

CONSOLIDATE SURVEY RESULT IN MONTENEGRO

ILO Global Study and Company Survey on Women in Business and Management

Opening remarks

According to the Montenegro Statistical Office (MONSTAT) data, Montenegro has a total population of 620 029 inhabitants (according to the last census 2011), 313 793 of which are women (or 50.61%) and 306 236 are men (or 49.39%). According to the same data, there have been 21 127 active business entities in Montenegro, from which the majority belongs to the small enterprises, i.e. 98.7%. 19 102 business entities out of the total number of active business entities have been owned by men while 2 025 business entities have been owned by women. Of the total number of active business entities in Montenegro, the largest number is in municipalities Podgorica (33.3%), Budva (10.9%) and Bar (9.9%).

The organisational and legal forms of enterprises in Montenegro, as regulated by the Law on Business Organisations (Official Gazette of the Republic of Montenegro no. 06/02, Official Gazette of Montenegro 17/07 i 80/08) are the following:

- individual entrepreneur
- general partnership (GP)
- limited partnership (LP)
- joint stock company (JSC)
- limited liability company (LLC)
- foreign company branches

In the survey done in Montenegro, enterprises fell into 4 categories: small, medium, large and multinational. Such division came out as a result of the ILO questionnaire which provided the participants in the survey with the possibility to choose one of those 4 options.

It should be noted that survey results would have showed somewhat different structure of enterprises in the sample if that specific question was created without the option “multinational”, which again could have resulted in participants classifying their enterprises in only two of 4 categories offered. The reason for this is that multinational companies operating in Montenegro may at the same time belong to the category of “multinational” and those of large and medium enterprises – depending on their number of employees.

Methodology and characteristics of the sample

A technique used in Company Survey on Women in Business and Management was an ILO survey questionnaire. The questionnaire was distributed by an umbrella employers’ organisation in

Montenegro - Montenegrin Employers Federation (UPCG) in a way that the ILO questionnaire was sent to 1000 e-mail addresses of business entities operating in Montenegro. The questionnaires were filled in and sent back by 103 enterprises (10.3 %).

The data provided by the ILO questionnaire, UPCG processed using a modern software package for statistical analysis and grouping of data – SPSS.

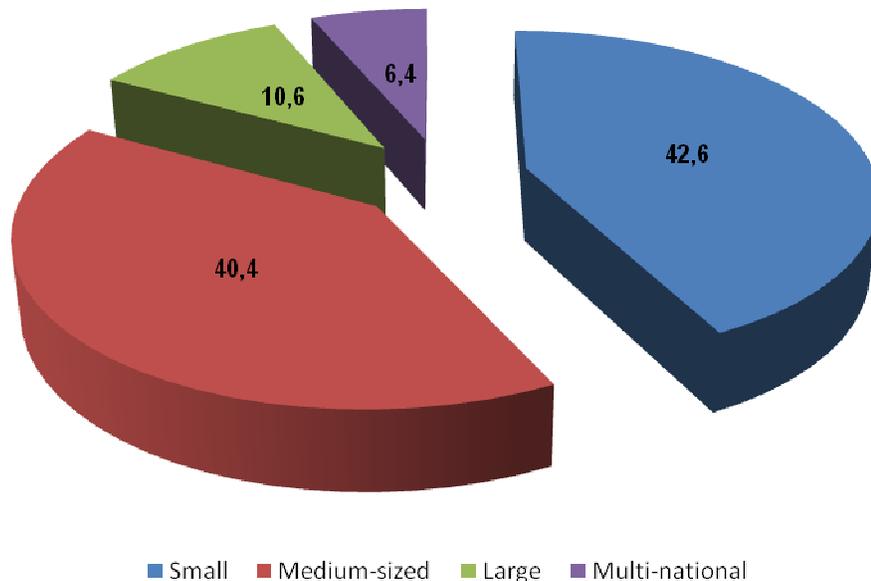
As it comes to specific survey, it should be pointed out that the results obtained are indicative enough when it comes to defining the state of the affairs, problems and needs, as well as provision of recommendations for further development of women in business and management in Montenegro.

RESULTS OF THE SURVEY

SECTION A: General Information

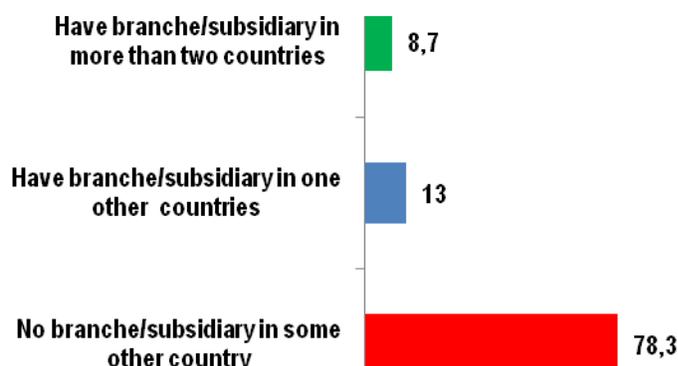
There were 103 enterprises participating in the survey. Viewed in terms of size, the majority of participants fits to the category of small (42.6%) and medium-sized enterprises (40.4%). The least number of participants is within the category of large (10.6%) and multinational companies (only 6.4%).

Graph 1: Enterprises by size



The largest number of companies in the sample is local companies (65.9%), while 31.8% of companies is owned by individual(s) or groups in another country in the region.

Graph 2: Companies' branches



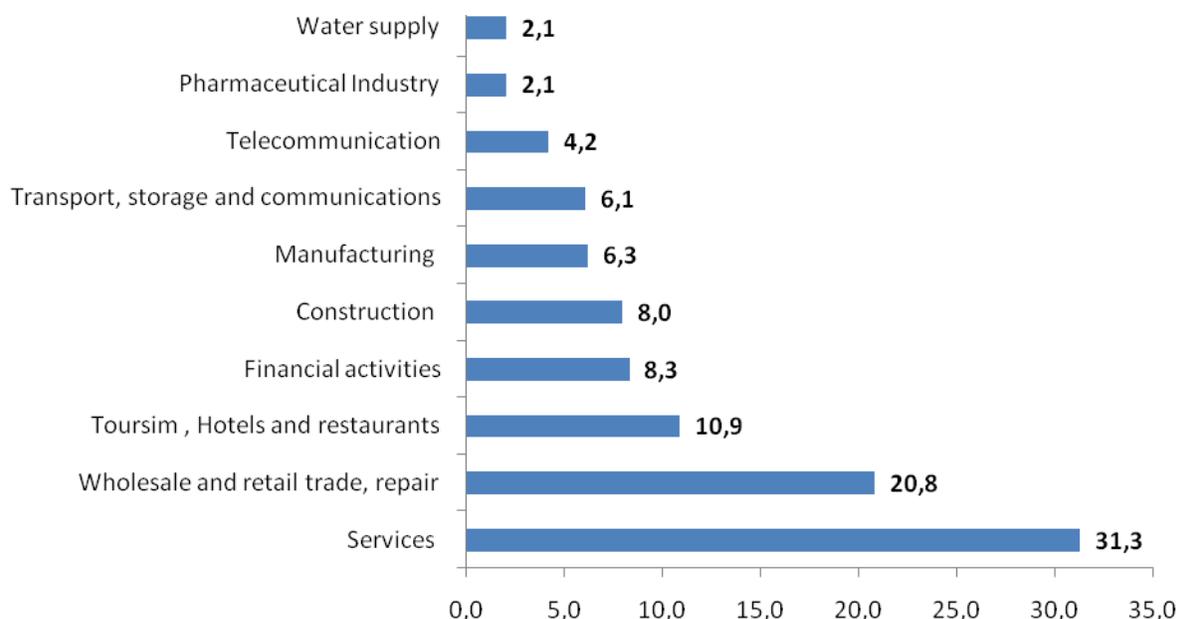
78.3% out of the total number of companies do not have branches in other countries while 13% have got the branches in more than two other countries.

Only 8.7% of enterprises have got their branches in one other country.

Those enterprises having their branches in more than two other countries are mainly large and multinational companies while most of the small and medium-sized enterprises in the sample do not have their branches abroad.

In terms of sectors share in the sample, the predominant one is the sector of services (31,3%) followed by wholesale and retail (20,8%). The portion of 10,9% goes to the tourism and hospitality sector.

Graph 3: Enterprises by sector



67.4% out of the total number of enterprises in the survey reported that a company was not owned by a woman while in 17.4% of enterprises woman owned at least 51% of a company.

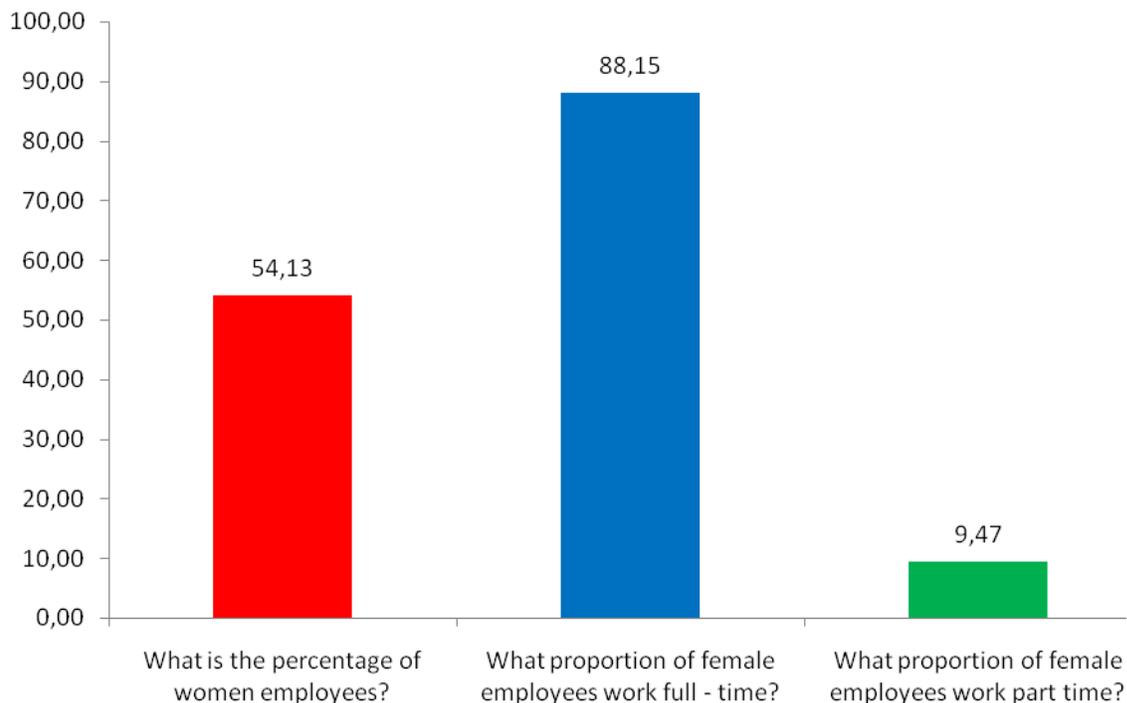
Table 1: Please indicate whether your company is a women-owned business

	Percentage
Yes, it is at least 61% owned by women	17,4
Yes, its management and daily business operations are controlled by one or more women	15,2
No, it is not a women-owned business	67,4
Total	100,0

Companies in the sample employ 120 workers on average. It should be pointed out thereby that the survey participants on one side were the enterprises having only one employee while on the other side the greatest number of employees reported by one company was 848.

The following graph gives an overview of women employed in companies in the sample

Graph 4: Percentage of women in companies



Companies in the sample employ 54.13% of women in total. 88.15% of women out of that number are full-time employed and only 9.47% of women are part-time employees.

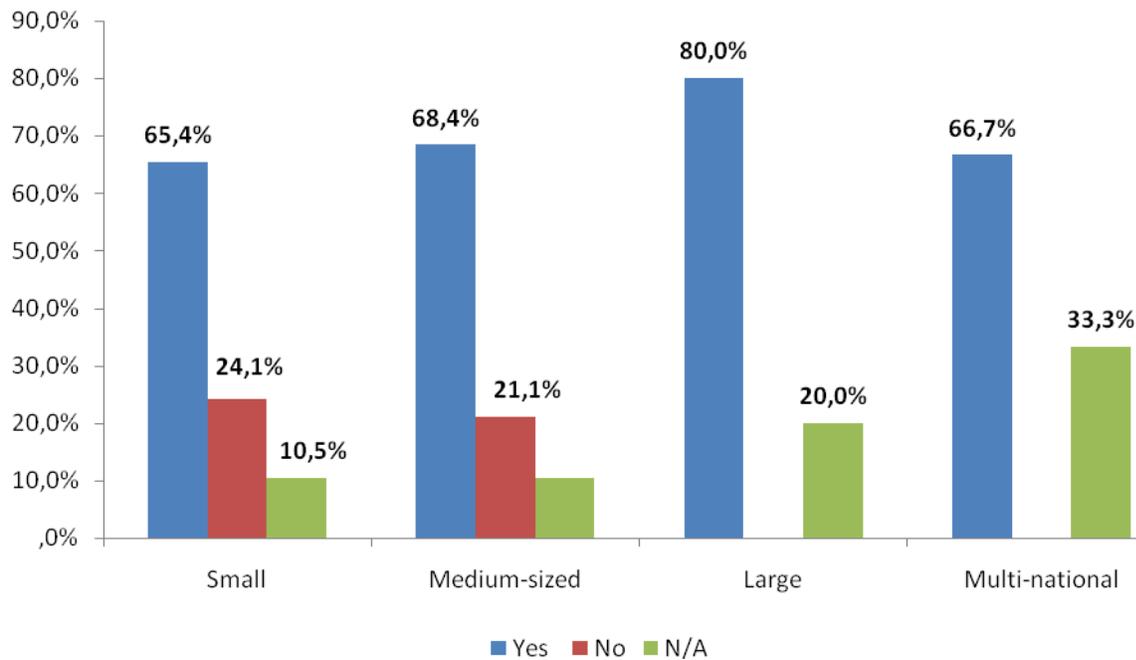
SECTION B: Policies and Measures

According to companies' responses, 69.6% of enterprises have an equal opportunity policy while 17.4% do not have such policy. The interesting fact to mention here is that out of the total number of enterprises having reported to have such policy there was only one enterprise (belonging to the category of large enterprises) which submitted the Policy (as the official company's document). The potential reasons for the

above could be found in the following: (1) some companies' business policies are such that do not allow that particular document and all other documents of this kind (for internal use) to be published or delivered to third parties; (2) it happens that businesses do not implement equal opportunity policy based on concrete written document but as part of the entire business policy; (3) equal opportunity policy is recognised as regulation prescribed by a particular law or bylaws (in one way or another related to gender issues) and not as an internal use document adopted at company level.

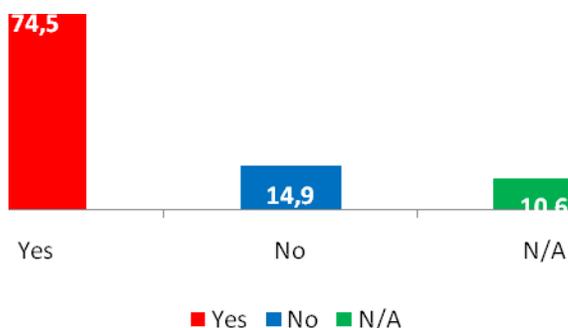
Graph 5 below gives an overview of companies' responses related to Equal opportunity policy (by companies' size).

Graph 5: Does your company have an equal opportunity policy



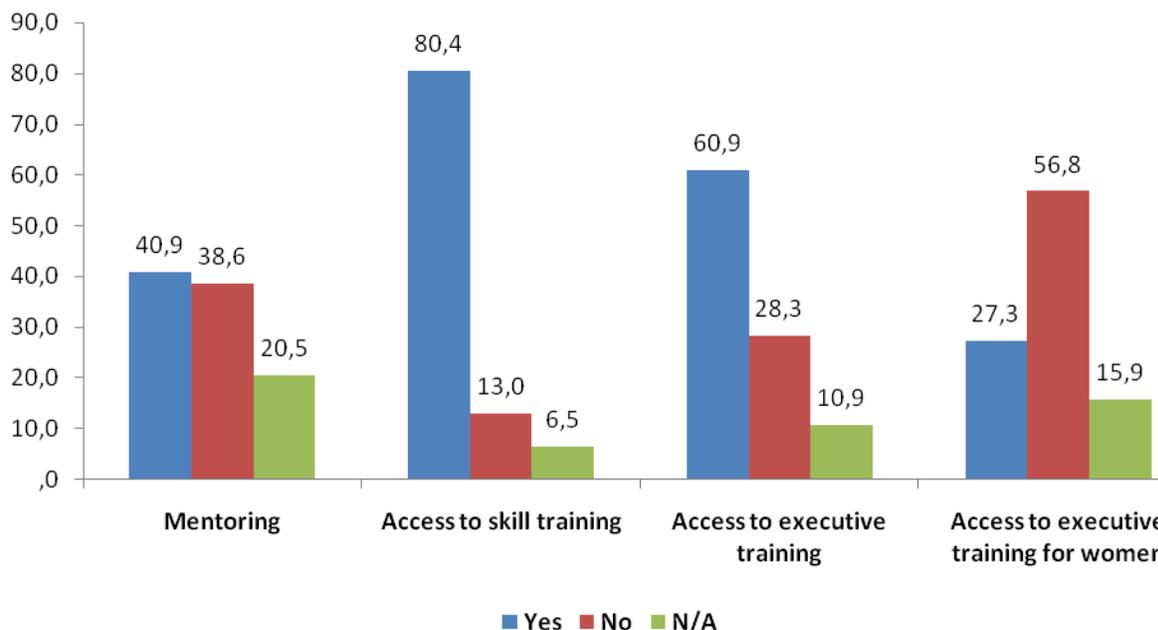
It can be easily seen from the graph that the majority of enterprises in the survey have equal opportunity policy. 80% of those belong to the category of large enterprises while 68.4% and 66.7% are in the groups of medium enterprises and multinational respectively. On the other hand, the largest group of those which do not have the policy is the one of small (24.1%) and medium enterprises (21.1%). An interesting fact that emerges here is that both large and multinational companies gave no negative responses to this question but also gave the greatest number of N/A answers.

Graph 6: Does your company implement initiatives to promote equality in the area of recruitment, retention and promotion



Out of the total participants in the survey even 74.5% of enterprises do implement initiatives to promote equality in the area of recruitment, retention and promotion, while 14.9% of enterprises do not take up such kind of initiatives.

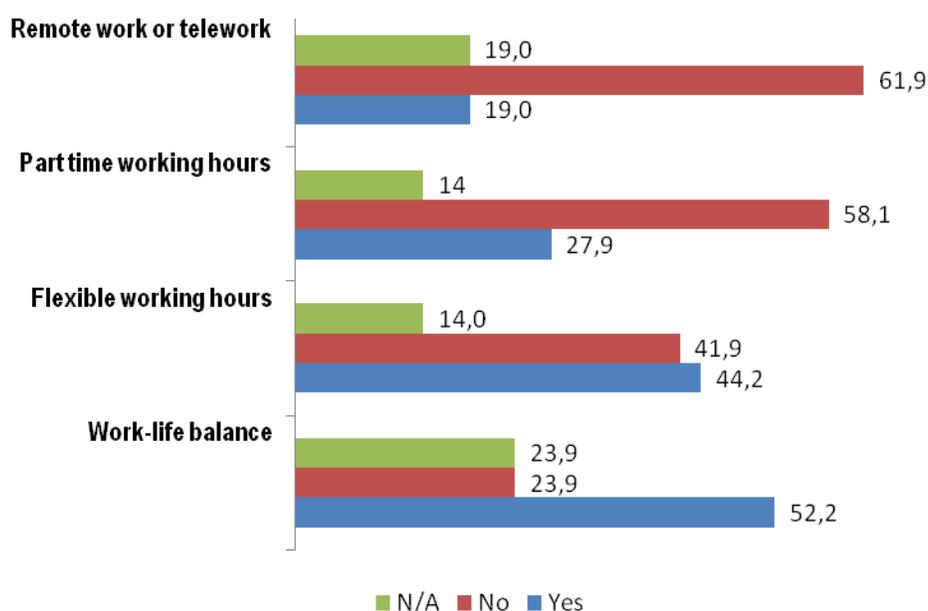
Graph 7: Initiatives in the areas:



Out of four initiatives offered, enterprises mostly implement those in the areas of access to skills training (80.4%) followed by those of access to executive training (60.9%).

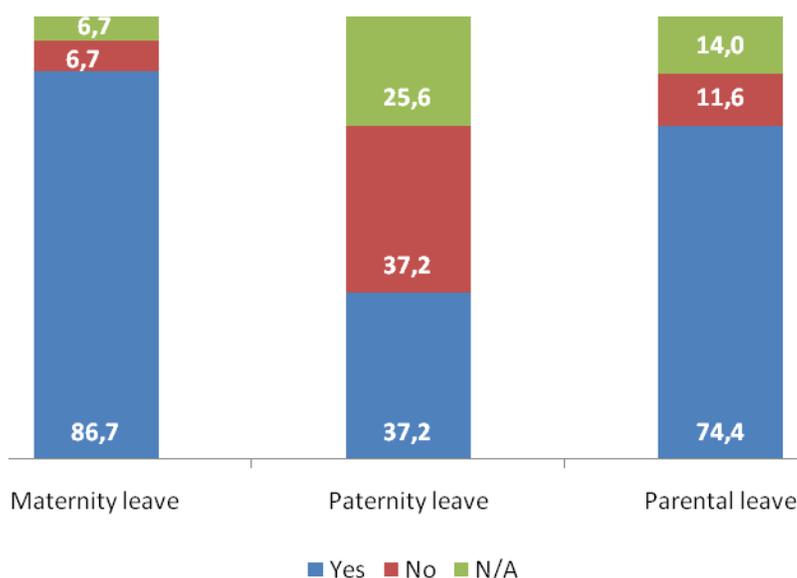
On the other side, the least implemented initiative is the one in the area of executive training specifically for women (27.3%). We come to the same data if we observe the negative answers – the greatest number of enterprises (56.8%) does not implement exactly those initiatives in the area of executive training designed specifically for women.

Graph 8: Initiatives in the areas:



Out of four initiatives given in the graph 8, the greatest number of enterprises does not implement initiatives in the area of remote work or telework (61.9%) as well as part-time working hours (58.1%). The most implemented initiatives are those related to work-life balance (52.2%) and flexible working hours (44.2%).

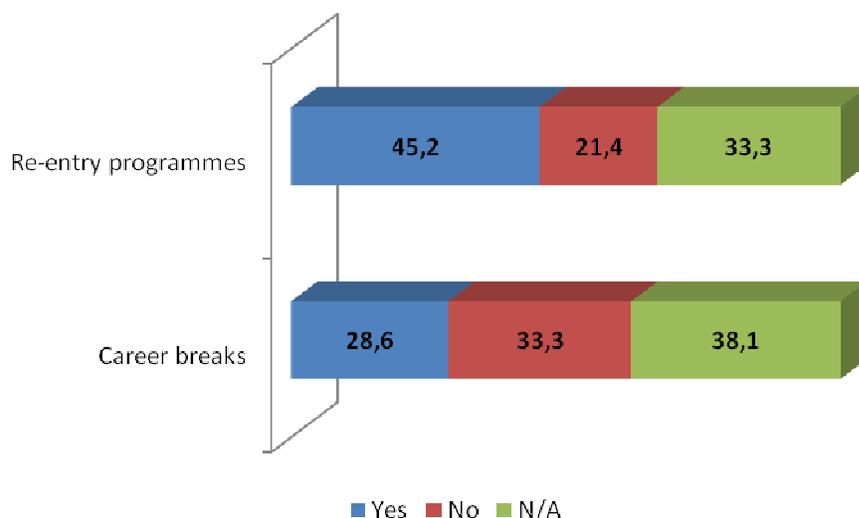
Graph 9: Initiatives in the areas:



This survey showed that enterprises in Montenegro largely implement initiatives related to maternity leave (86.7%) as well as those related to paternal leave (74.4%).

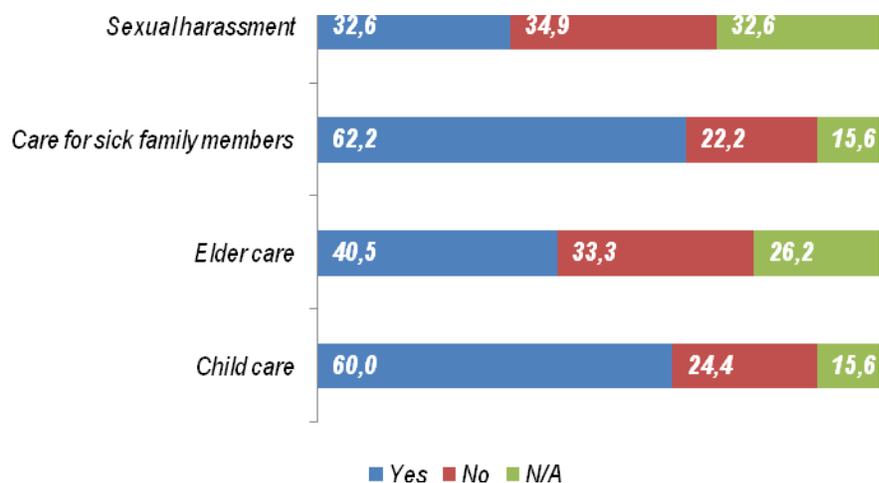
Initiatives related to paternal leave are given the least positive answers (37.2%), and again the most negative answers (37.2%). In order to interpret these data in a quality way one should have in mind that a Law on Amendments of Labour Law in Montenegro came into force in December 2011. Among other things, the Law introduces paternal leave (men and women are given equal right to use the leave), giving precise provisions on maternity/paternity leave (both parents are given equal rights to use the leave) .

Graph 10: Initiatives in the areas:



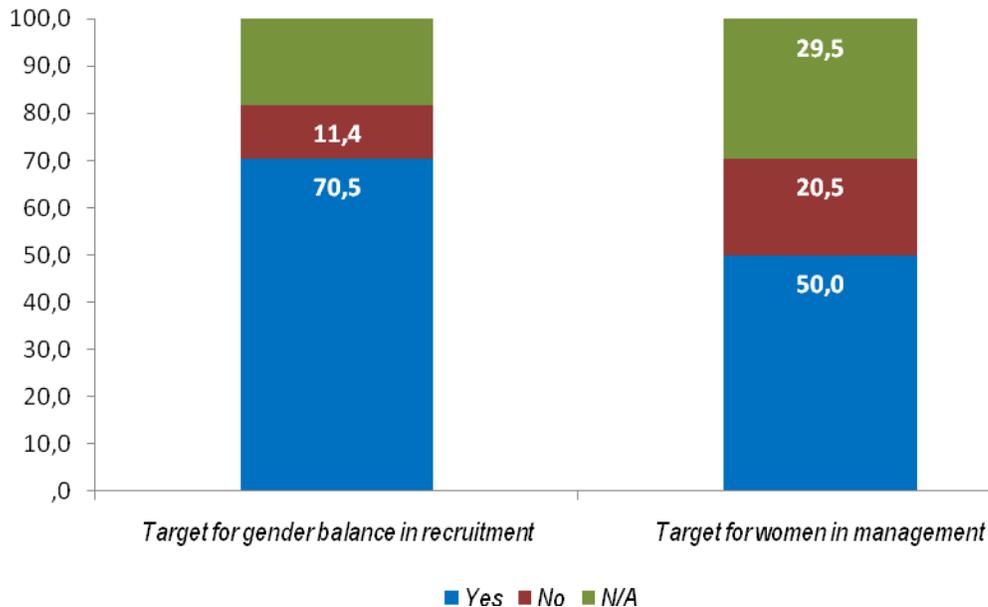
When it comes to these two initiatives, it is noticed that re-entry programmes after longer absence are implemented by 45.2% of enterprises in the sample while those initiatives related to career breaks are taken up significantly less (28.6%). 1/3 of the responses to both of the initiatives interestingly enough was N/A.

Graph 11: Initiatives in the areas:



As seen in the graph above and when it comes to the four initiatives offered, most enterprises implement those related to care for sick family members (62.2%) and child care (60%). Initiatives related to sexual harassment are taken up by only 32.6% of enterprises while the same initiatives are not at all implemented by 34.9% of enterprises.

Graph 12: Initiatives in the areas



Initiatives related to targets for women in management are taken up by 50% of enterprises while the initiatives aimed at gender balance in recruitment are implemented by 2/3 i.e. 70.5% of enterprises.

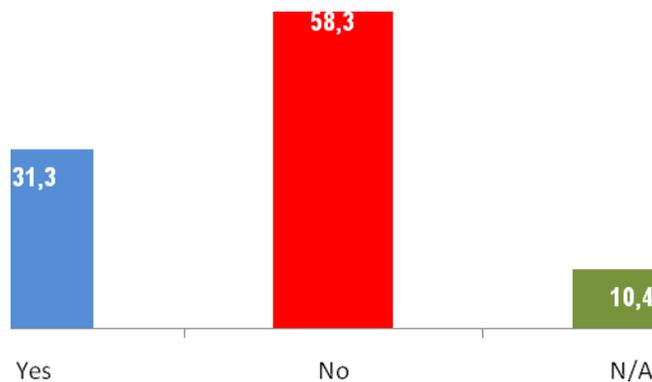
The responses presented in the previous seven graphs (Graphs 6, 7, 8, 9, 10, 11, 12) can be summarised as follows:

- enterprises in the survey to the greatest extent implement the initiatives related to: maternity leave (86.7%), access to skills training (80.4%), parental leave (74.7%), recruitment, retention and promotion (74.5%), targets for gender balance in recruitment (70.5%), care for sick family members (62.2%) and child care (60%).
- initiatives largely not taken up are: remote work or telework (61.9%), executive training specifically for women (56.8%) and part-time working hours (58.1%).
- the greatest number of N/A responses is given to the following initiatives: career breaks (38.1%), re-entry programmes (33.3%) and sexual harassment (32.6%).

SECTION C: Data and statistic

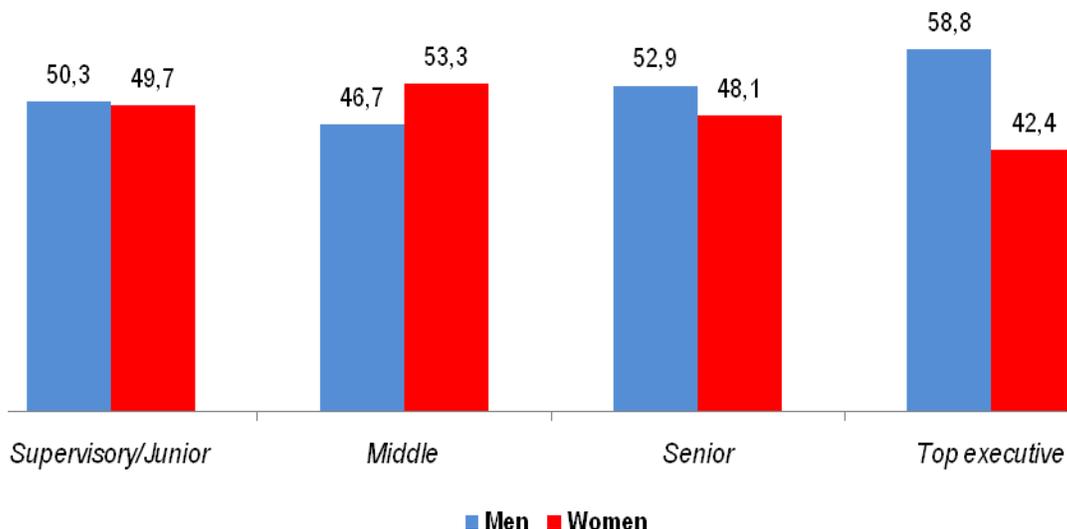
A question “Does your company monitor and report on the proportion of women and men at different levels of the hierarchy?” is given negative answers by the majority of enterprises (58.3%), while positive answer is given by 31.3% of enterprises. The overview of the responses is given below (graph 13).

Graph 13: Does your company monitor and report on the proportion of women and men at different levels of the hierarchy



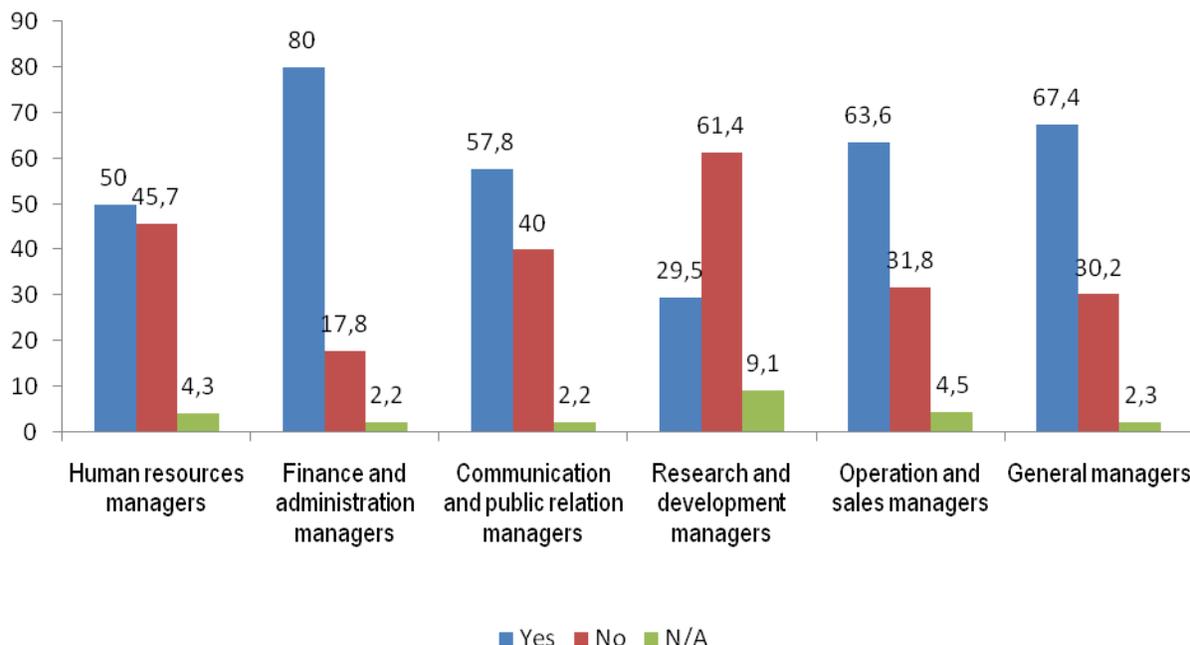
If the responses to this question are considered from the aspect of enterprise size, it is noticed that the proportion of women and men is monitored and reported by 60% of large companies. The situation is different when it comes to small and medium-sized enterprises – even 63.2% of medium and 70% of small enterprises do not monitor and report on the proportion of women and men at different levels of the hierarchy.

Graph 14: The proportion of women and men in managerial roles at different levels



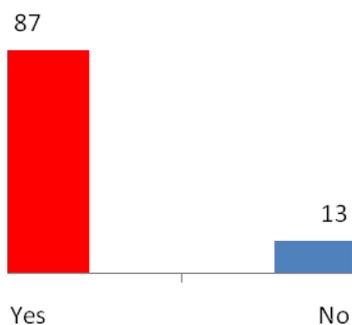
Women are the most represented at middle managerial level (53.3%) where they are in advance compared to their male colleagues (46.7%). At all other levels there are more men than women, the difference between these two groups being minimal at supervisory/junior level (50.3% of men and 49.7% of women) and maximal at top executive level (58.8% of men and 42.4% of women).

Graph 15: Does your company have:

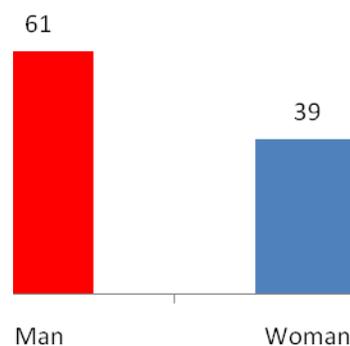


If we look at the structure of employed managers by sectors, we will notice that the greatest number of enterprises have finance and administration managers (80%), general managers (67.4%) and operation and sales managers (63.6%). If we analyse negative responses, results will tell us that the majority of enterprises do not have research and product development managers (51.4%), human resources managers (45.7%) and communications and public relations managers (40%). The most of negative responses were given by small and medium-sized enterprises.

Graph 16: Does your company have CEO?

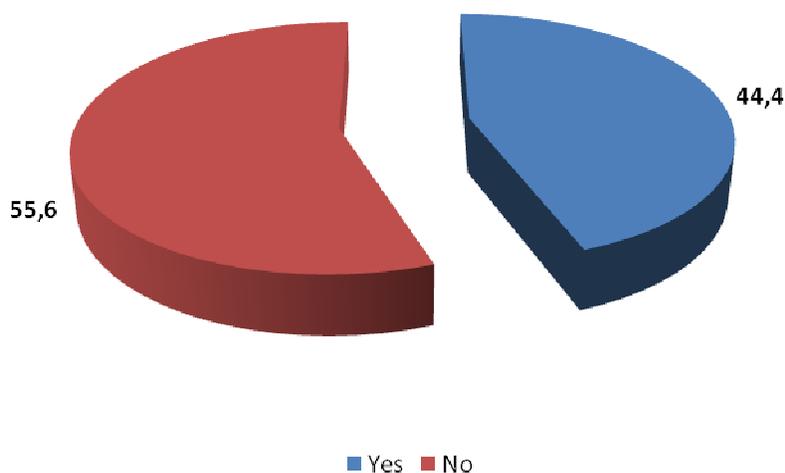


Graph 16a: If yes, is the CEO a man or a woman?



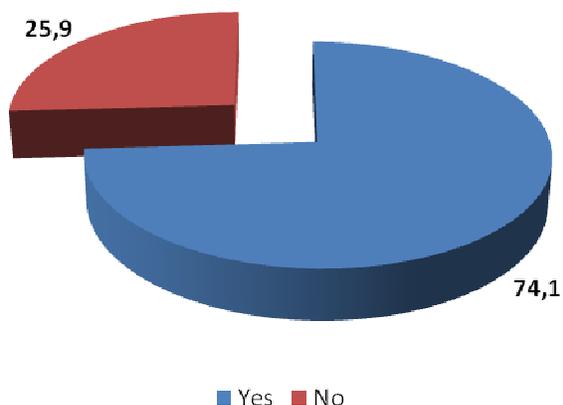
87% of enterprises in the survey have CEO. In 61% of those enterprises, CEO is a man, compared to only 39% of enterprises where CEO is a woman. Woman has never been a CEO in 57% of enterprises where CEO position is currently held by man, and only 25% of such enterprises previously had female CEO.

Graph 17: Does your company have a board of directors?



44.4% of enterprises in the sample have boards of directors compared to 55.6% with no boards of directors. The average representation of women in the boards is 28.2%.

Graph 18: If your company has a board, is there a Board President?

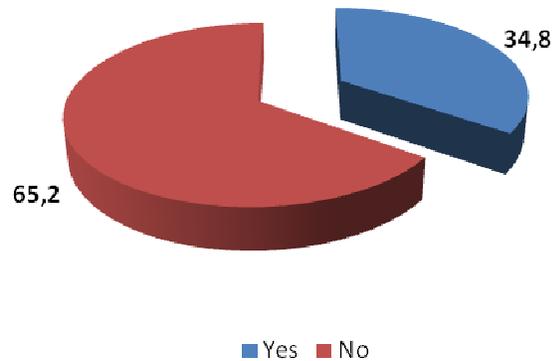


Board President position exists in 74.1% of enterprises which reported having board of directors while in 25.9% of enterprises there are no position such as Board President.

In the majority of enterprises having board of directors, Board President is a man (81%), compared to only 19% of enterprises with female Board Director.

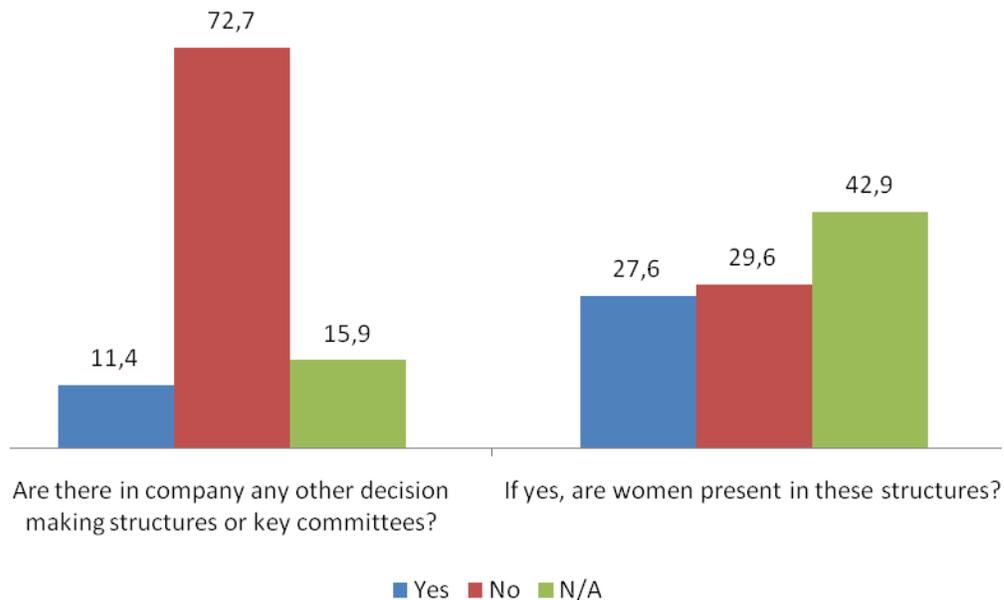
Graph 19: *If your company has a board are there vice-presidents?*

Enterprises with board of directors in 34.8% of cases have vice-presidents while in 65.2% of such enterprises there are no positions such as vice-presidents.



Question on women being at the positions of vice-presidents in the boards was an open-ended so the number of received responses was negligible (statistically insignificant) and as such therefore not presented here.

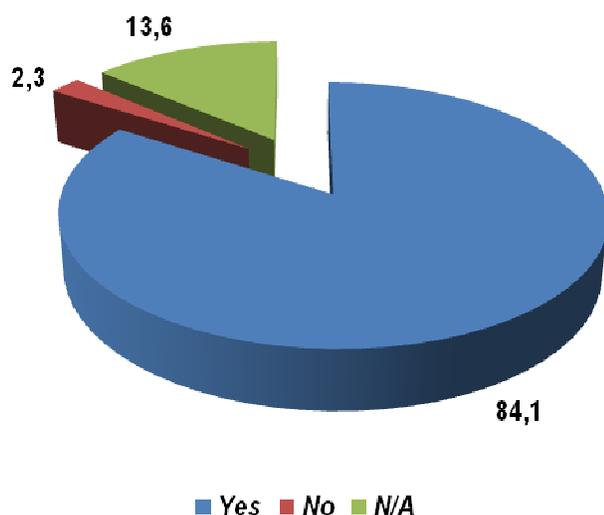
Graph 20: *Other structure of decision making?*



72.7% of enterprises do not have other decision making structures or key committees but such structures existing only in 11.4% of enterprises.

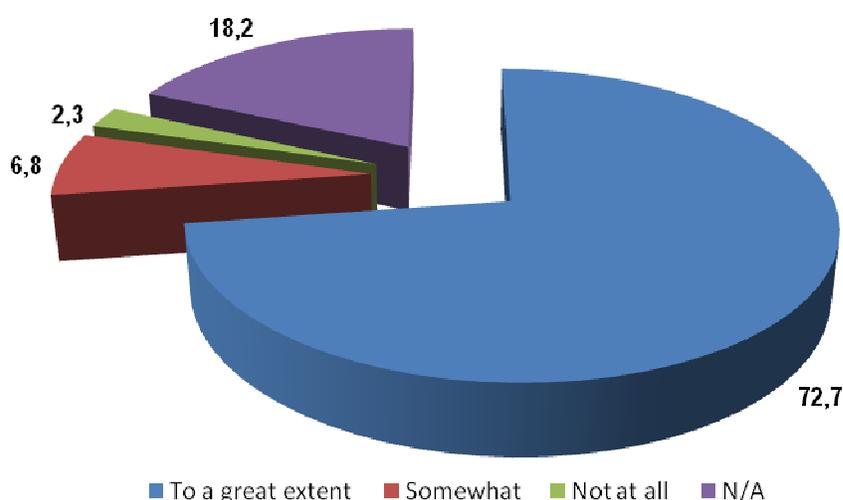
Within those 11.4% of enterprises, there are only 27.6% of women in decision making structures or key committees. One can also notice here a high percentage of N/A responses (42.9%) which can be interpreted in different ways one of them being: if in the above mentioned structures there are more than 27.6% of women, then those women are not recognised as those participating in policy creation and decision making in the enterprises.

Graph 21: Do female managers receive the same salary as male managers at the same level?



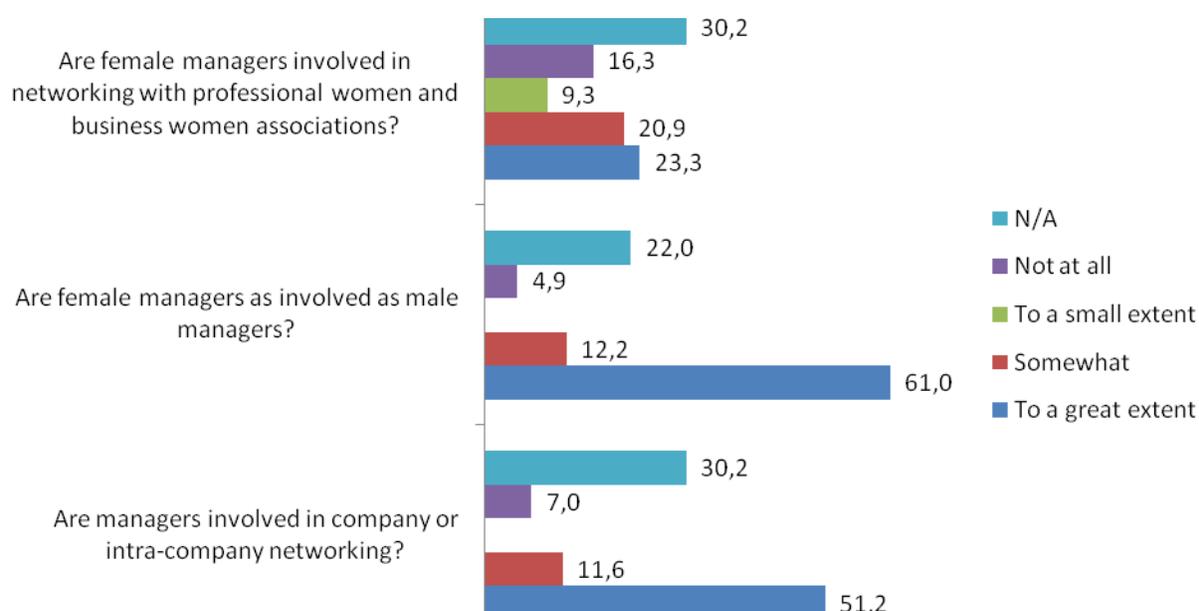
84.1% of enterprises have female managers receiving the same salary as male managers at the same level. Salary differences are reported by only 2.3% of enterprises in the sample. The situation is almost identical when it comes to differences for male and female managers in conditions for performance pay elements of the remuneration package – there are no differences in 81.4% of enterprises compared to 2.3% which reported such differences.

Graph 22: Do female managers receive the same benefits as male managers (travel allowance, vehicle, bonuses, pension contribution etc.)?



According to responses in the survey, 72.7% of enterprises have the same benefits (travel allowances, vehicle, bonuses, pension contribution) as male managers while that is not the case in only 2.3% of enterprises in the survey.

Graph 23: Involvement of female managers

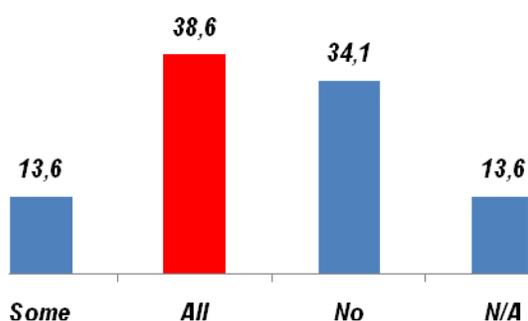


62.8% of enterprises have their managers to a large or certain extent involved in company or intra-company networking. On the other hand, 73.2% of enterprises to a large or certain extent equally involve both women and men in company or intra-company networking. Gender equality in this regard is not cherished in only 4.9% of enterprises.

44.2% reports that involvement of female managers in networking with professional women and business women association exists to a large or certain extent while that is not the case in 16.3% of enterprises.

56.8% of enterprises in the sample reported that no woman had left company in order to start her own business compared to 20.5% of enterprises in the sample which had few of such examples.

Graph 24: Does your company conduct exit interviews with employees who leave the company?



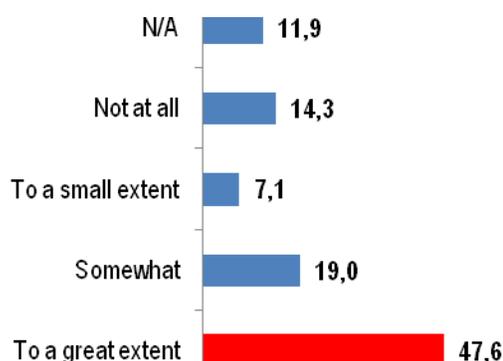
Exit interviews with all employees who leave the company are conducted by 38.6% of enterprises, while 34.1% of enterprises do not tend to do so.

During the exit interview, gender issues are not arisen by 64.7% of enterprises compared to only 2.9% of enterprises which arise gender issues.

Graph 25: Is retention of skilled women a challenge for your company?

Retention of skilled women is to a great extent a challenge for 47.6% of enterprises in the sample while 26.1% of enterprises find it a challenge to a small extent (or somewhat a challenge).

On the other hand, 14.3% of enterprises reported that this is not at all a challenge for them.

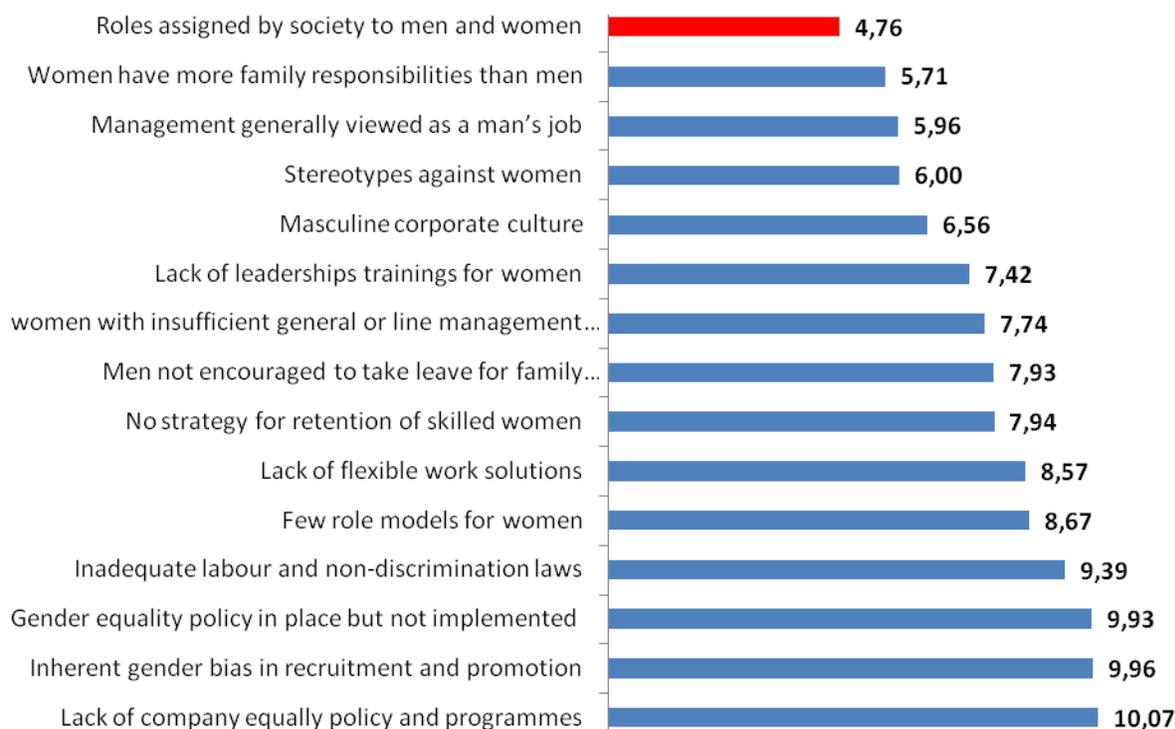


SECTION D: Barriers to women’s leadership

Respondents could rank the barriers for women to rise to senior and top management in their companies with „1“ as the most significant barrier and „15“ as the least significant barrier.

The graph below gives an overview of attitudes on barriers to women’s leadership, depending on average marks given to particular barrier.

Graph 26: Barriers to women’s leadership



According to respondents' marks, the most significant barrier for women's leadership in enterprises is **"Roles assigned by society to men and women"** (4.76), then **"Women have more family responsibilities than men"** (5.71). Recognised as very significant barriers are also **"Management generally viewed as a man's job"** (5.96), **"Stereotypes against women"** (6.00) and **"Masculine corporate culture"** (6.56).

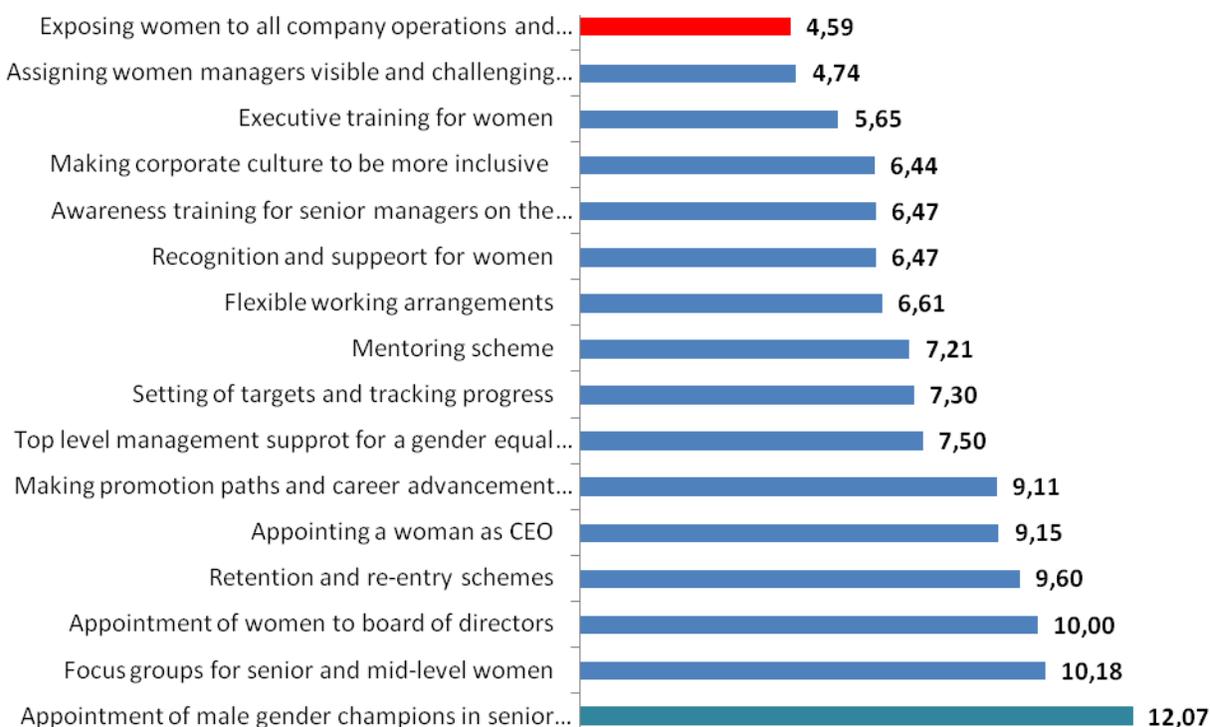
On the other hand, as least significant barriers for women's leadership recognised by respondents are: lack of company equality policy and programmes (10.7), inherent gender bias in recruitment and promotion (9.96), gender equality policy in place but not implemented (9.93). It is interesting to notice that above marks "follow" the survey result previously specified which says that 69.9% of enterprises have *Equal Opportunity Policy*. (Section B: Policies and Measures).

SECTION E: Measures to advance women in business and management

At the scale from 1 to 16 respondents could rank the measures to advance women in business and management, giving "1" to the measure with the highest priority and "16" to the measure with lowest priority.

The following graph gives an overview of respondents' attitudes on the measures, depending on average marks given to particular measure.

Graph 27: Measures to advance women



According to respondents' marks, the measures with the highest priority are **"Exposing women to all company operations and functions"** (4.59), **"Assigning women managers visible and challenging tasks"** (4.74) and **"Executive training for women"** (5.65).

On the other hand, as measures with the lowest priority recognised by survey participants are: **"Appointment of male gender champions in senior management and at board level"** (12.07), **"Focus groups for senior and mid-level women"** (10.18) and **"Appointment of women to board of directors"** (10.00), **"Retention and re-entry schemes"** (9.60), **"Appointing a woman as CEO"** (9.15), **"Making promotion paths and career advancement prospects clear for women"** (9.11). These marks are surprising especially having in mind the results specified in the Section C: Data and statistic, which says that women are the most represented at the middle managerial level and being the least represented at the highest managerial level, as well as that number of men at CEO positions is much more higher compared to the number of women at those positions.

SECTION F: Support mechanisms for companies to promote women in business and management

Given the scale from 1 to 8, respondents could rank the areas in which companies most benefit from the support of the national employers' federation and the ILO to attract and retain skilled women and to promote more women as managers, with „1“ as the most beneficial for possible support and „8“ as the last beneficial.

The following graph gives an overview of responses, depending on average marks given to particular areas.

Graph 28: Support mechanisms for companies



As seen in the graph, the most beneficial support mechanisms for companies to promote women in business and management for possible support are „**Identifying the business case for women in management**” (3.11), **“Networking with other companies on good practices”** (3.41), **“Developing a strategy to promote more women in management”** (3.81) and **“Designing an equal opportunity policy”** (3.84).

On the other hand, as the least beneficial areas, being at the bottom of the scale are: **“Designing a sexual harassment policy”** (5.65), **“Introducing a mentoring scheme”** (5.42) and **“Guides on measures and strategies to promote women in management”** (5.05).