

Studies to support the development of sea basin cooperation in the Mediterranean, Adriatic and Ionian, and Black Sea



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1. Selection of the most important regions

Montenegro has not further been split up into regions, considering that MONSTAT and EUROSTAT agreed to consider Montenegro as one statistical region in all three levels (NUT1, NUT2, NUT3).

2. Indicative size of all marine and maritime activities

No data available for a comparative analysis between marine and maritime activities

3. Relative growth of all marine and maritime activities

No data available for a comparative analysis between maritime economic activities. Alternative indices have been used for the economic activities where such indices were available. See the country fiche for this analysis.

4. Assessment of future potential for all marine and maritime activities

Function	Activity	Innovativeness	Competitiveness	Employment	Policy relevance	Spill-over effects	Sustainability	Overall score
0. Other sectors	0.1 Shipbuilding and ship repair	0	+	0	+	+	0	+++
	0.2 Water projects	+	+	0	+	+	+	+++++
1. Maritime transport	1.1 Deep-sea shipping	0	0	0	0	0	0	0
	1.2 Short-sea shipping (incl. RoRo)	0	0	+	+	+	0	+++
	1.3 Passenger ferry services	0	0	+	+	+	+	++++
	1.4 Inland waterway transport	0	0	0	0	0	0	0
2. Food, nutrition, health and ecosystem services	2.1 Fishing for human consumption	0	-	-	+	0	-	--
	2.2 Fishing for animal feeding	0	0	0	0	0	0	0
	2.3 Marine aquaculture	-	+	0	+	0	+	++
	2.4 Blue Biotechnology	0	0	0	0	0	0	0
	2.5 Agriculture on saline soils	0	0	0	0	0	0	0
3. Energy and raw materials	3.1 Offshore oil and gas	0	0	0	+	+	?	++
	3.2 Offshore wind	0	0	0	0	0	0	0
	3.3 Ocean renewable energy (wave, tidal, OTEC, thermal, biofuels, etc.)	0	0	0	0	0	0	0
	3.4 Carbon capture and storage	0	0	0	0	0	0	0
	3.5 Aggregates mining (sand, gravel, etc.)	0	0	0	0	0	0	0
	3.6 Marine minerals mining	0	0	0	0	0	0	0
	3.7 Securing fresh water supply (desalination)	0	0	0	0	0	0	0
4. Leisure, working and living	4.1 Coastal tourism	0	+	+	+	+	+	+++++
	4.2 Yachting and marinas	+	+	+	+	+	0	+++++
	4.3 Cruise tourism	0	0	+	?	+	?	++
5. Coastal protection	5.1 Protection against flooding and erosion	?	0	0	+	0	?	+
	5.2 Preventing salt water intrusion	0	0	0	0	0	0	0
	5.3 Protection of habitats	0	0	0	0	0	0	0
6. Maritime monitoring and surveillance	6.1 Traceability and security of goods supply chains	0	0	0	0	0	0	0
	6.2 Prevent and protect against illegal movement of people and goods	0	0	0	0	0	0	0
	6.3 Environmental monitoring	?	?	?	+	0	0	+

5. Growth drivers and barriers to growth

5.1 Results of the benchmark analysis

COASTAL TOURISM ¹	Growth drivers	Barriers to Growth
Maritime research	----	----
Development and innovation	Recommendations for economy policies in Coastal Tourism Sector by the Central Bank of Montenegro and policies for sustainable development	----
Access to finance	----	----
Smart infrastructure	----	Need for infrastructural upgrades in the mass tourism sector
Maritime clusters	----	----
Education, needs in training and skills	Presence of the International School for Tourism and Hospitality and International Language Centres	----
Maritime spatial planning	----	----
Integrated local development	----	----
Public engagement	Marketing and advertisement of distinguishing local products and “Wild Beauty” of Montenegro	----

YACHTING AND MARINAS ² (INCLUDING WATER PROJECTS ³)	Growth drivers	Barriers to Growth
Maritime research	----	----
Development and innovation	----	----
Access to finance	----	----
Smart infrastructure	One modern private port for yachting and cruises is in construction	Need for infrastructural upgrades in the mass tourism sector
Maritime clusters	----	----
Education, needs in training and skills	Presence of the International School for Tourism and Hospitality and International Language Centres	----
Maritime spatial planning	----	----
Integrated local development	----	----
Public engagement	Marketing and advertisement of distinguishing local products and “Wild Beauty” of Montenegro	----

¹ The benchmark instance is “Coastal Tourism in Sardinia (Italy)”.

² The benchmark instance is “Yachting and marinas in Italy”.

³ The benchmark instance is “Water projects in Belgium”.

MARINE AQUACULTURE ⁴	Growth drivers	Barriers to Growth
Maritime research	Many research programmes focused on aquaculture carried out by Institute for Marine Biology in cooperation with EU countries	----
Development and innovation	Exchange of information and technical assistance through various projects; lectures and researches performed by the Institute for Marine Biology	Also in Montenegro there is a problem of long waiting times to obtain permits
Access to finance	----	----
Smart infrastructure	----	Very limited production: impossibility to create positive scale effects
Maritime clusters	----	----
Education, needs in training and skills	----	Lack of researches and professionals
Maritime spatial planning	Potential sites to expand mariculture offshore	----
Integrated local development	----	----
Public engagement	Aquaculture and fisheries recognised as a potential and a strategic sector	----

SHIPBUILDING AND SHIP REPAIR ⁵	Growth drivers	Barriers to Growth
Maritime research	----	----
Development and innovation	----	----
Access to finance	----	----
Smart infrastructure	Good infrastructure (roads and airport).	----
Maritime clusters	----	----
Education, needs in training and skills	----	----
Maritime spatial planning	----	----
Integrated local development	----	Conflict with environmental protection and tourism activities
Public engagement	State support	----

PASSENGER FERRY SERVICES ⁶	Growth drivers	Barriers to Growth
Maritime research	----	----
Development and innovation	----	----
Access to finance	----	----
Smart infrastructure	Passengers are strictly linked to touristic dimension	Not enough investments in reconstruction and revitalisation of port facilities
Maritime clusters	----	----
Education, needs in training and skills	Faculty of Maritime Studies	Majority of Montenegrin crew works for foreign companies outside of Montenegro
Maritime spatial planning	----	----
Integrated local development	----	----
Public engagement	----	----

⁴ The benchmark instance is "Marine aquaculture in Greece".

⁵ The benchmark instance is "Shipbuilding and Ship repair in Germany".

⁶ The benchmark instance is "Passenger ferry services in Greece".

SHORT-SEA SHIPPING (INCL. RoRo) ⁷	Growth drivers	Barriers to Growth
Maritime research	----	----
Development and innovation	----	----
Access to finance	----	----
Smart infrastructure	----	Not enough investments in reconstruction and revitalisation of port facilities
Maritime clusters	----	----
Education, needs in training and skills	----	Majority of Montenegrin crew works for foreign companies outside of Montenegro
Maritime spatial planning	----	----
Integrated local development	----	----
Public engagement	----	----

⁷ The benchmark instance is “Short-Sea Shipping in the Netherlands”.

5.2 SWOT Analysis

Coastal tourism		
Maritime Research	Strengths	Weaknesses
	----	----
	Opportunities	Threats
	Increasing international demand for a new tourism and new destinations	----
Development and innovation	Strengths	Weaknesses
	Good natural potential for development. Growing demand and tourist arrivals will stimulate the innovation in the tourist infrastructure, port and marinas.	Pronounced seasonality, unauthorised and unplanned construction, limited use of IT technology
	Opportunities	Threats
	Plans for development of elite tourism	Climate change impact
Access to finance	Strengths	Weaknesses
	Constant growth of revenue during the summer season	Seasonal revenue
	Opportunities	Threats
	Foreign investors very interested in tourism activities	----
Smart infrastructure	Strengths	Weaknesses
	----	Not resolved problem for waste water deposition.
	Opportunities	Threats
	----	Increasing transport costs
Maritime clusters	Strengths	Weaknesses
	The entire coast represents a touristic cluster with hotels, restaurants, services for tourists and also marinas for yachting. Diversity confined to a small area. Developed tourism that supports creating of clusters	Clusters are still not well connected
	Opportunities	Threats
	Strategy for sustainable economical growth through introduction of clusters.	----
Education, training and skills	Strengths	Weaknesses
	Faculty for Tourism	Deficit of educated employees in management roles and need to import workers from other countries during the high season.
	Opportunities	Threats
	----	----
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Public enterprise for Coastal Zone Management "Morsko dobro" dealing with coastal spatial planning.	Visible changes in the landscape due to overbuilding of the coastal area.
	Opportunities	Threats
	----	Reduction of protected beach areas
Integrated local development	Strengths	Weaknesses
	CAMP Project, National Strategy of Sustainable Development of Montenegro.	----
	Opportunities	Threats
	National Strategy for ICZM	----
Public engagement	Strengths	Weaknesses
	Engagement to promote health, sport and cultural tourism. Activity of the Public enterprise "Morsko dobro", political stability, good relations with neighbouring countries	Overlapping of jurisdictions between Public enterprise "Morsko dobro" and municipalities.
	Opportunities	Threats
	Ongoing EU integrations	----

Yachting and Marinas (incl. water projects)		
Maritime Research	Strengths	Weaknesses
	----	----
	Opportunities	Threats
	Increasing international demand for a new leisure destinations	----
Development and innovation	Strengths	Weaknesses
	Growing demand and tourist arrivals will stimulate the innovation in the tourist infrastructure, port and marinas.	Pronounced seasonality, unauthorised and unplanned construction, limited use of IT technology
	Opportunities	Threats
	Plans for development of elite tourism	Climate change impact
Access to finance	Strengths	Weaknesses
	Constant growth of revenue during the summer season	Seasonal revenue
	Opportunities	Threats
	----	----
Smart infrastructure	Strengths	Weaknesses
	-----	Not resolved problem for waste water deposition. No boats organised for all – day cruise travelling.
	Opportunities	Threats
	Plans for combined transport connecting ports with other transport facilities	----
Maritime clusters	Strengths	Weaknesses
	The entire coast represents a touristic cluster with hotels, restaurants, services for tourists and also marinas for yachting. Diversity confined to a small area	Clusters are still not well connected
	Opportunities	Threats
	Strategy for sustainable economical growth through introduction of clusters.	----
Education, training and skills	Strengths	Weaknesses
	Faculty for Tourism	Deficit of educated employees in management roles and need to import workers from other countries during the high season.
	Opportunities	Threats
	----	----
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Public enterprise for Coastal Zone Management “Morsko dobro” dealing with coastal spatial planning.	Visible changes in the landscape due to overbuilding of the coastal area.
	Opportunities	Threats
	----	Reduction of protected beach areas
Integrated local development	Strengths	Weaknesses
	CAMP Project, National Strategy of Sustainable Development of Montenegro.	----
	Opportunities	Threats
	National Strategy for ICZM	----
Public engagement	Strengths	Weaknesses
	Activity of the Public enterprise “Morsko dobro”, political stability, good relations with neighbouring countries	Overlapping of jurisdictions between Public enterprise “Morsko dobro” and municipalities.
	Opportunities	Threats
	Ongoing EU integrations	----

Marine aquaculture		
Maritime Research	Strengths	Weaknesses
	Engagement of the Institute of Marine Biology in Kotor, Ministry of agriculture and rural development of Montenegro supports scientific research into aquaculture.	Lack of equipment for execution of researches
	Opportunities	Threats
	Good potential sites to expand mariculture, Good amount of surface and water	Lack of funds
Development and innovation	Strengths	Weaknesses
	Fisheries Development Strategy; National Fisheries Development Program 2009-2013	High prices of marine products and low consumption; technology applied to date is rudimentary; use of obsolete equipment.
	Opportunities	Threats
	Fisheries Development Strategy	----
Access to finance	Strengths	Weaknesses
	State Budget of Montenegro	Limited access to starting capital or loans to begin farming; access to credit is difficult
	Opportunities	Threats
	European funds	Bad management of funds
Smart infrastructure	Strengths	Weaknesses
	----	Limited space for farming (for now only in the Bay of Kotor); lack of adequate fishing ports and market places
	Opportunities	Threats
	----	----
Maritime clusters	Strengths	Weaknesses
	Boka Bay offers a large protected area that covers about 87 km ² , with good conditions to cultivate mussels. Touristic sites represent an important demand of fish products	Seasonality of demand in touristic centres
	Opportunities	Threats
	In clusters there is a opportunity to share the import costs of raw materials and to have lower prices on the market	Competitive countries nearby
Education, training and skills	Strengths	Weaknesses
	Institute of Marine Biology	Need for expert assistance
	Opportunities	Threats
	Higher education in aquaculture is offered	----
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Spatial plan for Special Purpose Coastal Zone (2007); determined areas for mariculture	Limited area for aquaculture in the Bay of Boka Kotorska
	Opportunities	Threats
	----	----
Integrated local development	Strengths	Weaknesses
	National programme for development of Fishery sector	Weak representative organizations
	Opportunities	Threats
	----	----
Public engagement	Strengths	Weaknesses
	The Ministry of Agriculture and Rural Development Fisheries Development Strategy	time-consuming administrative procedures for obtaining permits for farming
	Opportunities	Threats
	----	----

Shipbuilding and ship repair		
Maritime Research	Strengths	Weaknesses
	Faculty of maritime studies	Lack of professional employees
	Opportunities	Threats
	Expansion of nautical tourism	----
Development and innovation	Strengths	Weaknesses
	Presence of the Faculty for Maritime Studies; Leading role of Adriatic Shipyard Bijela	----
	Opportunities	Threats
	Expansion of nautical tourism	----
Access to finance	Strengths	Weaknesses
	Montenegro is taking active steps to set up a favourable business climate for investors	Crisis affecting incomes of the ship repairing yard
	Opportunities	Threats
	----	----
Smart infrastructure	Strengths	Weaknesses
	Good infrastructure and modern equipped wharfage	----
	Opportunities	Threats
	----	----
Maritime clusters	Strengths	Weaknesses
	Smaller shipyards can benefit by the presence and leading role of Shipyard Bijela	Still not created clusters
	Opportunities	Threats
	----	----
Education, training and skills	Strengths	Weaknesses
	Long maritime tradition. Good standard of schooling	Not enough funds for better support of education
	Opportunities	Threats
	Faculty for maritime studies offers studying of ship engineering	Brain drain
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	----	Limited area is available for shipyards
	Opportunities	Threats
	Strategic orientations of the shipyard Bijela	----
Integrated local development	Strengths	Weaknesses
	One of the priorities is development of the ship repairing yards respecting the protection of the sea	----
	Opportunities	Threats
	----	----
Public engagement	Strengths	Weaknesses
	The Ministry of Transport and Maritime affairs	----
	Opportunities	Threats
	The Government has programmed the privatisation of the ship repairing yard Bijela	----

Passenger ferry services		
Maritime Research	Strengths	Weaknesses
	----	----
	Opportunities	Threats
----	----	----
Development and innovation	Strengths	Weaknesses
	Constant improvement of ISPS (International Ship and Port Security) code implementation in ports and on ships,	Non developed infrastructure that could respond to fast growing tourist transport
	Opportunities	Threats
Measures for improvement of safety and security are planned to be undertaken	----	----
Access to finance	Strengths	Weaknesses
	Funds available from different Ministries	Budgetary limitations of the Government
	Opportunities	Threats
----	----	----
Smart infrastructure	Strengths	Weaknesses
	One of the goals of transport development strategy is implementation of EMSA (European Maritime Safety Agency) standards	Old ferries.
	Opportunities	Threats
Future development of combined types of transport	Threats from the future Albanian ports that will take over the present passengers	----
Maritime clusters	Strengths	Weaknesses
	No maritime clusters, but touristic activity can be fostered by efficient maritime transport.	Tensions for space between transport and touristic activities
	Opportunities	Threats
----	----	----
Education, training and skills	Strengths	Weaknesses
	Long tradition in forming the marine crew	Not enough professionals
	Opportunities	Threats
Faculty of maritime studies	----	----
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	----	No maritime spatial planning
	Opportunities	Threats
----	----	----
Integrated local development	Strengths	Weaknesses
	“Transport Development Strategy of Montenegro” focuses on integration between means of transportation.	----
	Opportunities	Threats
----	----	----
Public engagement	Strengths	Weaknesses
	The Ministry of Transport, Maritime Affairs and Telecommunications is engaged to achieve the goals of Transport Development Strategy in Montenegro	Budgetary limitations of the Government
	Opportunities	Threats
----	----	----

Short Sea Shipping		
Maritime Research	Strengths	Weaknesses
	Faculty for Maritime Studies	No specific researches linked to short sea shipping
	Opportunities	Threats
	Application of the regulations of the United Nations Convention on the Law of Sea	----
Development and innovation	Strengths	Weaknesses
	Direct involvement of the Ministry of transport, maritime affairs and telecommunications in the project "Adriatic Motorways of the Sea"	Bad technical equipment of the port authorities
	Opportunities	Threats
	Free zones in Bar and Kotor	----
Access to finance	Strengths	Weaknesses
	National funds for buying new ships. IPA funds for the project "Adriatic Motorways of the Sea"	Limited funds, Strong competition from neighbour countries
	Opportunities	Threats
	----	----
Smart infrastructure	Strengths	Weaknesses
	Future development of the Pan-European transport corridor using the Port of Bar as Adriatic Terminal	----
	Opportunities	Threats
	----	----
Maritime clusters	Strengths	Weaknesses
	No clusters related to short sea shipping, but important connections on the so-called Corridor 11 Timisoara-Belgrade-Bar and the Adriatic Corridors – Motorways of the sea	----
	Opportunities	Threats
	----	Development of parallel Pan European corridor through Croatia and Albania
Education, training and skills	Strengths	Weaknesses
	Long tradition in training of marine crew	Brain drain
	Opportunities	Threats
	Faculty of maritime studies	----
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Spatial plan for special purpose coastal zone	----
	Opportunities	Threats
	----	----
Integrated local development	Strengths	Weaknesses
	Transport Development Strategy of Montenegro" focuses on integration between means of transportation.	----
	Opportunities	Threats
	----	----
Public engagement	Strengths	Weaknesses
	"Crnogorska plovidba A.D. Kotor" is a 100% state-owned stock company	Limited funds. State institutions still not efficient
	Opportunities	Threats
	----	----

6. Maritime strategies

Title of the official document	Level	Responsible body	Maritime Strategy concerned	Kind of Strategy document and publishing date
National Strategy of Sustainable Development of Montenegro ⁸	National	Government of Montenegro; Ministry of Sustainable Development and Tourism	4.1 Coastal Tourism; 1. Maritime Transport 2.3 Marine aquaculture	National strategy (2007)
Montenegro Tourism Development Strategy to 2020 ⁹	National	Ministry of Sustainable Development and Tourism	4.1 Coastal Tourism Maritime transport	National strategy (2008)
Human Resources development Strategy in the tourism ¹⁰	National	Ministry of Sustainable Development and Tourism	4.1 Coastal Tourism	National strategy (2007)
Transport Development Strategy of Montenegro ¹¹	National	Ministry of Transport, Maritime Affairs and Telecommunications	1. Maritime transport	National strategy, undated
Montenegro's fisheries Development Strategy and capacity building for implementation of EU Common Fisheries Policy ¹²	National	Ministry of Agricultural and Rural Development	2.3 Marine Aquaculture	National strategy (2006)

⁸ http://www.uncsd2012.org/content/documents/Montenegro_National%20Strategy%20of%20Sustainable%20Development%20of%20Montenegro.pdf

⁹ <https://www.google.it/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CDQQFjAA&url=http%3A%2F%2Fwww.mrt.gov.me%2FResourceManager%2FFileDownload.aspx%3Frid%3D89273%26rType%3D2%26file%3D01%2520Montenegro%2520Tourism%2520Development%2520Strategy%2520to%25202020.pdf&ei=9k0aUqijNMqp4ASxu4HIDg&usg=AFQjCNEiV-nLP-FAeEFjZtl26V9AwaGT9A&bvm=bv.51156542,d.bGE>

¹⁰ http://www.velikaplaza.info/gallery/brosure/Human_Resources_Development_Strategy.pdf

¹¹ https://www.google.it/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&cad=rja&ved=0CC8QFjAA&url=http%3A%2F%2Fwww.minsaob.gov.me%2FResourceManager%2FFileDownload.aspx%3Frid%3D64000%26rType%3D2%26file%3DSTRATEGIJA%2520FINAL%2520EN.pdf&ei=mU4aUuPTG7Hn4QTR3oE4&usg=AFQjCNG_syKAG8x8eVPvZqpZdFedfRlzmw&bvm=bv.51156542,d.bGE

¹² http://www.velikaplaza.info/docs/Fisheries_Development_Strategy_and_capacity_building_for_implementation_of_EU_Common_Fisheries_Policy.pdf