



# *The Blue Growth Mapping Study with a special focus on Montenegro*

25th January 2021 – Vladimir Pandurov – Expert

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## 1. The regional economic dimension of the blue economy in the Montenegro

- The coast of Montenegro is 294 km (183 mi) long;
- Montenegro has not yet established any Marine Protected Areas (MPAs);
- Three sites for proposed Marine Protected Areas were identified in the Special Purpose Spatial Plan for the Coastal Zone of Montenegro (2007): Platamuni, Katici islands and Old Ulcinj island.

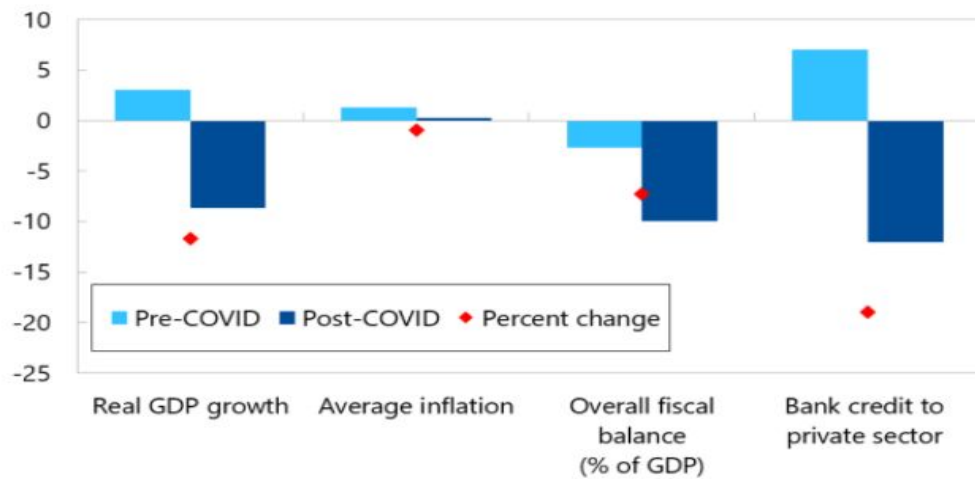
## 1. The regional economic dimension of the blue economy in the Montenegro

- According to the Montenegrin Tax authorities, there are 35,381 employees in all sectors of blue economy
- Most of employees (about 81% of the total) belong to tourism
- In 2018. the tourism sector contributed more than 23 per cent to the country's GDP and provided more than 30 per cent of jobs.

Montenegro's government expects the total revenue generated by the country's tourism sector to decline by 50% in 2020 as a result of the novel coronavirus (COVID-19) crisis.

### Economic impact

The impact of COVID-19 on Montenegro's economic outlook is expected to be large and the recovery will likely be slow.  
(year-on-year growth, percent, 2020 projections)



Source: IMF staff calculations.

## 1. The regional economic dimension of the blue economy in the Montenegro

- The "Adriatic Shipyard Bijela" is the biggest shiprepairing yard in the Southern Adriatic;
- The shipyard covers the area of over 120.000 m<sup>2</sup> and the aquatorium area of 350.000 m<sup>2</sup>;
- The installed capacities enable repair of vessels up to DWT 120.000 tons.

### Adriatic Shipyard Bijela



**DAMEN**  
Adriatic Shipyard



**DAMEN**  
Adriatic Shipyard



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REV	DATE	BY	CHKD	APPV	DESCRIPTION

<b>SUBJECT:</b> Montenegro - Shipyard Versus Urban Area			
<b>DRAWN:</b> MC	<b>CLIENT:</b> Damen & Adriatic Marinas	SECTION: SHIPYARD PROVISION	
<b>DATE:</b> 16/01/17	<b>NO.:</b> 24950	<b>MTB:</b> 0	
<b>SCALE:</b> 1:1000	<b>UNIT:</b> M	<b>STATUS:</b> CONCEPT	
<b>FORMAT:</b> A3	<b>DATE:</b> 02/02/19 13:56:44 PM		



## 1. The regional economic dimension of the blue economy in the Montenegro

- Presently Montenegro has **2,000 berths** for boats, yachts and mega-yachts;
- The Montenegrin **merchant fleet** currently consists of **68 ships and technical vessels**;
- The **total tonnage** of the merchant fleet in the national register is currently **99,138 gross tons**;

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## 1. The regional economic dimension of the blue economy in the Montenegro

- There are **13 maritime transport companies** from Montenegro registered at Lloyd's list of maritime intelligence
- According to 2018 data, Montenegro's fishing fleet comprises **190 vessels**. Of that number, 19 are trawlers, 18 seiners and 153 are small coastal fishery vessels

Table 1. Catch of marine fish for period 2007 – 2017 years (t), (Data source: MONSTAT, 2007-2017, [www.monstat.org](http://www.monstat.org))

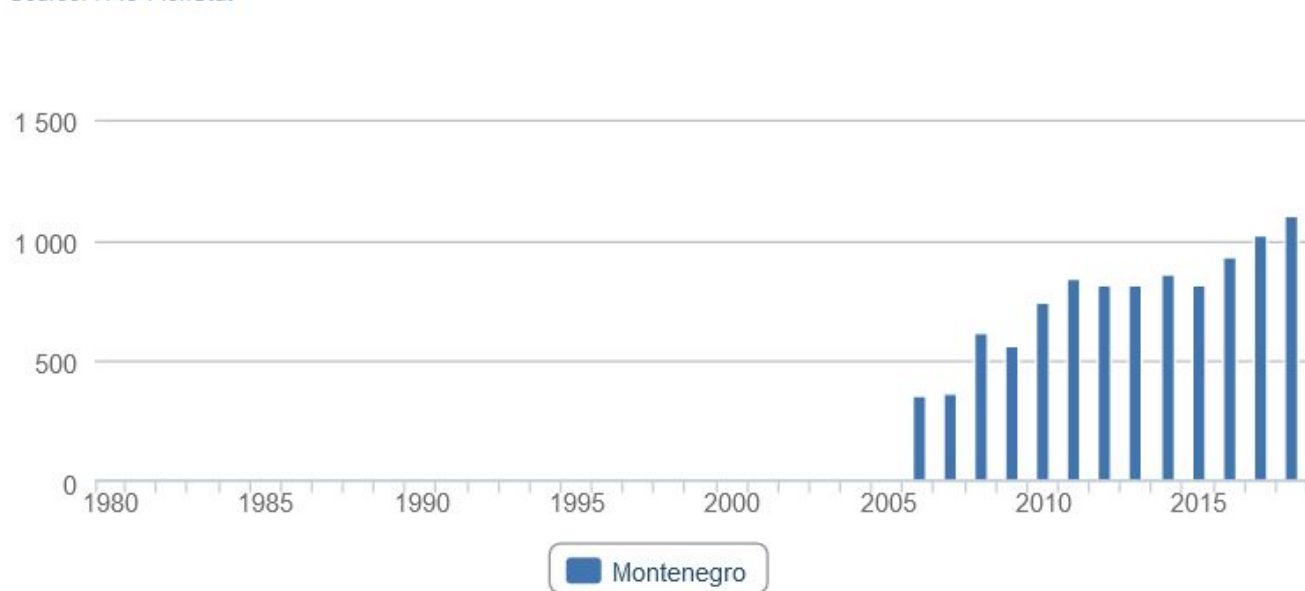
YEAR	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Small and large pelagic fish catch	196	241	199	206	174	245	226	222	245	292	659
Demersal fish catch	245	273	291	310	273	298	269	299	313	313	185
Cephalopods catch	67	78	47	61	49	55	44	51	51	50	33
Crustaceans catch	25	41	21	27	22	25	22	31	28	28	35
<b>Total</b>	<b>533</b>	<b>633</b>	<b>558</b>	<b>604</b>	<b>518</b>	<b>623</b>	<b>561</b>	<b>603</b>	<b>637</b>	<b>683</b>	<b>912</b>



In 2015 the apparent consumption of aquatic products was 4 220 tones implying average per capita consumption of about 6.75 kg. Total imports of aquatic products in Montenegro were 2 704.6 tones

### Total aquaculture production for Montenegro (tonnes)

Source: FAO FishStat



## 1. The regional economic dimension of the blue economy in the Montenegro

- The entire **mariculture** in Montenegro is concentrated in the Bay of Kotor, on a total of 19 farms.
- Shellfish are grown in all 19 farms, while six of them are engaged in oyster farming, and two farms apply the principle of multitrophic integrated mariculture (mussels, oysters, gilthead sea bream and sea bass).

## 2. Mapping the blue growth-related research offer in universities

**The Institute for Marine Biology - Kotor** is the only institution in Montenegro dedicated to the research of the sea.

It is a part of the University of Montenegro, and with 39 employees, it is focused on the following research areas:

1. biological, ecological, taxonomic and hydrographical research of marine life;
2. population dynamics and suggestions for rational exploitation of the economically important species of fish, crustaceans, and cephalopods;

## 2. Mapping the blue growth-related research offer in universities

3. neurophysiologic research on marine organisms; research and protection of flora and fauna as well as the hydrographical properties of the Boka Kotorska bay;
4. advancement of the marine fisheries and aquaculture and dealing with the artificial fertilisation of certain economically important species of marine organisms;
5. oceanographic research of the south Adriatic and preservation and advancement of the environment in the south Adriatic area (Montenegrin litoral).



## 2. Mapping the blue growth-related research offer in universities

**BIO-ICT**, as the first Centre of Excellence in Montenegro, creates a specific innovative ecosystem focused on development and implementation of novel bioinformatics technologies.

BIO-ICT has been exploiting its capacities towards unlocking and utilizing potential of the Montenegrin South Adriatic Sea and inland rural areas, bringing innovative ICT based solutions in various bioeconomy sectors, related to food security, blue growth, bio-based innovation for sustainable goods and services.

## 2. Mapping the blue growth-related research offer in universities

At BIO-ICT we combine specific scientific and innovative expertise in ICT, life sciences and ecological monitoring. Through synergy with industrial partners, BIO-ICT is progressing towards the goals of transferring research results into innovative products and services for boosting economic and social development, bringing into focus smart agriculture combined with environmental protection.

## 2. Mapping the blue growth-related research offer in universities

**The Institute - Center of Excellence for Research and Innovation** was established in February 2018 in order to contribute to the use, networking and coordination of research and innovation resources at the University of Montenegro, in order to increase the productivity of research teams, intensify participation in scientific research projects financed from external funds, encourage synergies and interdisciplinarity in research, encourage cooperation with domestic and foreign research entities, encourage cooperation with the business sector and establish research results.

## 2. Mapping the blue growth-related research offer in universities

Within the Institute, the **Center for Technology Transfer** functions as a sub-organizational unit, which as part of its activities provides support and assistance to faculties and institutes within the University of Montenegro, but also other institutions in Montenegro engaged in scientific research and innovation, in the field of technology transfer, commercialization of research results and implementation of innovative projects, and also mediates in establishing cooperation between academia and business, knowledge transfer to the economy, market needs analysis, support in the placement of new technologies and innovations and intellectual property protection issues.

## 2. Mapping the blue growth-related research offer in universities

**Innovation and Entrepreneurship Center Tehnopolis** is the first part of a planned capital project of Science and Technology Park in Montenegro. It officially started working in 2014. , Ministry of Science is responsible for implementation and development of this project, and partners on the project are Municipality of Niksic, Ministry of Agriculture and Rural Development and Investment and Development Fund. The final objective of this project is creation of new jobs by using new, advanced and innovative ideas and technologies, which represent one of the key moments in development of Montenegrin society.

## 2. Mapping the blue growth-related research offer in universities

Within the Institute, the **Center for Technology Transfer** functions as a sub-organizational unit, which as part of its activities provides support and assistance to faculties and institutes within the University of Montenegro, but also other institutions in Montenegro engaged in scientific research and innovation, in the field of technology transfer, commercialization of research results and implementation of innovative projects, and also mediates in establishing cooperation between academia and business, knowledge transfer to the economy, market needs analysis, support in the placement of new technologies and innovations and intellectual property protection issues.

## 2. Mapping of institutions and institutional bodies

**Ministry of Agriculture (Directorate of Fisheries)** defines and implements a policy that ensures the sustainable use of available fish resources and manages the fishing fleet in a way that ensures long-term and economically viable fisheries in Montenegro. It implements development policy in the field of fisheries, monitors normative activity at the national level and implements measures and management systems based on the principles of the Common Fisheries Policy of the European Union.

## 2. Mapping of institutions and institutional bodies

**Public Company for Management of Marine Assets of Montenegro** (JP Morsko dobro) is a government agency in charge of bringing the beaches and bathing areas of Montenegro to competitive standards of arrangement and management (raising the standards of quality, content and safety of visitors) in accordance with the long-term vision of tourism development of Montenegro. The company aims at sustainable development and management of the total tourist product of the beaches of Montenegro through the creation of new arrivals and stays, ie the extension of the season, as well as to creating additional value on the beaches and bathing areas of Montenegro.



## 2. Mapping of institutions and institutional bodies

**The Maritime Safety Directorate** (Uprava pomorske sigurnosti) performs the tasks of the administration related to: safety of navigation in the coastal sea of Montenegro; arranging and maintaining maritime waterways, setting up safety facilities on waterways and ensuring their proper functioning; performing a radio service for the protection of human lives and safety of navigation at sea; determining the navigability of vessels; performing technical supervision over the construction or alteration, as well as inspection of vessels during navigation; issuing documents and certificates to ships; organizing and performing search and rescue operations at sea; protection of the sea from pollution from vessels and floating objects; registration and maintenance of the yacht register.

## 2. Mapping of Civil Society

### **NGO National Association of Professional Sea Fishermen (NVO Udruženje profesionalnih ribara na moru Crne Gore „Škver”)**

Montenegro has established its first National Association of Professional Sea Fishermen in 2016, which brings together members of four fishing associations from the area of Bar, Ulcinj and Herceg Novi. Representatives of the fishing associations "South Adriatic" and "Anchor" from Bar, "Shipyard" from Herceg Novi and "Association of Fishermen Ulcinj" have set up a National Association that covers more than 80% of the total number of registered fishermen in Montenegro, and that all members associations accepted the Statute of the National Association.

## 2. Mapping of Civil Society

**National Association of Fish Producers of Montenegro** is a second national association of fishermen established in 2016. and consists of 49 members and 52 license holders. There are 16 of them from Herceg Novi, 10 from Kotor, three from Tivat, six from Budva, 12 from Bar, and two from Ulcinj. The representatives of this association are quite critical of policies related to: fishing fleet deterioration due to lack of access to funding, tax debts of fishermen, high prices of blue diesel and other docking and licencing issues they have been experiencing.

## 2. Mapping of Civil Society

**NGO Association of Professional Fishermen Bar (NVO Udruženje profesionalnih ribara Južni Jadran" – Bar)** has a successful cooperation with partner fishing associations in Montenegro, namely the Association of the South Adriatic, as well as the Association of Professional Fishermen of Montenegro.

**NGO "Association for Environmental Consulting - EKOM"** is the NGO that focuses on cooperating with Public Company for Management of Marine Assets of Montenegro (JP Morsko dobro) and organize the ceremonial raising of the clean beaches Blue Flags on the Day of Environmental Protection.

# Thanks for your attention

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*In collaboration with*