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## **Circular Economy Country Specific Report**

Written Contribution for the 2018 Annual Report

*Montenegro*



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**Disclaimer:**

# 1. Introduction

## 1.1. Circular Economy in the European policy context

The Union's economy currently loses a significant amount of potential secondary raw materials which are found in waste streams. In 2013, total waste generation in the EU amounted to approximately 2.5 billion tons of which 1.6 billion tons have not been reused or recycled and therefore have been loss for the European economy. It is estimated that an additional 600 million tons could be recycled or reused. For example, only a limited share (43%) of the municipal waste generated in the Union was recycled, with the rest being landfilled (31%) or incinerated (26%). The Union thus misses out significant opportunities to improve of resource efficiency and increase of circular economy share.

With respect to waste management, the Union also faces with large differences amongst its Member States. In 2011, six Member States landfilled less than 3% of their municipal waste, 18 landfilled over 50%, and some of them exceeding 90%. This unequal situation should be corrected<sup>1</sup> urgently.

One way to do this is through the following Directive changes:

- Directive 2008/98/EC on waste;
- Directive 94/62/EC on packaging and packaging waste;
- Directive 1999/31/EC on the landfill of waste;
- Directive 2000/53/EC on end-of-life vehicles;
- Directive 2006/66/EC on batteries and accumulators and waste batteries and accumulators<sup>5</sup>;
- Directive 2012/19/EU on waste electrical and electronic equipment

These Directives are part of a Circular Economy Package which also include a Commission Communication "Closing the loop – An EU action plan for the Circular Economy".

The concept of the circular economy emerged in the last decade of the last century as a response to the need to find a balance between economic growth, necessary to meet the needs of the expanding population, and the increasing need to stick to a sustainable development path. It originates from the industrial ecology paradigm and at its core is the idea of circular (closed) flows of materials through multiple phases. It builds on decades of gradual understanding of the increasing anthropogenic effect of human activity and its planetary limits. Efficient resource management is one of the important building blocks of the circular economy. Thus, understanding the principles of this concept and the possible ways of mainstreaming it are crucial for adopting a sustainable path of socio-economic development (which, in the case of Montenegro, means keeping the pledge for an "ecological state").<sup>1</sup>

## 1.2. Circular Economy in the Republic of Montenegro

The concept of the circular economy is pretty new in Montenegro. The first analysis regarding the circular economy in Montenegro was done in 2014 by the **UNDP (United Nation Development Programme)** in the document: *Resource efficiency and sustainable human development*.<sup>2</sup> According to the above-mentioned document, an analysis of national policies concludes that the concept of a circular economy is far from being implemented in Montenegro, and that the efficient use of resources

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<sup>1</sup> UNDP\_Resource efficiency and sustainable development 2014

<sup>2</sup> UNDP\_Resource efficiency and sustainable development 2014

has not been directly integrated into Montenegrin policies and regulations. However, in this document is written that there are some positive developments: Issues such as stimulation of innovations and productivity, mitigation of the impacts of economic growth, sustainable management of natural resources and governance improvements are integrated into **National Sustainable Development Strategy (NSDS) 2007 – 2012**.<sup>3</sup>

The National Strategy for Sustainable Development by 2030, which fully transposed the UN Agenda 2030, recognized the importance of the transition to the circular economy. One of the main goals of this Strategic document is: **“Improve waste management applying the circular economy-based approaches”** as priority one. In order to achieve this goal it is necessary to apply following measures:

- Encourage activities aimed at the reduction of waste generated in the territory of Montenegro,
- Apply primary selection of waste as efficient as possible, as a prerequisite for the achievement of clearly defined goals in the area of re-use and recycling of discarded materials (which implies considerable investments into the separate collection systems in the coming period, followed by appropriate awareness raising programs);
- Establish efficient waste selection and recycling (collection, separation, treatment, re-use of recyclables, as well as system for prevention of waste – include incentives for the development of recycling activities, stimulate secondary raw materials market and demand for recyclables);
- Develop a system for management of special waste streams (e.g. used batteries and accumulators, used tires, end-of-life vehicles, waste electric and electronic equipment, packaging waste, construction and demolition waste), biodegradable waste, sewerage sludge, veterinary waste, animal by-products, medical waste, industrial waste;
- Circular economy approaches should be gradually introduced into the waste management system (shift from “landfill system” to circular waste management system), applying measures for the encouragement of resource-efficient use of raw materials in production, enabling reduction of waste generation, especially of hazardous waste generation and use of waste as alternative fuel, applying the approaches based on recognition of economic and environmental importance of waste, establishing macro analysis and sector material flow analyses – MFA, and introducing related circular economy indicators) ;
- Improve the application of penalties in waste management, and raise awareness about the importance and advantages of sustainable waste management (ecological knowledge, ecological behaviour, ecological situation valuation)<sup>4</sup>.

The beginning of industrialization and transition towards market-based economy brought an unsustainable model of economic growth to Montenegro, which is similar to many other developing countries **“take, produce, consume and discard”**; it is a linear model resulting from the assumption that quantities of materials extracted from nature are inexhaustible. According to the 2013 Report on the implementation of the Ministry of Sustainable Development and Tourism, estimated quantities of generated waste amounted to 243,941 tons, and in the period between 1990 and 2011, emissions of gases from waste had been reduced by only 20%. Taking into account that linear economic growth model turned out to be unsustainable and that competition for use of scarce raw materials has become ever stronger, **transition to circular zero waste economy** has become one of the prerequisites for sustainable development and increased resource efficiency.

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<sup>3</sup> National Sustainable Development Strategy 2007 – 2012

<sup>4</sup> National strategy for sustainable development by 2030

Beside the National Strategy for Sustainable Development by 2030, the concept of circular economy is recognized in the proposal of the Law on Waste Management (Official Gazette of Montenegro, 64/2011) In the new proposal of the draft of **Law on waste management** are partially transposed the amended directives which are in circular economy package, spatially in terms of percentage of recycling rate.

## 2. Monitoring progress

Monitoring of the transition and achieving more sustainable resources in the economic cycle in the country is a challenging task, especially in relation to availability of and accessibility to relevant, verifiable data, as well as the indicators to measure the progress.

### 2.1. Legislation: general overview and main aspects

No	Name	Relevance	EU levers (examples)	National legislation
<b>Production and consumption</b>				
1	Self-sufficiency for raw materials	The circular economy should help to address the supply risks for raw materials, in particular critical raw materials.	Raw Materials Initiative; Resource Efficiency Roadmap	<ul style="list-style-type: none"> <li>• Law on Public Procurements (2017)</li> <li>• Strategy for Development of Public Procurement System in Montenegro for the period 2016-2020</li> <li>• Annual report 2017 – Realization measures from the Action Plan of the Strategy for Development of Public Procurement System</li> <li>• UNDP Resource efficiency and sustainable human development.</li> <li>• National Sustainable Strategy 2007 - 2012</li> <li>• National Strategy for Sustainable Development by 2030</li> <li>• National Strategy for Approximation in Montenegro for the period 2016-2020</li> <li>• Law on Waste Management (2018) - <i>draft</i></li> <li>• Waste Management Strategy by 2030</li> <li>• Regional and local waste management plans</li> <li>• National Waste Management Plan (2015-2020)</li> </ul>
2	Green public procurement	Public procurement accounts for a large share of consumption and can drive the circular economy.	Public Procurement Strategy; EU support schemes and voluntary criteria for green public procurement	
3a-c	Waste generation	In a circular economy, waste generation is minimised.	Waste Framework Directive; directives on specific waste streams; Strategy for Plastics	
4	Food waste	Discarding food has negative environmental, climate and economic impacts.	General Food Law Regulation; Waste Framework Directive; various initiatives (e.g. Platform on Food Losses and Food Waste)	
<b>Waste management</b>				
5a-b	Overall recycling rates	Increasing recycling is part of the transition to a circular economy.	Waste Framework Directive	<ul style="list-style-type: none"> <li>• National Strategy for Sustainable Development by 2030</li> <li>• Waste Management Strategy by 2030</li> </ul>

6a-f	Recycling rates for specific waste streams	This reflects the progress in recycling key waste streams.	Waste Framework Directive; Landfill Directive; directives on specific waste streams	<ul style="list-style-type: none"> <li>National Waste Management Plan (2015-2020)</li> <li>Law on Waste Management (2016)</li> <li>Regulation on the method and procedure for application of battery and accumulators on market, establishment of the termination collection and determination (2010)</li> <li>Regional and local waste management plans</li> <li>Rulebook on landfills</li> <li>Report on the implementation of National Waste Management Plan</li> </ul>
<b>Secondary raw materials</b>				
7a-b	Contribution of recycled materials to raw materials demand	In a circular economy, secondary raw materials are commonly used to make new products.	Waste Framework Directive; Eco-design Directive; EU Ecolabel; REACH; initiative on the interface between chemicals, products and waste policies; Strategy for Plastics; quality standards for secondary raw materials	<ul style="list-style-type: none"> <li>Waste Management Strategy (2008-2020)</li> <li>National Strategy for Clean Development Mechanism (2007)</li> <li>Set of Rulebooks on eco labelling (food, chemicals, textile, wood, detergents, tourists accommodation)</li> <li>Decree on procedure for establishing a system of collection and treatment of the waste packaging (OGM, 42/12)</li> <li>Decree on the method and procedure for establishing the system for acceptance, collection and treatment of waste batteries and accumulators and operation of the system (OGM, 39/12).</li> </ul>
8	Trade in recyclable raw materials	Trade in recyclables reflects the importance of the internal market and global participation in the circular economy.	Internal Market policy; Waste Shipment Regulation; Trade policy	<p><i>Note:</i></p> <ul style="list-style-type: none"> <li><i>Import, export and transit of hazardous waste in Montenegro is performed according to the Basel Convention on the Control of Transboundary Movement of Hazardous Waste and its storage.</i></li> </ul>
<b>Competitiveness and innovation</b>				
9a-c	Private investments, jobs and gross value added	This reflects the contribution of the circular economy to the creation of jobs and growth.	Investment Plan for Europe; Structural and Investment Funds; InnovFin; Circular Economy Finance Support Platform; Sustainable Finance Strategy; Green Employment Initiative; New Skills Agenda for Europe; Internal Market policy	<ul style="list-style-type: none"> <li>Horizon 2020</li> <li>Strategy of development of Micro, Small and Medium enterprises in Montenegro 2018 – 2022</li> </ul>

10	Patents	Innovative technologies related to the circular economy boost the EU's global competitiveness.	Horizon 2020	INVO Project – setting up the scientific technology park – ongoing
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## 2.2. Quality of Data

Quality data generation (and availability) is prerequisite for designing evidence-based strategies and for further monitoring of the progress in any sector, including the developments in the sectors that are fundamental for the circular economy (aspects of circularity of resources in the production and consumption, from waste management, secondary raw materials, stimulation of circularity of resources in competitiveness and innovation initiatives).

Data on municipal waste are unreliable and inconsistent. Data on industrial wastes are of low quality. The scope for measuring performance against key targets is limited as the data are absent or unreliable, and the basis for forward projections is relatively weak. These data-related shortcomings are recognised in the National Plan for waste management 2015 - 2020.<sup>5</sup>

For instance, concerning waste management, even though there are legal provisions (Rulebook on the manner of keeping records of waste and the content of a form on waste transport (Official Gazette of Montenegro, 50/12);) the data is inconsistent. For example: according to the MONSTAT (Statistical Office of Montenegro) the total amount of the collected communal waste for 2017 is: 292.762t<sup>6</sup>, according to the Ministry for Sustainable Development and Tourism the total amount of the collected communal waste in 2017 is: 254.523t<sup>7</sup>. This means that there is no standardized methodology between relevant institutions for collecting data regarding the waste management. Without defined methodology for collecting data about waste management between relevant institutions, there is no efficient way for waste management and transition from linear to circular economy.

The most important point related to the transition from linear to circular economy is establishing communal infrastructure for waste disposal.

In terms of landfill infrastructure, there are two sanitary landfills in the country designed to, or close to, EU standards. A further four are in various stages of design / seeking financing support.<sup>8</sup> According to the Report on the Implementation of the National Waste Management Plan in 2013, from the total amount of generated waste, nearly 30% of waste ends up in unregulated landfills, and nearly 30% in uncontrolled landfills. This unsatisfactory situation reflects inadequate infrastructure, especially in the North and the northern part of the Central regions, as well as a lack of proper enforcement in those areas where sanitary landfills already exist.

A huge number of local municipalities dispose waste on temporary dumpsites although the deadlines for their closure are passed and a large number of illegal landfills is evident (about 350 according to NEPA's records). Municipalities with locations for temporary storage are Andrijevica, Herceg Novi, Kolašin, Mojkovac, Plav/Gusinje, Pljevlja, Rožaje/Petnjica, Bijelo Polje and Berane. Two local government units (Nikšić and Kotor) have not established municipal waste management in accordance with regulations. In the municipality of Kotor, the first compost has been opened in Montenegro, to

<sup>5</sup> A comprehensive assessment of the current waste management situation in South East Europe and future perspectives for the sector including options for regional co-operation in recycling of electric and electronical waste

<sup>6</sup> <https://www.monstat.org/userfiles/file/otpad/2017/Saopstenje%20Komunalni%20otpad%202017.pdf>

<sup>7</sup> Izvještaj o sprovođenju Državnog plana upravljanja otpadom 2015 – 2020 za 2017, oktobar 2018

<sup>8</sup> These proposed landfills will be developed in Nikšić (located in Budos), Herceg Novi (located in Duboki Do), Bijelo Polje (located in Celinska Kosa), and Berane (located in Vasov Do).

address the issue of green waste management in the municipalities of Kotor, Tivat, Budva and Herceg Novi.

In the municipality of Berane, a medical waste treatment facility was installed to collect medical waste from the territory of municipalities: Kolašin, Mojkovac, Bijelo Polje, Pljevlja, Berane, Rožaje, Andrijevica and Plav and in the City of Podgorica.<sup>9</sup>

### 2.3. Circular Economy initiatives in Montenegro

In the recent years, there have been some initiatives and actions, which promote the concept of circularity of resources (materials, goods, and services) in the economy cycle, even though many were not explicitly named as “circular economy” activities.

- ***Bike-sharing***

Bike sharing is a service in which bicycles are made available for shared use to individuals on a short-term basis for a price or free. The capital city Podgorica has developed the business plan for this service and according to the business plan, it will cost 300.000EUR.<sup>10</sup>

- ***Reduction of communal waste and raising awareness of recycling***

Currently there are several on-going initiatives (International Coastal Day, Let's do it Montenegro). The main aim of these campaigns are to support citizens on proactively participation in the solving the problems related the environmental protection specially the waste disposal.

- ***Smart city - Podgorica***

Capital city Podgorica in cooperation with the company Siemens developed the Study: “Development of energy efficient infrastructure” which is the first step in the developing Podgorica in a “smart city”. This study has been developed/ within the global programme *Business to Society* which is funded by Siemens company.<sup>11</sup>

- ***Initiative: “Svaka limenka se računa” - Every can is counted***

The program "Every can is counted" is a partnership between cans manufacturers, beverage manufacturers, the recycling industry and environmental organizations, who know how much recycling cans is important and want to encourage you to recycle more. The campaign "Every can is counted", launched in England, is also being reported in Ireland, Austria, Hungary, Romania, France, Scotland and Greece, and in 2013 it was realized for the first time in Montenegro.<sup>12</sup>

- ***Collecting EE (electrical – electronic) waste in Montenegro***

NGO Green Heart in cooperation with the company Hemosan lunched the action: collecting the EE waste. In 2015, within this initiative is collected, storage and export in total 150t of the EE waste. Also, this NGO lunched the first ecological – energy portal: [reciklirajte.me](http://reciklirajte.me)<sup>13</sup>

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<sup>9</sup> Analysis – Chapter 27, Enviroment and Climate protection, Coalition 27

<sup>10</sup> <http://www.vijesti.me/bike-sharing-sistem-u-podgorici-uskoro-20-elektricnih-i-80-konvencionalnih-bicikala-za-iznajmljivanje-991653>

<sup>11</sup> <http://podgorica.me/2018/06/15/predstavljena-studija-smart-city-podgorica-razvoj-energetski-efikasne-infrastrukture-i-servisa/>

<sup>12</sup> <http://www.svakalimenkaseracuna.me/o-nama>

<sup>13</sup> <http://www.vijesti.me/vijesti/drzava-se-ne-plasi-opasnog-otpada-980688>

### 3. Findings

Using the approach and logic of the EU proposed Monitoring framework and indicators<sup>14</sup>, the assessment of the current state is grouped under the following stages and aspects of the circular economy: (1) production and consumption, (2) waste management, (3) secondary raw materials and (4) competitiveness and innovation. This broadly follows the logic and structure of the EU circular economy action plan.

#### 3.1. Production and consumption

*Limited progress can be observed towards more circular trends in production and consumption, in terms of waste generation.*

**The indicator on self-sufficiency is related to measuring the extent to which the country is dependant to supply of raw materials. In that respect, Montenegro belongs to the group of raw materials dependant countries.**

According to the last press releases of the Statistical Office of Montenegro in the period January – September 2018<sup>15</sup> the data show that the export of goods amounted to 260.9 million euros, and imports amounted to 1.6843 billion euros, which means that the value of imports was 64.5 times higher than the value of exports.

In the structure of exports according to the Standard International Trade Classification (SITC), the products classified by material amounted to 75.6 million euros (of which: Non-ferrous metals - 52.8 million euros, Iron and steel - 13,1 million euros and others). In structure of imports according to MONSTAT, the most represented are Machines and transport devices (sector 7) in the amount of 424 million euros (out of which: Road vehicles - 123.8 million euros, Electrical machines, apparatus and devices - 85.4 million euros and other)

In terms of **energy**, according to the Energy balance for 2018, the realized production in 2016 was 3024 GWh per year, the realized consumption was 3338GWh, while for the mentioned year the total net import was 306GWh, which is 9.16% of the total energy consumption in that year. Taking into account the above, it can be concluded that Montenegro is energy-stable, however, given that the biggest percentage of electricity comes from hydropower plants, there may be fewer or greater deviations from what is planned by the energy balance, and in that sense, there may be fluctuations in imports and exports electric energy. (Due to hydrological conditions)

Public procurements in Montenegro amounted to 10.38% of GDP in 2015<sup>16</sup>. Although the Law on Public Procurements stipulates possibilities to apply criteria related to environmental protection and energy efficiency (“green procurements”), this option is insufficiently used in practice.

In Montenegro, “**green public procurement**” is not widely used in a way to provide that aside from the prices of products and services, procurements take into account the costs of negative impacts of consumption and production on the environment and social aspects. In that context it is significant to emphasize that integration of energy efficiency requirements into the processes of public procurement is missing. There is no awareness, preparedness, nor legal and technical knowledge and skill of the officials in charge of the application of the criteria relevant for green public procurement during

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<sup>14</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1516265440535&uri=COM:2018:29:FIN>

<sup>15</sup> <https://www.monstat.org/userfiles/file/spoljna%20trgovina/2017/12/Spoljnotrgovinska%20robna%20razmjena%20Crne%20Gore%20jan-dec%202017.pdf>

<sup>16</sup> Public procurements participated with 9.46% in GDP in 2014, Ministry of Finance, May 2016;

implementation of tenders for the procurement of products and services without negative social and environmental impacts.<sup>17</sup>

### 3.2. Waste Management

According to the data of the Statistical Office of Montenegro - MONSTAT the total amount of **collected municipal waste** in the Montenegro in 2017 was 292,762 tones. Compared to 2016, the total amount of collected municipal waste increased by 0,6%<sup>18</sup>.

According to the Statistical Office of Montenegro - MONSTAT the total percentage of the separate fraction is 20%, from which: 12.3% green waste, of 7,6 % separate collected fractions and packaging waste 0,1%. According to the last report of the implementation National Management Plan for Waste Management 2015 – 2020 for 2017, on landfill has been disposed in total: 154,973t (61%); temporarily storage in total 50.147t (20%) and for the recycling is separately in total 26 403t (10%). (recyclable fractions, EE waste and green waste) This means that the dominant way in the management of collected municipal and other types of non-hazardous waste is the disposal, i.e. landfilling of the waste at legal and illegal landfills and recycling rate is 10%.

**There is no explicit data about the recycling rate of the packaging waste.** Pursuant to the draft proposal on Law on Waste Management Article 56, proscribe following:

An enterprise that manages an organized collection, collection and treatment system for waste packaging must take measures to ensure recycling by December 31, 2030, at least 55% of the total weight of the packaging placed on the market in order to achieve at least the next recycling ratio of the individual components:

- 1) 60% of the weight of the glass;
- 2) 60% by weight of paper and paperboard;
- 3) 50% of the weight of the metal;
- 4) 22.5% of the weight of the plastic;
- 5) 15% of the wood mass.

An enterprise that manages the collection, collection and treatment of packaging waste must undertake measures to ensure recycling by December 31, 2035 at least 65% of the total weight of the packaging placed on the market in order to achieve at least the next recycling ratio of individual components :

- 1) 70% of the weight of the glass;
- 2) 75% by weight of paper and paperboard;
- 3) 70% of the weight for iron metals and 50% for aluminium;
- 4) 50% of the weight of the plastic; i
- 5) 25% of the wood mass.<sup>19</sup>

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<sup>17</sup> National Strategy for Sustainable Development 2030

<sup>18</sup> State Statistical Office, News Release No, 9.1.18.01 from 20.04.2018

<sup>19</sup> Draft on Law on waste management – Should be adopted by the end of 2018.

Although they are present a serious danger to human health and the environment, there are no precise data on specific types of waste in Montenegro, it is rarely recycled and most end up in landfills or burned.

Under special types of waste, there are electrical and electronic products (EE), waste vehicles, tires, batteries and accumulators, waste oils, packaging, construction waste, asbestos waste, sewage sludge, medical and veterinary waste.

Precise data on quantities and types of waste do not exist, but projections in the State Waste Management Plan indicate that it is taking alarming proportions.

### **3.3. Secondary raw materials**

The contribution of recycled materials to satisfying the demand for raw materials is still small to negligible. In the Montenegro, there are recycling facilities for plastic, paper and vehicles. However, the country lacks recycling facilities for glass, batteries, and electrical and electronic equipment.

### **3.4. Competitiveness and innovation**

Concerning innovation, European Innovation Scoreboard<sup>20</sup> does not include Montenegro. As a rule, countries can be included only if data are available for at least 20 indicators. According to available data's Montenegro does not fulfil the conditions.

## **4. Concluding notes**

- Montenegro has not yet made the transfer from linear to circular economy.
- The concept of circular economy usually is identified with the green economy;
- We have numerous barriers on the way of using technical materials, including minerals, in the context of introducing circular economy concepts.
- Mitigation of pollution or innovativeness is not encouraged, whereas lack of political and other measures for internalization of external costs is evident.
- Inter- sectoral and cooperation among separate chains of value is insufficient, potentially more efficient models of production and consumption are not well accepted by producers and consumers.
- Lack of investments into renewal and maintenance of the existing infrastructure, into innovations and technologies is present (stuck within the use of the existing technologies), as well as insufficient waste separation and recycling.

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<sup>20</sup> European Innovation Scoreboard 2018

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European Innovation Scoreboard 2018

Ministry for tourism and sustainable development - Information sent to Green Home by e – mail.

National strategy for sustainable development 2030

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