practices and lessons learnt during implementation of the first Cfp as well as for identification of the needs on the ground for the future calls.

Cluster 2: System level recommendations

1. Strengthen policy dialogue on employment	EUD to conduct stronger policy dialogue on a comprehensive / inter-sectoral support to employment in order to increase the employability measures.
2. To strengthen comprehensive inter-sectoral approach to employment challenge	MED to strengthen the inter-service cooperation to support employment measures including with social housing, education, strategy for SMEs (self-employed).
3. MED should strengthen linkages with donors community and strengthen its sectoral donor coordination to ensure complementarity of support to employment	The evaluation evidence shows that the donor coordination for the employment sector is done to a limited extent and does not go beyond programming phase. The complementarity and efficiency of support to employment can benefit from stronger donor coordination conducted by MED.



4. Support of the Employment Agency of Montenegro regarding RE candidates

To ensure that the Employment Agency of Montenegro can provide support to identification of RE candidates for future trainings. At present, the Agency does not have ethnic origin data for selection of candidates.

Introduction

Objective of the evaluation

This mid-term result oriented evaluation is conducted in frame of the Multi-annual Action Programme for Montenegro on Employment, Education and Social Policies (IPA II 2015-2017) under the project “Technical Assistance to the Operating Structure for SOPEES”. The Activity 1.6.2 of the TA requires conducting an external mid-term result oriented programme evaluation, preceding the assessment and the development of an evaluation plan of relevant SOPEES actions or activities (TA Project Activity 1.6.1). Based on the elaborated evaluation plan for SOPEES Actions/Activities/projects under indirect management, [the Action 1/Activity 1: Grant Scheme “Training and education activities for deficit occupations and for boosting employability of RE population”](#) (Hereafter called: Grant Scheme or the Grant Scheme 1) was selected for mid-term evaluation.

The objective of this mid-term evaluation is the assessment of the on-going Grant Scheme 1² to determine the extent to which the grants approved are so far meeting the objectives both in terms of the Grant Scheme contribution to objectives of SOPEES programme and related sector reforms and developments in accession process in scope of related negotiation chapters.

In addition, the evaluation assesses the Grant Scheme 1 complementarity with other donors’ assistance and assesses the need for future programming of EU support in the sector concerned.

Scope of the evaluation

[Grant Scheme “Training and education activities for deficit occupations and for boosting employability of RE population”](#) is the subject of this mid-term evaluation.

The cut-off date for analysed information is end of May 2021.

The Financing Agreement for SOPEES was concluded on 12 July 2018 and was amended in August 2020 (FA Addendum signed on 28 August 2020), providing the formal basis for modifying the respective Operation Identification Sheet, introducing the 2nd CfP under Grant Scheme 1 as a “relaunch” of the saved funds after the 1st CfP.

The Grant Scheme 1 is implemented under **Action 1 – Improving the Labour Market and Increasing Employability** of SOPEES Operational Programme. The EU contribution foreseen for implementation of all activities under Action 1 is EUR 7,400,000, and the national contribution is EUR 1,300,000.

² For the purpose of the evaluation, it includes the 1st and the 2nd Call for Proposals

In overall, the Action 1 focuses on addressing the challenges related to high unemployment of youth (especially university graduates, regional disparities in employment rates increasing the competitiveness of labour force via trainings for deficit occupations, fostering entrepreneurship, improving local partnerships for employment, and ensuring better access to labour market for socially vulnerable groups. The objective of Action 1 is to improve conditions for the creation of new jobs for unemployed and inactive persons, by increasing their employability, having in mind regional needs and disparities, as well as equal opportunities, and to promote local employment initiatives.

The Action 1 was designed to contribute to the Employment and Social Reform Programme (ESRP) 2015-2020: Objective 1.1 Increase in the overall activity rate and employment rate objective by securing the increase of employability of the Montenegrin work force, in order to contribute to the increase of the employment rate for the population of 15 to 64 years to the levels 53%-56% by 2020.

The Action 1, among others, is expected to provide support that the unemployed persons will be trained, in order to increase their key competences and skills, and consequently, their competitiveness on the labour market and for deficit occupations and social inclusion will be supported and the employability of socially vulnerable groups will be increased.

Activity 1.1 Implementation of active labour market policy measures includes the following training activities foreseen:

1.1.2 Training activities:

1.1.2.1. Sustainable skills development for deficit occupations;

1.1.2.2. Increasing access to the labour market, increasing employment and providing support in acquiring entrepreneurial knowledge and skills through training programmes for Roma population.

The following indicators described in the FA Addendum are relevant for the scope of this evaluation:

- Level of employability of unemployed by their inclusion in active labour market measures;
- Percentage of unemployed persons benefited from skills development in deficit occupations.

Originally, the former Ministry of Labour and Social Welfare was nominated as the body responsible for the Action 1. Following the last parliamentary elections in 2020 and in accordance with the new Decree on the organisation and manner of work of the state administration, adopted on 7th December 2020 at the first session of the new elected Government of Montenegro, the organisation of state administration has been significantly changed. Due to it, the institutional framework for indirect management of SOPEES has changed as well. The Ministry of Labour and Social Welfare ceased to exist as separate institution. Labour market policy area has been transferred to the Ministry of Economic Development and the social policies area to the Ministry of Finance and Social Welfare.

In accordance with Annex VIII of SOPEES related FA, Action 1 operations are further specified in the Operation Identification Sheets. The GS that is subject to midterm evaluation is specified under OIS for **Activity 1.1 as Activity 3**: Implementation of training and education for deficit occupations and



training activities to boost employability of RE population, with two components:

- Design and deploy trainings for occupations in demand (deficit occupations). This will include counselling and guidance, training and educational activities, on-the-job trainings, and support post-graduation to find a job.
- Training programmes for RE population – activities such as tailor-made trainings and educational activities in compliance with RE population needs, including intensive individual support to overcome social and psychological barriers and actions to remove/reduce prejudices among employers.

Implementation of training and education for deficit occupations and training activities to boost employability of RE population – Main characteristics:

- Response to emerging skills mismatch in the country;
- To tackle the problem of low or inadequate qualifications and skills the jobseekers hold;
- Target group: jobseekers with low level of education or qualifications and skills not matching labour market demand and long term unemployed;
- Training to be organised in accordance with labour market needs;
- Special attention to be paid to deficit occupations;
- Special training activity focused on unemployed members of RE population;
- Training for RE population members and other vulnerable groups should include additional support, counselling, awareness raising activities among employers to mitigate barriers and prejudices;
- Local level cooperation and partnership based actions to be promoted (municipalities, schools, NGOs, social partners);
- The following types of upskilling/reskilling measures to be deployed: improvement of professional skills, gaining of new knowledge, skills and competences for independent performance tasks, gaining of first occupation, and implementation of on-the-job training in line with defined employers' needs.

This Activity 3 is being implemented by the **following Grant Schemes**:

Grant Scheme	Start date	Budget (EU and national contribution) / Contract value	Planned duration of grant projects	Completion at the cut-off date of evaluation
Training and education activities for deficit occupations and for boosting employability of RE population (EuropeAid/163191/ID/ACT/ME) 1 st CfP	April 2019 (deadline for concept notes)	1,678,235.31 Euro	12-14 months	Ongoing implementation

Implementation of training and education for deficit occupations (EuropeAid/171432/ID/ACT/ME) 2 nd CFP	April 2021 (deadline for concept notes)	710,730.55 Euro	6-12 months	Concept notes under review - no grantees selected
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Under the ongoing Grant Scheme (1st CFP), the following grant contracts have been awarded:

	Grant title	Implementing organisation (GB)	Start date	End date	Status at the cut-off date of evaluation
1	Contribution to social inclusion of the Roma and Egyptians from the Konik area through education and employment activities (No 1)	Montenegro Red Cross	01.12.2019	01.06.2021	Completed
2	Learn, work and earn (No 2)	Društvo za proizvodnju, promet i usluge, export-import IvaStefan Consulting D.O.O. Business unit GURU PLAST	10.02.2020	10.02.2021 Duration extended to 10.05.2021	Completed
3	Improved access to the labour market for women and youth in the Northeast of Montenegro (No 3)	Help - Hilfe zur Selbsthilfe	20.11.2019	20.11.2020 Duration extended to 20.01.2021	Completed
4	Boosting employability – creating sustainable solutions for RE population in the Northern region of Montenegro (No 4)	Help - Hilfe zur Selbsthilfe	20.11.2019	20.11.2020 Duration extended to 20.01.2021	Completed
5	Knowledge and skills in the function of better employability in hospitality industry (No 5)	PEI Hotel Education Center – Training Center Gastronom Club of Vuko Mitrovic-	01.12.2019	01.12.2020 Duration extended to 01.05.2021	Completed
6	RE open Doors (No 6)	Capital City Podgorica	15.01.2020	15.01.2021 Duration extended to 15.07.2021	Ongoing



7	Successful Measures for the Integration to the Labour Market (No 7)	PaMark Ltd.	22.11.2019	22.11. 2020 Duration extended to 22.08.2021 (implementation suspended from Nov20-Apr21)	Ongoing
8	The Right Approach to Educate (RAE) (No 8)	The Centre for Employment and Education of Adults, Organizing and Conducting a Psychosocial Professional Rehabilitation "ZOPT" Ltd Podgorica	22.11.2019	22.11.2020 Duration extended to 22.01.2021	Completed
9	Empowering RE population to access the labour market (No 9)	Centar za istraživačko novinarstvo Crne Gore (CIN CG)	01.01.2020	01.01.2021	Completed

Stakeholders map

The main groups of stakeholders relevant for the Action's Grant Scheme implementation are presented below:

Project beneficiaries:

- Former Ministry of Labour and Social Welfare (until December 2020)
- Ministry of Economic Development (from December 2020)

Target Groups:

- Unemployed persons, especially the long-term unemployed,
- Young people,
- Women,
- Persons with low education levels,
- Members of socially vulnerable groups at risk of social exclusion, especially RE population,
- Employers,
- Educational institutions and training providers.

Other bodies involved:

- DEU,
- EIO/ NIPAC Office
- MFSW/ CFCU.

Methodology

Key methodological elements

The mid-term evaluation is evidence based.

The DAC evaluation criteria (relevance, effectiveness, efficiency, sustainability and impact) have been applied as an underlying basis. In addition, the evaluation team assesses the donors coordination (Complementarity/Coordination) and EU Added value.

The Evaluation Questions were identified in the inception note and have given rise to a number of Judgment Criteria and associated indicators. The evaluation is indicator-based.

For all EQs, data collection included a mixture of desk review of documents and semi-structured online/ face-to-face interviews with relevant stakeholders.

All information was triangulated (as far as relevant) to the greatest extent possible. This includes validation of data through cross-verification from more than two sources. It also includes, to the extent possible, supplementary data collection methods, e.g., from statistics, interview, observation – to generate and test the findings.

The Intervention Logic plays a key role in explaining how and why the Grant Scheme is expected to bring about the desired results and impacts.

Details on the methodology are presented in Annex 2.

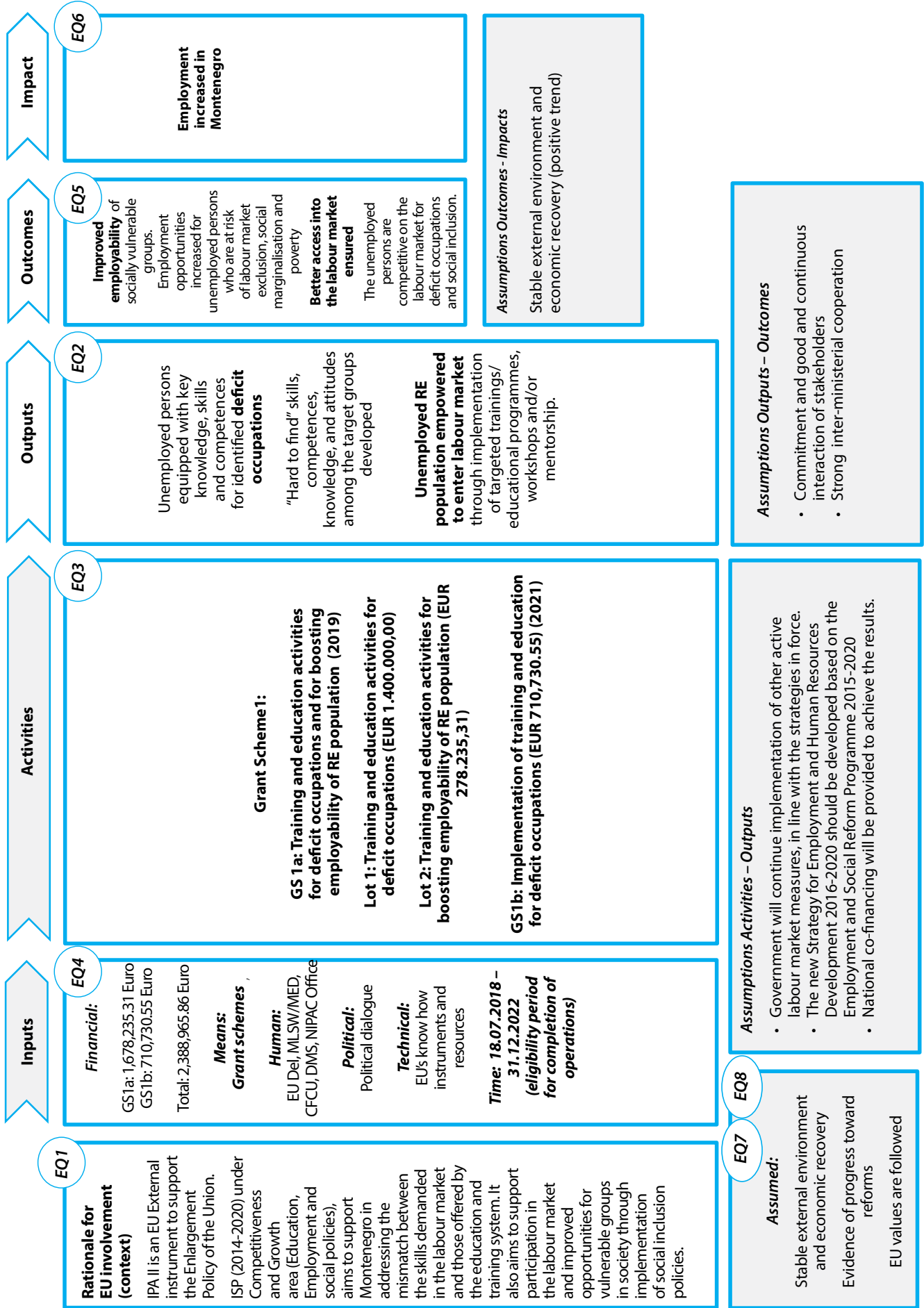
The intervention logic

This chapter presents the intervention logic with its narrative description elaborated in the inception phase.



Effectiveness

Efficiency



Intervention Logic (narrative)

The intervention logic (IL) of the Grant Scheme 1 was elaborated in the inception phase and its validity is confirmed in this report. It was elaborated on the basis of key documents such as Financing Agreement and its Amendment and Grant Scheme 1 related Guidelines for Grant applicants. The IL defines the impact, outcomes, outputs, activities and inputs contributing to or resulting from the implementation of the Grant Scheme.

The analysis of the IL is complemented with the identification of the assumptions required for the realisation of the causal relationships.

The analysis for the determination of the approach to be followed in the present evaluation and of the specific judgment criteria and indicators to be used under each evaluation question was logically based on the reconstructed intervention logic of the Grant Scheme.

It can be seen that Grant Scheme 1 has the overall intention to increase employment in Montenegro (impact).

The achievement of this **overall objective (impact)** is intended to be achieved on a number of **outcomes** such as:

- Improved employability of socially vulnerable groups: employment opportunities increased for unemployed persons who are at risk of labour market exclusion, social marginalisation and poverty
- Better access into the labour market ensured; the unemployed persons are competitive on the labour market for deficit occupations and social inclusion.

The Guidelines for Applicants further specify **outputs** which are planned to be produced:

- Unemployed persons equipped with key knowledge, skills and competences for identified deficit occupations
- Hard to find skills, competences, knowledge, and attitudes among the target groups developed
- Unemployed RE population empowered to enter labour market through implementation of targeted trainings/ educational programmes, workshops and/or mentorship.

The above-mentioned outputs will be achieved through **activities** such as:

- 1st CfP of Grant Scheme 1 - Training and education activities for deficit occupations and for boosting employability of RE population (2019), with two lots:
 - o Lot 1: Training and education activities for deficit occupations
 - o Lot 2: Training and education activities for boosting employability of RE population
- 2nd CfP of Grant Scheme 1 – Implementation of training and education for deficit occupations (2021).

The inputs required for the implementation of the activities, the production of outputs and the



contribution to outcomes and impacts comprise the Grant Scheme budget estimated at a total of 2,366,965 Euros, the involved human resources (relevant stakeholders), political inputs (non-spending activities: EU political dialogue) and technical inputs (know-how), all framed by the overall deadlines for operational implementation until 31 December 2022. The total available funds for this Grant Scheme coupled by national funds are expected to suffice for the achievement of the anticipated results. The FA and its Addendum do not mention the involvement of other donors.

The assumptions/ preconditions are presented at main levels of the IL. They are necessary for going from one level to the immediate higher one (e.g., an outcome can be achieved when corresponding outputs have been produced and at the same time, a set of assumptions/ preconditions are existing).

Rationale and context

The Grant Scheme 1 intention to increase employment in Montenegro is linked to Montenegro's efforts on increasing employment levels as specified in the sectoral policies.

The EU's objectives in the area of social policy and employment (Chapter 19 of the EU negotiations) require the EU rules in the social field and employment include minimum legal labour standards, equality, health and safety at work and non-discrimination as well as promote social dialogue.

The revised Labour law, intended to improve the functioning of the labour market was adopted by the Parliament in December 2019. The Labour law and the linked anti-discrimination law were planned to be further aligned with the EU acquis in this area during 2020.

The 2020 EU Progress report³ notes that Montenegro continues to implement its national strategy for employment and human resources development however, the effectiveness of the implementation remains difficult to assess due to lack of systematically collected data via monitoring and evaluation activities. The unemployment rate was 15.2% in 2019. The activity rate continued to improve, but is still low at 57.4%, while regional disparities persist, with unemployment disproportionately high in the north with 36% as compared to 5.5% in the coastal region. Long-term unemployment remains a major structural challenge, with 63% unemployed being out of work for more than two years. The most vulnerable groups on the labour market remain women, youth, Roma and low skilled workers. Of these the Roma and Egyptian community make up around 2% of the total registered unemployed.

The 2021 EC Progress Report⁴ for Montenegro was published on 19 October 2021. Key findings of the 2021 EC report on Montenegro related to sector of employment, education and social policies notes that Montenegro has some level of preparation on social policy and implement. It notes that limited progress was made during the reporting period, including the deployment of the labour law and adoption of the new law on pensions. The recommendations from last year remain. It finds that appropriate monitoring of the implementation of the national strategy for employment and human resources development remains difficult due to the lack of systematically collected data. It observes that the effectiveness and coverage of active labour market policies, which should be in place to assist job seekers finding employment remains insufficient. The most vulnerable groups on the labour market remain women, youth, Roma and low skilled workers. It also notes that building stronger links between employment and social services remains crucial in order to remove potential

3 Montenegro 2020 Report COM (2020) 353

4 Montenegro 2021 Report COM (2021) 293

disincentives to employment.

The main challenges identified at the time of SOPEES Programme design relevant for the Grant Scheme 1 included:

- One of the major challenges that characterise the labour market in Montenegro is uneven development of its three geographical regions: northern, central and coastal. Migratory movements and outflow of the labour force from the northern region towards central and coastal region also resulted in a decline in economic activity of the northern region in the last two decades, as well as in strong depopulation of rural areas;
- Along with strong seasonal nature of employment, the prominent specificity of Montenegro is the employment of foreigners (mostly in tourism, agriculture and construction);
- High youth unemployment. The share of youth in the total number of the unemployed at the end of 2014 was 20.87%.

The Screening Report for Montenegro for Chapter 19 states that it is necessary to take decisive action to increase activity and employment rates, to eliminate the mismatch between needs and available skills, as well as to strengthen the capacities of the Employment Agency of Montenegro for efficient and timely implementation of active labour market policy measures. Further work is needed on eliminating discrepancies in development and employment between the northern and other regions of the country. Sufficient attention should be also paid to adult education and training.

The activities Sustainable skills development for deficit occupations and Increasing access to the labour marker, increasing employment and providing support in acquiring entrepreneurial knowledge and skills through training programmes for RE population are based upon **the active employment measure “Education and Training”**. Active employment measures are organised and delivered to the end-users on the labour market in line with the Law on Employment and Exercising of Unemployment-based Rights and the related Rulebook on the conditions, manner, criteria and scope of implementing active employment policy measures. Education and training active employment measures include the activities that are used to provide the unemployed persons with the possibility to use education and training programmes to upgrade their knowledge within same occupation and education level, to acquire professional qualification, to be retrained and to acquire key skills, with the aim of improving their competitiveness on the labour market, i.e., ensuring their direct employment. The target groups of these programmes are long-term unemployed persons with inadequate knowledge and skills, persons with occupations not demanded on the labour market, persons without occupation, RE population, unemployment benefit users and users of other social care benefits, and other persons from the EAM register who are interested in participation in the programmes.

In line with the Rulebook on the conditions, manner, criteria and scope of implementing active employment policy measures the public calls are launched for the selection of education and training provider(s), with precisely defined deadlines, criteria and other conditions for their selection.

In relation to sustainable skills development for deficit occupations, the priority shall be given to construction, tourism, energy, agriculture and rural development sectors, in line with the National



Development Plan. The labour market surveys may serve as a solid information basis to define the economic activities with expressed demand for deficit occupations on the labour market.

In line with the EU 2020 Strategy and the sustainable growth concept one of the aims is to include the **green economy** aspect into the delivery of training and education courses for occupations in the target sectors.

At the time of Action design (2015) the following documents outlined the **Actions relevance**:

- **IPA II Regulation** states that financial assistance shall address five policy areas, one of them being: employment, social policies, education, promotion of gender equality, and human resources development.
- **Indicative Strategy Paper for Montenegro (2014-2020)** (ISP) notes that the high unemployment rate in Montenegro represents a serious challenge and will require improvements in the area of education and human resources development in order to respond to the labour market needs. IPA assistance will aim to improve access to health, education and employment opportunities for all citizens, with a particular focus on socially disadvantaged or marginalised groups and to support the implementation of the national strategy for social and economic integration of the Roma on track. IPA II Actions shall focus on labour market reform with the aim of having a more flexible and dynamic employment system and improving the human resource management of businesses. The indicators to be used to measure the accomplishment of the expected results of EU assistance in this area include: employment rate of population of 15 to 64 years, total 52-53% (for 2020 target year).
- **Montenegro 2015 Progress Report** notes that in the coming years Montenegro should focus on increase the active labour measures on the employability of young people, the long-term unemployed and people from vulnerable groups.
- **Montenegro Development Directions 2013-2016** in the area of labour market aims at higher employment of the active population.
- **Montenegro Economic Reform Programme (ERP) 2015-2017 and the Employment and Social Reform Programme 2015-2020** are based on the Montenegro Development Directions 2013-2016. In both documents, inclusive growth is seen as an impetus for increasing employment and reducing unemployment and, among others, increasing the activity of the working age population. ERP sets specific goals related to the labour market such as strengthening active labour market policies and increase the flexibility of the labour market.
- **The Employment and Social Reform Programme 2015-2020 (ESRP)** identifies objectives with a purpose of reducing low employment rate and high inactivity of the workforce, regional disparities on the labour market, unemployment of young people, aligning education system with labour market needs, low participation rate in adult education and LLL, supporting quality assurance of education at all levels, insufficiently developed local community service system and insufficient inclusion of socially vulnerable groups on the labour market as challenges.
- **Montenegro National Strategy for Employment and Human Resources Development (2016-2020)** represented the main strategy in the sector and aimed at improving the conditions for job

creation and investment in human capital so as to improve the conditions for job creation and investment in human capital so as to improve employment levels in Montenegro.

- ***The National Strategy for Adult Education and Training (2015-2020)***: the implementation of training activities is a contribution to the strategy objectives, particularly with regard to increasing the competence of employed with the aim of achieving an accelerated economic growth and to improving knowledge, skills, and competences for adults for employability, labour market mobility and competitiveness.
- ***The Government Action Plan “Decade for Roma Inclusion” 2005-2015*** recognises employment as one of the priority areas. The EAM was included in the elaboration of the Plan and invested efforts in improving employability and employment of RE population.

Limitations identified at the evaluation cut-off date

- The evidence for impact of the Grant Scheme can be limited as some of the awarded grant actions are still under implementation and the second call for grants is currently in the evaluation phase.
- The source of evidence for sustainability and the EU Added Value of the Grant Scheme was from the field phase interviews.

Responses to the evaluation questions

EQ1 – Relevance: To what extent has the Grant Scheme support been clear and consistent with the country needs, valid in terms of design and implementation of the SOPEES, country momentum, reform records and institutional needs?

The analyses of relevance are based on the question to what extent has the Grant Scheme support been clear and consistent with the country needs, valid in terms of design and implementation of the SOPEES, country momentum, reform records and institutional needs. The assessment is based on the investigation of three factors (corresponding to the judgment criteria) that were determined, namely (JC 1.1.) extent to which the objectives of the Grant Scheme are in line with the policy needs and contribute to increase of employment opportunities for unemployed persons who are at risk of labour market exclusion, social marginalisation and poverty, (JC 1.2) adequacy of the quality of design of individual grants in terms of intervention logic and definition of indicators and (JC 1.3) extent to which the priorities chosen at the time of Action design are still relevant.

EQ 1 Summary Findings:

The evidence shows that the objectives of the Grant Scheme are corresponding to the employment sector policy needs. Objectives of both calls for proposals correspond to the policy needs identified in the Employment and Social Reform Programme for Montenegro (2015-2020) and the Indicative Strategy Papers for Montenegro (2014 and revised in 2018). The first priority policy need for Montenegro is to improve the regulatory environment



and conditions for job creation, as well as increase employment opportunities for those that are inactive in the labour market.

The individual grants' objectives show that they correspond to a high degree to the policy needs. The grants objectives addressed issues like: reducing regional disparities, focus on increasing employment opportunities for youth and women, addressing deficit occupations (hospitality and tourism sector, construction sector) and focus on unemployed RE population. Objectives of two grants also focus on the less-developed areas in the North of Montenegro thus contributing to reduction of regional disparities. They correspond to the National Employment Reform Programme and are consistent with the Indicative Strategy Paper for Montenegro (2014-2020). All interviewers in the field phase confirmed the relevancy of the Grant Scheme to the policy needs of the country and employment sector needs. The relevance of the Grant Scheme was strengthened by the following approaches: possibility for receiving diplomas/ certificates, which increased the motivation to participate; employers receiving equipment to provide new products/ services; the right timing for support for employment (e.g., for RE) which follows on the evolution of support adjusting the legal system in relation to the status of foreigners, then improving living conditions and now starting to focus on increasing employment. It was noted that in the future more assistance to be channelled through companies in order to increase further the relevance of the GS.

A good degree of consistency between the GS objectives and the accession priorities was observed in relation to reducing regional disparities, focus on increasing employment opportunities for youth and women, addressing deficit occupations (hospitality and tourism sector) and focus on employment RE population. Progress towards Chapter 19 on Social Policy and Employment is presented in the annual EC progress reports. The EC Report 2020 notes the considerable regional disparities, with unemployment disproportionately high in the north of the country, particularly affecting women and young people. It noted that there is a need for introducing better quality employment measures aiming at young people, women, disabled people and minorities. The EC Report 2021 notes limited progress during reporting period with recommendations from last year remaining valid. It notes insufficient data coverage to monitor strategies implementation, the effectiveness and coverage of active labour market policies remains insufficient. It also highlights that stronger links between employment and social services remains crucial in order to remove potential disincentives to employment. The EPR (2019-2021) noted that the challenges remain with regard to insufficient engagement of the population in the labour market that is able to work, particularly women and young people, long-term unemployed.

The quality of design of individual grants is adequate in terms of intervention logic and definition of indicators. The logical approach and indicators were used from the design phase and throughout the implementation of the grants.

Priorities chosen at the time of Action design remain relevant. The initial and present objectives and priorities remained unchanged. The most vulnerable groups on the labour market remain women, youth, Roma and low skilled workers. Key challenge noted is increasing employment, particularly of women, and young people and tackling long-term unemployment. At the time of conducting the evaluation, there was no valid sector strategy to set the priorities. The National Employment Strategy 2021-2024 was not adopted as planned in 2020.



JC 1.1 The objectives of the Grant Scheme are in line with the policy needs for the employment sector in Montenegro (Grant Scheme design time) and contribute to increase employment opportunities for unemployed persons who are at risk of labour market exclusion, social marginalisation and poverty.

The objectives of the Grant Scheme are corresponding to the employment sector policy needs (I.1.1.1). The first CfP objective (in 2019) aimed at increasing employment opportunities for unemployed persons who are at risk of labour market exclusion, social marginalisation and poverty. The second CfP (2021) aimed at increasing employment in Montenegro and supporting development of 'Hard to find' skills, competences, knowledge, and attitudes among the target groups (jobseekers with low level of education, or qualifications not matching labour market demand and long-term unemployed persons, amongst these prioritised are women and youth. Both calls objectives correspond to the policy needs identified in the Employment and Social Reform Programme for Montenegro (2015-2020) such as long-term unemployment what is a particularly unfavourable characteristic of the labour market with regional differences. The programme notes that deficit exists in certain occupations, especially in the field of construction, tourism and hospitality. The Indicative Strategy Papers for Montenegro (2014 and revised in 2018) note that in the context of unemployment rate, reforming not only the labour market system, but also the education, training and research system as well as health, social protection and inclusion policies represent important policy objective. It notes that an important challenge for Montenegro is addressing the significant mismatch between the output of the education system and the market demand for labour and that it results in low participation levels in the labour market and a high official unemployment rate, in particular among women and disadvantaged groups. The first priority policy need for Montenegro is to improve the regulatory environment and conditions for job creation, as well as increase employment opportunities for those that are inactive in the labour market.

The individual grants' objectives show that they correspond to a high degree to the policy needs (I.1.1.2). The grants objectives addressed issues like: reducing regional disparities, focus on increasing employment opportunities for youth and women, addressing deficit occupations (hospitality and tourism sector, construction sector) and focus on unemployed RE population. Objectives of two grants also focus on the less-developed areas in the North of Montenegro thus contributing to reduction of regional disparities. These objectives are corresponding to the National Employment Reform Programme which aims at reducing regional disparities, increasing employment of domestic labour work including reducing the youth unemployment, addressing the deficit occupations especially in the field of construction, tourism and hospitality and supporting greater access to the labour market of the RE population and persons with disabilities. The grant objectives are also consistent with the Indicative Strategy Paper for Montenegro. **All interviewers in the field phase confirmed the relevancy of the Grant Scheme to the policy needs of the country and employment sector needs** (e.g., focus on RE, North of the country, deficit occupations, women and young people). The relevance was strengthened by the following approaches: possibility of receiving diplomas/ licences (many adults do not have certificates of formal education) which increased the motivation of trainees to search for the job; possibility for employers to receive equipment which they needed for providing new services/ products and to use the energy efficiency solutions and building trust with the trainees (e.g., engagement of local decision makers). The evolution of the assistance to RE was also noted. Over the last 20 years the focus of assistance to RE was on adjusting the legal system in Montenegro in relation to the status



of foreigners (e.g., access to education, health services and social welfare) that people can leave in normal conditions. At present, the foreigners have all rights (not voting rights). Later, the EU assistance was focused on improving the living conditions. The next logical step is to focus the assistance on supporting employment and elderly members of population. The lesson learnt was identified to channel more assistance through companies in the future in order to increase further the relevance of the GSs.

There is a good degree of consistency between the Grant Scheme objectives and the accession priorities (I.1.1.3) in relation to reducing regional disparities, focus on increasing employment opportunities for youth and women, addressing deficit occupations (hospitality and tourism sector) and focus on employment of RE population. Accession priorities for the employment sector are covered by the Chapter 19 on Social Policy and Employment, which was opened for negotiations in 2016. Montenegro efforts are needed in the following areas (1) amendments to the labour law and the law on safety and health at work in order to align its legislation and to demonstrate the adequate administrative structures and enforcement capacity (2) amending the laws on non-discrimination and equality and demonstrating the adequate administrative capacities and (3) strengthening administrative capacities to ensure effective implementation and effective enforcement of all legislative and policy frameworks in the areas of employment. The EC progress report (2019) noted that regional disparities are considerable, with unemployment disproportionately high in the north of the country, particularly affecting women and young people. It also noted that Roma and Egyptian community makes 2% share in the total registered, and the EC progress report (2020) noted that Montenegro should introduce better quality employment measures aimed at young people, women, disabled people and minorities. It also notes that long-term unemployment remains a major structural challenge and the most vulnerable groups on the labour market remain women, young, Roma and low skilled workers. Since 2015 the candidate countries submit annual Economic Reform Programmes with objectives and progress with structural reform agenda to boost competitiveness and improve conditions for inclusive growth and job creation in several areas including employment and labour market. The EPR (2018-2020) notes the need for active employment policy measures to help the long-term unemployed, young people and women with the purpose of their greater inclusion in the labour market. The EPR (2019-2021) noted that the challenges remain with regard to insufficient engagement of the population in the labour market that is able to work, particularly women and young people, and long-term unemployed.

JC 1.2 The quality of design of individual grants (contracts) is adequate in terms of intervention logic and definition of indicators

The logical approach and indicators were used from the design phase and throughout the implementation of the grants (I.1.2.1). Both CfPs note that the projects must contribute to the objectives and the achievements shall be measured by a set of indicators, which are specified. They also require that the logical framework is presented in the application. Final reports reviewed provide evidence that the achievements were measured by indicators at the end of the project. They are described with the output/ outcome values in the reports. The final reports include also the log frame with all the outputs and indicators' values. The evidence shows that the Monitoring Information sheets, provided periodically by the Grant Beneficiaries, include log frames and reporting on progress towards results by indicators.

JC 1.3 Priorities chosen at the time of Action design are still relevant

The initial and present objectives and priorities remained unchanged (I.1.3.1). EC Progress Report for 2020 noted that Montenegro should introduce better quality employment measures aimed at young people, women, disabled people and minorities. The most vulnerable groups on the labour market remain women, youth, Roma, and low skilled workers. The EC assessment of the EPR (2021-2023) noted that although the labour market continued to improve prior to the COVID-19 pandemics, the persistently low activity and high unemployment rates, especially among women, young people and the low-skilled, reflect structural issues. Key challenge noted is increasing employment, particularly of women, and young people and tackling long-term unemployment. Despite a slight improvement, there are still great geographical disparities. Roma and persons with disabilities face additional challenges in accessing the labour market, despite the continued support from employment and education programmes targeting those groups. At the time of conducting the evaluation, there was no valid sector strategy to set the priorities. The National Employment Strategy 2021-2025 was not adopted in 2020 as planned, but in December 2021.

EQ2 – Effectiveness: To what extent the Grant Scheme assistance contributed/ is expected to contribute to tangible improvements in employment sector?

The analysis of effectiveness are based on the question to what extent Grant Scheme assistance contributed/ is expected to contribute to tangible improvements in employment sector. The assessment is based on the investigation of two factors (corresponding to the judgment criteria), namely (JC 2.1) extent to which the outputs envisaged have been achieved and (JC 2.2.) extent to which the projects outputs developed have been utilised.

EQ 2 Summary Findings

In the area of deficit occupations the expected results were achieved or are expected to be achieved (for the ongoing projects). Special approaches to support results achievement included measuring people's motivation before application process; going beyond technical skills development (e.g. soft skills needed); nominating a mentor separately for theory and practice to be consulted directly by the trainee.

The skills, knowledge and attitudes developed are proved by the official certifications and actual employment of the trainees of the grants. Based on the analysis of information available at the evaluation time, approximately 230 people received formal certificates/ training completion and out of which approximately 82 persons got employed/self-employed⁵.

RE population participating in the GS was empowered to enter labour market. The evidence shows that the anticipated results were achieved and in several cases exceeded the target values. Special approaches were applied to support the results achievement or RE grants. They included: development of motivational tools, e.g., workshops for the target group to attract and motivate candidates, workshops for employers to discuss the prodigies; direct

⁵ Evaluators' estimation based on the final reports and progress reports available at the mid-term evaluation time.



communication between employers and potential trainees was practiced to support trust and engagement, methodologies for assistance had to be changed under COVID conditions, e.g., creation of smaller groups, equipment given to the trainees that they can practice their can practice what they had learnt. RE assistants were crucial to support the communication with the RE community and providing assistance to the trainees. The grants facilitates employment by target groups during the implementation of grant action and also beyond its completion.

To a great extent, the Grant Beneficiary organisations remain in contact with many trainees and follow up their employment history. At the time of evaluation, beneficiary organisations confirmed that majority of trainees stayed in the job, e.g., all welders and mechanics were working, trainees in the media stayed in the media business and some of them started own business in the media sector and will continue education. Grant Beneficiary organisations also received feedback from the employers (e.g., hospitality industry) that they are very satisfied with the trainees knowledge and skills. Some organisations plan periodic assessment of the situation on how many trainees stayed in the job.

JC 2.1. Extent to which the outputs envisaged have been achieved

The expected results of the grants in the area of deficit occupations were achieved (finalised projects) or are expected to be achieved (on-going projects)⁶ (I 2.1.1). In the grant on Knowledge and skills in the function of better employability in hospitality industry the final beneficiaries were employers in tourism, particularly in the hospitality industry that have the greatest need for new employees. There is evidence on achievement of the results of the grant: public informed about project objectives and outputs and target groups motivated to take part in the project; unemployed people selected for the process of adjusting to the needs of the employers; employment on deficit job vacancies achieved – 25 contracts between the certified trainees an employers signed. Under the grant on Learn, work and earn, there were 7 candidates who got employed after on-the-job training and 6 candidates were employed after employment mediation. In the Improved access to the labour market for women and youth in the Northeast Montenegro all planned results were achieved. 40 persons received certificate within the project, 15 persons completed vocational training and 12 persons were contracted at the end of the project and additionally 10 persons work honorarily.

Special approaches were identified during the field phase interviews to provide training and to equip trainees with skills needed for the deficit occupations. They included; it was important to measure people's motivation before the application process; along developing technical skills (for deficit occupations) training on other types of skills is needed (e.g., soft skills, understanding expectations of employers or understanding the standards in the future). It was important to nominate a mentor for theory and practice, a person who could be consulted directly by the trainee.

There is evidence that the skills, knowledge and attitudes developed are proved by the official certifications and actual employment of the trainees of the grants (I 2.1.2). Based on the analysis of information available at the evaluation time, approximately 230 people received formal certificates/

Subject to verification for the final evaluation.

6 Not all projects were finalised before the cut off date of the evaluation.

training completion and out of which approximately 82 persons got employed/self-employed⁷.

In relation to unemployed RE population there is evidence of empowerment to enter labour market through implementation of targeted training/ programmes, workshops etc (I 2.1.3). The Right Approach to Educate (RAE) (No 8) aimed at increasing the employment opportunities for unemployed RE population members who are at risk of labour market exclusion, social marginalization, and poverty and the Empowering RE population to access the labour market (No 9) which aimed at improving employability of Roma and Egyptians (RE), thus enhancing their social inclusion and access to the labour market. Specific objective was to increase multi-media and/or journalistic skills of RE population, thus empowering them to seek employment in media society, while raising public awareness and sensitizing the society to combat and decrease discrimination against RE population. The analysis of the final reports of both grants show that the anticipated results were achieved or even in several cases exceeded the target values. Under the Right Approach to Educate the target was to empower 40 RE population members. The final result indicator is 52 persons who passed the training for primary occupations of which **48 took exam and received certificates**. Output level indicators exceeded the targets set for the majority of indicators.

Special approaches were developed to support the achievement of results for RE support, they included: using posters, workshops to attract and motivate the target group; good knowledge of the local communities enabled selection of the target group; training for the employers was needed that they can better understand the RE community; direct communication between employers and potential trainees was practiced to support trust and engagement; Under COVID conditions, the beneficiaries received the equipment that they could practice what they had learnt and they are called by the employers for specific jobs; methodologies for assistance had to be changed due to COVID e.g. creation of smaller groups of trainees; RE assistants were crucial to support the communication with the RE community and providing assistance to the trainees e.g. filling in the questionnaire.

JC 2.2 Extent to which the projects outputs developed have been utilised

There is evidence that the grants facilitated employment by target group beneficiaries during implementation of grant action (as noted in 2.1.2) and also beyond its completion (I 2.2.1). Grant Beneficiaries to a great extent, remain in contact with many trainees and follow up their employment history. Some organisations plan periodic assessment of the situation on how many trainees stayed in the job. At the time of evaluation beneficiary organisations confirmed that majority of trainees stayed in the job, e.g., all welders and mechanics were working, trainees in the media stayed in the media business and some of them started own business in the media sector and will continue education. Grant Beneficiary organisations also received feedback from the employers (e.g., hospitality industry) that they are very satisfied with the trainees knowledge wledge and skills.

EQ3 – Efficiency: To what extent was the preparation and implementation of the Grant Scheme managed adequately

The analyses of efficiency are based on the question to what extent was the preparation and implementation of Grant Scheme managed adequately (Evaluation Question). The assessment is

⁷ Evaluators' estimation based on the final reports and progress reports available at the mid-term evaluation time. Subject to verification for the final evaluation.



based on the investigation of the two factors (corresponding to the Judgement Criteria) that were determined, namely (JC 3.1) the process of preparation of grant contracting documentation does not show avoidable delays (by analysing the time elapsed between programming and contracting and the acceptable reasons for delays in contracting) and (JC 3.2) the activities are implemented and outputs are delivered as scheduled (by analysing deviations from work plans of grant actions and acceptable reasons for delays in implementation).

EQ 3 Summary Findings:

Evidence on preparation of GS and implementation of grant actions management shows room for improvements. In relation to the actual start of programme implementation and the launch of CfPs, the time elapsed between programme approval and its actual start of implementation and between the preparation of GfA and related approval by DEU prove that there is place for improvements.

The time elapsed between programming (i.e. date of SOPEES approved by CID) and tendering (first CfP for the GS launched) was 3,2 years after the approval by EC of SOPEES programme and between programming and contracting (first grant contracts signed) 4,15 years.

Limited efficiency in the preparation and implementation of grant actions can be attributed to the process of assessment of the Montenegrin administration for indirect management of SOPEES, with ex-ante controls by DEU. 27 months passed from the submission of the request for EBIT until the signing of the FA which was pre-conditioned by the EC positive assessment of the readiness of the Montenegrin administration for indirect management of SOPEES programme. There were some delays in ex-ante control of GfA for the first CfP, which was due to the quality of tender documents. The amount of funds originally planned for the award of grant through the GS (1.647.647,07 EUR) was much higher than the amount of grant awarded to selected Grant Beneficiaries (966.358,99 EUR). 26 CNs were received, of which 17 CNs for actions related to the implementation of training and education for deficit occupations, and nine CNs for actions related to the implementation of training activities to boost employability of RE population. Seven CNs for deficit occupations and six CNs for RE population were successfully assessed. 10 applicants responded with FAFs (with five FAFs for deficit occupations and five for RE population). At the end, nine grant contracts were signed, of which four for deficit occupations and five for RE population.

The beneficiary proposed that another CfP for deficit occupations is launched in scope of the GS, for the amount that remained available after the first CfP. It took 12 months between the proposal for FA Addendum and the launch of the second CfP (more than 6 months to formalise the change through the FA Addendum and another 6 months until publishing of the second CfP following the restricted procedure). By the end of November 2021, the evaluation report was not yet approved. Regarding the "n+5" rule that applies for SOPEES, it is worth noting that planned 12 month implementation period of grant actions selected under the second CfP might enter in the year 2023 and generate ineligible cost for SOPEES programme if the contracts with selected GBs do not get signed by the end of 2021 and the actions completed by 2022.

Shortly after the grant projects awarded in scope of the first CfP started, the COVID-19 pandemic emerged. Due to related measures imposed by the Government, the situation in the field has no longer allowed for the implementation of activities in the manner described in the FAFs. During both desk phase and field phase analyses, evidence shows that **deviations from work plans of grant actions have occurred in all nine grant projects**. There is evidence that main and generic reasons for delays and changes of implementation timelines **relate to COVID-19 pandemic as the root cause**. The grant actions' progress was not endangered by COVID-19 situation due to proactive measures undertaken to reduce its impact. GBs have modified their originally planned organisation strategy and adjusted their approach to the respective target groups in the manner, which to the maximum extent possible ensured the implementation of activities within the extended implementation period. Evidence exists that challenges faced by the GBs during implementation in the COVID-19 pandemic circumstances have been considered and managed by the projects' risk mitigation strategies addressing the new risks due to COVID-19 pandemic situation. While some were very positive about the attitude and the responses by the CA and/or LM, some of GBs reported on problems in communication with the CA and non-existence of crisis management by the responsible public authorities.

There is evidence that **grant actions awarded under the first CfP were completed. The perspectives for the award and completion of selected grant actions of the second CfP are positive**, provided that contracts get signed before the end of 2021 and the actions completed by the end of 2022.

Based on lessons learned by beneficiaries and their need for exchange of good practices among GBs and (workshop etc) and the proposal for longer duration of projects noted during field phase interviews, organising round tables with GBs would be relevant, for sharing of the experience in the implementation and learn from the experience of other GBs. Round tables with GBs and their network could be organised by the ministry in charge of the GS. On the other hand, round tables would provide an opportunity to discuss also the needs on the ground that could be taken into consideration when planning or preparing new CfPs. In such manner, more relevant project proposals in terms of their number and eligibility might be expected.

JC 3.1 The process of preparation of grant contracting documentation does not show avoidable delays

The implementation of multi-annual Joint EU-MNE Programme for Employment, Education and Social Welfare (SOPEES 2015-2017) that was approved by EC in December 2015 started in July 2018, following the signing of the FA which was preconditioned by the EC decision on the entrustment of budget implementation task (EBIT) to Montenegrin authorities responsible for indirect management of multi-annual programme. NAO's request for EBIT was submitted 4 months after the approval of SOPEES programme, and **related FA was signed 27 months after the approval of SOPEES programme by EC**.

The analyses of procurement plan maintained by the CFCU has shown that the actual duration of the period from submission of draft GfA to DEU for ex-ante control until the start of grant contracts awarded has lasted app one year. Considering that restricted procedure with ex-ante controls by



DEU has been used for the Grant Scheme, the duration from publishing of GfA until selection of awarded Grant Beneficiaries lasted app eight months which is within the time frame for this type of grant award procedure.

The time elapsed between programming (i.e. date of SOPEES approved by CID) and tendering (first CfP for the GS launched) was 3,2 years after the approval by EC of SOPEES programme and between programming and contracting (first grant contracts signed) 4,15 years. (I 3.1.1)

The amount of funds originally planned for the award of grant through the GS (1.647.647,07 EUR) was much higher than the amount of grant awarded to selected Grant Beneficiaries (966.358,99 EUR). In scope of the first CfP following the restricted procedure, 26 CNs were received, of which 17 CNs for actions related to the implementation of training and education for deficit occupations, and nine CNs for actions related to the implementation of training activities to boost employability of RE population. Seven CNs for deficit occupations and six CNs for RE population were successfully assessed. 10 applicants responded with FAFs (with five FAFs for deficit occupations and five for RE population). At the end, nine grant contracts were signed, of which four for deficit occupations and five for RE population.

The amount of funds originally planned for the award of grant through the GS (1.647.647,07 EUR) was much higher than the amount of grant awarded to selected Grant Beneficiaries (966.358,99 EUR). For this reason, the beneficiary proposed that another CfP for deficit occupations is launched in scope of the GS, for the amount that remained available after the first CfP.

More than 2 years after its signature, the FA was amended in August 2020 by its Addendum No 1, providing formal approval for the second CfP in scope of the GS that was launched app 6 months after the signing of FA Addendum No 1. This is nearly 2 months earlier compared to the first CfP. However, in total, it took 12 months between the proposal for FA Addendum and the launch of the second CfP: more than 6 months to formalise the change through the FA Addendum and another 6 months until publishing of the second CfP following the restricted procedure. (I 3.1.1)

Poor quality of tender documents is usually the main reason for delays in the procurement and grant award procedures. Two levels of controls, first by the CFCU and ex-ante control by DEU add to longer duration of period for the preparation of tender documents/GfA before launch of the tender/CfP. The evidence obtained during desk phase analysis has shown one major deviation from planned duration of the period for the approval of GfA by DEU for the first CfP. Instead of 21 days originally planned, the approval by DEU was awarded after 83 days. For the second CfP, with exception of 39 days delay in the submission of GfA to the CFCU, the actual duration of implementation periods have not shown deviations from the plan. In overall, the grant award processes following restricted procedure were carried out within the usual duration of its timeframe (at least 12 months). (I 3.1.2).

In overall it can be concluded that the major delay occurred in the process of assessment of the Montenegrin administration for indirect management of SOPEES, with ex-ante controls by DEU. 27 months passed from the submission of the request for EBIT until the signing of the FA which was pre-conditioned by the EC positive assessment of the readiness of the Montenegrin administration for indirect management of SOPEES programme. There were some delays in ex-ante control of GfA for the first CfP, which was due to the quality of tender documents, however the situation has shown

improvements in the case of the second CfP. The lessons learned suggest that time elapsed between the programming and formal signing of FA, or signing of FA Addendum should be kept under control to prevent substantial changes in the time plans set by the national and EU administration that might have significant impact on the implementation periods of projects and consequently, on the absorption of funds within the eligible period.

JC 3.2 The activities are implemented and outputs are delivered as scheduled

For the analysis of whether the activities are implemented and outputs delivered as scheduled, workplans from FAFs and information on the progress of implementation presented in MI documents or final reports have been analysed and compared. Each grant contract implementation has been analysed in detail in terms of occurrence of delay. The analysis took into consideration the information from MI documents with the cut-off-date 31 Dec 2020 or 31 March 2021 and two final reports that have been approved by the CFCU.

The results of the analysis have shown the following situation:

(I 3.2.1) **Deviations from work plans of grant actions have occurred in all nine grant projects.** In total, 108 activities were planned and included in the workplans of grant actions. 58 activities started on time (54%), 50 activities started with delay (46%) and 17 activities were modified (18%) compared to initial idea.

Work plans in FAFs were prepared per main group of activities or sub-activities and did not include milestones for monitoring of the progress but rather the time frame of planned both preparatory and implementation activities. Based on information analysed during desk phase, it seemed that in the majority of cases, COVID-19 pandemics and related measures imposed by the Government were the main and generic reason for delays.

During the field phase interviews, GBs confirmed the completion of their activities. According to GBs, the majority of final reports have been finalised and submitted to the CFCU.

(I 3.2.2) Based on information analysed during desk phase, it seemed that in the majority of cases, COVID-19 pandemics and related measures imposed by the Government were the main and generic reason for delays. The situation was tested during field phase interviews with GBs. The information obtained in relation to reasons for delays in the workplans, among reasons for changes/delays pointed to situations specific for respective grant action, however **all relating to COVID-19 pandemic as the root cause.**

In general, **grant actions' progress was not endangered** by COVID-19 situation due to proactive measures undertaken to reduce its impact. GBs have modified their originally planned organisation strategy and adjusted their approach to the respective target groups in the manner, which to the maximum extent possible ensured the implementation of activities in scope of the original plan.

In overall, the activities of grant actions by GBs awarded under the first CfP were implemented as planned. The desk phase analysis has shown that perspectives for completion of planned activities by GBs were positive. According to the information provided by the GBs and the evidence obtained from the ministry in charge of the respective GS during field phase, all grant actions have been completed. In adapting to the new circumstances that could not be foreseen at the time of elaboration of the FAF, the opinions of GBs in terms of communication and responsiveness by the CA and the LM varied.



While some were very positive about the attitude and the responses by the CA and/or LM, some of GBs reported on problems in communication with the CA and non-existence of crisis management by the responsible public authorities. They have pointed out the need for exchange of good practices (workshop etc) and longer duration of projects allowing enough time for doing it properly and with less stress due to the complexity of administrative procedures and requirements.

Recommendations for the future grant schemes point out that organising round tables with GBs would be relevant, for sharing of experience in implementation and learn from experience of other GBs. This could be ensured by organising round tables with GBs, in scope of which also the needs on the ground that could be discussed and consequently, reflected in new CfPs, thus ensuring relevant project proposals.

EQ 4 – Efficiency: to what extent the Grant Scheme made good use of the (financial and human) resources

Complementary analysis of efficiency is based on the question related to the extent the Grant Scheme made good use of the (financial and human) resources (Evaluation Question). The assessment is based on the investigation of the two factors (corresponding to the Judgement Criteria) that were determined namely (JC 4.1) extent to which the costs of the interventions are justified by the results achieved and (JC 4.2) other efficiency aspects of implementation taken into account. In principle, the assessment of this aspect of efficiency is devoted to more qualitative considerations rather than a quantitative exercise. As this is a mid-term evaluation with ongoing projects that have just started delivering first results of wide and heterogenous range defined in the contracts of various types (with global price contracts prevailing over fee-based contracts) and there is limited evidence on actual use of contracted financial and human resources, it was necessary to resort to proxy measures related to administrative and management techniques deployed, by analysing disbursements at project level, administrative modifications and approvals, by collecting evidence on disbursements and confirmation of projects' expenses by the project audits reports, evidence that risks discussed and risks mitigation strategy is in place, that EU visibility is ensured in all grant actions and gender equality is mainstreamed into the grant action implementation, and on inclusion of green economy aspects into the trainings delivered under grant scheme actions.

EQ 4 Summary Findings

All Grant Beneficiaries of nine contracts signed under the first CfP of the GS were entitled to receive pre-financing amount after the signature of the contract. Most of them received 80% pre-financing of contracted grant amount. Five GBs received pre-financing amount in 20 days after contract signature by GB. Some GBs have faced problems in ensuring bank guarantee for pre-financing. For this reason, in three cases the payment of pre-financing was executed nearly 5 months after the signature of the contract. One GB reported that due to late payment of pre-financing that was pre-conditioned by the submission of bank guarantee by the GB, some activities could not be implemented as planned. Disbursements by GBs to large extent followed the work plan implementation in terms of timeliness related to project duration and the majority of GBs expected to receive the amount of grant contracted. The majority of final payments are

planned for December 2021. For three grant actions, final payment has been processed by the CFCU and the final amount of eligible cost recognised by the CA to some extent differed from the total amount of actual cost declared by GB. The deductions by the CA extend from app 3% to 11% of cost declared by GBs.

As this is mid-term evaluation, deducted amounts will be known only after completion of all verification checks by the CA. However, it can be concluded that at the end, all grant actions will absorb the majority of grant contracted for selected grant actions.

In connection with administrative modifications, there is evidence that adjustments in the implementation of grant actions were necessary, in order to ensure grant actions' progress of implementations in spite of COVID-19 situation. In addition to minor modifications notified by GBs through notification letters, addenda to contracts were signed for extended project implementation beyond originally planned duration of 12 months for eight grant contracts out of nine.

In connection with risk management, there is evidence, that risks are regularly discussed and risks mitigation strategy is in place to manage the GS (I.4.2.2). All GBs interviewed confirmed that projects were implemented in the crisis situation requiring risk management. Awarded GBs are required to report on a quarterly basis on their progress through Monitoring Information, which inter-alia include a section on risks identified during reporting period and corrective measures, either planned or undertaken by GB. Monitoring visits by PIU provide the possibility to discuss with GBS the measures related to risks identified during the implementation.

In the area of EU visibility, standard EU visibility requirements are respected by all projects in scope of the GS (I.4.2.3). In practice, GBs are required to report in the Monitoring Information documents on visibility activities/measures undertaken and visibility materials produced and used. Standard final reports (narrative part) by GBs include a separate section dedicated to information in relation to Visibility. At programme level, SOPEES programme website exists, with a separate section on each GS financed in scope of the programme.

Regarding specific criteria of the GS and the principles of gender equality mainstreamed in the implementation of grant actions (I.4.2.4), there is evidence that good balance on gender equality was achieved. Nevertheless, GBS reported on challenging traditional issues in this regard, e.g., that Roma girls do not obtain education and their early marriages by tradition, and pointed out the fact that some occupations are traditionally more interesting for men than women.

In the context of green economy aspects, no evidence has been found on green economy aspects being taken into account and going beyond the beneficiaries own procedures (I.4.2.5). There is place for improvement. Recommendation suggests that in order to better integrate green economy aspects in the delivery of grant actions, a **Guidance document on green economy aspects could be prepared** that would also elaborate on Training modules which should be included in training activities planned in scope of grant actions aimed training and education for better employability of representatives of respective target groups.



JC 4.1 Extent to which the costs of the Grant Scheme are justified by the results achieved

(I 4.1.1) In scope of the first CfP, 4 grant contracts were signed under Lot 1 (deficit occupations) and 5 contract were signed under Lot 2 (RE population). Contracts were signed in the period from November 2019 to February 2020. All Grant Beneficiaries were entitled to receive pre-financing amount after the signature of the contract. Most of them received 80% pre-financing of contracted grant amount. In most cases, pre-financing payment was executed app 20 days after contract signature by GB. In three cases, the payment of pre-financing was executed nearly 5 months after the signature of the contract by the Lead GB. One of these three GBs reported that due to late payment of prefinancing, some activities could not be implemented as planned. Evidence obtained during desk phase proved that disbursements by GBs to large extent followed the work plan implementation in terms of timeliness related to project duration. Additional information on actual costs were obtained during field phase interviews. According to the GBs, the final actual costs of their grant actions very much mirrored the costs foreseen in their proposals. The majority of them expected to receive the amount of grant contracted. However, the final amount of paid grant depends on the results of the administrative and on-the-spot checks by the CA. The evidence obtained during the field phase shows that the majority of final payments are planned for December 2021, however there is no precise data yet in the system on the actual amounts to be paid to GBs, except for three grant actions, where the final amount of eligible cost recognised by the CA differs from the total amount of actual cost declared by GB. Compared to the total eligible cost contracted, the difference between planned eligible cost and the actual eligible cost recognised by the CA varies from 89% to 95%.

As this is mid-term evaluation, percentages of differences and deducted amounts will be known only after completion of all verification checks by the CA. However, it can be concluded that at the end, all grant actions will absorb the majority of grant contracted for selected grant actions.

The evidence obtained during desk phase (I 4.1.2) proves the existence of administrative modifications through notification letters and formal addenda to grant contracts. **Due to COVID-19 situation**, for eight grant contracts out of nine **addenda have been signed for extended project implementation** beyond originally planned duration of 12 months. Minor modifications were notified by GBs through notification letters. The number of notification letters varied from 1 as minimum to 6 as maximum, based on information obtained from Monitoring Information documents per specific cut-off dates. Administrative modifications formalised through contract addenda or notification letters demonstrate the extent of proactive measures undertaken by GBs, in order to ensure grant actions' progress of implementations in spite of COVID-19 situation.

JC 4.2 Other efficiency aspects of implementation are taken into account

In connection with sound financial management and control practises, the evidence has been obtained (I 4.2.1) that for projects above 100.000 EUR projects' costs are confirmed by grant audit reports. In scope of the first CfP and 9 grant contracts signed, 3 grant contracts were concluded for grant above 100.000 EUR. Two contracts have been completed by 31 May 2021 (evaluation cut-off date) and one contract is still ongoing. Expenditure verification reports have been presented with the final reports submitted by two GBs for grant actions that were completed by 31 May 2021. During field phase interviews, GBs that were obliged to submit EVRs have not exposed any audit findings.

In connection with risk management, there is evidence, that risks are regularly discussed and risks mitigation strategy is in place to manage the GS (I 4.2.2). The Implementing Agencies, the PIUs and DEU conduct regularly, on a monthly basis, coordination meetings, during which the risks are discussed at meetings and related risk mitigation measures are agreed and followed-up. During implementation, awarded GBs are required to report on a quarterly basis on their progress through Monitoring Information, which inter-alias include a section on risks identified during reporting period and corrective measures, either planned or undertaken by GB. All GBs interviewed confirmed that projects were implemented in the crisis situation requiring risk management. Evidences obtained during field phase prove that also monitoring visits by PIU are organised to monitor the progress and to discuss measures related to risks if a need for an intervention has been recognised.

Standard EU visibility requirements are respected by all projects in scope of the GS (I 4.2.3). At project level, attention to EU visibility has been paid in the Monitoring Information documents, with a separate section dedicated to visibility activities/measures undertaken and visibility materials produced and used. Further, copies of final reports (narrative part) by GBs include a separate section dedicated to information in relation to Visibility (4. *How is the visibility of EU contribution being ensured in the action?*). At programme level, SOPEES programme website exists, with a separate section on each GS financed in scope of the programme. During the field phase interviews, GBs reported on visibility materials produced and used, e.g., notebooks, pens, t-shirts, posters, flyers, videos, advertisements in newspapers, on TV and newspapers articles, etc.

In regard to gender equality mainstreamed into the project implementation (I 4.2.4), there is evidence that good balance on gender equality was achieved. In accordance with GfA, grant applicants were required to address special attention to specific criteria, however at the same time, gender equality should be mainstreamed in the implementation of their grant actions. Considering that the Grant Scheme is aimed at actions related to the implementation of training and education for deficit occupations, and actions related to the implementation of training activities to boost employability of RE population, there were challenging traditional issues, e.g., that Roma girls do not go to school to obtain education. Early marriages are tradition. One GB pointed out that training should be paid as Roma people need money and such financial support should be an important budget item. Further on, some occupations are traditionally more interesting for men than women.

(I 4.2.5) No evidence has been found on green economy aspects being taken into account and going beyond the beneficiaries own procedures. There is place for improvement. Recommendation suggests that in order to better integrate green economy aspects in the delivery of grant actions, a **Guidance document on green economy aspects could be prepared** that would also elaborate on Training modules which should be included in training activities planned in scope of grant actions aimed training and education for better employability of representatives of respective target groups.

EQ 5 – Sustainability: To what extent are the envisaged outcomes of the Grant Scheme likely to produce effects after the end of EU funding?

The analysis of sustainability are based on a question to what extent are the envisaged outcomes of the Grant Scheme likely to produce effects after the end of EU funding. The assessment is based



on the investigation of two factors (judgment criteria) namely (JC 5.1) outputs produced are likely to be operational and will function at envisaged level and (JC 5.2) there are some lessons learnt on sustainability to enhance further EU assistance on support to deficit occupations and increase of RE employability.

EQ 5 Summary Findings

Sustainability issues were taken into account at the design phase of the interventions and followed up to the final reports on the implementation. The Calls for grants include sustainability into the award criteria. The ex-post evaluation of the Operational Programme for HR development (2012-2013) from 2018 noted that the past grant schemes were unsustainable. The grant organisations cannot provide training services for the unemployed without additional funding.

All Grant Beneficiary organisations remained operations after the project completion (or during the final stages of implementation. No evidence was found that any of the GBs will have difficulties to be operational and adequately staffed after grant financing closure.

Several GBs plan follow up actions, e.g., developing a regional centre for training on tourism, where the GS assisted in conceptualisation of the regional centre idea; all GBs see the need for the continuation of the support; e.g., developing applications for other GSs, providing additional training in other municipalities etc.

There are several lessons learnt identified on sustainability. They include: need for a comprehensive inter-sectoral approach including social housing, education and strategy for SMEs (self-employed); the key role of education supporting employment; the important role of community centres to support GS and to interconnect services at local level; An importance of the psychologist support was noted to support the trainees on the change of their personal and professional life.

It was noted that the assistance of the Employment Agency in selection of RE candidates was limited as the Agency does not have ethnic origin data for selection of candidates-

JC 5.1 Outputs produced (envisaged to be produced) are likely to be operational and will function at envisaged level

Sustainability issues were taken into account at the design phase of the interventions and followed up to the final reports on the implementation (I 5.1.1). The programming documents note that the involvement of the local community is the factor of sustainability. Implementation of various types of interventions towards raising employability will help the employment authorities in Montenegro to consolidate experience in designing more targeted measures and sound monitoring and evaluation procedures. The opportunities to apply and implement grants will reinforce the experience and capacity of relevant regional or local public and non-public actors, such as municipalities, schools, social partners, NGOs, providers of education and training services. Sustainability of grants is integrated already in the design of the grants. The Calls for grants include sustainability into the award criteria. At the same time, the ex-post evaluation of the Operational Programme for HR development (2012-2013) from 2018 noted that the past grant schemes were unsustainable. The grant organisations cannot provide training services for the unemployed without

additional funding. The past GS was able to offer some insights and examples of good practice for the future employment services, however, there was no obvious support structure that could learn from these examples and pass them to the policy makers.

All Grant Beneficiary organisations remained operations after the project completion (or during the final stages of implementation) (I 5.1.2). No evidence was found that any of the GBs will have difficulties to be operational and adequately staffed after grant financing closure.

Several GBs plan follow up actions (I 5.1.3), e.g., developing a regional centre for training on tourism, where the GS assisted in conceptualisation of the regional centre idea; all GBs see the need for the continuation of the support; e.g., developing applications for other GSs, providing additional training in other municipalities, etc.

JC 5.2 Lessons learnt on sustainability to enhance further EU assistance on support to deficit occupations and increase of RE employability.

There are several lessons learnt identified on sustainability (I 5.2.1). They include: need for a comprehensive inter-sectoral approach including social housing, education and strategy for SMEs (self-employed) in order to support sustainability of GSs; the key role of education supporting employment e.g. RE people learn what are other options than collecting scrap materials and they are asking for other jobs, mechanics, waiters, welders etc; the important role of community centres to support GS and to interconnect services at local level e.g. market measures and social policies. It was noted that the assistance of the Employment Agency in selection of RE candidates was limited as the Agency does not have ethnic origin data for selection of candidates. An importance of the psychologist support was noted to support the trainees on the change of their personal and professional life, to change their understanding and mindset. Schemes to support self-employed people (e.g., guarantees) are under preparation for those who cannot afford the loan.

EQ6 – Impact: To what extent has the assistance under the Grant Scheme contributed to increased employment in Montenegro?

The analysis of impact are based on the question to what extent has the assistance under the Grant Scheme contributed to increased employment in Montenegro. The assessment is based on the investigation of two factors (corresponding to the judgment criteria) that were determined namely (JC 6.1) expected outputs of grant actions contributed to increased employment and (JC 6.2) expected contributions of outputs of GS to the EU negotiations process (long term impact).

It has to be noted that for the mid-term evaluations, the possibilities of measuring impact are limited. Only preliminary observations on the foreseen impact can be captured.

EQ 6 Summary Findings

There is a good level of achievement performance measures by indicators and reported at various levels of the GS. The evidence shows that the expected outputs of the completed grant actions (at the time of the cut-off date) will contribute to increased employment of persons trained for deficit occupations and increased number of members of RE



population that received training. Evidence gathered under EQ 2 on effectiveness shows that approximately, at the time of the evaluation, 82 persons found employment or became self-employed.

Lessons learnt on impact enhancement were noted; need for connecting the assistance with other sectors measures, e.g., launching a scheme that employers who employ RE will pay lower taxes; building partnerships as a good tool to increase the impact of assistance (e.g., with municipality, mediators for education etc); Receiving a licence or certificate is very important, especially for women. They feel confident to apply for a new job. Impact on the general public was noted; some GS has a significant outreach to the general public (e.g., 150,000 people watched Vijesti with information on the GS) and thus assisted in changing the perception on RE.

In relation to the links of the GS to the EU negotiations process (I 6.2.1) the chapter 19 is opened with closing benchmarks. The EC progress report (2020) noted good progress by the adoption of the new labour law. Montenegro should focus on implementing the revised labour law, revising the anti-discrimination law and introducing better quality employment measures aimed at young people, women, disabled people and minorities.

JC 6.1 Expected outputs of grant actions contributed to increased employment

The achievements of performance are measured by indicators and reported at various levels of the GS (I 6.1.1). The available documentation at programme, action/activity level, GS level and grant project level include information in relation to on how planned actions/activities should contribute to increased employment. The SOPEES Programme notes that Sectoral Monitoring Committee shall review the effectiveness, efficiency, quality, coherence, coordination and compliance of the implementation of the actions in the SOP and their consistency with the relevant national and, whenever relevant, regional sector strategies. It shall measure progress in relation to achieving the objectives of the actions and their expected outputs, results and impact by means of indicators related to a baseline situation, as well as progress with regard to financial execution. Monitoring of achievements is based on a system of reporting and assessing performance against plans and progress against set targets (indicators) based on collected information. The evidence shows that the expected outputs of **three completed grant actions** in scope of the first Call for Proposals (2 projects finalised in the area of deficit occupations and 1 project finalised in the area of training of RE population) will contribute to increased employment of persons trained for deficit occupations and increased number of members of RE population that received training. Evidence gathered under EQ 2 on effectiveness shows that approximately, at the time of the evaluation, 82 persons found employment or became self-employed. Lessons learnt on impact enhancement were noted; need for connecting the assistance with other sectors measures, e.g., launching a scheme that employers who employ RE will pay lower taxes; building partnerships as a good tool to increase the impact of assistance (e.g., with municipality, mediators for education etc.); Receiving a licence or certificate is very important, especially for women. They feel confident to apply for a new job. Impact on the general public was noted; some GS has a significant outreach to the general public (e.g., 150,000 people watched Vijesti with information on the GS) and thus assisted in changing the perception on RE.

JC 6.2 Expected contribution of outputs of Grant Scheme to the EU negotiations process (long term impact)

In relation to the links of the GS to the EU negotiations process (I 6.2.1) the chapter 19 is opened with closing benchmarks. The EC progress report (2020) noted good progress by the adoption of the new labour law. Montenegro should focus on implementing the revised labour law, revising the anti-discrimination law and introducing better quality employment measures aimed at young people, women, disabled people and minorities.

EQ7 – EU Added Value: What is the added value of the EU intervention to support “Training and education activities for deficit occupations and for boosting employability of RE population in Montenegro” compared to interventions by member states, and/or other donors?

The analysis of EU added value are based on a question what is the added value of the EU intervention as compared to interventions by member states, and/or other donors. The assessment is based on the investigation of two factors (JC 7.1) extent to which similar results could have been achieved without EU support and (JC 7.2) extent to which further interventions in the area of deficit occupations and employability of RE population can be better tackled by EU action.

EQ 7 Summary Findings

The added value of the EU support was noted in regards clear rules and transparency of EU support; EU assistance covers a lot of issues and tries to think in a comprehensive way to cover various issues; the added value of EU support is in its approach to minority rights, position of the RE population, working with disabilities and the importance of the rule of law.

At the same time, it was noted that the EU support has challenging reporting requiring time and human resources effort as compared to other donors and the duration of the grants (one year) is shorter as compared to other donors (e.g., two years with German assistance) for the same area of assistance covered.

Future EU assistance could make a difference if using the following approaches: including private sector in the grant scheme calls; EU stronger supporting the policy dialogue on the need for the tax exemptions for employers; taking into account the time needed to invest in the target group (before they can reach employment), e.g., there is a need to work individually with RE people who are missing skills (writing, literacy, local language, financial skills).

JC 7.1 Extent to which similar results could have been achieved without EU support

Field phase interviews provided the following observations on the added value of the EU support (I 7.1.1); the duration of the grant was shorter when compared with other MS assistance (e.g., German assistance projects in this field are implemented in two years); EU type of reporting is challenging and it requires dynamic responses and thus a lot of time is spent on reporting, the EU has clear rules and it is working in transparent manner; EU assistance covers a lot of aspects and EU tries to think in a comprehensive way to cover various issues related to employment. The added value of the EU support is in its approach to minority rights, position of the RE population, working with disabilities and the importance of the rule of law.



JC 7.2 Extent to which further interventions in the area of deficit occupations and employability of RE population can be better tackled by EU action

In the future, the EU assistance could make a difference with the following approaches (I 7.2.1); private sector to be included in the grant scheme calls; EU could support policy dialogue on the need for the tax exemptions for employers; EU assistance should take into account the need for investing in the target group (i.e., there is a need to work individually with RE people who are missing skills (writing, literacy, local language, financial skills) in addition to the employment actions.

EQ8 – Complementarity: To what extent is the scope of the EU support to deficit occupations and RE employability aligned with/ complements other interventions of other donors?

The analysis of complementarity are based on a question to what extent the scope of the EU support complements other interventions of other donors. The assessment is based on the investigation of two factors (JC 8.1) programming of grant scheme assistance as a coordinated process and (JC 8.2) extent to which donors complementarity and coordination exists and have effect on the EU assistance.

EQ 8 Summary Findings

The EU support to deficit occupations and RE employability was complementary to other assistance as noted in the relevant programming documents. The main donors active in the area include; UNDP, UNICEF, the Council of Europe Development Bank, KfW, the World Bank, British Council, Lux Development.

However, at the implementation phase there is limited evidence on sector donor coordination practices. The overall coordination has been performed by the Office of the Prime Minister, which has prepared and maintained the database for donor coordination purposes. A good experience with the working group under the Strategy for Roma inclusion was noted. In the working group, there are representatives of all institutions such as ministry of health, finance, education, and employment. There are regular meetings with the UN office and meetings with the donors of other projects.

JC 8.1 Programming of Grant Scheme assistance was a coordinated process

Coordination process with other donors took place at the time of programme design (I 8.1.1). There is an overview of other donors assistance conducted in the programming documents of SOPEES. The coordination process has been capitalized on the experience of the database for donor coordination prepared under the Office of the Prime Minister a few years ago. The main donors active in the area include; UNDP, UNICEF, the Council of Europe Development Bank, KfW, the World Bank, British Council, Lux Development.

JC8.2 Extent to which donors complementarity and coordination exist and have effect on the EU assistance

There is limited evidence on the donor coordination practices in the sector (I 8.2.1). The overall coordination has been performed by the Office of the Prime Minister, which has prepared and maintained the database for donor coordination purposes. There is a working group under the Strategy for Roma inclusion which is working well. There are representatives of all institutions such

as ministry of health, finance, education, and employment. It was not confirmed that the Ministry of Economic Development takes part in the working group. Grant Beneficiaries cooperate with other donors, e.g., the Open Society, Council of Europe. There are regular meetings with the UN office and meetings with the donors of other projects.

Conclusions

Conclusion 1: Relevance of the Grant Scheme

EU support under the Grant Scheme has been clear and consistent with the country needs, valid in terms of design and implementation of the SOPEES as well as the reforms and institutional needs.

The Grant Scheme support relied on a comprehensive set of EU and national policies and strategy documents, which have been internally consistent. The objectives of the Grant Scheme correspond to the employment policy needs. The first priority policy need for Montenegro is to improve the regulatory environment and conditions for job creation, as well as increase employment opportunities for those who are inactive in the labour market. The individual grants' objectives are well aligned with the policy needs and focus on addressing issues like: reducing regional disparities, focus on increasing employment opportunities for youth and women, addressing deficit occupations (hospitality and tourism sector, construction sector) and focus on unemployed RE population. The relevance of the Grant Scheme was strengthened by the following approaches (1) possibility of receiving diploma/ certification (2) employers having a possibility to receive equipment to provide new services/ products. The Grant Scheme timing is relevant from the point of evolution of the needs of RE. The assistance focused initially on supporting adjustments in the legal system in relation to the status of foreigners, then on improving living conditions and now is starting to focus on increasing employment.

There is good consistency between the GS objectives and the accession priorities in relation to reducing regional disparities, focus on increasing employment opportunities for youth and women, addressing deficit occupations (hospitality and tourism sector) and focus on employment RE population. The quality of design of individual grants is adequate in terms of intervention logic and definition of indicators. The logical approach and indicators were used from the design phase and throughout the implementation of the grants.

The GS priorities remain valid in relation to the current policy needs. EC Progress Reports note the considerable regional disparities (North of Montenegro) affecting women and young people. There is a need for introducing better quality employment measures aiming at young people, women, disabled people and minorities.

However, the National Employment Strategy 2021-2024 was not adopted as planned, and therefore the validity of the GS priorities with the new strategy could not be assessed.



Conclusion 2: Effectiveness of the Grant Scheme

At the midterm of Grant Scheme implementation its contribution to improvements in employment sector is visible. The expected results were achieved (for completed projects) or are expected to be achieved (for ongoing projects).

In the area of deficit occupations the expected results were achieved or are expected to be achieved. RE population participating in the GS was empowered to enter labour market. The anticipated results were achieved, and in several cases exceeded the target values.

Overall, the skills, knowledge and attitudes developed are proved by the official certifications and actual employment of the trainees of the grants. Based on the analysis of information available at the evaluation time, approximately 230 people received formal certificates/training completion and out of which approximately 82 persons got employed/self-employed.

Effectiveness of the support was increased by using the following approaches: (1) measuring people's motivation before the application process, (2) going beyond technical skills development (e.g. soft skills), (3) nominating mentor for theory and practice for each trainee, (4) development of motivational tools, e.g., workshops for the target group to attract and motivate candidates, (5) organising workshops for employers, (6) adjusting to COVID restrictions, e.g., smaller groups of trainees, (7) using RE assistants to support trainees.

Grant Beneficiary organisations to a great extent remained in contact with many trainees and followed up their employment history. At the time of evaluation, beneficiary organisations confirmed that majority of trainees stayed on the job, e.g., all welders and mechanics were working, trainees in the media stayed in the media business and some of them started own business in the media sector and will continue education. Feedback from the employers (e.g., hospitality industry) confirms that they were very satisfied with the trainees' knowledge and skills.

Conclusion 3: Efficiency of the Grant Scheme (preparation and implementation of the Grant Scheme management)

Preparation and implementation of the scheme was managed adequately to some extent.

Preparation of GS and implementation of grant actions management shows room for improvements. There was significant time elapsed between programming (i.e., date of SOPEES approved by CID) and tendering (first CfP for the GS launched) – 3.2 years and between programming and contracting – 4.15 years. Limited efficiency in the preparation and implementation of grant actions can be attributed to the process of assessment of the Montenegrin administration for indirect management of SOPEES, with ex-ante controls by DEU. 27 months passed from the submission of the request for EBIT until the signing of the FA which was pre-conditioned by the EC positive assessment of the readiness of the Montenegrin administration for indirect management of SOPEES programme.

There were some delays in ex-ante control of GfA for the first CfP, which was due to the quality of tender documents. As the amount of funds originally planned for the award of grant through the GS was much higher than the amount of grant awarded to selected Grant Beneficiaries, the beneficiary proposed that another CfP for deficit occupations is launched in scope of the GS, for the amount that remained available after the first CfP. It took 12 months between the proposal for FA Addendum and the launch of the second CfP. In November 2021, the evaluation report was not approved yet. Regarding the “n+5” rule that applies for SOPEES, it is worth noting that planned 12 month implementation period of grant actions selected under the second CfP might enter in the year 2023 and generate ineligible cost for SOPEES programme, if the contracts with selected GBs do not get signed by the end of 2021 and the actions completed by 2022.

COVID pandemics had a great impact on efficiency of the grants implementation. Deviations from work plans of grant actions have occurred in all nine grant projects. The main and generic reason for delays and changes in the implementation timelines relate to COVID-19 pandemic as the root cause. However, the grant actions' progress was not endangered by delays due to proactive measures taken by the Grant Beneficiaries to reduce its impact. GBs have modified their originally planned organisation strategy and adjusted their approach to the respective target groups in the manner, which to the maximum extent possible ensured the implementation of activities within the extended implementation period. The GBs managed the risk mitigations strategies addressing the new risks due to COVID-19 situation.

Grant actions awarded under the first CfP were completed. The perspectives for the award and completion of selected grant actions of the second CfP are positive, provided that contracts get signed before the end of 2021 and the actions are completed by the end of 2022.



Conclusion 4: Efficiency: Good use of financial and human resources

Grant actions will absorb the majority of grant contracted for selected grant actions and to a great extent made a good use of financial and human resources.

Grant Beneficiaries were entitled to receive pre-financing amount after the signature of the contract (e.g., 80% pre-financing of contracted grant amount). There were delays in payment of pre-financing (for three contracts) for almost five months, which in one case caused delays in implementation of some activities. Disbursements by GBs to large extent followed the work plan implementation in terms of timeliness related to project duration and the majority of GBs expected to receive the amount of grant contracted. However, for some grants the final amount of eligible cost recognised by the CA to some extent differed from the total amount of actual cost declared by GB.. The deductions by the CA extend from app 3% to 11% of cost declared by GBs.

Adjustments in the implementation of grant actions were necessary, in order to ensure grant actions' progress of implementations in spite of COVID-19 situation. Addenda to contracts were signed for extended project implementation beyond originally planned duration of 12 months for eight grant contracts out of nine.

All grants were implemented in the crisis situation requiring risk management. Grant Beneficiaries discussed regularly the risks and risk mitigation strategies were in place. Awarded GBs were required to report on a quarterly basis on their progress through Monitoring Information, which inter-alia include a section on risks identified during reporting period and corrective measures, either planned or undertaken by GB.

Standard EU visibility requirements were respected by all awarded GBs in scope of the GS. At programme level, SOPEES programme website exists, with a separate section on each GS financed in scope of the programme.

A good balance on gender equality was achieved. However, awarded GBs reported on challenging traditional issues in this regard, e.g., Roma girls do not obtain education and their early marriages by tradition, and some occupations are traditionally more interesting for men than for women.

Green economy aspects were not taken into account beyond the awarded Grant Beneficiaries own procedures (e.g., less printing).

Conclusion 5: Sustainability of the Grant Scheme

At the midterm there are good prospects that the envisaged outcomes of the Grant Scheme are likely to produce effects after the end of EU funding.

Sustainability issues were taken into account at the design phase of the interventions and followed up to the final reports on the implementation.

All Grant Beneficiary organisations remained in operation after the project completion (or during the final stages of implementation). No evidence was found that any of the GBs will have difficulties to be operational and adequately staffed after grant financing closure.

GBs plan follow up actions, e.g., developing a regional centre for training on tourism and there is a need for continuation of support, e.g., in other municipalities. Majority of GBs plan developing proposals to continue support to employment.

Future sustainability of the GS's outcomes is linked to the following issues: (1) comprehensive inter-sectoral approach including social housing, education and strategy for SMEs (self-employed), (2) key role of education supporting employment, (3) role of community centres to support GS and to interconnect services at local level.

Conclusion 6: Impact of the GS on increased employment in Montenegro

The assessment of impact of the GS on increased employment is limited at the mid-term. There is a good level of achievement performance measured by indicators and reported, thus the outputs and expected outputs will contribute to increased employment.

The expected outputs of the completed grant actions (at the time of the evaluation cut-off date) will contribute to increased employment of persons trained for deficit occupations and increased number of members of RE population that received training. Approximately 82 people found employment or became self-employed.

The GS also contributes to the EU negotiation process priorities under chapter 19 as there is a need for introducing quality employment measures aimed at young people, women, disabled people and minorities.

Impact on the outreach to general public was noted, e.g., 150,000 people watched Vijesti with information on the GS and thus assisted in changing the perception on RE population.



Conclusion 7: Added value of EU support

To some extent there was an added value of EU support compared to other donors.

The added value of the EU support was noted in regards to clear rules and transparency of EU support; EU assistance covers a lot of issues and tries to think in a comprehensive way to cover various issues; the added value of EU support is in its approach to minority rights, position of the RE population, working with disabilities and the importance of the rule of law. At the same time, it was noted that the EU support has challenging reporting, requiring time and human resources effort as compared to other donors and the duration of the grants (one year) is shorter compared to other donors (e.g., two years with German assistance) for the same area of assistance covered.

In the future, the EU could make a difference with (1) including private sector in the grant scheme calls, (2) supporting policy dialogue on the need for the tax exemptions for employers, (3) allowing for time needed to invest in the target group – enhancing missing skills (writing, literacy, local language, financial skills).

Conclusion 8: Complementarity of the Grant Scheme assistance

The Grant Scheme assistance is complementary to other donors interventions to some extent.

The EU support to deficit occupations and RE employability was complementary to other assistance as noted in the relevant programming documents. There is limited evidence on sector donor coordination practices. The overall coordination has been performed by the Office of the Prime Minister, which has prepared and maintained the database for donor coordination purposes. A good experience with the working group under the Strategy for Roma inclusion was noted. In the working group, there are representatives of all institutions such as ministry of health, finance, education, and employment.

Recommendations

Cluster 1: Operational level recommendations

Recommendation 1	Close monitoring of timeline for the second CFP implementation
Description	<p>MED and CFCU should closely monitor the timeline of implementation of the grants under the second CFP.</p> <p>The “n+5” rule that applies for SOPEES implies that all grants contracted under the second CFP (in 2021) have to be completed by the end of 2022. Costs generated in 2023 will be ineligible.</p>
Implementation and timeline	<p>To implement this recommendation, the MED and CFCU will need to take the following actions:</p> <ol style="list-style-type: none">1. Reviewing quarterly monitoring reports to ensure lack of delays2. Taking pro-active role in supporting GBs to overcome delays. <p>Timeline: During 2022</p>
Recommendation 2	Guidance on eligible costs
Description	<p>MED (and CFCU) to provide timely identification of ineligible costs in order to avoid deductions of the final grant amounts.</p>
Implementation and timeline	<p>To implement this recommendation, the MED/ CFCU will need to take the following actions:</p> <ol style="list-style-type: none">1. To provide feedback and guidance on problematic cases of non-eligible costs identified under the first CFP. <p>Timeline: second CFP implementation and next Calls for Proposals</p>
Recommendation 3	Stronger involvement of the private sector
Description	<p>To ensure greater involvement of the private sector (employers) in the GS implementation.</p>
Implementation and timeline	<p>To implement this recommendation, the MED will need to take the following actions:</p> <ol style="list-style-type: none">1. Including the potential employers in the grant scheme calls that more assistance is to be channelled through companies;2. Providing workshops/ trainings for employers on how to conduct training schemes and provide internships. <p>Timeline: Next calls for proposals</p>



Recommendation 4	Guidance on green economy
Description	MED to provide more guidance on green economy aspects to be taken into account during GSs implementation.
Implementation and timeline	<p>To implement this recommendation, MED will need to take the following actions:</p> <ol style="list-style-type: none"> 1. To develop a guidance document on green economy aspects including training modules to be included in training activities in scope of the grant actions. <p>Timeline: 2022 onwards</p>
Recommendation 5	Exchange of good practices and lessons learnt
Description	There is a need for supporting exchange of good practices and lessons learnt during implementation of the first CfP as well as for identification of the needs on the ground for the future calls.
Implementation and timeline	<p>To implement this recommendation, MED will need to take the following actions:</p> <ol style="list-style-type: none"> 1. To support exchange of good practices (workshops, round tables) among GBs and to give possibility to discuss the needs on the ground that could be taken into account when planning or preparing of the next call for proposals; 2. To support establishment of a network of GBs; 3. To consider planning longer than 12 months duration of implementation period of grants. <p>Timeline: 2022 onwards</p>

Cluster 2: System level recommendations

Recommendation 1	Strengthen policy dialogue on employment
Description	EUD to conduct stronger policy dialogue on a comprehensive / inter-sectoral support to employment in order to increase the employability measures.
Implementation and timeline	To implement this recommendation, EUD will need to take the following actions: <ol style="list-style-type: none">1. Stronger support the policy dialogue, e.g., on the need for the tax exemptions for employers who employ people for deficit occupations or RE candidates;2. Stronger support to the need for inter- sectoral cooperation, e.g., on support measures for self-employed. Timeline: 2022 onwards
Recommendation 2	To strengthen comprehensive inter-sectoral approach to employment challenge
Description	MED to strengthen the inter-service cooperation to support employment measures including with social housing, education, strategy for SMEs (self-employed).
Implementation and timeline	To implement this recommendation, MED will need to take the following actions: <ol style="list-style-type: none">1. To create inter-services working group on supporting employment of vulnerable groups and for deficit occupations in order to identify measures in other sectors which will facilitate the employment. Timeline: 2022 onwards



Recommendation 3	MED should strengthen linkages with donors community and strengthen its sectoral donor coordination to ensure complementarity of support to employment
Description	The evaluation evidence shows that the donor coordination for the employment sector is done to a limited extent and does not go beyond programming phase. The complementarity and efficiency of support to employment can benefit from stronger donor coordination conducted by MED.
Implementation and timeline	<p>To implement this recommendation, the MED will need to take the following actions:</p> <ol style="list-style-type: none"> 1. Follow on a good experience with the working group under the Strategy for Roma inclusion where the representatives of all institutions such as ministry of health, finance and education are present; 2. To ensure coordination/ exchange of information between the working group set up for the development of both the National Employment Strategy and the Employment Action Plans, and the working group under the Strategy for Roma inclusion. Information on the RE needs in relation to employability should taken into account in the preparation of Employment Action Plans. <p>Timeline: During 2022</p>
Recommendation 4	Support of the Employment Agency of Montenegro regarding RE candidates
Description	To ensure that the Employment Agency of Montenegro can provide support to identification of RE candidates for future trainings. At present, the Agency does not have ethnic origin data for selection of candidates.
Implementation and timeline	<p>To implement this recommendation, MED will need to take the following actions:</p> <ol style="list-style-type: none"> 1. Support the EAM to find the best ways in selecting unemployed RE candidates. <p>Timeline: 2022 onwards</p>

Annexes

Annex 1 Evaluation matrix

[Presented as Volume 2 of the report]

Annex 2 Further details on the methodology

This evaluation builds on information gathered at Grant Scheme level and Grant contracts level.

Analytical tools used for the evaluation

Evaluation Questions	Description
EQ 1 – Relevance	Relevance is usually understood as the extent to which the aims of an intervention are pertinent to the needs, problems, and issues to be addressed. In this evaluation, we understand relevance as the extent to which the objectives of the Grant Scheme are still pertinent to the needs, problems, and issues to be addressed in the area of Employment policies in Montenegro.
EQ 2 – Effectiveness	Effectiveness is commonly understood as the extent to which the aims of a programme are achieved. In this mid-term evaluation, we measure how far the Grant Scheme results were used or their potential benefits were already realised/ are expected to be realised. The key question is what difference the Grant Scheme made or is making in practice, as measured by how far the intended target groups really benefited/ expect to benefit from the products or services the projects made/will make available.
EQ 3 – Efficiency	Efficiency refers to the cost-effectiveness. In the case of this Grant Scheme 1, the key question is how well the various grants transformed the available resources into the intended results so far. Efficiency addresses value-for-money that is whether similar results could have been achieved by other means at lower costs.
EQ 4 – Efficiency	
EQ 5 – Sustainability	Sustainability refers to whether the positive outcomes of the Grant Scheme are likely to continue after external funding ends and whether envisaged impacts can be sustained. In this mid-term evaluation, we look at the probability of continued long-term benefits



EQ 6 – Impact	Impact denotes the relationship between the Grant Scheme purpose and overall objective. The extent to which the benefits received by the target beneficiaries had wider overall effect on larger numbers of people in the sector or county as a whole.
EQ 7 – EU Added value	EU Added Value requires consideration of the value and improvements which are caused by the EU rather than another party taking action.
EQ 8 – Complementarity	Under this evaluation, complementarity is understood as the connection between the Grant Scheme intervention and other donors' initiatives in Montenegro in the deficit occupations and employability of RE population area.

The table below presents ranking to be used to assess the strengths of evidence.

Ranking	Explanation
Strong	The finding is consistently supported by a range of evidence sources, including documentary sources, quantitative analysis and qualitative evidence; or the evidence sources, while not comprehensive, are of high quality and reliable to draw findings/conclusion (e.g., the evidence is based on a wide range of reliable qualitative sources, across which there is good triangulation).
More than satisfactory	There are at least two different sources of evidence with good triangulation, but the coverage of the evidence is not complete.
Indicative but not conclusive	There is only one evidence source of good quality, and no triangulation with other sources of evidence.
Weak	There is no triangulation and/or evidence is limited to a single source.

Evaluation steps

The main steps of the evaluation are:

1. evaluation inception phase,
2. desk phase,
3. field phase,
4. synthesis phase,
5. dissemination phase.

The description of the steps including outputs and meetings envisaged and provisional timeline is presented in the evaluation work plan below.

Evaluation timeline

MTE stages	Description	Outputs and meetings	Provisional Timeline
Inception phase (27 April – 31 May 2021)	<ul style="list-style-type: none">• Initial document/data collection• Stakeholders' analysis• Reconstruction/ construction of the intervention logic• Methodological design of the evaluation (evaluation questions etc)	Kick off meeting Establishment of the Evaluation Steering Group (ESG) Inception note	27 th April 2021 End of May 2021
Desk phase (June – July 2021)	<ul style="list-style-type: none">• In-depth document analysis (focused on evaluation questions)• Interviews (if relevant)• Identification of information gaps and hypothesis• Methodological design of the Field phase	Presentation of the findings and gaps to the ESG Draft evaluation matrix	June to Mid-July 2021
Field phase (September – October 2021)	<ul style="list-style-type: none">• Gathering of primary evidence• Case studies development (if relevant)• Data collection and analysis	Meetings and interviews with stakeholders Presentation of key findings to the ESG Final evaluation matrix	September – October 2021 October 2021
Synthesis phase November 2021 – January 2022	<ul style="list-style-type: none">• Final analysis of the findings• Formulation of the overall assessment, conclusions and recommendations	Draft final report Executive Summary Final report Presentation of key findings/recommendations to the ESG	November 2021 – January 2022
Dissemination phase November 2021	<ul style="list-style-type: none">• Final presentation of the findings/ recommendations	Final presentation to broader audience Publishing the final report	January – February 2022



Annex 3 List of People Interviewed

Name	Organisation	Position/ Unit	Date
Nedjeljka Sindik	HELP	Project Coordinator	17.09.2021
Dzenan Demic	HELP	Project Assistant	17.09.2021
Teodora Kusovac	Capital city Podgorica	Project Manager	17.09.2021
Albina Medjedovic	Capital city Podgorica	Financial Manager	17.09.2021
Snezana Radenovic	Red Cross of Montenegro	Project Coordinator	21.09.2021
Aleksandar Radunovic	Guru Plast	Project Coordinator	22.09.2021
Mirjana Maslovar	HEC	Project Coordinator	22.09.2021
Slaven Cipranic	ZOPT	Director	22.09.2021
Ahmat Muric	ZOPT	Project Administrator	22.09.2021
Vukosava Pekovic	ZOPT	Team Leader	22.09.2021
Milka Tadic Mijovic	CIN	President	23.09.2021
Zeljana Kandic	CIN	Project Manager	23.09.2021
Natasa Pavlicic	Pamark	Executive Director	12.10.2021
Miguel Magro Gomez	DEU	Task Manager	23.11.2021
Mladenka Tesic	DEU	Task Manager	23.11.2021

Annex 4 List of main documents consulted

Policy documents

- EC Progress report on Montenegro (2020) (2021)
- Employment and Social Reform Programme for Montenegro (2015-2020)
- Indicative Strategy Papers for Montenegro (2014 and revised in 2018)
- Economic Reform Programmes (ERPs)
- EC Assessment of the ERP of Montenegro 2021-2023 (SWD(2021) 94)
- The Financing Agreement for SOPEES (2018)
 - Addendum No.1 to Financing Agreement 2015-2017 Multi-annual action programme for Montenegro on Employment, Education, and Social policies (CRIS no. 2015/037-895.
- Screening Report for Montenegro for Chapter 19
- IPA II Regulation
- Montenegro Development Directions
- Employment and Social Reform Programme 2015-2020
 - Montenegro National Strategy for Employment and Human Resources

Development (2016-2020)

- National Strategy for Adult Education and Training (2015-2020):
- Government Action Plan “Decade for Roma Inclusion” 2005-2015
- IPA Annual Implementation Reports (2019 and 2020)
- Expenditure verification reports
 - Ex-post evaluation of the Operational programme for Human Resources Development 2012-2013 (IPA Component IV)
- Operation Identification Sheet: Implementation of Active labour Market Measures.

Grant Scheme documents

- Grant Scheme – 1st call - Training and education activities for deficit occupations and for boosting employability of RE population (EuropeAid/163191/ID/ACT/ME) (2019)
- Grant Scheme – 2nd call - Implementation of training and education for deficit occupations (EuropeAid/171432/ID/ACT/ME) (2021)
- Grant application forms (for all grants under the 1st call)
- Monitoring reports (quarterly) and final reports (as available)
- Procurement plans (CFCU)

Annex 5 Other evaluation related documents

Annex 5.1 Assessment and evaluation plan finalised in March 2021 in scope of project activity 1.6.1

Planned Project Output: Evaluation plan developed based on prior assessment of SOPEES actions/ activities to be subject of evaluation

1.0 Introduction

By the original project ToR, an external mid-term result oriented programme evaluation should be conducted in scope of the Activity 1.6.

In IPA II, the evaluation to be organised by the IPA II Beneficiary Country is mid-term evaluation. Montenegro is obliged to ensure interim evaluation of SOPEES, the on-going programme managed by Montenegro under indirect management. Taking into consideration the launch of programme implementation in December 2018 after signing of FA and the time needed for implementation of activities within programme, originally the beginning of 2021 has been anticipated as the most plausible timing for evaluation activities. In the inception phase of the TA project, i.e. in May 2019, it has been agreed that the Action or Activity within SOPEES that will be subject of evaluation will be selected in close cooperation with the main beneficiary and the EIO, in charge of preparing the overall Evaluation Plan for IPA II programmes in Montenegro. At that stage, it has been preliminary indicated by the ministry that one of the GSs of Action 1 or Action 3 would be relevant for conduct of interim evaluation.

The implementation start of Activity 1.6 was planned for November 2020 and for reasons explained below, the actual implementation started in March 2021.

Due to given situation in relation with COVID-19 pandemics, since April 2020 project activities have been implemented remotely. At the end of October 2020, CA rejected the request for home-based



work by the experts and initiated preparation of an amendment to the contract, for changing daily fees for the work performed from home base. The Contract Addendum was finally signed on 03 March 2021. As the signing of Contract Addendum conditioned the approval of work from home base, immediately after its signing the CA issued the approval for remote work as from 08 March 2021, allowing for legitimate usage of available project resources. In spite of continues support provided by the project to the main beneficiary in relation to SOPEES implementation, formally there was a standstill in project implementation from November 2020 until the beginning of March 2021.

2.0 Assessment and evaluation plan

Elaboration of evaluation plan included the following:

- **Co-ordination arrangements for planned interim evaluation**

Considering the originally planned time lines for conduct of evaluation, in November 2020 the main beneficiary requested from NIPAC/EIO information in relation to SOPEES related evaluation, eventually planned in the overall evaluation plan. In their reply, the EIO explained that no actions/activities related to SOPEES have been planned for mid-term evaluation and invited the lead ministry to their sole decision on the Action/Activity that would be subject to mid-term evaluation for assessment of mid-term results.

- **Consultation of IPA II MoP, Chapter on Programme Evaluation**

In scope of project activities, the IPA II MoP, Chapter on Programme Evaluation and its Annexes have been consulted for relevant information to be considered in relation to planned evaluation. This included main evaluation criteria for selection of activity/GS that should be subject to evaluation, the outline of the Evaluation Plan and preparatory activities including drafting of ToR/mission plan for NKE's assistance in planned evaluation.

- **Selection of evaluation subject**

Based on the Results-oriented Monitoring Handbook (ROM Handbook), the following key criteria for selection of operation that should be subject to interim evaluation have been taken into consideration:

- *The implementation has already started (C1),*
- *Have more than 6 months of implementation life outstanding (C2),*
- *Differently performing projects, i.e. balanced representation of underperforming projects and those which are going well (C3),*
- *Diverse size of EC contribution (C4),*
- *60% of projects being evaluated for the first time (C5.,*

For the assessment, an overview of contracts in scope of SOPEES has been prepared and analysed (Annex I).

Guided by the decision of project main beneficiary to evaluate one of the GSs in Action 1 or in Action 3, the following analysis has been made:

Originally, there were two GSs in scope of Action 1 ("Training and education activities for deficit occupations and for boosting employability of RE population" and "Support to employment in less developed

municipalities”) and one GS in scope of Action 3 (“Support to social and child protection services”).

For the first GS of Action 1, the Call for Proposals for GS “Training and education activities for deficit occupations and for boosting employability of RE population” was published on 01 March 2019. Nine projects have been selected for funding and contracted in the period from November 2019 to February 2020, with duration from 12 to 14 months and EU contribution from 89.000 to 150.000 EUR. According to the payment plan (last updated in March 2021), some of the projects have finished by the end of 2020. Due to COVID-19 pandemics, some were extended to May, June or July 2021. After selection of GBs, savings have occurred and based on it, another Call for Proposals in relation to this GS has been planned, for “Training and education activities for deficit occupations”. The 2nd call was published in February 2021 and contracts are planned to be signed by December 2021.

The second GS of Action 1, the GS for “Support to employment in less developed municipalities” was published in September 2020. Evaluation has been ongoing and contracts are planned to be signed by September 2021.

Under the Action 3 GS “Support to Provision of Social and Child Protection Services”, the Call for Proposals was published on 05 March 2019. 17 projects have been selected for funding and contracted in the period from February to March 2020, most of them with duration of 22-24 months and EU contribution of 180.000 EUR in average. The last contract was signed in December 2020.

Considering the above criteria, the **GS “Training and education activities for deficit occupations and for boosting employability of RE population”** is more suitable for evaluation: (1) Implementation of contracts under the 1st Call for Proposals is coming to its end and will be followed by contracts selected under the 2nd Call for Proposals (2). Some of the projects have been extended due to COVID-19 situation, with performance below expected, where some projects have not faced problems in implementation (3.) There is diverse size of EC contribution granted to selected projects (4). The selected GS would be evaluated for the first time (5).

- **Evaluation related activities**

For actual start of evaluation conduct, other evaluation-related activities are necessary, which also need to be planned and implemented prior to evaluation.

In this connection, ToR/mission plan for NKE’s input shall be prepared and relevant expert selected for conduct of evaluation. The ToR/mission plan will be finalised in March 2021 and upon main beneficiary’s agreement with the mission plan, procedure for selection of NKE will be launched.

For assessment and conduct of mid-term evaluation, the following project resources are available (as planned in the Inception Report):

1. 20 WDs for TL-KE1,
2. 20 WDs for NKE’s support,
3. 5 WDs for KE2.

Indicative timetable for evaluation related activities is April - November 2021.

Annex 5.2 Kick-off meeting summary points

Minutes of the kick-off meeting in relation with mid-term results oriented evaluation in scope of SOPEES (Activity 1.6.2)

Meeting venue: online meeting via zoom platform

Date: 27 April 2021, from 10:00 to 11:15 hrs

Attendants:

- Granica Simičević, MED-PIU
- Ljulje Dušaj, MED-PIU
- Edina Dešić, MED
- Sladjana Pešić, MFSW-CFCU
- Vesna Lučić, MFSW-CFCU
- Maja Stanaj; MFSW-CFCU
- Tijana Marković, MFSW-CFCU
- Dragomir Marković, MFSW-CFCU
- Marko Krivokapić, MLSW-CFCU
- Marko Dragaš, OEI-NIPAC Office
- Joanna Fiedler-Morotz, SNKE-AC
- Mojca Grošelj, TL-KE1, AC
- Radmila Bobić, PD-AC
- Bojana Laković, PM-ICE

Subject: Introduction of conduct of mid-term results oriented evaluation under SOPEES

Summary:

Based on the assessment and the evaluation plan finalised in March 2021 by the TL-KE1, the GS “Training and education activities for deficit occupations and for boosting employability of RE population” in scope of Action 1, Activity 1 of SOPEES has been selected for mid-term evaluation. For the conduct of evaluation, SNKE has been selected and approved for performance of services planned by the mission plan/ToR agreed with the beneficiary. The evaluation will be performed by the Evaluation Team represented by TL-KE1 and SNKE, assisted by Office Manager and KE2-GSE, as appropriate. The implementation period for the conduct of evaluation (Activity 1.6.2 PWP) is planned from April to November 2021.

For the kick-off meeting, agenda and the presentation in power point has been prepared and presented by the TL-KE1 and SNKE to the representatives of the main beneficiary, CFCU and NIPAC Office. The presentation covered the following topics:

- Introduction to evaluation and presentation of the evaluators team
- Overview of the current status of GS Contracts (based on procurement plan of April 2021, requiring the most recent update/information on eventual changes from CFCU)



- Methodology for conducting evaluation (general aspects of evaluation methodology based on OECD/DAC criteria (Relevance, Effectiveness, Efficiency, Sustainability, Impact) and additional criteria for the EU funds (EU added value, Complementarity) and evaluation matrix)
- Scope of an evaluation in terms of objectives, scope, cut off dates, specific aspects to be considered
- Evaluation phases (inception phase, desk phase, field phase, synthesis phase, dissemination phase), with description of relating activities and initial planning proposed for the evaluation concerned
- Details of evaluation inception phase and related actions (Launch of the Evaluation Steering Group by the beneficiary and the need for the follow up meetings).

After the presentation, the attendants of the meeting had no specific questions or comments to proposed evaluation plan and provisional timelines of the phases of evaluation. They all expressed their willingness for cooperation with Evaluation Team and their support during the conduct of evaluation, which in view of capacity building can offer an opportunity for their better understanding/ knowledge of evaluation process at programme level, as mentioned by the TL-KE1 at the wrap-up of the meeting.

Key points:

The aim of the Inception phase

The Inception phase of the evaluation will aim at elaboration of:

- the specific objectives of the evaluation
- scope of the evaluation (specific aspects to be evaluated)
- intervention logic and narrative explanation of the logic
- evaluation matrix (evaluation questions with judgement criteria, indicators and methods of data collection and analysis)
- In the inception phase, documents to be analysed will be identified and the cut-off date for mid-term evaluation defined in agreement with the beneficiary.

The output of the evaluation phase will be the **Inception note**.

Provisional timeline of the phases of the evaluation proposed by the evaluation team

MTE stages	Description	Outputs and meetings	Provisional Timeline
<p>Inception phase (27 April – 31 May 2021)</p>	<ul style="list-style-type: none"> Initial document/data collection Stakeholders' analysis Reconstruction/ construction of the intervention logic Methodological design of the evaluation (evaluation questions etc) 	<p>Kick off meeting</p> <p>Establishment of the Evaluation Steering Group (ESG)</p> <p>Inception note</p>	<p>27th April 2021</p> <p>End of May 2021</p>
<p>Desk phase (June – July 2021)</p>	<ul style="list-style-type: none"> In-depth document analysis (focused on evaluation questions) Interviews (if relevant) Identification of information gaps and hypothesis Methodological design of the Field phase 	<p>Presentation of the findings and gaps to the ESG</p> <p>Draft evaluation matrix</p>	<p>June to Mid-July 2021</p>
<p>Field phase (September – October 2021)</p>	<ul style="list-style-type: none"> Gathering of primary evidence Data collection and analysis 	<p>Meetings and interviews with stakeholders</p> <p>Presentation of key findings to the ESG</p> <p>Final evaluation matrix</p>	<p>September – October 2021</p> <p>October 2021</p>
<p>Synthesis phase November 2021</p>	<ul style="list-style-type: none"> Final analysis of the findings Formulation of the overall assessment, conclusions and recommendations 	<p>Draft final report</p> <p>Executive Summary</p> <p>Final report</p> <p>Presentation of key findings/ recommendations to the ESG</p>	<p>November 2021</p>
<p>Dissemination phase November 2021</p>	<ul style="list-style-type: none"> Final presentation of the findings/ recommendations 	<p>Final presentation to broader audience (? - TBA)</p> <p>Publishing the final report (?)</p>	<p>November 2021</p>



The appointment of Evaluation Steering Group by the beneficiary

At the latest by the end of Inception phase, the Evaluation Steering Group should be appointed by the beneficiary and its members communicated to the project evaluation team.

➤ **Next steps for the evaluation**

- Preparation of the Inception note by (Evaluation Team) by end of May 2021;
- Collection of documents and information through interviews, if needed, for preparation of Inception note;
- Presentation of the Inception note to the Evaluation Steering Group (end of May 2021).

Prepared by:

Mojca Grošelj, TL-KE1

Joanna Fiedler Morotz, SNKE

[Annex 5.3 Summary notes of the meeting with ESG members on preliminary conclusions and emerging recommendations](#)

Meeting venue: online meeting via google meet platform

Date: 26 November 2021, from 10:00 to 11:30 hrs

Attendants:

- Granica Simičević, MED-PIU
- Ljulje Dušaj, MED-PIU
- Edina Dešić, MED
- Jelena Vujadinović, MFSW-CFCU
- Marko Dragaš, OEI-NIPAC Office
- Joanna Fiedler-Morotz, SNKE-AC
- Mojca Grošelj, TL-KE1, AC

Subject: Preliminary conclusions and emerging recommendations

Summary:

Background information:

Following the desk phase of the mid-term result oriented evaluation under SOPEES, with Desk phase note presented in the beginning of September 2021, the field phase has been completed after the conduct of interviews with GBs and other relevant counterparts. The evaluation is currently in the synthesis phase, meaning that the team has worked on preliminary conclusions and recommendations that should be presented to the ESG members.

For the meeting, the presentation in power point has been prepared and presented by the SNKE and the TL-KE1 to the members of ESG. The presentation covered:

- The results of the analysis and the field phase observations relating to:
 - Relevance
 - Effectiveness

- Efficiency
 - Sustainability
 - Impact
 - EU Added Value
 - Complementarity,
- The directions of recommendations, for discussion with ESG members.

In their feedback to the presentation, the ESG members agreed with the direction of proposed recommendations. In their opinion, it was useful to hear about the field phase observations as this information comes from the angle of GBs which is very useful and relevant in view of future grant schemes.

The ESG members agreed with proposed timing for dissemination phase of the evaluation that has been planned for January 2022.

The key points agreed are as follows:

- The direction of proposed recommendations are relevant.
- The results of the evaluation analyses will be presented in Evaluation Report and Evaluation Matrix.
- Detailed feedback received from the ESG Members will be taken into account by the Evaluation team for the final formulation of the recommendations.
- Dissemination phase is planned for January 2022.

Prepared by:
Mojca Grošelj, TL-KE1
Joanna Fiedler Morotz, SNKE



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