Country fact sheet

Municipal waste management

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Municipal waste management in Western Balkan countries — Country profile

Montenegro

Contents

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Executive summary

The total amount of municipal waste generated in Montenegro was 339 000 tonnes in 2019. Despite a stagnating population, the amount of waste per capita has increased by 8 % over the past 5 years to 545 kg per capita, which is higher than the EU average. The share of Montenegro's population covered by public waste collection services has been slightly increasing over the last 5 years, from 82 % in 2015 to 86 % in 2019, although there are differences within the country. Increasing the population coverage is mostly hindered by infrastructural and operational limitations that require investments or additional funds to address.

The legal framework in Montenegro is guided by the Law on Waste Management, which aims to transpose the EU waste legislation, but the implementation is lacking. The adoption of the new Law on Waste Management is planned for 2021 and aims to further harmonise Montenegrin waste legislation with EU legislation. Action is especially needed to set up infrastructure for separate waste collection and recycling and to provide adequate financial and human resources, including those for inspection activities. Currently, the targets do not match the waste management performance. In the new Law on Waste Management, it will be important to set realistic targets that are underpinned by implementation strategies, including planning and financing of investments, building up capacities and ensuring proper enforcement mechanisms. Although extended producer responsibility (EPR) is prescribed in the Law on Waste Management, it has not been implemented. As the new Law on Waste Management is anticipated to be adopted in 2021, it is expected that an EPR scheme will be implemented between 2022 and 2024.

The local municipality is responsible for organising waste management activities in its territory and manages the entire process of collection and disposal of waste. Of the waste, 90 % is collected by public utility companies (PUCs) and about 10 % is collected by authorised private companies specialised in the collection of specific waste streams. The PUCs are also responsible for collecting service fees from households and businesses to cover the costs. However, the low fee collection rate, combined with the difficulties of pursuing non-payers, has an impact on the financial performance of municipalities. Currently the service fee is based on the number of household members, although the PUCs are demanding a shift towards a service fee based on the amount of waste collected. The shift is hindered by it currently being perceived as too complex for municipalities to organise and manage such a fee system.

The effectiveness of separate waste collection is still very low because recyclable waste is often not sorted after collection and there is no financial incentive for citizens or businesses to sort their waste at source.

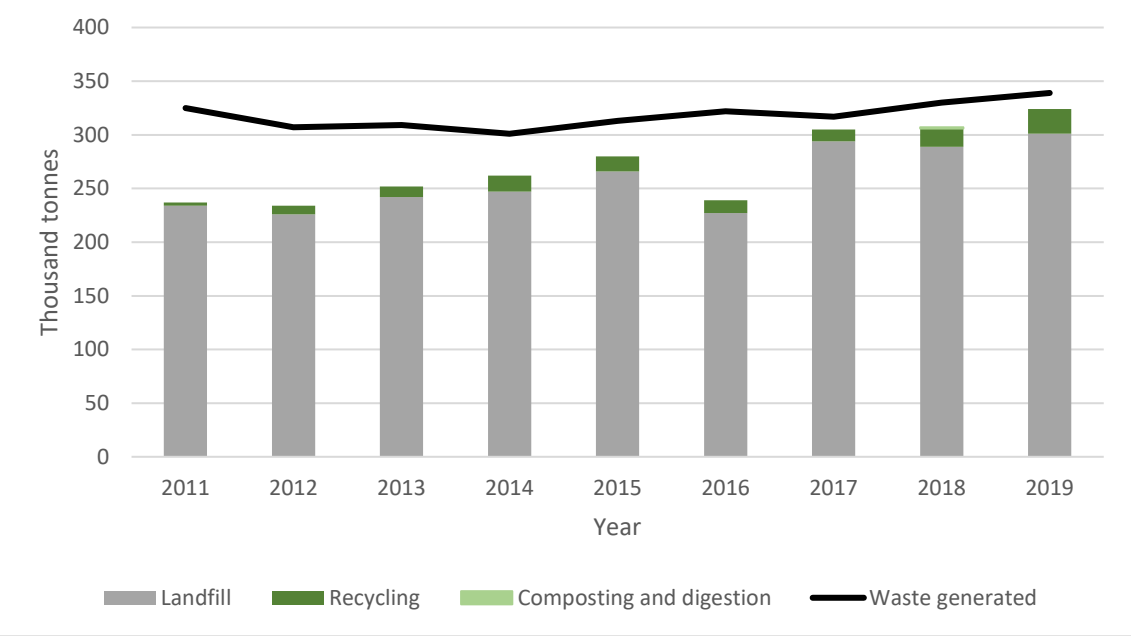
Most of the collected waste ends up in municipal landfills. There are initiatives to either upgrade these landfills to sanitary landfills or close them, and to develop recycling centres with sorting facilities and transfer stations. Still, the operational and financial effectiveness of waste sorting and processing is low in Montenegro because of a lack of adequate waste inputs.

1 Municipal waste management performance

Among the six non-EU Western Balkan countries, Montenegro has the smallest population (approx. 622 000 inhabitants) and the lowest population density (45 inhabitants per square kilometre) but the highest gross domestic product (GDP) per capita (Wikipedia, 2021). Montenegro has 24 municipalities, including two urban municipalities that are a subdivision of the capital city of Podgorica, and is divided in three main regions.

Figure 1.1 illustrates the development of municipal waste generation and management between 2011 and 2019 in Montenegro. As there were no data available in Eurostat's database, the 2019 data were provided by the Statistical Office of Montenegro (Monstat). Despite a stagnating population during the past few years, Figure 1.1 shows a small increasing trend in the total amount of municipal waste generated to 339 000 tonnes in 2019. This corresponds to 545 kg per capita, which is an increase of 8 % over the past 5 years and is higher than the EU average of 502 kg per capita (Monstat, 2020b; Eurostat, 2021). The reported amounts of municipal waste generated include estimates for households not covered by waste collection services (OECD and Eurostat, 2019).

Figure 1.1 Municipal waste generation and treatment in thousand tonnes in Montenegro, 2011-2019



Sources: Eurostat (2021) for 2011-2018; Monstat (2020b) for 2019.

In 2018, household waste was estimated to make up 78 % of the municipal waste stream (OECD and Eurostat, 2019). With regard to the composition of the municipal waste stream only the categories 'other municipal waste' (87 %), 'bulky waste' (12 %) and 'discarded electric and electronic equipment' (< 1 %) are used to report the composition of municipal waste (Monstat, 2021a).

The share of the population of Montenegro covered by public waste collection services has been slightly increasing over the last 5 years, from 82 % in 2015 to 86 % in 2019. Especially in the mountainous northern region of Montenegro the population coverage is lower because it lacks a good road infrastructure (NEPA, 2021). The population coverage has only slightly increased over the years and is mostly hindered by infrastructural and operational limitations that need to be addressed by investments or additional funds. The share of the population covered is estimated and reported through a survey by the public utility companies (PUCs), which are responsible for the organisation of waste management activities in their territory (OECD and Eurostat, 2019). However, there is no minimum requirement (standard) set for the share of population to be covered by the PUCs. Although the need to define such minimum requirements is acknowledged by the Ministry of Ecology, Spatial Planning and Urbanism of Montenegro, no action has been taken to date (NEPA, 2021).

Most municipal waste in Montenegro is disposed of in landfills (Figure 1.1). In 2019, 301 000 tonnes of municipal waste collected were landfilled, representing 93 % of the total amount that was reported to have been treated. The remaining 7 %, representing almost 23 000 tonnes of municipal waste, was collected for recycling (NEPA, 2021). The amount of waste collected for recycling has slowly been increasing over the past years, but is still far off from the targets set (see Chapter 2).

Figure 1.1 also shows a difference between the amount of municipal waste generated and treated. Temporary storage of waste (2.5 % in 2018) and the use of estimates for municipal waste generation partly explain this difference (OECD and Eurostat, 2019). The disposal of municipal waste in illegal landfills will also be a major contributor to this difference. According to the Ministry for Ecology, Spatial Planning and Urbanism, about 10 % of total waste collected is disposed of in illegal landfills (NEPA, 2021). Over the years, the difference between the amount of municipal waste generated and treated has become smaller, which could be the result of the increase in population coverage and improved reporting. Until 2016, waste data collection was done in cooperation with the Nature and Environment Protection Agency (NEPA) through an annual statistical survey. Since 2017, Monstat has been responsible for conducting these surveys, which are done via interviews to improve the response rate and data quality (NEPA, 2021).

2 Legal framework, strategies and targets

The institutional architecture of municipal solid waste management in Montenegro is organised at state and local levels. At the state level, the former Ministry of Sustainable Development and Tourism has been operating under the name of Ministry of Ecology, Spatial Planning and Urbanism since 2020. This ministry is responsible for the development of Montenegro's national legislative and strategic framework for waste management. The Nature and Environment Protection Agency (NEPA) is an executive body of the ministry and is responsible for issuing licences to companies participating in the export, import and transit of waste, national environmental monitoring, managing databases, gathering and reporting waste data, approving waste management plans of waste producers and establishing communication and cooperation between national and international bodies and organisations (Eunomia, 2017).

At the local level, the local government is responsible for the development and implementation of waste management policy and for organising waste management activities in its territory. This comprises adopting local waste management plans, gathering data on the amount of waste generated, improving or building on the capacity of the PUCs that collect and transport municipal waste, managing municipal waste landfills and regulating private companies that offer waste collection, transport and disposal services (Eunomia, 2017).

The legal framework in Montenegro is guided by the Law on Waste Management, which aims to transpose the EU waste legislation, but the implementation is lacking. The adoption of the new Law on Waste Management is planned for 2021 and aims to further harmonise Montenegrin waste legislation with EU legislation. Action is especially needed to set up infrastructure for separate waste collection and recycling and to provide adequate financial and human resources, including for inspection activities (EC, 2018, 2020).

The national waste management plan (NWMP) 2015-2020 sets the strategic direction and planning for the improvement and development of Montenegro's waste management and has been adopted at the state and local levels. The NWMP contained the following specific objectives in the area of waste separation, reuse and recycling (Eunomia, 2017):

- strengthening the administrative capacity of institutions and bodies in charge of planning, permitting, control and monitoring;
- implementing the legislation and the measures resulting from the objectives;
- introducing mandatory registration of the types and quantities of waste collected by PUCs, authorised private waste collection companies and companies generating waste, and reporting this information to municipalities;
- introducing new, more rational and more objective economic instruments (fees and fines);
- designing and constructing facilities and waste management systems;
- expanding the waste collection system to cover the entire territory of Montenegro;
- introducing schemes for the collection of recyclable materials;
- increasing the amount of used and recycled waste (to achieve high recycling rates), including recycled industrial waste;
- setting up the essential elements of a system for the separate collection and sorting of packaging waste (recycling centres in the city and rural areas);
- establishing producer responsibility schemes;
- establishing a mobile waste collection system for special waste streams;
- creating opportunities for and promoting the use of waste as an alternative energy source in the future;
- eliminating illegal waste disposal and rehabilitating and remediating dumpsites;
- raising public awareness of the importance of proper waste management and public involvement in the decision-making process.

Amendments to the 2015-2020 NWMP were adopted in May 2018, but the details of the country's waste management model and the modalities of its implementation remain to be clarified (EC, 2020). According to the Ministry of Ecology, Spatial Planning and Urbanism, the adoption of the new NWMP is planned for the end of 2022 and will, in accordance with the Law on Waste Management, be valid for a period of at least 5 years.

In the Law on Waste Management, local waste management plans for municipal and non-hazardous construction and demolition waste have been adopted and need to be aligned with the NWMP and its objectives. The executive bodies of the municipalities are responsible for the implementation of the local waste management plans (NEPA, 2021). However, very few municipalities complied with the obligation to develop, adopt and implement local waste management plans (Eunomia, 2017). The lack of finances and human resources at the local level combined with the lack of enforcement and penalties are reported to be the main reasons for this (NEPA, 2021).

In line with the EU Waste Framework Directive (WFD), the Law on Waste Management defined that at least 50 % of the total amount of collected waste materials would have to be prepared for reuse or recycled by 2020 (NEPA, 2021). Although no data for 2020 are available yet, the data available show that Montenegro is currently far from achieving this target (see Chapter 1). The

targets for the recycling of packaging waste were originally set in the Law on Waste Management but were revised and updated in the 2015-2020 NWMP, and no data are available yet to monitor the targets. These targets are far lower than those defined in the EU Packaging Waste Directive (Eunomia, 2017):

- an overall packaging recycling target of 53 % by 2019;
- a plastics recycling target of 20 % by 2020, 22 % by 2025 and 24 % by 2030;
- a paper and cardboard recycling target of 46 % by 2020, 52 % by 2025 and 61 % by 2030.

With regard to reducing the amount of biodegradable municipal waste going to landfill, a target was set that in 2020 no more than 50 % of the total mass of biodegradable municipal waste produced in 2010 could be landfilled and no more than 35 % by 2035.

Registered waste management companies are responsible for applying these targets in mandatory waste management plans and are obliged to annually report the fulfilment of these targets to NEPA. Although no data for 2020 are available yet, waste management in Montenegro is clearly not on track to meet any of these targets. These targets will be revised in the new NWMP. In any case, it will be important to set realistic targets that are underpinned by implementation strategies, including the planning and financing of investments, the building up of capacity and the proper enforcement of mechanisms.

According to the Law on Waste Management, the local municipality is responsible for organising waste management activities on its territory. More than 90 % of the waste is collected by PUCs and less than 10 % is collected by private companies specialised in the collection of specific waste streams, including recyclable waste delivered directly to sanitary landfills by citizens (plastics, metals, paper, cardboard, waste oils, waste electrical and electronic equipment, batteries, packaging, etc.) (Monstat, 2020b). All waste management companies need a permit licensed by NEPA, have to be included in NEPA's register of waste collectors and need to have consent of local authorities in order to receive a permit (NEPA, 2021).

To date, Montenegro remains partly aligned with the EU legislation regarding waste management. According to a 2020 European Commission report, no progress has been made in the implementation of the waste legislation. Considerable efforts on strategic planning and investments are needed to implement the national strategy for waste management until 2030 and the 2015-2020 NWMP (EC, 2020).

3 Waste fee and taxation system

The Law on Communal Services (Official Gazette of Montenegro Nos 55/16 and 66/19) prescribes how the fees for communal services and, consequently, waste management services are determined through the adopted Decree on Detailed Elements and Methodology for Determining the Prices of Utility Services (Official Gazette of Montenegro, No 55/20). The decree prescribes four models for calculating the waste management fee:

- a model based on area (square metres) of living space or used space;
- a model based on the number of household members;
- a model based on the mass of municipal waste;
- a model based on the volume of municipal waste.

The Law on Communal Activities (Article 14) stipulates that the performance of communal activities on a municipality's territory is provided and regulated in more detail by the local government. This also implies that the local government determines the method for calculating the fee or price of municipal waste collection, removal and disposal services. In most cases the model based on area is applied to determine the waste management fee. With regard to the fee

charged to companies, some municipalities use the model in which the fee is based on the volume of the waste collection containers (Ministry of Ecology, Spatial Planning and Urbanism, 2021). Although there is a demand from PUCs to shift towards the model that calculates the fee based on mass of the waste, this model and the model based on the number of household members are not applied, as they do not match the existing municipal waste management system and are currently too complex for municipalities to organise and manage (ZWNE, 2021; Ministry of Ecology, Spatial Planning and Urbanism, 2021).

The PUCs responsible for the collection and disposal of municipal waste are also responsible for collecting service fees from households and businesses to cover the costs. Although there are no new data available, the United Nations reported that the average fee collection rate is 56.5 % for households and 68 % for companies (UNECE, 2015). PUCs also lack the ability to chase debt (ZWNE, 2021). The low fee collection rate, combined with the difficulties of pursuing non-payers, has an impact on the financial performance of municipal companies collecting waste.

The Law on Waste Management stipulates that all costs associated with waste management should be borne by those who generate the waste. According to NEPA, the average monthly fee for households has increased over the past few years and is currently EUR 7. This monthly fee is 1.3 % of the disposable income of households and fits well within the 1-1.5 % range reported in international practice (Monstat, 2020a). However, it is unclear whether this fee accurately reflects the actual costs of the waste management service to ensure full cost recovery. The service fee is too low to cover capacity building and investments in recycling infrastructure. At the moment, funding for these activities primarily comes from foreign development organisations.

PUCs that do not have access to a regional or controlled landfill can temporarily store municipal waste and non-hazardous construction waste. The fee to temporarily store waste has been set at EUR 10 per tonne.

Sanitary landfills operate with a gate fee. The fee PUCs have to pay is the same for mixed municipal waste as for separately collected waste. This does not create a financial incentive for PUCs to increase separate collection (Ministry of Ecology, Spatial Planning and Urbanism, 2021). At the sanitary landfills, separately collected waste is pre-treated for recycling or for export.

With regard to fines for illegal activities, the Law on Waste Management stipulates a number of fines for individuals and organisations that range from EUR 30 to EUR 40 000. The new Law on Waste Management sets out an even larger number of fines (Ministry of Ecology, Spatial Planning and Urbanism, 2021). However, the effectiveness of these fines is limited because of the lack of enforcement.

At the moment, there are no financial incentives for households and companies to limit the amount of waste they produce or for PUCs to increase the amount of separately collected waste. The current model combined with the low fee collection rate puts PUCs in a financially vulnerable position and imperils further improvements in the waste management system.

4 Collection coverage and separate collection

In accordance with the Law on Waste Management, the local municipality is responsible for organising waste management activities on its territory. In most cases solid waste collection is entrusted by municipalities to a PUC. Municipal solid waste is collected using large on-street containers that serve multiple households and at collection points. There is very little door-to-door collection. Depending on the region, the municipal waste is collected with a frequency ranging from once per week, mainly in the northern mountainous region, to a couple of times

per day. Collection frequency is especially high during the peak tourist season. In general, PUCs are sufficiently equipped, although there is an uneven distribution of equipment among the municipalities. This results in unused capacity in some municipalities while others lack it. Because there is no cooperation between PUCs, this results in the collection of empty bins in some areas while bins in other areas overflow (Eunomia, 2017; NEPA, 2021; ZWNE, 2021).

Paper, metals, plastics, glass and bio-waste need to be separately collected and recycled in accordance with the Law on Waste Management. However, because of the lack of financial means or knowledge, this is not the case in all municipalities. In some municipalities or cities there are collection points or recycling centres to which citizens and companies can directly bring recyclables (NEPA, 2021).

Citizens and businesses can bring their recyclables to the collection point or recycling centre (often referred to as civic amenity site) for free. However, because of the waste fee model (see Chapter 3), citizens pay a fixed fee per month, regardless of the volume of waste deposited or whether or not it was sorted at source.

Although in general there is a proper infrastructure in place to separately collect waste, the effectiveness is still poor, because the focus is not on improving separate collection at source but on separating recyclable materials from mixed municipal waste at recycling centres. This results in low-quality recyclables. There is no financial incentive for citizens or businesses to sort waste at source and sort it into containers for recycling or to take it to civic amenity sites.

5 Extended producer responsibility schemes

Under the current Law on Waste Management from 2016, extended producer responsibility (EPR) applies to companies that manufacture, import or sell electrical and electronic equipment, vehicles, tyres, batteries or packaging; the companies must organise the collection and disposal of the waste generated by these products. Although EPR is prescribed in the Law on Waste Management, it has not been implemented so far. As the new Law on Waste Management is anticipated to be adopted by the end of 2021, it is expected that EPR will be implemented between 2022 and 2024.

According to the Ministry of Ecology, Spatial Planning and Urbanism (2021), one of the reasons that EPR was not properly implemented earlier is because of the way the collection of the fees was set up. The idea was to collect the EPR fees directly from customs on arrival of the goods in the country. However, because product and waste codes do not match, this system never worked. In the new Law on Waste Management, this responsibility and the collection of the fees will be organised by producer responsibility organisations (Ministry of Ecology, Spatial Planning and Urbanism, 2021).

6 Treatment infrastructure

Mixed municipal waste in the coastal region and almost the whole central region is delivered to waste transfer stations, to recycling stations or to separation stations in recycling centres for sorting out recyclables. Sorting residues are landfilled. In the northern region of Montenegro, mixed municipal waste is still largely directly landfilled, but this is expected to change (NEPA, 2021). Municipalities that do not have access to regional landfills can temporarily (for a maximum of 2 years) store the waste in controlled landfills or bring it to transfer stations. After

temporary storage or from the transfer station, waste goes to a sanitary landfill. Using transfer stations makes the transport of waste more efficient.

Most of the municipal waste in Montenegro is disposed of in landfills (see Chapter 1). According to the Ministry of Ecology, Spatial Planning and Urbanism, of the municipal waste collected about 60 % is disposed of in sanitary landfills, about 20 % in temporary storage facilities (controlled landfills) and about 10 % in illegal landfills or dumpsites.

With regard to the remediation of illegal landfills and dumpsites, the Ministry of Ecology, Spatial Planning and Urbanism is the leading institution in the realisation of projects to close and rehabilitate unregulated landfills. Since 2017, the rehabilitation of five big unregulated city landfills (in the municipalities of Žabljak, Cetinje, Berane, Šavnik and Plav) was completed (Ministry of Ecology, Spatial Planning and Urbanism, 2021). However, there is still an urgent need to remedy illegal waste disposal and to make use of temporary waste disposal in all municipalities in Montenegro (EC, 2020).

There are two sanitary landfills in Montenegro. These sanitary landfills have a total capacity of 672 849 m³ and operate in accordance with EU standards. The controlled landfills, of which there are 17, are used to temporarily store waste. These landfills are fenced and under video surveillance (Ministry of Ecology, Spatial Planning and Urbanism, 2021). Although the objective is to upgrade controlled landfills to sanitary landfills or to shut them down, the timing is unclear.

There are four material sorting facilities for dry recyclables in Montenegro (in Podgorica, Žabljak, Kotor and Herceg Novi), with a capacity of 108 250 tonnes per year. A new recycling centre with a sorting plant is planned to be built in the municipality of Berane by the end of 2022, and there are plans to build sorting facilities in Pljevlja and Kolašin (Ministry of Ecology, Spatial Planning and Urbanism, 2021). The sorting facilities or recycling centres separate paper and cardboard, plastics — (polyethylene terephthalate (PET) bottles, high-density polyethylene (HDPE) and low-density polyethylene (LDPE)), aluminium cans, metals and glass. In addition to automated sorting, the materials are also manually sorted. Recycling centres still do not work at full capacity, and most of the waste collected is simply disposed of at landfills (Eunomia, 2017). With the exception of metals, which are further processed in Montenegro's steel factory, the recyclable materials that come out of the sorting process are exported for further processing, as the volumes are low, while the sorting residues of the sorting process are sent to a transfer station, after which they are landfilled (NEPA, 2021).

Although there have been initiatives to remediate illegal landfills and to develop recycling centres with sorting facilities and transfer stations, the operational and financial effectiveness of waste sorting and processing is low in Montenegro. There is a need to increase the input through improved separate collection systems (see Chapter 4) and to prevent waste from being disposed of in (illegal) landfills.

7 Social aspects of waste management

According to Monstat (2021b), 2 856 people were employed in the collection, processing and disposal of waste in 2019. This number also includes environmental cleaning activities. Overall, this is about 1 % of the active population of Montenegro. Montenegro also has a relevant informal waste sector, but the number of people involved in such activities is not known. Most of the people working in the informal waste sector are disadvantaged individuals, among whom people from the Roma community are the majority (NEPA, 2021).

The waste management sector is expected to grow further, as there is a growing interest from private companies, and investments of up to EUR 350 million in the sector are planned by 2035 (Ministry of Ecology, Spatial Planning and Urbanism, 2021).

Abbreviations

Abbreviation	Name
EPR	Extended production responsibility
GDP	Gross domestic product
HDPE	High-density polyethylene
LDPE	Low-density polyethylene
Monstat	Statistical Office of Montenegro
NEPA	Nature and Environment Protection Agency
PET	Polyethylene terephthalate
PUC	Public utility company

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