

## **FACTSHEET: WASTE MANAGEMENT IN MONTENEGRO**

## Area and Population

Montenegro is a largely mountainous country located on the Adriatic coast in the Western Balkan region of Southeast Europe with a population of 628,053 and a surface area of 13,450 km<sup>2</sup>. The capital Podgorica has 136,500 inhabitants.



## Government

Montenegro is a parliamentary republic whose prime minister has been Zdravko Krivokapić since December 2020. The government's top priorities include economic development, rule of law and good governance, development of science, education and culture, successful infrastructure projects, care for the health and well-being of its citizens and environmental protection, as well as strengthening the country's international position (especially joining the EU).

## Key Economic Data

Currency: EURO (EUR)

GDP per capita: \$ 8,903 in 2019, \$7,703 in 2020

GDP growth: 4.1% in 2019 – 15.2% in 2020

Unemployment: 16.2% in 2019, 19% in 2020

Inflation rate: 1.0 % in 2019, - 0.5 % in 2020

National debt as % of GDP: 77.2% in 2019; 105.15% in 2020

Average wage: 515 EUR in 2019

Foreign direct investment: 5,545 (million USD) in 2019

World Bank Ease of Doing Business Index: Montenegro is ranked 50<sup>th</sup> overall out of 190 countries in 2020.

Main economic sectors: Agriculture and food processing, forestry, metals, pharmaceuticals and tourism.

## Waste Volumes

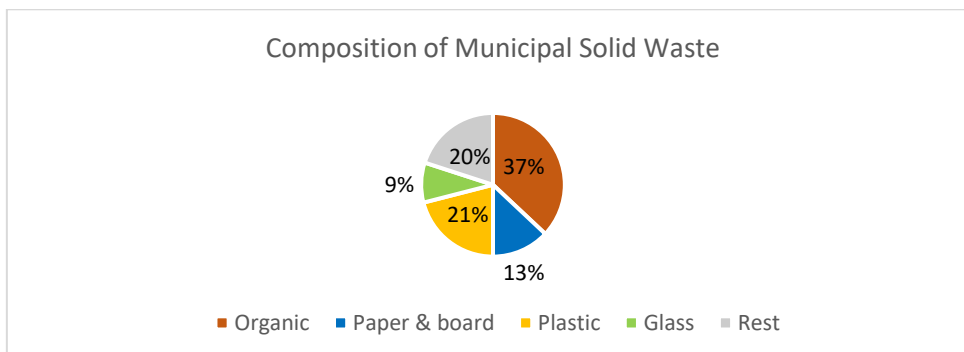
340,823 tonnes of municipal solid waste (MSW) were generated in 2019, equivalent to 548 kg per inhabitant. Of this amount 308,104 tonnes (90%) were collected by municipalities, the rest disposed or recycled locally. Within the overall MSW generation figure, households accounted for 76% of the total and commercial, industrial and public sector premises for 24%. Note: the relatively high municipal waste generation and collection figures provided by the Statistical Office of Montenegro (MONSTAT) are partly based on estimates by municipalities that may be inaccurate due to inadequate weighing and registration procedures.

Regionally around 30% of total MSW is generated in Podgorica and around 10% each in Bar, Budva and Nikšić. Significant quantities are also generated in the coastal municipalities Herceg Novi, Kotor and Ulcinj as well as in the northern municipality Bijelo Polje.

Industrial and mining waste arisings totalled 753,239 t in 2019 and construction and demolition waste 140,902 t. Large industrial waste producers are Daido Metal in Kotor, MB Team and Trebjesa Brewery, both in Nikšić, the container terminal in Bar and the lignite power station in Pljevlja. In addition, around 3,500 t medical waste are produced each year in Montenegro.

## Waste Composition

The composition of MSW illustrates the potential to develop recycling, composting and anaerobic digestion facilities.



Source: Revised National Waste Plan of Montenegro, 2015 - 2020

## Disposal and Recycling Routes

Although a number of separate collection systems for recyclables have been introduced, overall less than 2.5% of MSW is recycled. 97.5% is landfilled.

However, Montenegro has undertaken to recycle 50% of paper, plastic, metal, and glass waste under Chapter 27 of EU Accession rules. In order to meet the criteria of the accession rules, Montenegro also intends to recycle at least 70% of non-hazardous construction waste.



Separate collection of PET, paper/cardboard and residual waste in Tivat. Source: AvS Consulting

## Waste Management Infrastructure

Much of the equipment used for the collection and transport of waste is outdated, but progress has been made in developing the recycling and disposal infrastructure. Examples:

- Materials recovery facilities for MSW in Podgorica, Kotor, Melinje and Žabljak,
- Green waste composting facility in Kotor,
- End-of-life vehicle dismantling plant in Podgorica,
- Waste electrical and electronic equipment (WEEE) recycling plant in Bar, and
- Medical waste treatment facilities in Podgorica and Berane.

Sanitary municipal waste landfills are in operation at Podgorica-Livade and Možura by Bar. In addition, it is estimated that there are around 150 uncontrolled illegal landfills where MSW as well as construction and demolition waste and other wastes, such as WEEE and tyres, are dumped.



Materials recovery facility at the Livade landfill site in Podgorica. Source: AvS Consulting

## Key Players

Municipalities are responsible for managing the entire municipal waste collection and disposal process including the collection of fees. To achieve this, they usually establish public utility companies or PUCs. Frequently PUCs fulfil other municipal obligations, such as street cleaning or park maintenance. The largest is Čistoća, Podgorica. Municipal companies Deponija and Možura also manage the sanitary landfills in Podgorica and Bar respectively.

Private waste management companies include Hemosan (hazardous waste and industrial cleaning, WEEE, medical waste and paper/cardboard), Inter Trejd (recyclables trading and hazardous waste management) and Ekomedika (medical waste). Saveco, part of the Turkish ISPET group, has opened an office in Podgorica and is offering waste management and consulting services. Recomont was founded by the Trebjesa brewery, Coca-Cola and the Serbian beverage producer Knjaz Miloš to fulfil the Montenegrin extended producer responsibility (EPR) obligations for packaging waste.

## Waste Management Strategy

Montenegro's waste policy is shaped by a number of overarching goals: reducing municipal waste generation and landfilling and accelerating the expansion of the separate collection and recycling of recyclable materials. The *Revised National Waste Management Plan of Montenegro 2015–2020* lists a number of measures aimed at achieving these goals, for example the introduction of economic instruments with incentives and penalties to promote waste separation and recovery, the construction of recycling centres and sorting plants, the introduction of a collection system for packaging waste, the elimination of illegal dumping of waste and the rehabilitation of old landfills. Measures designed to lead to an increase in the willingness of the population to participate in separate collection systems are to be intensified.

## Legal Framework

The legal framework on waste management in Montenegro comprises:

- Law on Waste Management,
- Law on Communal Activities,
- Law on Regional Water Supply of the Montenegrin Coast,
- Law on Municipal Wastewater Management,
- Law on Environment,
- Law on Nature Protection, and
- Law on Environmental Impact Assessment etc

Also, certain legal acts in relation to foreign investments may be relevant for investors in waste management projects in Montenegro:

- Foreign Investment Law,
- Law on Public-Private Partnerships,
- Law on Public Procurement, and
- Concessions Law etc.

## Opportunities for Investors

As policy implementation improves and funding mechanisms are strengthened, there are opportunities for investors along the entire waste management value chain from collection to sorting and recycling to final disposal. Examples:

- Upgrading of the collection infrastructure (vehicles and containers) for the increased source segregation of recyclables.
- Strengthening the EPR scheme for packaging and development of systems for WEEE, batteries and end-of-life vehicles.
- Construction and operation of waste transfer stations, materials recovery, mechanical-biological treatment and composting or anaerobic digestion facilities.
- Development of new EU compliant landfills and the closure and after-care of non-compliant municipal and industrial waste landfills.
- Development of facilities for the treatment of hazardous waste – currently hazardous waste is exported as there are no domestic facilities for safe treatment or disposal.
- Development of facilities for the recycling of construction and demolition waste.

The development and execution of these projects will also provide business opportunities for consultants, engineers, equipment suppliers and waste management companies.

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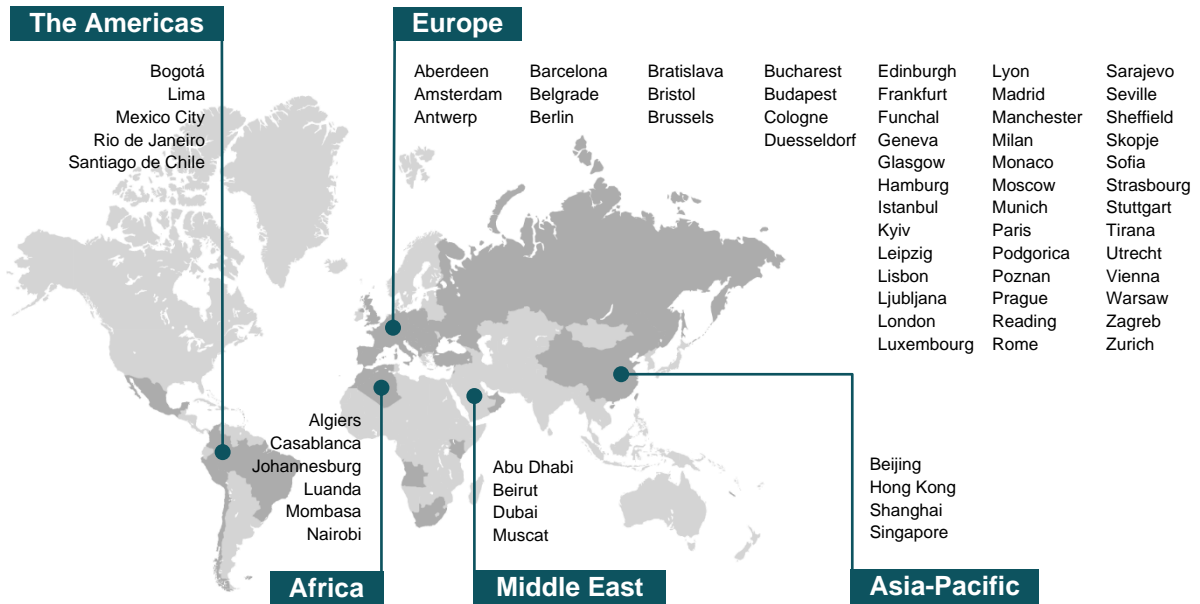
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