

At Risk:

The Social Vulnerability
of Roma, Refugees
and Internally Displaced Persons
in Montenegro





United Nations Development Programme (UNDP)
Country Office Montenegro

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Podgorica, November 2006

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Abbreviations

CEED – Centre for Entrepreneurship and Economic Development

DPRS – Development and Poverty Reduction Strategy

IDPs – Internally Displaced Persons

ISSP – Institute for Strategic Studies and Prognoses

MDGs – Millennium Development Goals

MONSTAT – Statistical Office of the Republic of Montenegro

NGO – Non-Governmental Organization

PRSP – Poverty Reduction Strategy Paper

RAE – Roma, Ashkaelia and Egyptians

SEE – South East Europe

UNDP – United Nations Development Programme

WB – World Bank

Introduction

Having become an independent state in May 2006, Montenegro is currently at a crucial phase of its development. The country is experiencing positive economic growth, which does not always translate into pro-poor growth. Some socioeconomic challenges, common for most transition economies in SEE, remain, including the socioeconomic status of vulnerable groups. A number of groups in Montenegro are exposed to social vulnerability, such as women, children, or persons with disabilities. However, in the case of Roma, refugees and internally displaced persons (IDPs) their vulnerability is particularly related to their ethnicity (in the case of the Roma), or the experience of forced migration (refugees and IDPs), which supplements the already existing vulnerabilities of those who experience poverty, gender discrimination, disability, or other kinds of discrimination.

In the last decade, the vulnerable groups in our focus received increasing attention from donors, development organizations and intergovernmental agencies. The realization of the Millennium Development Goals (MDGs) also envisages the social inclusion of vulnerable groups. The MDGs originate from the Millennium Declaration that was signed by 189 countries, including 147 heads of state, at the United Nations' Millennium Summit in New York in 2000. The eight MDGs provide time bound quantified indicators to help governments and other actors measure progress in reducing poverty and social exclusion. Specific targets and quantified indicators are associated with each of these goals.

Box 1: Millennium Development Goals

Goal 1: Halving the number of people living in absolute poverty by 2015.

Goal 2: Reaching 100 per cent primary school completion by 2015.

Goal 3: Gender equality, empowering women and eliminating gender disparities in primary and secondary education.

Goal 4: Reducing child mortality by two thirds by 2015.

Goal 5: Reducing maternal mortality by 75 per cent.

Goal 6: Combating HIV/AIDS, malaria, tuberculosis, and other communicable diseases.

Goal 7: Addressing environmental causes of poverty.

Goal 8: Calling for stronger global partnerships for development.

More information on the MDGs in Montenegro can be found at:

<http://www.undp.org.yu/montenegro/>.

As it was noted that achieving MDGs in the case of vulnerable groups will present a particular challenge, the international initiative “Decade of Roma Inclusion 2005-2015” was launched in an attempt to alleviate the socio-economic plight of Roma. The Decade of Roma Inclusion grew out of the conference “Roma in an Expanding Europe: Challenges for the Future”, where high level representatives from nine countries – Bulgaria, Croatia, Czech Republic, Hungary, Macedonia, Montenegro, Romania, Serbia and Slovakia – pledged to close the gap in welfare and living conditions between Roma and the non-Roma in their countries, and to break the

vicious circles of poverty and social exclusion.¹ The national action plans (NAPs) that these governments subsequently designed and will implement during the Decade correspond to the MDGs with their emphasis on employment, education, health and housing, and also the cross-cutting themes of poverty, discrimination and gender. Within this initiative, the Government of Montenegro adopted the *Decade of Roma Inclusion 2005-2015 Action Plan* in January 2005.² The Action Plan is the result of an extensive consultation process, which included ministries relevant to the main topics of the Roma Decade, and also the Romani civil society, through the inclusion of the *Roma Circle* – a network of twelve Roma NGOs from Montenegro. For the moment, however, the implementation of the Action Plan in Montenegro is stalled, due to the lack of financial commitments by the Government; there are also no local action plans to improve the Roma situation. In the meanwhile, several other important Roma-related projects are being developed: the Government Strategy for Roma in Montenegro is drafted within a project of the US-based *Project on Ethnic Relations* in cooperation with the Ministry for the Protection of Minority Rights. It is planned that the strategy will address those areas not covered by the Action Plan, especially political participation, and its public review is slated for January 2007.³ At the same time, the National Action Plan on Romani Women is also being drafted, within the auspices of the Gender Equality Office of the Republic of Montenegro.⁴

Additionally, the insufficient quantitative data on the socioeconomic status of vulnerable groups vis-à-vis the majority populations and national averages was noted as another major obstacle, as national averages often hide poverty pockets and the actual social and economic status of vulnerable groups. There is a great need for statistical data on the situation of vulnerable groups, especially in the case of Roma where the official statistics appears to be a large underestimation compared to the observed real conditions. In response to these needs, UNDP conducted a further comprehensive vulnerability survey on Roma, refugees, IDPs and the domicile non-Romani population living in close proximity to Roma in Serbia, Montenegro, Kosovo, Albania, Bulgaria, Bosnia and Herzegovina, Croatia, Macedonia and Romania in late 2004.⁵ The primary task of this report is to present the data gathered through the UNDP vulnerability survey in Montenegro.⁶ On the basis of the UNDP vulnerability data and other available sources, this document will analyze the levels of vulnerability of Roma, IDPs/refugees and domicile non-Roma living in close proximity to Roma. It will follow the structure of the Montenegrin Roma Action Plan with its four major areas of employment, education, health, and housing. In addition, it will identify other crucial areas of intervention, such as racial and/or gender discrimination; lack of identity documents as the main barrier to access to services and social inclusion programs; a need for policies at the local level; lack of participation in the decision

¹ For more information on the Decade of Roma Inclusion, see: <http://www.romadecade.org>.

² The Action Plan can be found at: <http://www.vlada.cg.yu/eng/mininos/vijesti.php?akcija=vijesti&id=5933>.

³ Project on Ethnic Relations, “PER holds second roundtable discussion on drafting Montenegro’s government Roma (RAE) strategy,” Podgorica, 21 February 2006, available at: <http://www.per-usa.org>.

⁴ Gender Equality Office of the Republic of Montenegro, “Projekat ‘Romkinje to mogu’,” Podgorica, 11 July 2006, available at: <http://www.gender.vlada.cg.yu>.

⁵ When used in regard to statistical data from this survey, the terms “domicile non-Roma” or “domicile non-Romani respondents” will indicate only the surveyed non-Romani population who are neither refugees nor IDPs and who live in close proximity to Roma.

⁶ The full UNDP Vulnerable Groups Dataset for all the survey countries, including Montenegro, is available online at: <http://vulnerability.undp.sk>.

making process at the local level; and finally the Government's commitment to social inclusion. This study both measures the levels of Roma vulnerability in comparison with other groups, and provides analytical input and baselines that can be used in monitoring the Decade implementation. These are limited data but can hopefully serve to give insight into the economic and social situation of vulnerable groups, and can provide the data needed for the (rough) calculation of poverty lines, poverty depth, employment/unemployment rates, educational level and educational attainment, and health and housing conditions.

In addition to supporting the vulnerability survey, the UNDP Country Office Montenegro assisted the development of the local Roma community through a number of projects implemented since 2002. Within its project named "Capacity Building of Local NGOs for Civil Society Development in Montenegro 2003-2005," UNDP Montenegro took part in creating the Roma NAP and supported its translation into Romani, which became the first official document in Romani language in the country. It also supported NGOs which presented the NAP before Roma communities and the relevant authorities. Within the same project, the capacity building and initiatives of Roma NGOs were supported through eleven grants in the amount of 7,000 USD on average.

So far, UNDP Montenegro supported a number of NGO initiatives relevant to the topics of the NAP:

- Personal Documents, 2005 (this pilot project, conducted by *Enfants* from Berane facilitated the issuance of over 400 personal documents for Roma);
- Roma NGOs Capacity Building, 2005 (this project on computer literacy and the provision of computers was conducted by *Početak*, together with NGOs *Rom-čovjek* and *Ambicija*);
- Ecology Knowledge, 2005 (NGO *Luč* project on health care in Romani settlements);
- Stimulating Parents for Their Children's Education, 2005 (NGO *Humanitarac*);
- Strengthening the Roma NGO network *Romski krug*, 2005 (this project, conducted by *Početak*, resulted in the official registration of the Roma NGO coalition).

Other illustrative initiatives are "Our Traditional Heritage" (2002-2003), where local NGOs *Bonum*, *Montevita* and *Početak* promoted the ethnic and cultural diversity and heritage of Roma, and the "PRSP Participatory Design Process" (2003), building the capacity of Roma NGOs and non-Roma NGOs concerned with Roma issues to take part in PRSP design.⁷

Poverty eradication through sustainable development towards the achievement of MDGs and the social inclusion concept is the UNDP's central priority theme. On the basis of the abovementioned small and pilot projects, and following an intensive consultative process with the respective local parties, the UNDP developed a comprehensive two-year (2007-2009) project proposal "Decreasing the vulnerability of Roma in Western Balkans." This project will be funded by the Swedish

⁷ Within this process, the Institute for Strategic Studies and Prognoses (ISSP) conducted the *Household Survey on Roma, Ashkaelia and Egyptians, Refugees and Internally Displaced Persons* (2003) in cooperation with twelve Roma NGOs. The survey provided vital data for more accurate poverty profiling correcting initial poverty rate of 9.6 per cent up to 12.2 per cent. The programme also strengthened the NGO cooperation and credibility, upgraded their technical expertise, etc.

International Development Cooperation Agency (SIDA), whereas the Montenegro component is a part of a regional programme that includes Serbia and Kosovo, and which will be run on the regional level by the UNDP Bratislava Regional Centre. The overall objective of the project is the targeted Roma poverty reduction ensuring improved and sustainable social inclusion, better employment and development opportunities. The envisaged major outcomes of the project are:

- Ensuring equal access to and the improvement of social security services for Roma for their better social inclusion;
- Access to quality public employment services; and
- Roma NGOs as a voice of the Roma community, empowered to better represent the community, and to advocate and deliver social security services.

Methodology

The primary universe under study in this survey consists of: (i) all the households in Roma settlements or areas of compact Roma population; (ii) displaced persons (IDPs/refugees); and (iii) domicile non-Roma communities living in close proximity to Roma and the displaced. To generate the data on all three targeted groups, the survey questionnaire used both household and individual modules. Within the individual module, each household member's profile was registered, including demographic characteristics, economic status, education, and health. The household module addresses issues related to the household in general, such as the dwelling type, access to basic infrastructure, the possession of household items, etc. Questions related to income and expenditures were addressed in both modules.⁸

Following a tendency evident in other countries under this regional survey, the sampling of Roma population was a major challenge in Montenegro as well. In Montenegro, the broader vulnerable community in question includes Roma, Ashkaelia, and Egyptians (RAE).⁹ The latest population census from 2003 registered 2,826 Roma and Egyptians, which is 0.46 per cent of the total population of Montenegro.¹⁰ As is usually the case with official data on Roma in Europe, it is considered that these numbers are in reality much higher, because a certain share of Roma prefer to identify themselves as members of other ethnic groups. Additionally, some Roma escape the census networks and remain unregistered. For these reasons, some Roma NGOs raise the number to 20-27,000, while moderate estimates, offered by Montenegrin NGOs who conducted extensive household surveys in main Roma settlements, place the Romani population of Montenegro in the range of 10-15,000 persons.¹¹ In any case, it is very likely that in reality Roma make the fourth largest minority in the country after Serbs, Bosniaks and Albanians.¹² Though unofficial, this data was used to set up the structure of the sample in Montenegro.

In the case of displaced persons, including refugees and IDPs, a similar approach was made. Data from official sources related to those displaced persons whose status was registered was used for the sampling. The samples for IDPs/refugees were constructed using official registries provided by expert organizations, primarily the United Nations High Commissioner for Refugees (UNHCR) and the Commissioner for Displaced Persons of the Government of the Republic of Montenegro.

⁸ For any additional information related to the questionnaire, please see the dedicated website <http://vulnerability.undp.sk>.

⁹ In this text and solely for the purpose of presenting the survey results, the term "Roma" will be used as an umbrella term covering "Roma, Ashkaelia and Egyptians." The latter two groups are often perceived (and treated) as Roma by the majority society, however they do not identify themselves as Romani. For more information on RAE, see: Marushiakova, Elena et al., *Identity Formation among Minorities in the Balkans: The Cases of Roms, Egyptians and Ashkali in Kosovo*. Sofia: Minority Studies Society Studii Romani, 2001.

¹⁰ MONSTAT – Statistical Office of the Republic of Montenegro, *Census of Population, Households and Dwellings in the Republic of Montenegro in 2003*, available at: <http://www.monstat.cg.yu/engPopis.htm>.

¹¹ SOS Hotline for Women and Children Victims of Violence, *Research on Inclusion of Roma Children in the Educational System*, Nikšić: SOS Hotline, 2006, p. 14.

¹² United Nations Development Programme and Institute for Strategic Studies and Prognoses, *Diversities – Potential for Development: Human Development Report for Montenegro*. Podgorica: UNDP and ISSP, 2005.

The non-Roma booster samples were constructed using similar procedure as for the Roma. These are representative samples of domicile non-Roma communities living in settlements with Roma communities of “average and above” size. These samples are therefore not representative of national averages. The idea was to have records of their socio-economic status, which can serve as a baseline for comparing levels of vulnerability and their determinants for the Roma and displaced persons.

The UNDP vulnerability survey was conducted in ten municipalities of Montenegro, in a total of 601 households (198 domicile non-Roma households, 199 Roma households, and 204 refugee and IDP households), mainly living in central (61 per cent) and southern (33 per cent) parts of Montenegro. A total of 2107 persons were interviewed, including 700 persons from the domicile non-Roma community, 699 persons living in Roma communities, and 708 refugees/IDPs. The survey was executed by Medium Gallup, a GALLUP affiliated agency based in Belgrade, and coordinated by the GALLUP regional office in Sofia which managed the execution of the whole survey. After the fieldwork was completed thorough control was run with 10-15 per cent of the sample depending on the country. All errors were cleared. Data control was conducted centrally by the GALLUP regional office.

Identifying vulnerable groups

When formerly socialist countries in Europe and Central Asia entered the transition process from a controlled to a market economy, poverty was not in the focus of their activities, under the assumption that poverty would decrease in time with the higher economic growth rate, improved labour mobility and better education. However, more than fifteen years later, the situation is considerably different than expected: the national product decrease was sharper than estimated, while the process of recovery is slower than planned. Consequently, there is an increase in poverty and inequality all over the region.

Prior to the transition process, socialist countries had lower poverty rates than is the case today, while inequality was not a topic of discussion due to governmental control of freedom of expression. The transition resulted in a sharp decrease in the national product and unequal distribution, while the complex interaction between economic, social and political processes surfaced. Eventually, the national product was reduced, in addition to lower budget revenues and reduced household income. The unemployment rate increased, as shrinking government funds reduced already weak investments in the public sector (primarily health and education), and corruption spread. The public sector still employed a largest portion of the labour force at low salaries, at least formally, and a dearth of new jobs increased poverty rates and kept numerous households in a difficult situation.

Poverty and the risk of falling into poverty are usually the first criterion for determining vulnerability. In addition to poverty, vulnerability may surface due to the lack of educational opportunities, inadequate personal (physical) security, poor housing and poor access to health care; experiencing multiple disadvantages usually distances vulnerable groups from social and community networks as well. Displacement is another major determinant of vulnerability, and so is ethnic or religious affiliation, disability, or age. Gender can also further exacerbate vulnerability. In south-east Europe, groups that are usually perceived as particularly vulnerable are Roma and other ethnic minorities, women, those with less education, the unemployed, the displaced, and those living in rural areas.¹³

In Montenegro, despite rising living standards and an overall improvement, some groups still suffer from continued losses, and pockets of deep poverty remain. In an effort to reduce poverty, the Government of Montenegro adopted the Development and Poverty Reduction Strategy (DPRS) in 2003. The Montenegrin poverty profile was well developed and one of the first in the region to include RAE, refugees and IDPs. The DPRS also confirmed the low living conditions and standards of certain population strata in Montenegro, placing a special emphasis on RAE and refugees/IDPs.¹⁴ In addition to monetary poverty indicators, the UNDP/ISSP survey also provided non-monetary indicators to additionally explain living standards of those populations (see Table 1). Since DPRS was adopted, two major reforms in the area of education and health were established, with the goal of increased public access to social services as well as to provide higher security to the most vulnerable.

¹³ This paragraph has been adopted from a detailed section on vulnerability in: United Nations Development Programme, *At Risk: Roma and the Displaced in Southeast Europe*. Bratislava: UNDP, 2006, pp. 3-6.

¹⁴ Government of Montenegro, *Development and Poverty Reduction Strategy*, 2003, available at: <http://www.seerecon.org/serbiamontenegro/index.cfm>.

Table 1: Multidimensional poverty indicators

Indicators	Per cent of population	Resident population	RAE	Refugees	IDPs
Health poverty: any illness/injury in the past 30 days that precluded usual activities	6.1	6.2	9.3	3.3	3.2
Employment poverty: age 15-65, not working but ready to work if given a job opportunity	17.4	15.8	33.7	42.3	31.6
Housing poverty: the drinking source in the dwelling is not piped water, or there is no bathroom in the dwelling	18.6	16.0	74.7	28.5	39.9
The dwelling space per person is less than 10m ²	11.3	6.9	85.8	54.5	50.1

Source: ISSP/UNDP Household Survey.

The RAE community in Montenegro is characterized by highest poverty and unemployment rates compared to other groups in the society. They typically live in ethnically homogenous areas, illegally built at the outskirts of cities. As mentioned earlier, a significant share of the RAE population are persons displaced from Kosovo, many of whom do not speak the local language. This subgroup of the Roma population – those who are both an ethnic minority and have been forcibly displaced – deserves special attention as they are exposed to vulnerability on several levels. Very few of them have formal education, and the jobs they perform are primarily based on self-learned skills, rather than formal knowledge. Additional barriers are created by their limited possibilities to receive loans and own property. Another subgroup of Roma that needs particular mention are those who were returned to Montenegro from Western Europe after their asylum applications were refused; the economic and social situation of the returnees is particularly dire.¹⁵

With regards to forced migrants, refugees and displaced persons, 26,679 refugees and displaced persons lived in Montenegro as of November 2006.¹⁶ This figure included 8,484 refugees and 16,195 IDPs from Kosovo. The IDPs are mainly Montenegrins (33 per cent), followed by Serbs (25 per cent), Roma (2,975 persons – 18 per cent), and Egyptians (1,336 persons – 8 per cent). The majority of refugees and IDPs live in private accommodation and informal collective centres; this was the case of 2,440 Roma, Ashkaelia and Egyptians, with 1,697 in Podgorica alone. In March 2005, the Government of Montenegro adopted the Strategy for Durable Solutions for Refugees and Internally Displaced Persons, which should resolve issues related to their status in the next three years.

Generally, when taking into account the numbers of refugees, IDPs and Roma in a country with the population of 620,145, it is evident that these particular vulnerable groups present a significant segment of the society.¹⁷

¹⁵ For more information, see Group 484, *Return from Western Europe of Nationals of Serbia and Montenegro who were not granted asylum or whose temporary protection ended*. Belgrade: Group 484, 2005.

¹⁶ Office of the Commissioner for Displaced Persons of the Government of the Republic of Montenegro, Podgorica, 13 November 2006.

¹⁷ MONSTAT – Statistical Office of the Republic of Montenegro, *Census of Population, Households and Dwellings in the Republic of Montenegro in 2003*, available at: <http://www.monstat.cg.yu/engPopis.htm>.

Poverty and unemployment among vulnerable groups in Montenegro

Being a multidimensional phenomenon, poverty is described through both monetary and non-monetary indicators. In practice, there is no single indicator that captures all the dimensions of poverty. Therefore, to describe and compare living standards of different groups in Montenegro, this document will present statistical data across an array of socio-economic indicators.

According to the official data included in the Development and Poverty Reduction Strategy, the poverty rate among the RAE population in Montenegro is 4.5 times higher than the national poverty rate, and 5.5 times higher than the poverty rate among the domicile population (see Table 2). Among refugees and internally displaced persons, on the other hand, there is an equal distribution of poverty (up to 40 per cent of each of the two groups).

Table 2: Poverty rates¹⁸

	Montenegro	Residents	RAE	Refugees	IDPs
Poverty rate: Head Count	12.2	9.6	52.3	38.8	38.6
95% confidence interval	[6.8-17.6]	[3.7-15.5]	[45.2-59.3]	[29.8-47.8]	[31.1-46.0]
Poverty and Economic Vulnerability:¹⁹ Head Count	34.4	31.1	75.6	68.9	73.2
95% confidence interval	[26.4-42.3]	[22.5-39.8]	[69.8-81.5]	[60.7-77.1]	[67.6-78-8]
Per cent of all poor	100.0	72.5	11.7	5.9	9.9

Source: ISSP/UNDP Household Survey. Note: Standard errors in parentheses.

The results of the survey showed that poverty rates calculated by using the monetary criterion – the share of persons living on less than 4.3 USD per day in purchasing power parity (PPP) terms – indicate that 33 per cent of RAE population and 29 per cent of refugees and internally displaced persons live in poverty, while this is the case with only 4 per cent of non-RAE populations living in close proximity to Roma. On the other hand, if the reported monthly household expenditures are compared to the national poverty line (amounting to 116.2 EUR per month per capita), poverty figures are significantly higher and account for 14 per cent of domicile non-Roma, 76 per cent of RAE population and 51 per cent of refugees and internally displaced persons. Rather than elaborating different methodologies in calculating poverty, we will rely on the national poverty profile (presented in Table 1) while the reference to reported expenditures and the national poverty line will be used to make a comparison between poor and non-poor in the sample analyzed.

When comparing households' income and expenditures, a certain number of households appear to have expenditures that exceed the reported monthly income. To

¹⁸ Material wellbeing was measured by using total household consumption as the main poverty indicator. The consumption indicator is then compared to the national poverty threshold, which is a minimum living standard (in EUR) calculated on the basis of actual consumption patterns and minimum caloric needs.

¹⁹ This category refers to the fraction of the population which is economically vulnerable – for the purposes of this analysis, those who would become poor if the poverty line would be increased by 50 per cent. For more details, see Institute for Strategic Studies and Prognoses and World Bank, "Living Standards and Poverty in Montenegro 2002." Podgorica: ISSP and WB, 2002.

some extent, this phenomenon reflects either involvement in grey economy and non-reported income, or incidents of arrears. Also, a significant portion of non-poor households reported expenditures exceeding their monthly income (see Table 3).

Table 3: Some living standards indicators

	Domicile non-Roma	RAE	Refugees and IDPs
Households with expenditures exceeding reported monthly income	19%	46%	43%
Non-poor households with expenditures exceeding reported monthly income	19%	76%	45%
Average share of food in total household expenditures	46%	56%	53%
Expenditures per equalized capita (EUR)	214	116 (-46%)	135 (-37%)
Income per equalized capita (EUR)	235	104 (-56%)	131 (-44%)

Source: UNDP Vulnerable Groups Dataset, 2004.

Note: Difference in reference to the non-RAE average is given in parentheses.

In the RAE community, numerous households live in chronic poverty, one generation after another. Though the percentage of chronically poor RAE families in Montenegro is unavailable, it is clear that it exceeds the percentage of chronically poor in the majority population. The First Progress Report on the implementation of the DPRS in 2003 and 2004 also confirms that – notwithstanding socially vulnerable groups – chronic poverty among domicile non-Roma is negligible and not exceeding 1 per cent of the relevant population.²⁰

Additionally, RAE in Montenegro do not own land and have no tradition of land cultivation, and therefore the possibilities to supplement their livelihood through agriculture are minimized (only 1.5 per cent of both RAE and displaced population confirm use of some agricultural land, in comparison to 7.1 per cent of the domicile non-Roma living in close proximity to them). The same applies to producing vegetables, fruits, dairy products, and eggs (see Table 4). Additionally, most RAE live in urban and suburban settlements – 24 per cent in the capital of Podgorica, 23 per cent in other cities, and 53 per cent in settlements established without legal authorization – where access to land is less likely. The lack of such coping mechanisms is an additional burden for vulnerable groups in Montenegro.

Table 4: Coping mechanisms - production for home consumption

	Domicile non-RAE	RAE	Refugees and IDPs
Households using agricultural land	7%	1.5%	1.5%
Households producing and growing vegetables	13.1%	9.5%	2.5%
Households producing and growing fruits	10.1%	1%	0.5%
Households producing milk and dairy products	7.6%	2%	1%
Households producing eggs	10.6%	10.6%	--
Households producing meat and meat products	7.6%	1%	0.5%

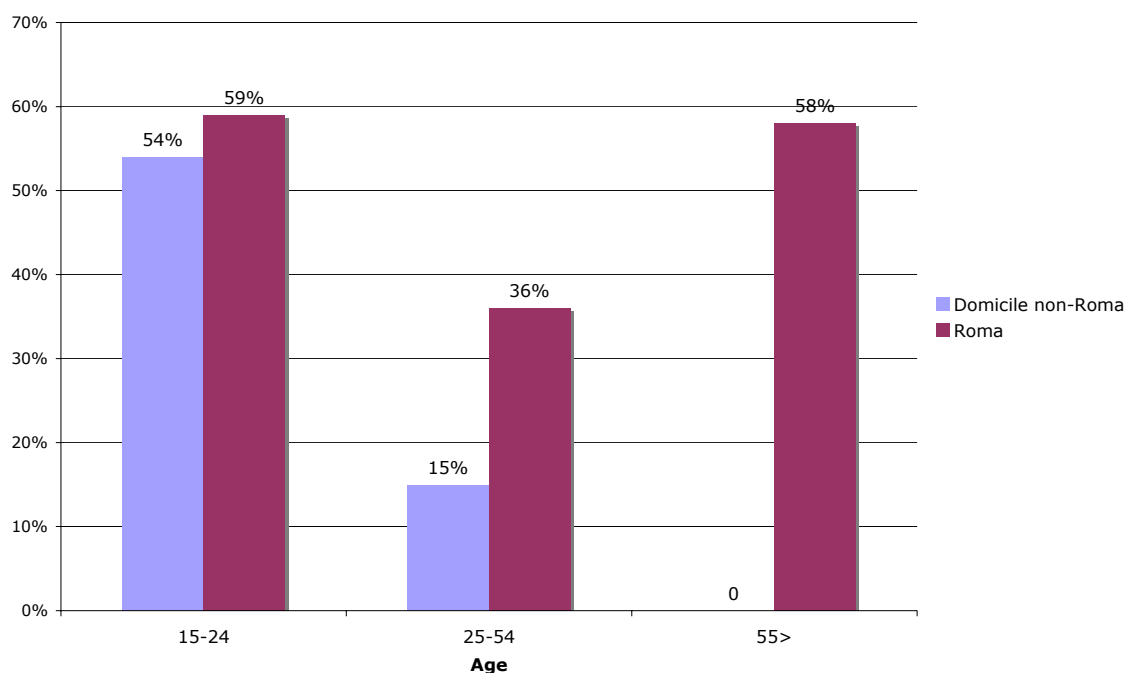
Source: UNDP Vulnerable Groups Dataset, 2004.

²⁰ Government of the Republic of Montenegro, *Poverty Reduction Strategy Paper: The First Progress Report 2003-4*. Podgorica: Government of the Republic of Montenegro, 2005, p. 9.

Confirming a close link between poverty and unemployment, the survey results indicate a high unemployment rate for RAE population (36 per cent), as well as for refugees and IDPs (38 per cent), in comparison to 17 per cent among domicile non-Roma.²¹ More than a third of domicile non-RAE respondents confirmed being employed or self-employed (36 per cent), whereas this was the case with only 21 per cent Roma and 16 per cent refugees/IDPs.

The previous paragraph referred to the respondents who declared themselves employed or unemployed within a variety of categories. Yet, if following the methodology of Labour Force Surveys defining “labour force” as the working age population (aged 15 and above) excluding people who are retired, in school and/or involved with housekeeping, the unemployment rates by major age groups among Roma are much higher. As shown in Chart 1, while the unemployment rate significantly decreases with the increased age of domicile non-Roma, this is not the case with Roma population. Having no possibility of receiving a retirement pension, elderly Roma are out of labour market (and without a job) after the age of 55.

Chart 1: Unemployment rate by major age groups



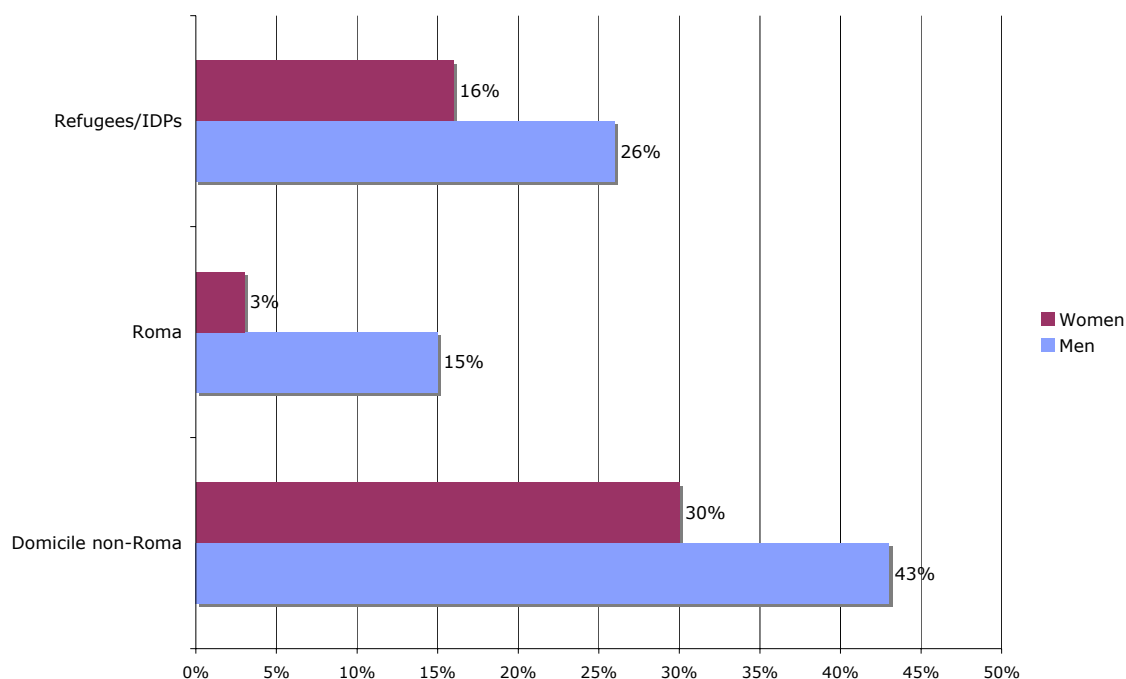
Source: UNDP Vulnerable Groups Dataset, 2004.

According to survey respondents, the length of unemployment is alarming: out of persons who declared themselves unemployed or housewife, those who have never been employed present 39 per cent of domicile non-Roma group, 61 per cent of Roma and 59 per cent of refugees/IDPs. Also, the unemployment rates for women are higher than for men, regardless of age. The greatest discrepancy between the sexes is evident at the age 25-54, and especially for Roma: the unemployment rate for Roma women is 61 per cent compared to 36 per cent of the unemployment rate among Roma men. The greatest discrepancy between Romani and non-Romani women is at their advanced age (over 55) when the majority of women are retired. The same pattern

²¹ Despite the high unemployment rate among RAE, only two households reported receiving unemployment benefits.

applies to the male population. The gender gaps in unemployment are more pronounced among RAE and refugees/IDPs (see Chart 2).

Chart 2: Employment or self-employment by group and gender



Source: UNDP Vulnerable Groups Dataset, 2004.

If only respondents of working age are taken into consideration, 48 per cent of domicile non-RAE respondents claim that they are employed or self-employed, while the same applies to only 15 per cent of RAE and 30 per cent of refugees and IDPs.

For all three sub-samples it is clear that the public sector is still the largest employer and source of income: 40 per cent domicile non-RAE, 23 per cent of RAE and 15 per cent of refugees/IDPs earned income from jobs in state institutions or firms. When it comes to wages received in private firms or organizations, this was the source of income for 22 per cent of domicile non-Roma, yet only 1 per cent of Roma, and 26 per cent of refugees/IDPs. Another source of income showing important differences is selling collected secondary resources: no members of domicile non-Roma and refugee/IDP households engaged in this activity, which is a source of income for 7 per cent of RAE respondents. An average income made per household per month in this activity was 29 EUR. Selling goods at alternative markets and bazaars provided income for only 1 per cent of domicile non-Roma, compared to 9 per cent of Roma and 7 per cent of refugees/IDPs. Finally, various kinds of pensions and benefits provided income for 22 per cent of domicile non-Roma, compared to only 3 per cent Roma and 14 per cent of refugees/IDPs. Regarding the specific branches of economy providing work for those who were employed, trade is leading among both non-Roma categories, while working in public utilities is most popular among Roma (see Table 5).

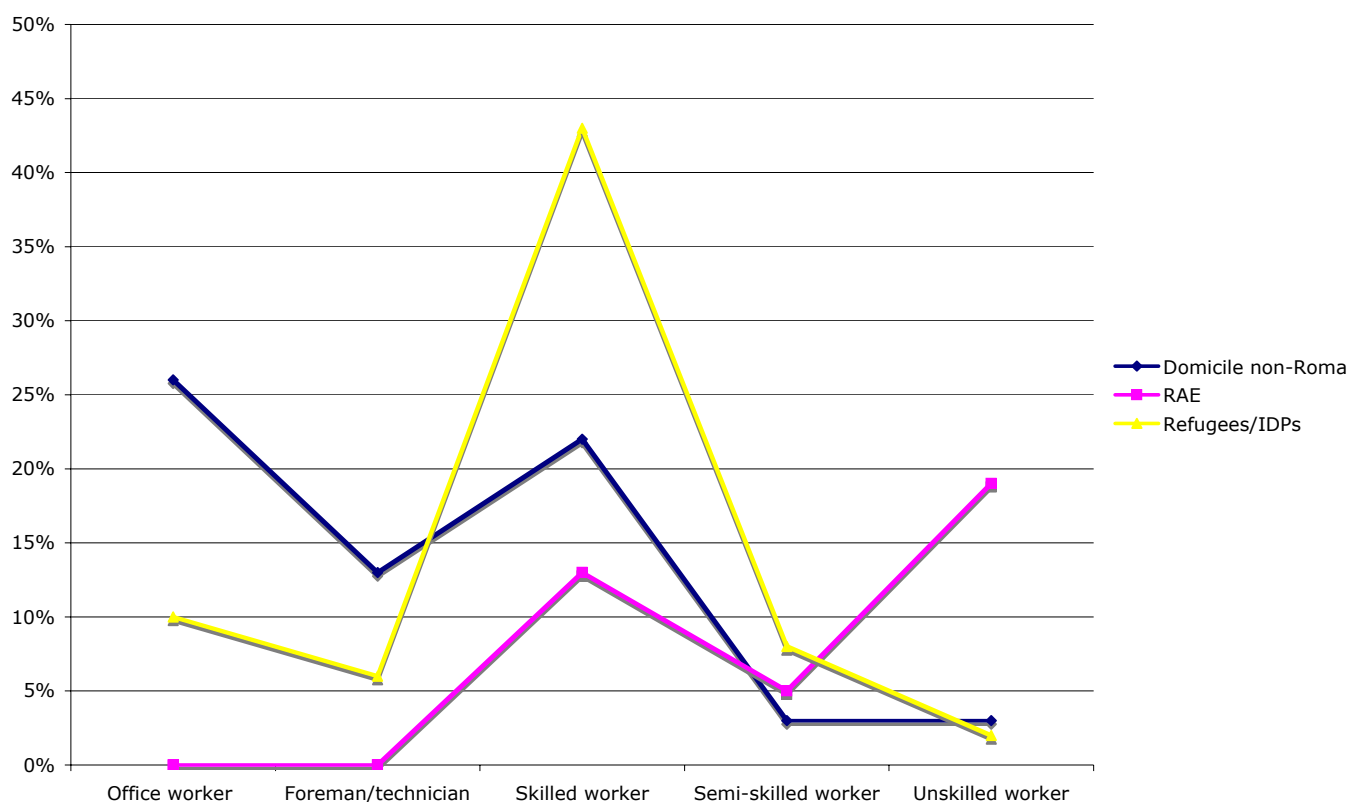
Table 5: Selected branches of economy providing work

	Domicile non-RAE	RAE	Refugees and IDPs
Industry or mining	14%	2%	6%
Construction	5%	1%	10%
Trade	23%	9%	30%
Agriculture and forestry	2%	6%	8%
Leisure services (tourism, restaurants, etc.)	7%	0%	12%
Public utilities	6%	28%	2%

Source: UNDP Vulnerable Groups Dataset, 2004.

In terms of occupation, those persons from the domicile non-Roma community who were employed were mainly office workers (26 per cent), compared to Roma whose largest single category were unskilled workers (19 per cent) and refugees/IDPs with skilled workers (43 per cent) – see Chart 3.

Chart 3: Occupation by group



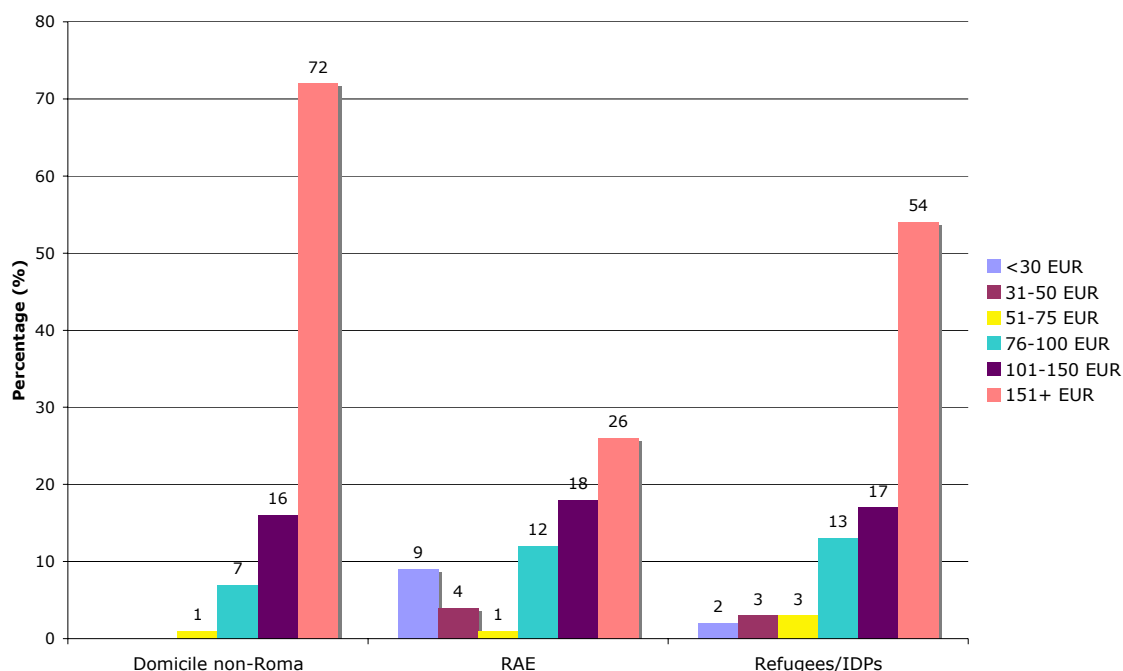
Source: UNDP Vulnerable Groups Dataset, 2004.

Box 2. Traditional Roma occupations

For centuries, Roma in Montenegro traditionally worked as blacksmiths, musicians, entertainers, or fortune tellers. However, such occupations nearly disappeared in the 1960s with the introduction of mass production. With no possibilities to improve their production processes and introduce new technologies, Roma were left unprepared for the rise of industrialization. This is how Roma began working in alternative occupations such as street cleaning, collecting scrap materials for recycling, or doing other menial jobs. Such lowly paid and often stigmatized occupations only increased prejudices against Roma.

The height of income averagely made per person per month in these activities varies largely across groups. While most domicile non-Roma persons making an income (72 per cent) earned over 150 EUR per month, this was the case with only 26 per cent Roma, and 54 per cent of refugees/IDPs (see Chart 4). Gender again made a difference and women earned less in all groups: domicile non-Romani women earned on average 220 EUR per month (compared to 299 EUR for men), Romani women earned 78 EUR (compared to 164 EUR for men) and refugee/IDP women earned 169 EUR (compared to 202 EUR for men). The gender income gap was most pronounced in the Roma respondent group, where women earned 53 per cent less than men, followed by domicile non-Roma (26 per cent less) and 16 per cent in the refugee/IDP group where probably newly emerged situation and the need for all family members to make an income overcame the traditional gender roles with men as the usual breadwinners. The total average monthly incomes per household were as follows: 515 EUR for domicile non-Roma, 209 for Romani households, and 270 EUR per month for refugee/IDP households.

Chart 4: Average monthly income in EUR per working person



Source: UNDP Vulnerable Groups Dataset, 2004.

The correlation between poverty and unemployment is mainly clear, as the unemployed face a higher risk of becoming poor, however in a domicile non-RAE household being an unemployed person does not necessarily mean that one will be poor. Namely, 82 per cent of such heads of households claiming that they are unemployed are not concurrently poor. This could be explained by coping mechanisms developed within the household, whether relying on other members of households who work, or living in a household involved in cultivating land and growing fruits and vegetables.

On the other hand, this situation is quite different with RAE and refugees/IDPs: 70 per cent of unemployed RAE household heads live below the poverty line, whereas the same applies to 60 per cent of the refugee/IDP heads of households. There is also a difference in the educational and literacy profile of the unemployed: all domicile non-RAE respondents claiming that they are unemployed can read and write, while the majority (82 per cent) have completed secondary school. On the other hand, 39 per cent of RAE and 8 per cent of refugees/IDPs in the same category are illiterate.

Racial discrimination against Roma is present in all areas of life, including the area of employment. Roma surveyed in this study, however, did not report on discrimination in hiring procedures in the favour of persons from the majority or other minorities. This should by no means indicate that discrimination does not exist; one of the reasons could be that due to very low education levels the discriminated persons might have not been able to recognise discrimination. Indicatively, almost a third of the surveyed persons did not know how to answer this question.²²

One specific concern of the refugee/IDP community regardless of ethnicity is that existing legislation creates obstacles in their employment. Namely, with the aim of reducing the grey economy, the Government of Montenegro adopted a Decree regarding the employment of non-residents in May 2003, developing a tax system for employers who engage non-residents in for-profit activities. This decree limited access to the labour market to all non-residents, including IDPs and refugees, as it imposed an additional tax burden on their employers. As a consequence, their wages were mostly reduced by the additional tax amount, or some even lost their jobs.²³ The relevant decree is still in force, very often preventing members of this vulnerable group from employment. Displaced persons seeking employment face an additional obstacle as the Employment Agency of Montenegro does not register non-resident job seekers and does not offer them any of its supporting services.

²² For more detailed studies on employment discrimination of Roma and other minorities in Montenegro, see Sindik 2005 and Sindik 2006 in the Bibliography section.

²³ ISSP, *Household Survey Report #8*, Podgorica, pp. 25-27.

Box 3: The situation of Romani women

The situation of Romani women is rendered complex by their multiple discrimination, as they are perceived as Roma by the majority society, and as women within the Roma community. Recent surveys conducted by Romani NGOs offer much information on the position of women within Romani culture in Montenegro. One such survey was conducted by the researchers of the Nikšić-based *Centre for Roma Initiatives* in 2005 who interviewed 209 women in their city over the age of 14. Only a half of the married women in the community (52 per cent) were able to willingly chose their husband; only 52 per cent of marriages in the community were legal. Fifty-two per cent of women had children before they turned 18, yet there is also a very positive improvement that less than 6 per cent women gave birth at home. The numbers of children per family were higher than the Montenegrin average: 30 per cent women had one to three children, and 38 per cent had four to six children. Most of the respondents lacked formal education: 75 per cent did not complete elementary school, and only 6 per cent graduate from secondary schools. A third of the survey group (30 per cent) could neither speak nor write in the majority language; as many as 75 per cent of the surveyed women were unable to assist their children with homework. The percentage of women who did not work was extremely high: 96 per cent. When asked whether they would accept a job if they were offered one, 58 per cent said that they would; out of those who would not a third listed their husband's or community's disapproval and Romani tradition as reasons. Evidently, it is not just the lack of education that accounts for Romani women's high unemployment rates. Women themselves, however, are fully aware of the importance of education: 67 per cent realize how important formal schooling is for their children, and 74 per cent said that if women want to improve their situation, they need to get education most of all.

Source: Centre for Roma Initiatives, *Research on the Position of Roma Women in Nikšić*, available at: <http://www.osim.cg.yu/>.

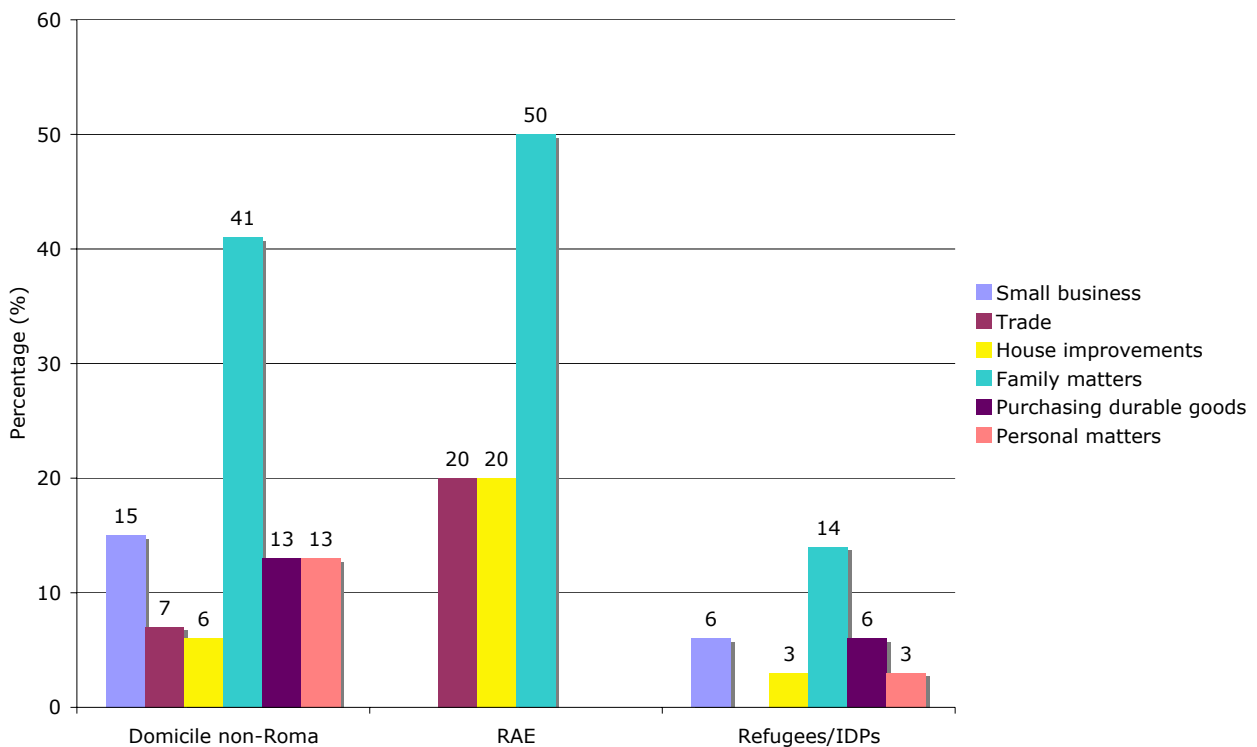
Having in mind the poor education of RAE, and the high unemployment rate reflecting a mismatch between skills offered and the demand on the labour market, it seems that starting small, self-owned businesses could be one of the best employment opportunities. For more than ten years, various international organizations provided in-kind grants and micro credit schemes to vulnerable groups (see Box 4). According to the UNDP survey results, 26 per cent of domicile non-Roma surveyed attempted to launch a business of their own, and the same applies for 9 per cent of RAE and 12 per cent of refugees/IDPs. The level of officially registering the newly opened business is lowest among RAE (17 per cent) compared to 73 per cent among domicile non-Roma and 36 per cent of refugees/IDPs. The most popular sector of economy for private businesses by far appears to be trade; it accounted for 49 per cent domicile non-Roma, 22 per cent Roma and 59 per cent refugee/IDP-run businesses. The rate of success for most businesses, however, was low: while 43 per cent of domicile non-Roma and 32 per cent of refugee/IDPs businesses grew and developed, this was not the case with any Roma-run venture, indicating the need for business education, planning and operation in the community.

Box 4: In-kind grants and micro-credits for the most vulnerable

In the past years, several organizations in Montenegro targeted the most vulnerable groups, including RAE, refugees and IDPs, as well as the local population, through different income generating and housing projects. Among the most successful are the programs of the International Committee of the Red Cross (ICRC), German NGO *Help – Hilfe zur Selbsthilfe*, and the Montenegrin micro-credit organization *Alter Modus*. In the period 2002-2004 alone, ICRC allocated over 500 grants to IDPs, including monthly cash assistance amounting to 30 EUR per vulnerable household per month. Due to the specific needs of RAE IDPs and a lack of skills to set up a sound business plan, ICRC carried out a programme introducing vocational training that aimed at developing the necessary skills among the targeted population. The same problem was addressed by *Help*, which disbursed over 700 in-kind grants in the last five years, as the RAE beneficiaries faced difficulties filling out the required forms. The solution was found in the cooperation with regional business centres around Montenegro. All these programmes helped vulnerable IDPs to develop interaction with local population, restore their hope and self esteem, preparing them to build their own future and significantly reducing the need for local assistance.

A rather small portion of respondents reported experience in using some of the instruments of the financial and banking sector. Only 12 per cent of domicile non-Roma, 1 per cent of Roma and 2 per cent of refugee/IDP households used a savings account. Around 70 per cent of both domicile non-Roma and refugees/IDPs reported never using credit or borrowing money, and the same applies for 86 per cent of RAE. Among those who use credits or loans, commercial banks are most popular with domicile non-Roma (14 per cent), compared to only 3 per cent of both Romani and refugee/IDP households. An explanation for this might be complicated procedures in filling out the requested forms and – probably most of all – compiling the appropriate collaterals. One of the required guarantees in obtaining a loan is real estate ownership. As many members of vulnerable groups do not own real estate, and this is particularly the case among women, this is a serious limitation in accessing loans and economic development opportunities. On the other hand, those members of vulnerable groups that have regular, registered yet lowly paid jobs face limitations in the loan amount. Alternatively, friends and relatives account for 12 per cent of loans among domicile non-Roma and refugees/IDPs as well, compared to only 2 per cent Roma. In most cases, borrowed money was mainly used for family needs (see Chart 5).

Chart 5: Purpose of obtaining credits or loans



Source: UNDP Vulnerable Groups Dataset, 2004.

Quantitative data on low living standards are additionally confirmed by the qualitative perception of difficulties that vulnerable groups are faced with. In the month prior to the survey alone, as much as 59 per cent of RAE and 31 per cent of refugees/IDPs, compared to 4 per cent of domicile non-Roma, confirmed experiencing at least one instance where someone in their family went to bed hungry because the household could not afford to feed them. In the event that a similar situation might recur, coping mechanisms would differ: domicile non-Roma population would borrow food/money from neighbours, friends or relatives (around 18 per cent each); Romani households would attempt borrowing food/money from neighbours (43 per cent) or collect secondary materials from garbage containers (24 per cent), whereas refugee/IDP households would ask their neighbours or friends for assistance (around 24 per cent each) or try to earn money through manual labour (14 per cent).

Additionally, respondents were asked to rank the level of different threats members of their household could be faced with (see Table 6). While Roma perceive hunger as the highest threat, non-Roma fear organized crime most, and refugees/IDPs are most concerned with the corruption of officials and a possible lack of income they could face. In the event that any problematic situations arise, all groups are most likely to ask family and relatives for assistance. Sixteen per cent of Roma would also approach the local police, compared to only 1 per cent of domicile non-Roma and 6 per cent refugees/IDPs.

Table 6: Importance of threats a household could be faced with

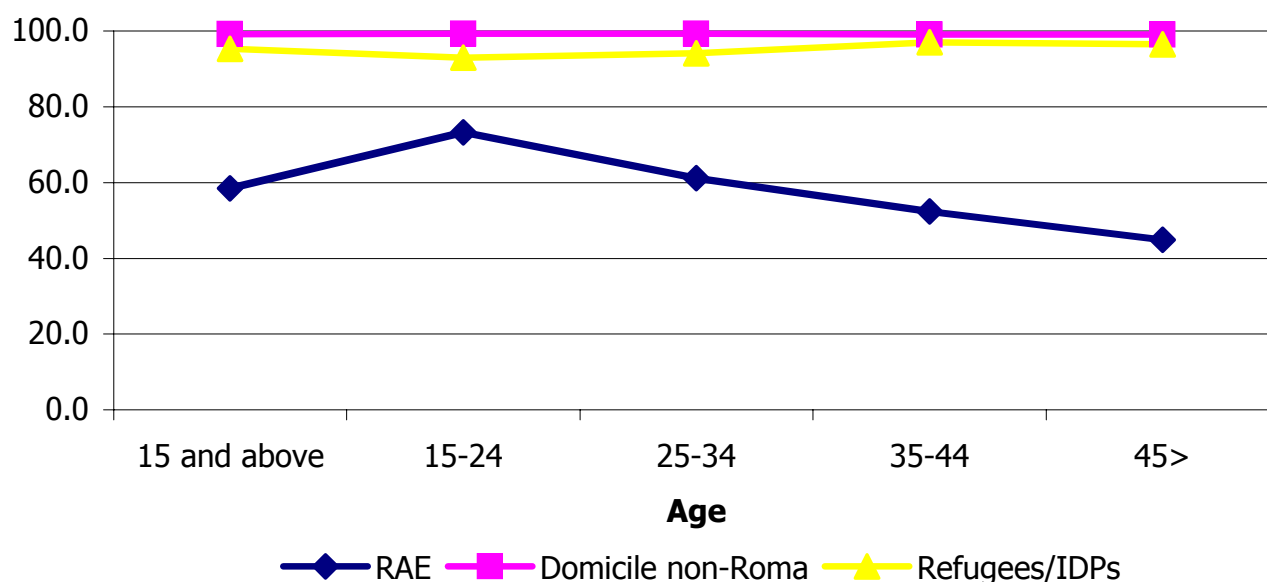
1 – Lowest level of threat 5 – Highest level of threat	Domicile non-Roma	RAE	Refugees and IDPs
Lack of sufficient income	1.8	1.9	3.4
Hunger	1.6	3.3	2.9
Ordinary crime	2.1	1.7	2.5
Organized crime	2.7	1.3	2.7
Denied opportunity to practice your religion	1.7	1.3	1.9
Corruption of officials	2.6	1.5	3.5
Physical security	1.5	1.7	1.7

Source: UNDP Vulnerable Groups Dataset, 2004.

Vulnerable groups and education

Education is the key channel for vulnerable groups to break out of the poverty cycle. However, the survey results indicate that literacy rates and educational achievements among vulnerable groups rate significantly lower than national averages, especially in the case of Roma. While literacy rates of refugees and IDPs surveyed (94 per cent) slightly lag behind the averages for domicile non-Roma (99 per cent), in the case of Roma the rates suffer a significant loss, dropping to an average of 55 per cent.²⁴ If disaggregating data by age groups, Roma literacy rates further decrease for the groups above the age of 25 (see Chart 6). Data disaggregated by sex for all three groups show lower literacy rates for women, especially if older than 45. However, the literacy gap is biggest in the case of Roma women, with 51 per cent of literate girls and women compared to 60 per cent among men.

Chart 6: Literacy rates by age groups



Source: UNDP Vulnerable Groups Dataset, 2004.

Formal education levels are also lower among vulnerable groups, and particularly among Roma. Whereas the domicile non-Roma surveyed mainly graduated from various secondary schools (47 per cent), similar to the situation of refugees/IDPs (46 per cent), only 2 per cent of Roma have secondary school degrees. Most Roma in fact have no education at all, or have several grades of elementary school (55 per cent); among women, this percentage slightly rises to 57 per cent, compared to 53 per cent among Romani men.

²⁴ For this purpose, literacy rates were defined as the share of persons over the age of 6 who can read and write.

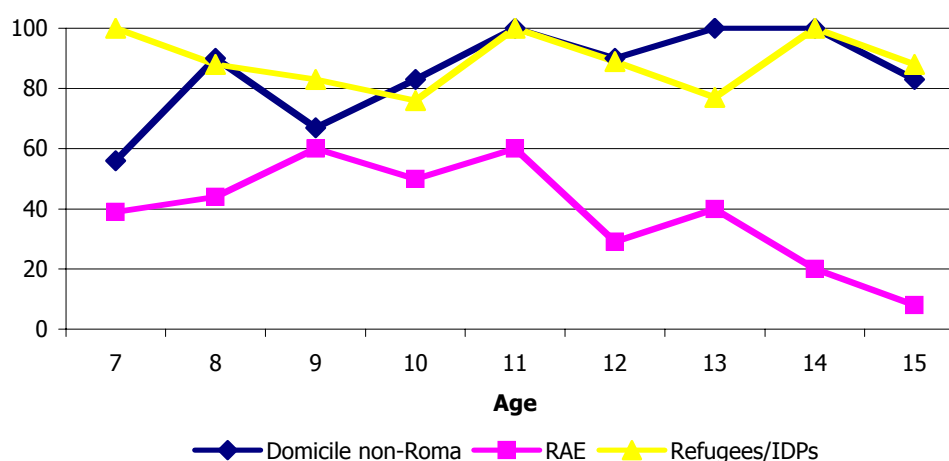
Table 7: Formal education levels (%)

	Domicile non-Roma	RAE	Refugees/IDPs
None and incomplete elementary	4	55	9
Completed primary school	7	10	12
Incomplete secondary	8	3	5
Secondary school	47	2	46
Associated (2 years) college	10	0	8
Incomplete university	6	*	5
University and higher	9	0	4

Source: UNDP Vulnerable Groups Dataset, 2004.

Regarding the situation of children currently of school age, low enrolment rates of Romani children perpetuate low educational levels in the community. It is significantly lower than the enrolment of children from other groups, starting from primary school with the gap growing throughout higher education (see Chart 7). While 86 per cent of domicile non-Roma children of primary school age are actually enrolled, this is the case with only 38 per cent of Roma (including domicile Roma and Romani IDPs). On the secondary school level, this discrepancy becomes drastic: whereas 83 per cent of eligible domicile non-Roma population attend secondary school, the percentage drops to 69 per cent for the same category among refugees and IDPs, and to 13 per cent among Roma. The phenomenon of high dropout rates for Romani children also indicates that in addition to enrolling higher numbers of Romani children into school, efforts need to be made to keep the children in school as well. The decrease is particularly alarming for Romani children above the age of 11.

Chart 7: Primary school enrolment rates



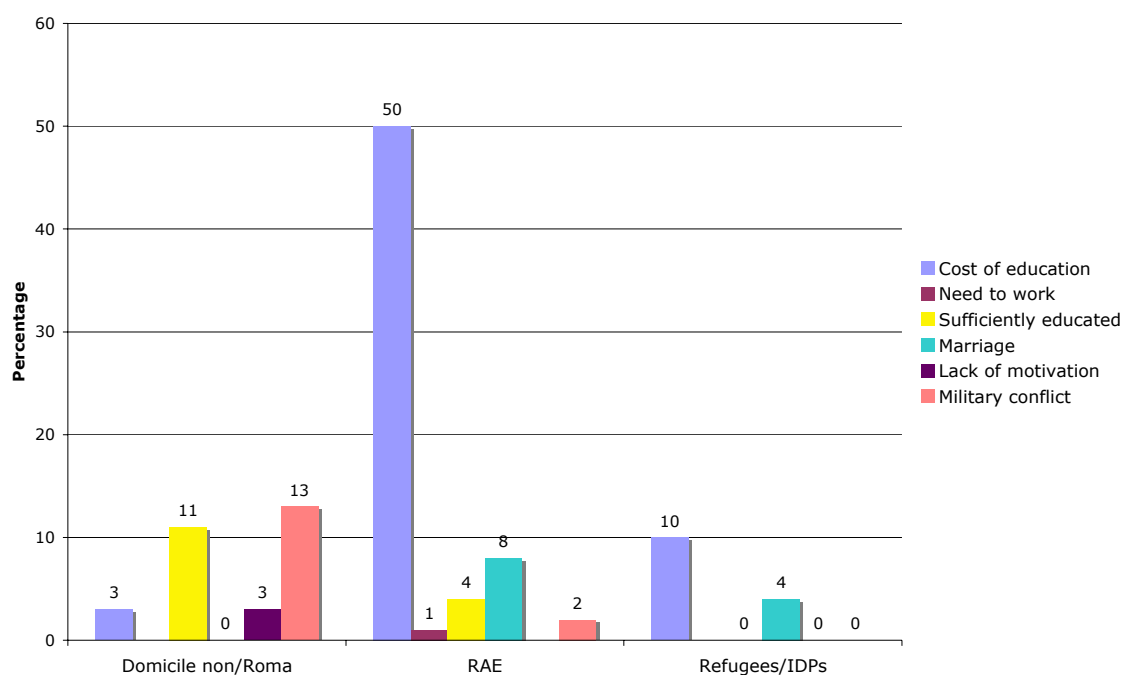
Source: UNDP Vulnerable Groups Dataset, 2004.

Sometimes the obstacle to getting education was the location of institutions: One out of ten (11 per cent) Roma households report no accessible educational establishments for the children in the household to attend or to continue their education, compared to 2 per cent of domicile non-Roma and 3 per cent of surveyed refugee/IDP households. In another situation, the children of unsuccessful asylum seekers returned to Montenegro have difficulties accessing education primarily because of the lack of

appropriate documents required for school enrolment, but also because many of them do not speak Montenegrin or Serbian, and because they are sent to classes that they have already passed due to the difference between the educational systems they came from and that of Montenegro.

Poverty, nevertheless, remains a top obstacle: almost a half (43 per cent) of Roma households and every fifth refugee/IDP household having children reported that they could not financially afford the education of their children, in comparison to 3 per cent of domicile non-Roma households living in close proximity of identified vulnerable groups. If focusing only on persons aged 6 to 22 that do not attend school, the high cost of education was identified as the main reason for dropping out at the current educational level for a half of relevant Romani persons, compared to 10 per cent of refugees/IDPs and only 1 per cent of domicile non-Roma (see Chart 8). Although mandatory education is free of charge in Montenegro, attending school is associated with significant costs for textbooks, notebooks, transportation, adequate clothing and footwear, etc.

Chart 8: Reasons for leaving school



Source: UNDP Vulnerable Groups Dataset, 2004.

If reviewing the average annual household expenditures for education, the figures confirm the limited possibilities for Roma: in comparison to an annual expenditure close to 600 EUR dedicated to education costs in domicile non-Roma households, and 350 EUR for the same purpose in refugee/IDP households, Romani households were able to dedicate only 90 EUR per year. On the other hand, possibilities of receiving financial assistance in the form of scholarships or stipends are very low in general: only 1 per cent of Romani households received such assistance, compared to 2 per cent for refugees/IDPs and 3 per cent of domicile non-Romani households.

Box 5: Millennium Development Goals for education and literacy in Montenegro

Montenegro's National MDG report called for the achievement of virtually complete literacy (99 per cent) by 2015, compared to 96.3 per cent in 2005. This implies only small annual improvements of 0.37 per cent, which in the case of Roma would result in achieving complete literacy only in the year 2115. To achieve the given target, the growth in Roma literacy rates would need to be ten times higher.

The MDG report also called for increasing net primary enrolment rates from 97.6 per cent in 2005 to 99 per cent by 2015. With the pace given for the national average, children from refugee and IDP households would achieve the given enrolment rate as late as 2090 – the pace of increase would need to be almost nine times faster than the national increase rate.

In addition, if engaged in schooling, children can no longer take part in income-generating activities, ranging from helping in the household, taking care of siblings, or manual labour, to begging. With regards to one per cent of Romani children who dropped out of school, the need to make an income or have a job was the primary reason for quitting; this was not the case with any children from the other two groups. Generally, according to the survey results, children who do not go to school are usually engaged in some kind of economic activity: 43 per cent of Roma children who do not go to school help elders, while 12 per cent beg, and 8 per cent collect recyclables. Only 39 per cent use their free time for playing.²⁵

Box 6: Roma Scholarship Foundation

As the UNDP survey data confirmed, the main reason for low numbers of Romani pupils and students is poverty. Receiving scholarships would enable vulnerable students to pursue further education without jeopardizing the economic status of their families. With this idea in mind, the Roma Scholarship Foundation was established in Podgorica in January 2005, with the support of the Organization for Security and Cooperation in Europe (OSCE) Mission in Montenegro. The core activities of the Foundation are providing financial support to Roma attending high schools, universities, and informal education programmes which support the integration of Roma in formal education systems. The Foundation also provides additional resources to support Roma children and youth to enter and remain in the educational system, and supports Roma NGOs in their work related to the Decade of Roma Inclusion. Seven young Roma have already completed intensive training in journalism with the support of the Foundation. In the academic year 2005/6, the Foundation financially supported 19 Romani high school students and 7 university students. The Faculty of Philosophy in Nikšić showed understanding for Romani students studying at this institution, and exempted them from paying tuition fees. Unfortunately, this was not the case with the Faculty of Law in Podgorica, and the tuition fees for the single Romani student studying there – a young woman – were covered by the Gender Equality Office of the Republic of Montenegro. Nevertheless, the sustainability of the Foundation is under threat of insecurity, as the Foundation does not have any permanent sources of financial support, and has to invest considerable efforts in constantly seeking donations.

²⁵ United Nations Development Programme and Institute for Strategic Studies and Prognoses, *Household Survey on Roma, Ashkaelia and Egyptians, Refugees and Internally Displaced Persons*. Podgorica: UNDP and ISSP, 2003.

To a certain extent, cultural reasons can also serve as an impediment to education. Among persons aged 6 to 22 who do not attend school, some reported leaving school due to marriage. This was the case with 8 per cent of Roma, compared to 4 per cent refugees/IDPs; there were no similar cases in the domicile non-Roma group. Regarding the ethnic composition of schools, the majority of Romani children who attend schools are a minority in their school in terms of ethnicity (68 per cent), compared to only 11 per cent of domicile non-Roma children and 4 per cent refugee/IDP children in the same situation. When asked about the language they use at home most, the majority of Romani households stated that their primary language (72 per cent) is Romani, followed by 22 per cent of families who primarily speak Albanian; generally, when asked about all languages spoken at home, most Romani families are multilingual: 78 per cent Romani households use Romani, 76 per cent Albanian, followed by 48 per cent Serbian. With regards to children who left school, 1 per cent reported leaving school due to problems with language – this is not a high percentage, however no children of any other ethnic group reported problems of the same kind.

Box 7: Improving educational outcomes for Roma children in Montenegro

The Government of the Republic of Montenegro has embarked upon a comprehensive reform of its school system, launched in 2004 in 25 schools, to be extended each year until all schools are included. This reform programme includes a revised curriculum for all grades, training of teachers on the new curriculum, new pedagogical approaches, the use of information technology, new textbooks and other study materials, and the renovation of school buildings. This process is supported by the World Bank and other donor organizations through the Montenegro Education Reform Project. At least two schools with significant minority populations, including Roma, will take part in the project, ensuring that their students as well have access to the revised curriculum and that their teachers' skills are upgraded as quickly as possible. It will also give policy makers information on the implementation of the reform process in different types of schools, so that adjustments can be made to ensure real improvements in all schools. The Government will provide all students from disadvantaged backgrounds attending reformed schools with free textbooks. The Ministry of Education and Science and the Ministry of Labour and Social Welfare will work closely together on this project.

Source: Christian Bodewig and Akshay Sethi, "Poverty, Social Exclusion and Ethnicity in Serbia and Montenegro: The Case of the Roma."

Health and access to health care for vulnerable groups

Insecure living conditions of vulnerable groups and various obstacles in their access to health care, such as the lack of personal documents, lead to their poor health status. Particularly in the Roma community, this situation is often aggravated by a poor understanding of health issues. Housing conditions further exacerbate the health of vulnerable groups, especially in the case of refugees and IDPs living in collective centres and elderly households. In the case of Roma, in addition to malnutrition caused by poverty, living in unofficial settlements usually not covered by regular water supply and sewage network and facing improper waste disposal often endanger their health as well.²⁶

When asked to subjectively evaluate their health on the day of the survey and compare it with the situation a year before, 25 per cent of Roma reported an increasingly worsened state of health, in comparison to 6 per cent of domicile non-Roma respondents and 19 per cent of surveyed refugees/IDPs. The incidence of chronic illnesses is higher among refugees and IDPs (19 per cent), supported by their higher annual expenditures for health care, in comparison to 17 per cent of Roma and 10 per cent of domicile non-Roma respondents who reported chronic illness. Table 8 displays data on chronic illnesses reported as being of highest concern for vulnerable groups. In the relevant 12 months, the most serious sicknesses encountered among respondents from all three sub-samples were cold and influenza, with the most influential consequences among Romani respondents who lost on average 40 days due to illness, in comparison to 16 days of absence from normal activity for refugees and IDPs, as well as domicile non-Roma.

Table 8: Incidence of various chronic illnesses

	Domicile non-Roma	Roma	Refugees and IDPs
High blood pressure	14%	9%	20%
Ulcer	13%	3%	5%
Bronchitis, emphysema	9%	7%	4%
Diabetes	20%	8%	14%
Other cardiovascular diseases	9%	13%	17%

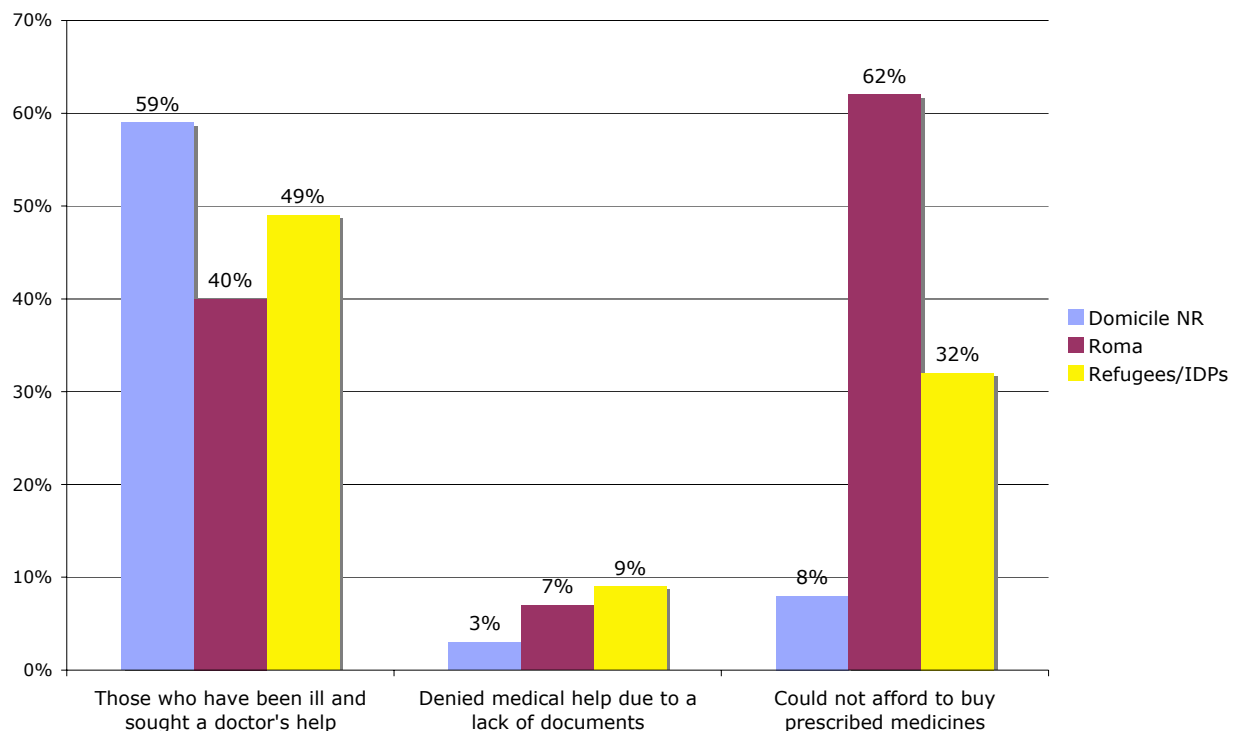
Source: UNDP Vulnerable Groups Dataset, 2004.

Though sick and out of regular activity for more than 40 days on average due to sickness during the relevant 12 months, only 40 per cent of Roma consulted a doctor; the same applied to 49 per cent of refugees/IDPs, and 59 per cent of domicile non-Roma (see Chart 9). Some could not fulfil the prerequisite of having a valid medical ID: 7 per cent of Romani respondents and 9 per cent of refugees/IDPs reported being denied medical services due to a lack of relevant personal documents, compared to 3 per cent of domicile non-Roma with the same experience. The lack of personal documents, widespread among certain groups of domicile Roma and also Romani and other IDPs, presents a serious obstacle to the enjoyment of many social and economic

²⁶ The detrimental effects of substandard housing on health will be elaborated in more detail in the following section on housing conditions.

rights of vulnerable groups.²⁷ For many, access to health care is also a matter of personal finances: According to the survey data, 62 per cent of Roma reported situations in the same year in which they could not afford to purchase prescribed medicines needed for a member of their household. This was the case also with 32 per cent of refugee/IDP households and 8 per cent of domicile non-Roma households.

Chart 9: Access to health care



Source: UNDP Vulnerable Groups Dataset, 2004.

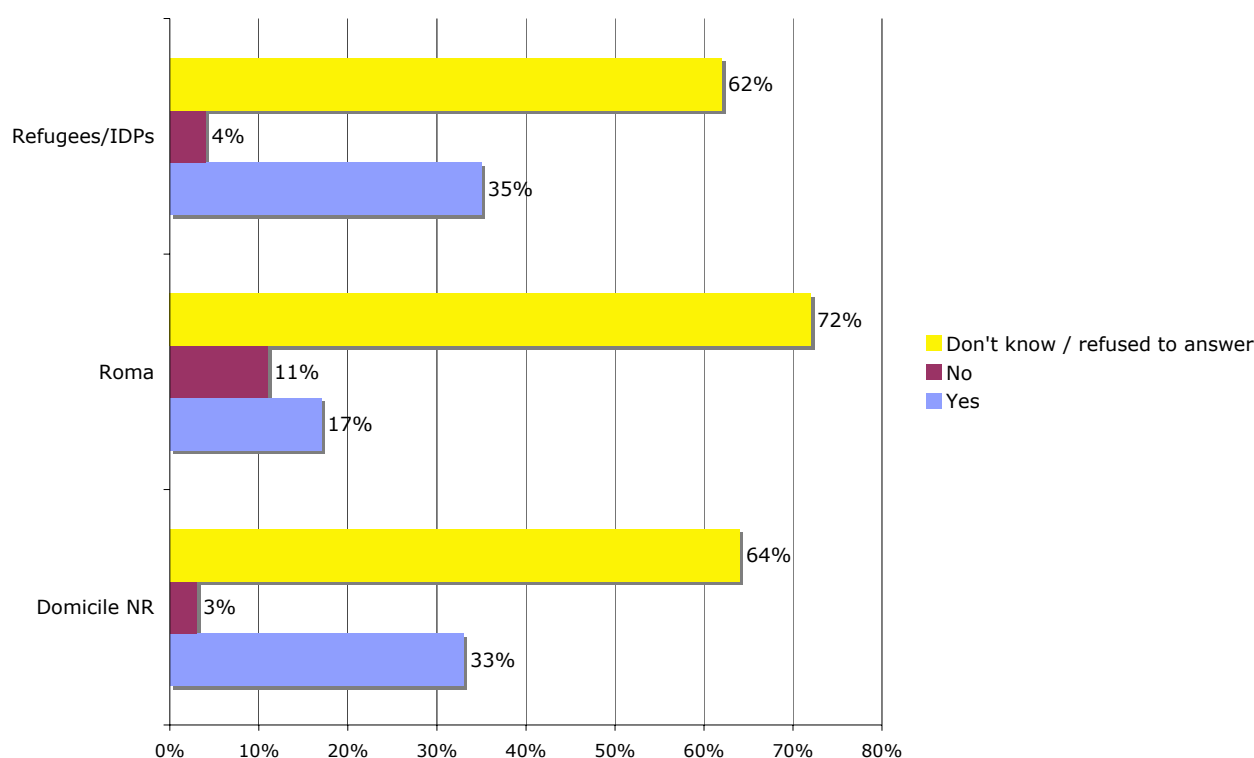
On average, Roma were able to spend around 85 EUR per year for health care, in comparison to the 180 EUR expenditure of domicile non-Roma and almost 360 EUR of average household expenditure for health care reported by refugee/IDP households. If compared to the total monthly costs of the household, refugees and IDPs spent around 15 per cent of their monthly household budget for medicines and medical services; comparatively, Romani households spent 9 per cent and domicile non-Roma spent 6 per cent of their household budget. One explanation for higher absolute and relative healthcare costs among refugee/IDP households could be the average age of the respondents: the youngest were Roma (average age 29 years), followed by domicile non-Roma (33), and the oldest, on average, were refugee and IDP respondents (34).

With regards to early immunization, only 26 per cent of children under the age of 14 in surveyed households have been vaccinated against polio, diphtheria, tetanus and whooping cough: broken by group, it represented 17 per cent of Romani children, 35

²⁷ More information on the statelessness and lack of personal documents among IDPs can be found in: IDP Inter-Agency Working Group, pp. 29-38. For information on the lack of citizenship and personal documents among Roma in Montenegro, see: Perić, Tatjana, "Personal Documents and Threats to the Exercise of Fundamental Rights of Roma in Europe," *Roma Rights* 3 (2003).

per cent of refugees and IDPs, and 33 per cent of domicile non-Romani children. These figures refer to survey responses in the households where the performance of vaccination could be confirmed for sure, and the results have to be examined in the light of the fact that in many cases household members in fact did not know the exact answer: 62 per cent of refugees/IDPs, 63 per cent of domicile non-Roma and 72 per cent of Roma (see Chart 10). This emphasises the need for written medical records with regards to vaccination.

Chart 10: Vaccination rates in children under 14



Source: UNDP Vulnerable Groups Dataset, 2004.

In the case of eligible children who were surely not vaccinated only a small number of survey respondents could give a clear answer why the vaccination was not undertaken. Some respondents claimed not being not properly informed on the issue: in the case of 43 per cent unvaccinated Romani children and 40 per cent of refugee/IDP children, the vaccination did not take place because of a lack of medical information. In this respect, there is evidently a need for awareness raising and information campaigns on the importance of immunization in particular, and health care in general, among all groups. The issue of personal documents was raised in the case of immunization as well: 13 per cent of unvaccinated Romani children did not have adequate medical IDs. Another 17 per cent of unvaccinated Romani children were not vaccinated primarily due to a lack of medical assistance. These latter two concerns were not raised in any case in both non-Romani groups.

Box 8: NGOs improving Roma health in Nikšić

Surveys conducted by the Nikšić-based women NGOs *Centre for Roma Initiatives* and the *SOS Hotline for Women and Children Victims of Violence* confirm the improvement in health status of RAE women in this town. Prior to the year 2000, 60 per cent of Romani women in Montenegro delivered their babies at home; among Romani women in Nikšić in 2005 this percentage has been reduced to just above 5 per cent. The Pap test was almost unknown among Romani women prior to 2000, while in 2005 it was conducted on 25 per cent of women. Similarly, the percentage of vaccinations grew: 72 per cent of Romani children in Nikšić were vaccinated in 2005, compared to only 29 per cent in 2001. These obvious improvements were primarily the result of these NGOs' activities working in cooperation with institutions; it is also important to note that the organizations applied a home-by-home approach, visiting virtually all households. Some problems, of more systematic nature, still persist: many children have medical IDs (84 per cent) but not all. Romani women were also concerned with the treatment they have in the health care system: when asked how they rated the way they were treated by (non-Romani) medical professionals, 22 per cent were satisfied, 54 only partly satisfied, and 24 per cent were not satisfied.

Source: Centre for Roma Initiatives and SOS Hotline for Women and Children Victims of Violence, Nikšić.

Housing issues faced by vulnerable groups

Limited income resources are very often reflected in poor housing, which correlates to poor health conditions in the population. In Montenegro, most Roma, Ashkaelia and Egyptians live in suburban settlements such as Konik, Brlja, Komanski Most, and Vrela Ribnička in Podgorica for instance. A vast majority of RAE in Montenegro live in urban and suburban areas, mainly in the central part of Montenegro and its seaside; 74 per cent of Romani respondents in the UNDP survey lived in central Montenegro. Their habitats are mainly unsanitary settlements characterized by minimal living standards, low quality housing and substandard water supply, lack of bathrooms and sewage systems, and illegally built and overcrowded houses.

In addition to critical housing conditions, a quarter of Romani households live in legally unregulated areas, according to the survey. Since the Montenegrin local governments are campaigning to remove all illegal buildings and settlements, many Roma settlements located on non-designated land and not registered in zoning records have become an issue of concern. There is no obvious and simple way to change the legal status of many unregistered Roma settlements. Ultimately, the only way out may be to legalize existing Romani settlements, or transfer Romani households from precarious illegal settlements to suitable designated alternative housing. In cooperation with local governments, some international organizations in Montenegro are already active in this field, by the means of providing housing for the most vulnerable. It is also important to note that as much as 42 per cent of surveyed Romani households migrated to their current location within the past 15 years, and most of those who migrated came from Kosovo (86 per cent), especially in 1999 (51 per cent). A vast majority of them moved for political and safety reasons (76 per cent); as forced migrants from a generally impoverished ethnic group, they mostly could not afford better locations to settle. Some 24 per cent of Romani households live in accommodation for refugees, compared to 52 per cent of non-Romani refugees living in refugee housing.

With regards to the housing situation of refugees/IDPs, the ownership of housing – or rather the lack of it – appears to be the main issue. Only 11 per cent of refugee/IDP households live in their own houses (compared to 41 per cent Roma and 78 per cent domicile non-Roma); for most others members of this group, the uncertainty of tenure remains an issue and opens them to vulnerability. This is reflected in the risk analysis as well: when asked to assess the level of threat that eviction or lack of housing presents for their household, the largest share of refugee/IDP households (35 per cent) assessed it as the highest level of threat, with an average score of 3.1 on the scale from 1 to 5. On the contrary, for 43 per cent of Romani households and 58 per cent of domicile non-Romani households this issue was seen to have the lowest level of threat, with average scores 1.6 and 1.7 respectively.

Box 9: New homes for a dignified life of refugees and IDPs

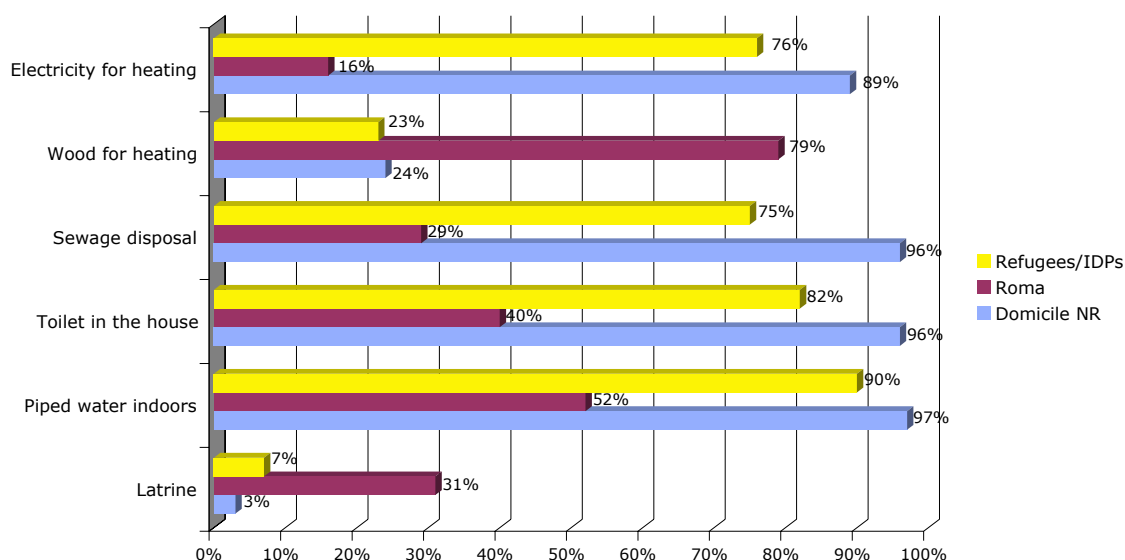
The need for adequate housing was identified as one of the most serious impediments to the implementation of sustainable solutions for displaced populations in southeast Europe. The lack of public and social housing was found to equally affect the stability of poor local populations, slowing the overall socio-economic recovery process, and hampering integration efforts. The German NGO *Help – Hilfe zur Selbsthilfe* launched a project together with local governments with the aim of making plots of land available for building construction, including infrastructure connections (water, sewage system and electricity supply). Thus, a living space for 86 persons in the size of 1,162m² will be created, resolving the housing issues of some refugees and IDPs in the municipalities of Berane and Kolašin.

Regarding the type of housing, the results of the ISSP/UNDP household survey on vulnerable groups in Montenegro indicate that most RAE households (48 per cent) live in barracks, 31 per cent live in houses, while 8 per cent live in one-bedroom apartments. Among those who live in their own accommodation, most numerous are households in the south (32 per cent) and central parts (28 per cent) of Montenegro, while the respondents in collective accommodation mainly reside in the central part of Montenegro (41 per cent). Most households living in houses live in the south (41 per cent). Barracks are most prevalent among RAE families in the central (49 per cent) and northern (55 per cent) parts of Montenegro.

Almost half of the respondents could not judge the age of their housing units (48 per cent) and 55 per cent of these respondents live in barracks. A high percentage of RAE families (61 per cent) live in dwelling spaces under 30m.² The average floor area per Romani household is 36.6m², as is the case with refugee/IDP households, compared to 80.6m² for domicile non-Roma households, and indicating that both Romani and refugee/IDP housing is overcrowded. Slightly more than four fifths of RAE households (81 per cent) live in dwelling units with less than 10m² floor area per member of the household; in comparison, the same indicator for the resident non-Romani population is 8 per cent. A half of RAE housing units are made of hard material (50 per cent) and an additional 43 per cent live in housing made of wood; 5 per cent live in housing made of mixed materials, and 1 per cent in housing made of ground/soil and other materials. Living conditions of RAE households additionally suffer from the severe environmental conditions of their immediate surrounding. Namely, 48 per cent of RAE households live in close proximity to garbage dumps, 22 per cent live in settlements where waste waters flood, 17 per cent live in areas affected by air pollution, and 12 per cent are exposed to mudslides.²⁸ Such living conditions expose the Romani population to serious health risks. Survey data show that 68 per cent of RAE, in comparison to 20 per cent of the refugees and IDPs and 2 per cent of domicile non-RAE population, do not have improved sanitation. As indicated in Table 2, housing poverty is the greatest issue for RAE, refugees and IDPs both in terms of square meters per household members as well as in terms of water supply.

²⁸ United Nations Development Programme and Institute for Strategic Studies and Prognoses, *Household Survey on Roma, Ashkaelia and Egyptians, Refugees and Internally Displaced Persons*. Podgorica: UNDP and ISSP, 2003.

Chart 11: Housing conditions



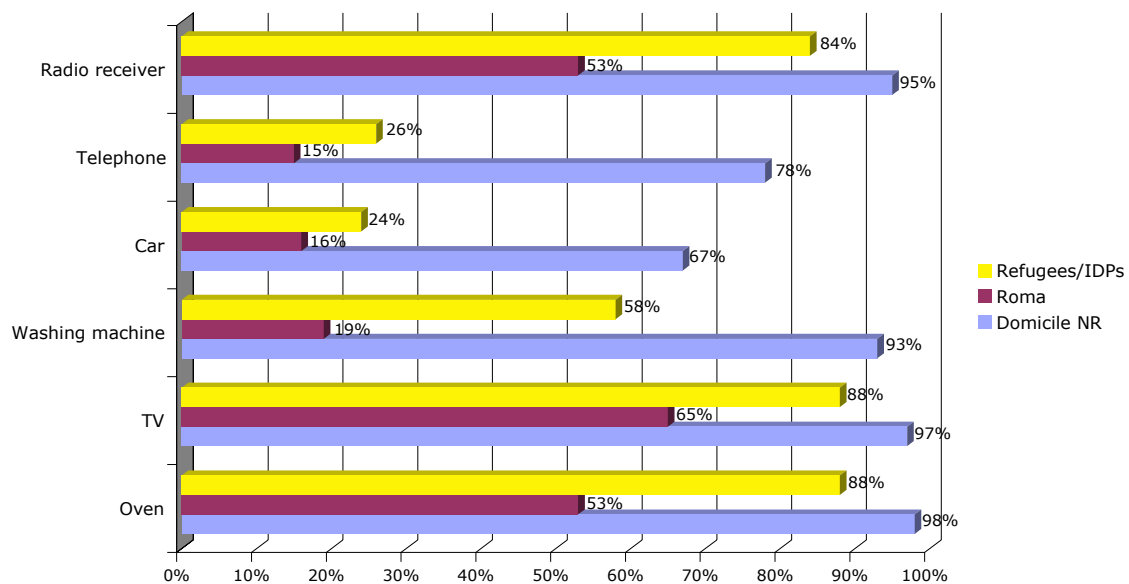
Source: UNDP Vulnerable Groups Dataset, 2004.

As illustrated in Chart 11, only 52 per cent of surveyed RAE households have piped water inside the dwelling, compared to 90 per cent of refugee/IDP households and 97 per cent of domicile non-Roma households. A further 34 per cent have piped water in the garden/yard, which is the case with only 9 per cent of domicile non-Roma households and 34 per cent among refugees/IDPs. Eighteen per cent RAE households must use a public tap. Only 40 per cent of Romani households have a toilet in their house, as is the case with 82 per cent of refugee/IDP homes, and 96 per cent of domicile non-Roma. Sewage disposal is an even greater problem for RAE households – only 29 per cent households have it, compared to 75 per cent of refugees/IDPs and 96 per cent of domicile non-Roma households. This is also a vulnerability indicator in terms of health since an absence of indoor plumbing practically often means that primitive pipelines are used to distribute the water from a public tap throughout the settlement. Very often, such water sources are not properly isolated and may be connected to sewage channels. Upgraded water supply systems and proper drainage of wastewater would also improve the general living conditions of the Roma population. In order to make it feasible, it is necessary to legalize Romani settlements, including the involvement of local governments.

Regarding other housing characteristics, 39 per cent of RAE households and 70 per cent of refugee/IDP households have a kitchen inside the dwelling in which they live, which is almost a norm (96 per cent) in domicile non-Romani households. Among surveyed vulnerable groups, the majority of domicile non-Roma households use electricity for heating (almost 90 per cent), while 79 per cent of RAE and 23 per cent refugee/IDP households use wood fuel for heating, which puts their health at risk of being harmed by indoor air pollution, and also exposes them to the threat of loss of life and property in fire.

In line with the quality of housing, the ownership of durable goods is also low: Chart 12 shows the incidence of basic household appliances, indicating once more the greater economic vulnerability of the RAE population. Only 1 per cent of refugee/IDP households and 5 per cent of Romani households were able to purchase some durable goods in the year prior to the survey, compared to 25 per cent in the majority population.

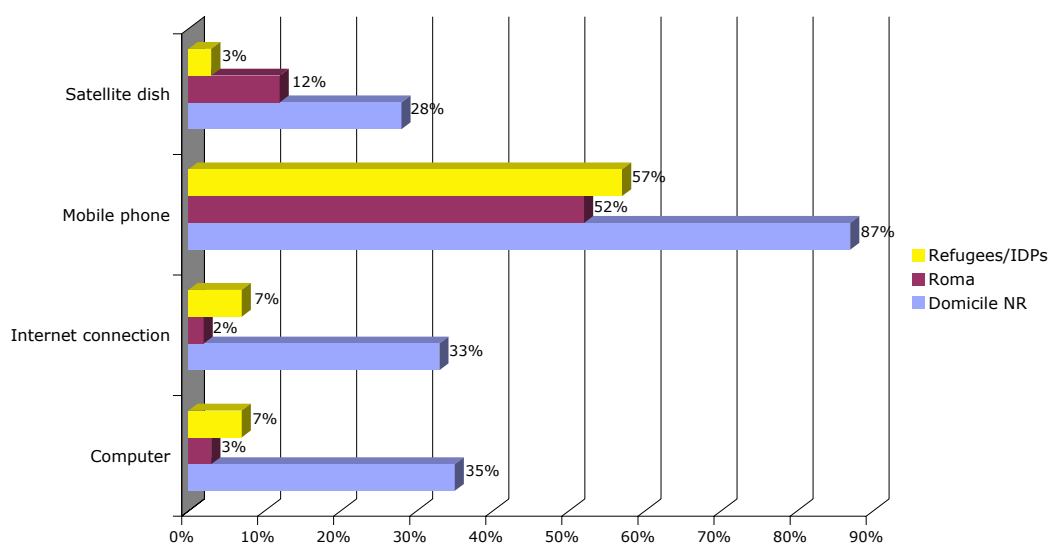
Chart 12: Basic housing appliances



Source: UNDP Vulnerable Groups Dataset, 2004.

The ownership and usage of advanced means of communication is another reflection of living standards for vulnerable groups in Montenegro, displayed in Chart 13. Again, these means are also less available for members of Roma and refugee/IDP communities. Only 15 per cent Romani and 26 per cent refugees and IDP households have phones in functioning order, compared to 78 per cent of domicile non-Romani households. The situation is better in the case of mobile communication: 52 per cent of Romani, 57 per cent of refugee/IDP and 87 per cent of domicile non-Romani households have functioning mobile phones. For every 100 Romani households there are only 3 computers; for refugees and IDPs, the number slightly rises to 7, compared to the domicile non-Roma average of 35 per cent. Internet access is available to 2 per cent Romani and 5 per cent refugee and IDP households, while the share of domicile non-Romani households with an internet connection amounts to 33 per cent.

Chart 13: Means of communication



Source: UNDP Vulnerable Groups Dataset, 2004.

The cost of utilities related to housing present a significant financial burden for all Montenegrin households, but especially vulnerable groups, and many households have some sort of outstanding housing-related monthly payments (see Table 9). Almost a half of Romani households have not covered their water or electricity bills. In this respect, the situation of refugee and IDP families is better than the domicile non-Romani population: 18 per cent have outstanding water bills, compared to 23 per cent of domicile non-Romani households, and 21 per cent of both refugee and domicile households have outstanding electricity bills. The average length of outstanding payments among vulnerable groups reaches up to 13 months in some cases. Among the households which have outstanding payments, the average amounts owed for electricity bills, for instance, reach up to 325 EUR per Romani household, compared to the national net monthly salary of around 250 EUR,²⁹ and especially considering that the vulnerability survey data show that most Roma earn well below this amount.

Table 9: Outstanding bills

	Domicile non-Roma	RAE	Refugees/IDPs
Water	23%	44%	18%
Electricity	21%	42%	21%
Other utilities	15%	8%	5%
Average amount due for water bills	42 EUR	151 EUR	163 EUR
Average amount due for electricity bills	140 EUR	325 EUR	160 EUR
Average amount due for other bills	64 EUR	140 EUR	177 EUR

Source: UNDP Vulnerable Groups Dataset, 2004.

²⁹ The average net salary in Montenegro for September 2006 was 248.34 EUR, according to MONSTAT.

Conclusions and recommendations

As shown by the results of the UNDP survey on social vulnerability in Montenegro, many Roma but also refugees and IDPs live under the poverty line, in numbers indicating that their economic and social situation is considerably more reprehensible than that of the domicile non-Roma living in their proximity. Romani households are additionally often burdened by the persistence of chronic poverty, and have little possibility to supplement their income. Numerous Romani families consider hunger as the greatest threat to their human security. One of the causes for such poverty levels is high unemployment among both Roma and refugees/IDPs, with women having less jobs than men in all groups. The Roma labour force is mainly unskilled and does not match the current market needs; Romani households consequently make much lower incomes. Launching own businesses by members of vulnerable groups is rare, and formalizing them even less common, due to numerous difficulties in obtaining the necessary documents. The usage of financial instruments as a form of assistance is also rare.

Low employment rates among Roma in Montenegro stem, to some extent, out of low education levels. Literacy rates of Roma fall notably behind national averages, especially in the case of women. Most Roma have no education at all, whereas school enrolment is insufficient, in addition to high dropout rates by Romani children. Poverty appears to be the main reason keeping Romani children out of school; children also often leave school to supplement family budgets through child labour. Most Roma and refugees/IDPs live in substandard and insecure housing, in the case of Roma also facing the risks of living in illegal settlements. Their living conditions are characterized by the lack of proper infrastructure and commonly also exposure to environmental hazards raising health concerns too. Though their poverty and living conditions cause that their health is worse compared to the other groups, Roma seek medical assistance to a lesser extent. Obstacles such as the lack of personal documents (which essentially blocks the exercise of many human rights) and unaffordable related costs of health care stand in their way. The percentages of vaccinated Romani children are on the rise yet still below national averages. Households that are both Romani and IDPs face increased risks, and so the households of Romani asylum seekers returned from Western Europe.

The Republic of Montenegro has taken a number of steps to improve the situation of its vulnerable groups. It is making progress in the implementation of its Millennium Development Goals policy, the Development and Poverty Reduction Strategy, and the Strategy for Durable Solutions for Refugees and Internally Displaced Persons. It joined the Decade of Roma Inclusion and adopted the relevant National Action Plan. A future strategy of Roma in Montenegro is being drafted, and so is the National Action Plan on Romani Women. Nevertheless, much work remains yet to be done, and here are some main highlights of issues that merit particular consideration:

In the field of poverty reduction and employment:

- Combining formal education and vocational training of Roma to yield best results and raise the employability of Roma by improving their educational outcomes;

- Setting an example by hiring eligible Romani men and women in the public sector;
- Supporting small businesses run by members of vulnerable groups;
- Including the focus on business training and education as a measure to ensure greater success of new businesses;
- Taking special measures to combat chronic poverty among Roma.

In the field of education:

- Making education a priority in policies related to vulnerable groups, especially Roma as it is the main channel of social inclusion of Romani children;
- Extending educational programmes to include Romani children in the public educational system and take all steps to reduce their dropout rates;
- Providing means of financial and/or in-kind support for vulnerable families of Romani children at school to prevent child labour;
- Supporting programs offering scholarships and stipends for Romani pupils and students.

In the field of health care:

- Making health concerns of vulnerable groups a priority in the implementation of health reform;
- Providing efficient health care and free basic medicines for vulnerable groups;
- Organizing immunization and other preventive care campaigns with the element of strong outreach to the Roma community;
- Urgently improving those elements of Roma housing that raise health risks.

In the field of housing:

- Providing low-cost housing for vulnerable households;
- Building and improving infrastructure in Romani settlements;
- Pursuing the legalization of Romani settlements while ensuring that the implementation of relevant laws does not cause further social exclusion of Roma;
- Actively seeking short-term solutions until long-term provisions are identified.

With regards to policies related to any field of activity addressing the concerns of vulnerable groups in Montenegro:

- Committing sufficient funding for the implementation of strategies and initiatives relevant for vulnerable groups, especially the Decade of Roma Inclusion, including the development of local actions and involvement of local government, and dutifully monitoring and evaluating their implementation, stressing best practices and undertaking corrective measures if necessary;

- Strengthening refugee/IDP and Roma participation in creating and implementing any national development and pro-poor strategies and policies;
- Making necessary amendments so that no existing legislation directly or indirectly discriminates against vulnerable groups;
- Maintaining a continuous dialogue with the civil society sector, especially the NGOs representing vulnerable groups;
- Providing easier access to personal documents to members of vulnerable groups;
- Including gender equality aspects and promoting the empowerment of women and girls in all policies related to vulnerable groups;
- Paying particular attention to special groups within the vulnerable population, such as Romani IDPs and Roma returned from Western Europe;
- Collecting statistical data on Roma in Montenegro, disaggregated by both ethnicity and sex, ensuring to include unregistered settlements in censuses, and involving Romani pollsters;
- Protecting the human rights of Roma, and strongly condemning racial discrimination and any violations of Roma rights.

Lastly, the effects of various parallel initiatives, such as the Decade of Roma Inclusion, the Millennium Development Goals and other national strategies would be strengthened by close cooperation and interaction of all actors involved to improve the development opportunities of vulnerable groups in Montenegro.

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Appendices

Appendix 1

Table 10: List of municipalities where the interviews were conducted

<i>No.</i>	<i>Municipality</i>	<i>Number of sampling points</i>	<i>Number of interviews achieved</i>
1.	Andrijevica	1	5
2.	Bar	6	71
3.	Berane	3	21
4.	Budva	2	11
5.	Herceg Novi	5	60
6.	Nikšić	6	59
7.	Plav	1	9
8.	Podgorica	32	285
9.	Tivat	4	32

Table 11: Number of households and persons interviewed

	<i>Domicile non-Roma</i>	<i>Roma</i>	<i>Refugees/IDPs</i>	<i>Total</i>
Households	198	199	204	601
Persons	700	699	708	2107
Men	349	374	360	1083
Women	351	325	348	1024

Appendix 2: Outline of the Survey Methodology

A. Survey questionnaire

The survey questionnaire that was used to generate the data on which this report is based follows the philosophy of integrated household surveys, with separate components containing both household and individual modules. Within the individual module, each household member's profile was registered (demographic characteristics, economic status, education, health). The household module addresses issues related to the household in general (dwelling type, access to basic infrastructures, household items possession etc.). Questions related to incomes and expenditures were addressed in both modules, making it possible to crosscheck the results. For any additional information related to the questionnaire, please see the dedicated website <http://vulnerability.undp.sk>.

B. Universe under study

The primary universe under study consists of: (i) all the households in Roma settlements or areas of compact Roma population; (ii) displaced persons (IDPs/refugees); and (iii) domicile non-Roma communities living in close proximity to Roma and refugees/IDPs.

C. The Roma sample

The sampling of vulnerable groups in general and of Roma in particular is a major challenge in every survey targeting diversities and vulnerability. The first assumption of the survey was that major disparities in socio-economic status of the populations are most obvious (and can be explored best) at the level of municipality (or other relevant micro-territorial unit). Since at this level vulnerability factors exist that affect both Roma and other communities, vulnerability profiles of the two groups (Roma and domicile non-Roma) in the same municipality were developed, in order to make possible the identification of those vulnerability factors that affect the Roma.

The most difficult question in this regard is “Who is Roma?” and how to appropriately identify the survey respondents. The primary objective of the survey was to map the vulnerability of groups with common socioeconomic, cultural and linguistic patterns – irrespective of how the potential surveyed might identify themselves. Since Roma identity is often associated with underclass status and discrimination, the decision to avoid self-identification as “Roma” is not infrequent. In most countries, therefore, Roma are underreported in censuses, and officially registered sizes of Roma populations often differ dramatically from experts' estimates.

While accepting the belief that censuses understate the absolute numbers of Roma, the survey accepted that the census data provide reasonably adequate pictures of the **structure** and **territorial distribution** of those individuals who identify themselves as Roma. Since the absolute number of Roma populations is not known, random sampling was not possible, so a “pyramid” sampling model was used instead. Within this model, various estimates of Roma population (including census data) constitute different tiers of the pyramid. The bottom of the pyramid constitutes the total (“real”) number of Roma in a country. The top represents the hypothetical situation of total exclusion in which not a single person would self-identify as Roma. Census data constitute one of the pyramid's tiers, with the pyramid's strata reflecting the structure of the population. Under this model, if the “propensity to underreport” (i.e., the share of the Roma not willing to identify themselves as Roma) is distributed

similarly in different regions within a country, the structure of the population reflected in the census tier would be identical to the structure of the total population. This should be sufficiently unbiased to construct a representative stratified sample.

In practical terms, it was assumed that the propensity to underreport was identical for each region within an individual country. Based on this assumption, the Roma sample was taken as representative of the Roma population living in “Roma settlements or areas of compact Roma population”. Those settlements and areas were defined as settlements where the share of Roma population equals or is higher than the national share of Roma population in the given country, as reflected in the census data. The share – not the absolute number – of Roma was used for identification of the sampling clusters. The knowledge that X per cent of Roma (as reported in the census) live in settlement Y was taken to mean that X per cent of the sample will be derived from settlement Y. In this way, the demographic structure of the sample reflects the demographic structure of the Roma population (as reflected in the census data in proportions).

At the first stage of the sample design the universe was defined as mentioned above, using “average and above share of Roma in each settlement”. In the second phase, taking into consideration also Roma organizations’ estimates of Roma populations, the distribution of the settlements and population sizes, sampling clusters were determined. Respondents were then identified using “random route” selection processes (third stage).

Internal (self-identification) and external (outsider’s identification) modes therefore prevail at different stages of the sampling process. Self-identification (reported during census) was used in the first stage; external identification (assessment of local people, NGOs, experts) was employed in the second stage. In the third stage (respondents’ selection), the results of the first two stages were confirmed or rejected by “implicit endorsement of identification”.

In some cases (particularly in big cities and capitals), large Roma communities constitute relatively small shares of total populations. In such cases, the sampling methodology conformed to administrative subdivisions (usually the “capital municipality” is divided into smaller municipalities and/or lower levels of self-government). These lower levels were then chosen as the sampling units. Such cases were also corrected typologically introducing additional sampling points.

D. Refugees, IDPs, and domicile non-Roma sample living in close proximity to Roma

Similar approach was adopted to refugees and IDPs. Data from official sources (registering their status) was used for the sampling. The samples for IDPs/refugees were constructed using official registries provided by expert organizations.

The non-Roma booster samples were constructed using similar procedure as for the Roma. These are representative samples of non-Roma communities living in settlements with Roma communities of “average and above” size. These samples are therefore not representative of national averages. The idea was to have records of their socio-economic status, which can serve as a baseline for comparing levels of vulnerability and their determinants for the Roma, refugees and internally displaced persons.

For obvious reasons, the samples for non-Roma living in close proximity to Roma were constructed for the same settlements reflected in the Roma samples. In the second stage of sampling (determining the size of population and the sampling clusters), external identification was used to identify the non-Roma neighbourhoods

(assessment of local people, local self-governments). In the third stage random route selection was also applied.

In cases of municipalities with a high share of Roma population and the number of domicile non-Roma population not sufficient for creating a majority booster (for example, in cases of isolated Roma settlements or segregated neighbourhoods), the majority booster was based on a typologically similar settlement in the same district (administrative unit) with Roma population equal or higher the national average. The criterion for choosing this settlement was the ‘closest village accessible by road connection’.

The desire to obtain comparable data for non-Roma living in close proximity to Roma reflected a major emphasis of the current analysis: Roma are the most vulnerable, but not all vulnerable are Roma. The domicile non-Roma boosters gave the survey the “benchmark” needed for assessments of the depth of Roma poverty and vulnerability vis-à-vis non-Roma living in similar socio-economic environments. Despite the sample design challenges it poses, this approach allows us to distinguish among various vulnerability factors, particularly those that are related to minority status (and hence can be attributed to various forms of discrimination), as opposed to manifestations of regional development disparities or depressed local economic circumstances. It also provides clues on how to tackle the issues of exclusion and marginalization. Although often determined by institutional factors and policies, exclusion occurs at the level of interaction. This is primarily the level of the community, where people enter daily contacts. Measuring the distance between Roma and non-Roma in areas they cohabit could be an important clue of how to tackle challenges of social distance.

It is important to bear in mind that this approach does not attempt to guarantee national representativeness for domicile non-Roma communities. Because they share similar socioeconomic circumstances, members of domicile non-Roma communities living in close proximity to Roma may well be more vulnerable than national averages. Whenever national indicators are available these are used as a benchmark to assess the vulnerability of the three groups covered in the survey.

E. Methodological costs and benefits

The samples based on municipalities with average and above shares of Roma population are not fully representative for the entire Roma populations of the countries covered in this survey. They do, however, cover roughly 85 per cent of Roma in each country, and as such provide a good basis for developing quantitative socioeconomic indicators of Roma welfare (quality of life, life expectancy, access to services, incomes etc.). The resulting samples are representative not just for residents of segregated Roma communities, but also for the majority of Roma.

The data generated by these samples are broadly consistent with census data, since this survey’s data are based on relative numbers (structure and regional distribution) instead of the absolute numbers of Roma registered in the censuses. This approach also gives some standardized criterion for majority booster selection. The major drawback of this sampling methodology concerns its application to municipalities where the share of Roma in the total population is below national averages. Because these municipalities effectively fall out of the scope of the sample, the conditions of Roma concentrated in “mini-poverty pockets” or who are dispersed (presumably integrated with the domicile non-Roma) are not captured. Both groups are represented in the sample, however. In the first case, most of the 85 per cent of Roma who are captured by this survey methodology also live in similar poverty

pockets, which benefit from representative sampling. In the second (integrated) case, this would be because a significant portion of the 85 per cent of Roma is functionally integrated (employed, maintaining contacts with majority communities and institutions) and thus typologically similar to dispersed (presumably integrated) Roma from the 15 per cent. Those of the 15 per cent who are “dispersed and integrated” and self-identify themselves as Roma are typologically close to those who are integrated into the 85 per cent. Those who have been assimilated and do not self-identify as Roma fall out of the scope of the research, either because do not meet the criterion of “being Roma” (whatever that means) or because they do not meet the vulnerability criterion.

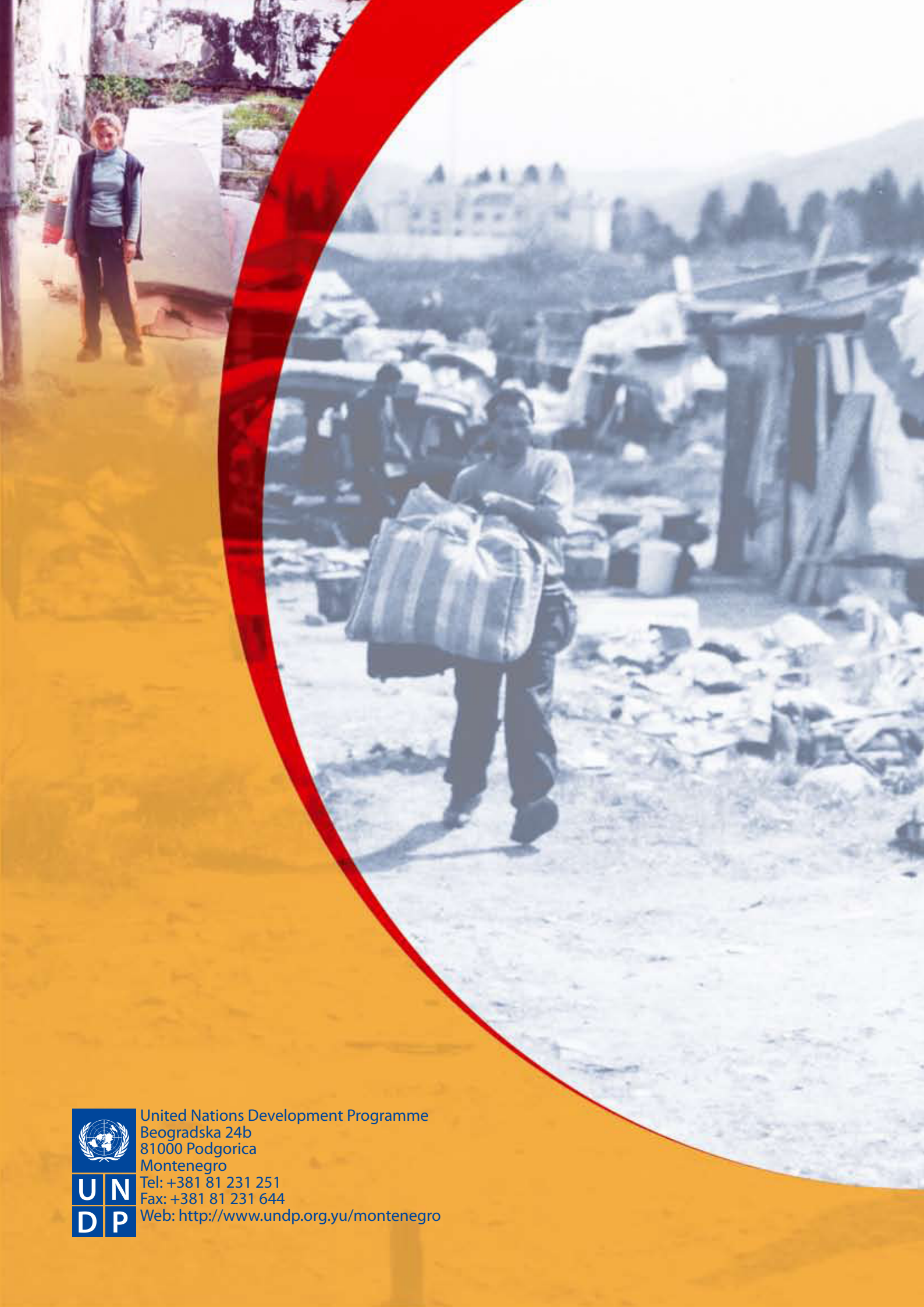
Overall, the methodology employed in this survey is based on the assumption that existing demographic information on size and structure of Roma populations can be reliably analysed and disaggregated, in total and by territory. This is not easy to achieve, and the results will inevitably reflect estimates and expert’s assumptions. These steps are nonetheless a precondition for representative sampling procedures, and as such all efforts should be made in this direction.

F. Fieldwork and partnerships

Given the nature of the survey – addressing the needs of groups that are not easy to identify – fieldwork was another major challenge. High level of trust was needed on the side of respondents – particularly in the case of Roma. As a specific and unique minority group Roma in some countries show certain level of distrust towards other ethnical groups and ethnical majority as well. The general rule was to approach the communities carefully, with respect and avoiding any suspicion about the purpose of the data collection.

The survey was executed by Medium Gallup, a GALLUP affiliated agency in Serbia, and coordinated by the GALLUP regional office, Sofia, which managed the execution of the whole regional survey. Using the GALLUP framework made it possible to apply similar standards and procedures in all countries covered by the regional vulnerability project, making cross-country comparisons possible and reliable. After the fieldwork was completed thorough control was run with 10-15 per cent of the sample depending on the country. All errors were cleared. Data control was conducted centrally by GALLUP regional office which managed the execution of the survey.

From the outset all agencies involved were working in coordinated manner under the methodological and conceptual guidance from UNDP Bratislava Regional Centre. The methodology of the survey, sampling and fieldwork were broadly discussed with colleagues from the World Bank and members of the UNDP Data Experts Group. Three consultants (Gabor Kezdy, Valerie Evans and Dragana Radević) were particularly instrumental in the final design of the methodology and sampling models.



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