

The Significance of The Hinterland of The Port of Bar for the Development of Montenegro's Blue Economy Highlighting Intermodal Transport

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Abstract: Countries strive to diversify their economy. The goal is for income from economic activities to come from as many different economic branches as possible. Montenegro has a special interest in diversifying its economy, which today is significantly dependent on tourism. This goal can be achieved by creating a Montenegrin logistics product that will be exported to the countries of the region. The subject of this paper is an overview of the importance of the countries in the hinterland of the Port of Bar in intermodal transport, as well as their connection with Montenegro through high-quality road and railway infrastructure. The aim of the paper is to highlight the significance of developing the Montenegrin logistics product for the country's economy and to identify the entities that will be involved in its creation. The main hypothesis of this paper states that the Montenegrin logistics product, including activities within Montenegro's blue economy, will contribute to the diversification of the Montenegrin economy and the general growth of the Montenegrin economy. The results of this paper can help Montenegro's state administration create strategies aimed at the development of the Montenegrin economy.

Keywords: Montenegro, Intermodal transport, Blue economy, Hinterland, The Port of Bar.

1. INTRODUCTION

The economy of Montenegro is an interesting combination of tourism driven by natural beauty, strategic reforms, and post-independence evolution. The currency is the euro, though Montenegro is not in the Eurozone. The estimated nominal gross domestic product (GDP) for 2025 is \$8.56 billion, while projected GDP growth is 3.2% in 2025 [1]. Services make up more than 75% of GDP in Montenegro, mostly because of tourism. Industry includes aluminum, steel, and energy. Agriculture constitutes a

small part of the economy, about 7.5% of GDP [2]. In the coming period, special emphasis should be placed on improving the business environment and diversifying the economy, especially the tourism sector, which is recognized as the main driver of the value chain in the entire economy. Furthermore, additional attention should be directed toward strengthening the capacity for energy production from renewable sources, the given statement is the opinion of the president of the Chamber of Economy of Montenegro [3]. The Port of Bar and its associated infrastructure provide significant developmental possibilities for Montenegro. Intermodal transport is an ecologically sustainable mode of transport and an important driver of economic growth in coastal regions, since it employs a higher number of entities compared to other forms of maritime transport. Intermodal transport is not only a driver of the economy in the coastal area but also a means of increasing the value of capital infrastructure facilities in a country, such as highways and railways. The promotion of intermodal transport via the Port of Bar is in line with the green European agenda and the efforts of Montenegro to diversify its economy. At the same time, it represents the main way to pay off investments in the construction of the highway and the reconstruction of the railway in Montenegro. The most important prerequisite for the success of a port is that it has a region with a developed GDP in its hinterland and that it is connected to it by modern road and railway infrastructure, that it has better connectivity than competing ports [4]. Serbia is the primary hinterland for the Port of Bar. Alongside Serbia, the market of Montenegro is limited, as are the markets of Bosnia and Herzegovina and Kosovo, where the Port of Bar lacks a competitive edge. The establishment of the Bar-Belgrade-Budapest transport corridor is the key condition for improving intermodal transport via the Port of Bar in the future. A supplementary route for Budapest needs to be established via Sarajevo in Bosnia and Herzegovina. All entities in Montenegro that enable the receipt, transshipment, and transit of commodities within its territory constitute a Montenegrin logistics product, which is sold to regional countries through intermodal transport to link their economy with the global market.

2. LITERATURE REVIEW

The blue economy is a broad term, most appropriately defined by the World Bank as the sustainable use of ocean resources for economic growth and job creation while maintaining the health of ocean ecosystems. It is therefore a comprehensive concept that includes several aspects, including maritime knowledge, infrastructure, economy, maritime safety and security,

maritime communications, and environmental protection [5]. The blue economy implies a sustainable economic framework based on oceans and seas as essential resources for economic growth and protection of the environment. These vast bodies of water are seen as catalysts for the economy due to their significant potential for innovation and global expansion. In addition to supporting life, marine and oceanic waters facilitate the movement of people and goods. Logistics is crucial to the blue economy, since a significant portion of freight forwarding activities is conducted by maritime shipping aboard container vessels [6]. The disappearance of maritime activity would significantly alter people's lives and the economy. The blue economy is a crucial component of the European economy since it supplies food and resources, strengthens tourism, enables transportation, and fosters the production and utilization of renewable energy. Concerning the EU's blue economy, seven designated sectors include all blue activities: marine living and non-living resources, marine renewable energy, port operations, shipbuilding and repair, maritime transport, and coastal tourism. The seven established industries provide over 1.5% to the European Union's economy in gross value added and employ over 2.2% of the workforce in the EU. Coastal tourism, maritime transport, and their associated industries are the greatest sectors in terms of value added at factor cost. Coastal tourism accounts for 45% of the overall value added at factor cost of the blue economy, whilst marine transport and its associated sectors (shipbuilding, repair, and port operations) comprise about 40% of the total value added at factor cost of blue economy activities [7].

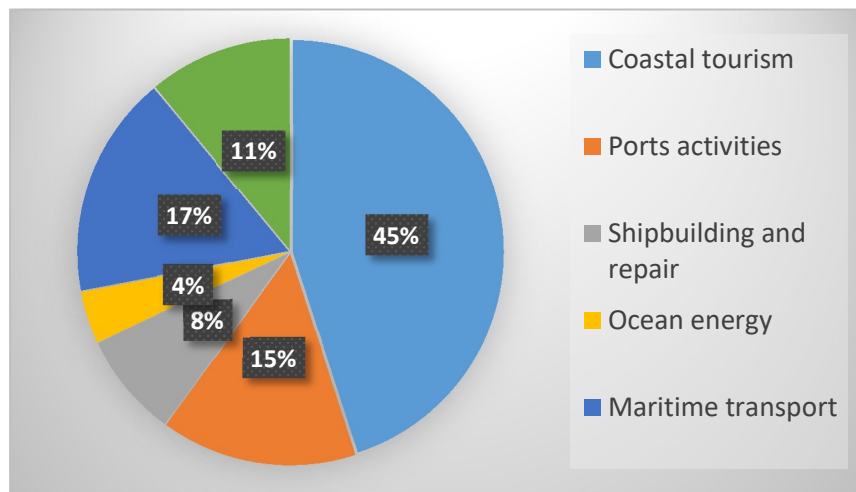


Fig. 1 - % of total value added of the blue economy in EU, 2019 [8].

As per Figure 1, coastal tourism accounts for 45% of the overall value added at factor cost within the blue economy, whilst marine transport and its associated sectors (including shipbuilding, repair, and port operations) contribute with around 40% of the total value added at factor cost of blue economy activities. Coastal tourism requires extensive hospitality services and employs a significant workforce. Consequently, 64% of blue economy employees are engaged in coastal tourism, as per Figure 2, whereas maritime transport and its associated sectors, including shipbuilding, repair, and port activities, comprise 24% of blue economy employment.

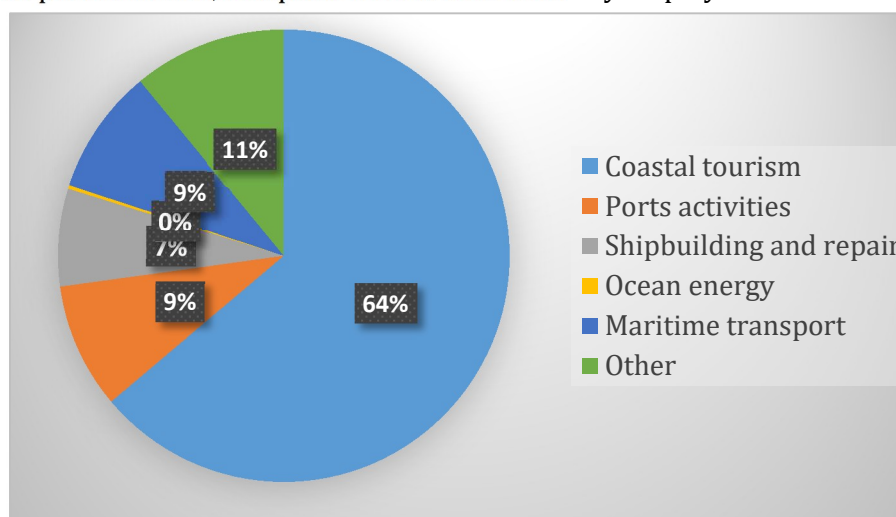


Fig. 2 - % of total employment in the blue economy in EU, 2019 [8].

Maritime transport is a vital element of the transport system and represents a significant portion of global commerce. Furthermore, engaging in global marine commerce is seen as a critical element for attracting international funding. Niavis et al. assess the significance of maritime transport for the economy, society, and environment of the Adriatic-Ionian region using value estimation methodologies to create an integrated assessment tool for comparative analysis of maritime transport in relation to other regional drivers. The authors determine that marine transport is the second most significant element influencing change in the Adriatic-Ionian area, after coastal tourism [9]. Özer et al. analyze the impact of maritime rail container transport on economic growth in Turkey, between 1991 and 2016, using the autoregressive distributed lag-based bounds testing approach. They find no significant relationship between rail transport and economic growth; however, they identify positive and statistically significant relationship between maritime container transport and economic growth,

both in the short run and long run [10]. Park and Seo found that container port activities can positively influence regional economic growth [11]. Ports play a vital role in facilitating economic operations in neighboring regions, serving as a crucial link between maritime and land transportation [12].

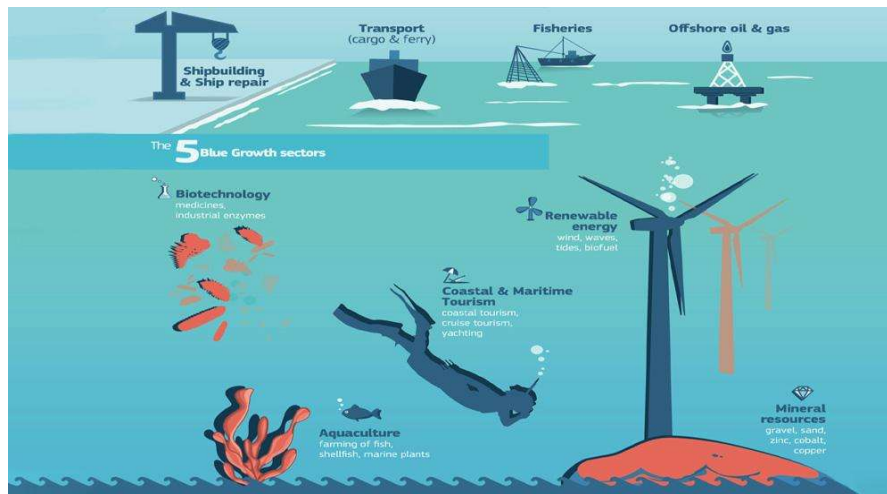


Fig. 3 - Blue Economy sectors [11].

Estimates from the 2018 Special Purpose Spatial Plan for the Coastal Area of Montenegro indicate that 28.5% to 30% of the national GDP is produced in the coastal region, which comprises six municipalities that account for 11.5% of the country's land and 24% of the total population. Approximately one-fifth of the nation's total employment is associated with economic operations in the coastal region, which generates a GDP per employed individual that is 1.5 times more than the national average. The coastal region is the most developed section of Montenegro [14]. The blue economy in Montenegro includes the sustainable use of marine and coastal resources with the aim of economic development, preservation of the environment, and social well-being. One of the key sectors of Montenegro's blue economy includes maritime transport and ports, which includes operations in the Port of Bar, port logistics, and shipping activities [15]. Montenegro has achieved a major milestone by becoming the newest member of the Sustainable Blue Economy Partnership, impacting its environmental and economic destiny. Announced during the General Assembly on 25 November 2024, this initiative integrates Montenegro into a consortium of 74 partner institutions from 30 countries, dedicated to collaborative research, development, and the harmonization of national programs on a pan-European scale. The Partnership aims to restore ocean and marine health, improve resilience, and promote climate-neutral,

sustainable, and profitable economic activities [16]. The primary objective of the Blue Economy is to foster economic prosperity by promoting the use of marine resources, which are only viable if they are employed responsibly. The sustainable use of marine resources is a multidimensional issue that requires an interdisciplinary approach. The significance of maritime waterways is invaluable for tiny nations like Montenegro, which has a total coastline of 289 km. The geographic location offers advantages over landlocked countries that cannot leverage opportunities in maritime transport, coastal tourism, capital infrastructure projects, shipbuilding and repair, fisheries and mariculture, and offshore oil and natural gas for economic advancement [17]. Table 1 presents the economic contribution, as per Nikcevic and Skuric.

Table 1 - Economic contribution of blue economy in Montenegro [Ibid].

	2014	2015	2016	2017	2018
No of business entities	336	379	390	417	488
Average no. of employees	1971	1778	1592	1481	1582
Gross Value Added (million EUR)	29.5	27.9	26.8	30.2	27.2
% in GDP	0.9	0.8	0.7	0.7	0.6

The foremost priority project in transport infrastructure affecting the blue economy sectors is the construction of the Bar-Boljare highway; the second priority pertains to the modernization of rail infrastructure, and the third priority project focuses on expanding the number of shipping lines [Ibid].

3. RESULTS AND DISCUSSION

3.1. The importance of the logistics economy for the economy of Slovenia

The Chamber of Commerce and Industry of Slovenia published a report on the economic impact of port activities. In 2018, around 7,000 jobs in Slovenia were directly or indirectly associated with port operations, with the Port of Koper at the forefront. The investigation included direct, indirect, and induced effects. The limited direct impacts included the company Luka Koper d.d. and its primary operations in transshipment and storage. The broader immediate effects included the port's ancillary operations, including pilotage, towing, ship supply and repair, vessel mooring, truck terminal functions, regulation, and many general services. On the other hand, indirect impacts included transportation operations (such as road and rail transport), freight forwarding, construction services, banking and

insurance services, and public administration services. The research only examined companies located in Slovenia to ensure that the value-added services remained within national boundaries. In 2018, the impact of port activity on value added rose by 58 percent relative to 2009, reaching approximately 400 million euros, while overall revenues from port activity in 2018 were 1.2 billion euros. One euro in port activity sales produces an additional 3.3 euros in the broader economy [18]. It is worth noting that the above data refer to the overall effects created by the port of Koper, not only intermodal transport through the port of Koper.

3.2. The importance of the transport and storage sector for Montenegro and the EU

Data from the Statistical Office of Montenegro indicate that the transport and storage sector constituted 4.3% of Montenegro's GDP in 2023, or 280 million euros. The total gross added value in this sector has been consistently increasing, but at a slower pace than the overall expansion of the Montenegrin economy. Ultimately, it culminated in exhibiting a reduced proportion in GDP compared to 2009, when this sector constituted 4.8% of the GDP. In 2023, the transport and storage industry employed an average of 12,082 persons, representing 5.3% of the overall workforce, marking the highest employment figure in the last decade [1, 19]. Business entities in the transport and storage sector account for 1/5 of the income of the municipality of Bar. They contribute to the Municipality of Bar twice as much as business entities in the area of accommodation and food. 16.2% of working-age people in the Municipality of Bar are employed in the field of transport and storage [18]. After trade, which employs the highest number of people, the transport and storage sector is the second largest employer in the Municipality. Bearing in mind that a significant percentage of that value is created for the regional market, transportation and storage represent the most important export product in the Municipality of Bar [21]. Statistics from the Statistical Office of Montenegro do not include data on the blue economy and logistics; however, information from the transportation and storage sector can be useful for analyzing trends in logistics. In contrast to Montenegro, the transport and storage sector employs 10.4 million people in the EU, accounting for 6.5% of the workforce [22]. According to data from 2022, this sector accounted for 6.5% in the EU GDP [Ibid]. In neighboring Croatia, the situation is similar to that of the EU in terms of employment, and the transport and storage sector accounted for 6.4% of total employment [23], while it generated as much as 9.5% of Croatia's GDP, amounting to EUR 5.3 billion annually [24]. Logistics activities at the Port of Rijeka and, to a lesser extent, the Port of Ploče, contribute to that GDP. The Croatian ports of Rijeka and Ploče compete for the same market for almost 70% of goods as

the Port of Bar. It overlaps the market of Croatian ports with the port of Bar in Montenegro, the market of Serbia, Bosnia and Herzegovina, and the market of Hungary. Montenegro's potential to sell its logistics products in regional markets is clear, especially considering that its revenues from the transport and storage sector are 19 times smaller than those of Croatia.

3.3. Potentials for the development of intermodal transport via the Port of Bar and importance for the economy of Montenegro

The Port of Rijeka and the Port of Bar were among the most significant commercial ports in the former Yugoslavia. Fifty years ago, the two significant Adriatic ports had comparable transshipment levels. Currently, the Port of Bar is much inferior to the Port of Rijeka. The Port of Rijeka (Operator - Adriatic Gate Container Terminal) handles about eight times more containers than the Port of Bar (Operator - Port of Adria), with the handling of full containers being practically eleven times more. The higher percentage of empty container transshipments in Bar compared to Rijeka is an additional indicator of the inefficiency of the intermodal logistics route through the Port of Bar. The main issue in Bar is that a significant number of containers imported for the Serbian market are stripped into conventional trucks within the port itself, and empty containers are located in the territory where there are no goods. Unlike Bar, the Port of Rijeka largely uses rail transport as an intermodal connection with the Serbian market. This issue is one of the main reasons for the competitive advantage of the Port of Rijeka over the Port of Bar. Figure 4 provides a comparative analysis of container handling in Bar and Rijeka.

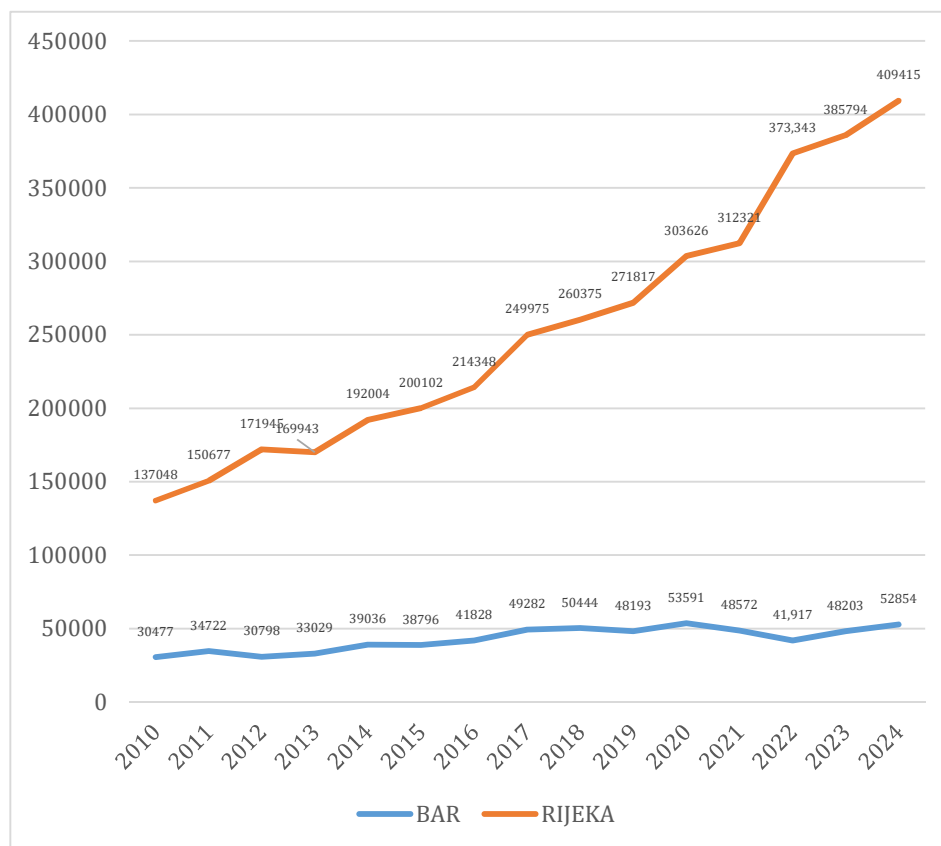


Fig. 4 - Container throughput: Rijeka vs. Bar (2010-2024) in TEU [adapted 25].

The most important market in the Western Balkans for intermodal transport is the Serbian market. Owing to the Serbian market, the Port of Rijeka has positioned itself as an important regional port and has attracted the investment from the shipping company Maersk in the amount of half a billion euros. "Rijeka Gateway," which will start operating in 2025, will be the most modern container terminal on the Adriatic. The second most important market for the Port of Rijeka is Croatia. The Croatian economy accounts for 28.7% of transshipments through the Port of Rijeka. Table 2 presents other markets with their respective percentage participation.

Table 2 - Hinterland of Rijeka port in 2024 [adapted 25].

Hinterland of Rijeka port in 2024	Full containers in TEU	Share
Serbia	133487	41.0%
Croatia	93386	28.7%
Hungary	42991	13.2%
Bosnia and Herzegovina	34191	10.5%
Other	21183	6.5%
Total:	325238	100.0%

Serbia is the main market for the Port of Bar. Over 70% of containers transiting the Port of Bar have their final destination or origin in Serbia. Despite Bar's proximity to Rijeka, Rijeka transports nearly six times more Serbian goods than Bar. The main reason for this lies in the better infrastructure connection between Rijeka and Belgrade compared to the direction that goes to Montenegro. The railway from Belgrade to Bar is 30% shorter than that from Rijeka, but the carrying capacity of the Rijeka-Belgrade line is 50% higher than that of the Bar-Belgrade line. Rijeka and Belgrade are connected by a highway, which is not the case for Bar and Belgrade [26]. Table 3 presents the hinterland of the Port of Bar in percentage terms.

Table 3 - Hinterland of Bar port in 2024 [adapted 25].

Hinterland of Bar port in 2024	Full containers in TEU	Share
Serbia	23980	71.5%
Montenegro	8292	24.7%
Other	260	0.8%
Total:	33532	100.0%

The hinterland of the Port of Bar and its potential markets include the following countries: Montenegro, Serbia, Bosnia and Herzegovina, and Kosovo. These regions offer diverse opportunities for trade and economic growth, making Bar a strategic hub for logistics and commerce. Companies looking to expand their reach can benefit from the port's accessibility and the growing demand in these markets. If we were to form the Bar-Belgrade-Budapest corridor, we could also consider the Hungarian market. Table 4 presents the amount of intermodal transport in 2024 for the mentioned countries.

Table 4 - *Potential hinterland of Bar Port in 2024 in TEU [adapted 25].*

Country	Yearly TEU capacity	Share
Montenegro	10000	3.4%
Bosna and Hercegovina	70000	23.7%
Serbia	185000	62.7%
Kosovo	30000	10.2%
Total:	295000	100.0%

If we look at the data from Table 3 and Table 4, it can be concluded that today 9 times fewer containers are handled via the Port of Bar than the capacity of the immediate hinterland. Specifically, the countries bordering Montenegro transship 8.5 times more containerized goods than the Port of Bar does. If the establishment of the Bar-Belgrade-Budapest corridor were to be taken into account, the Port of Bar would have access to intermodal terminals in Budapest, where close to 400,000 TEU were transshipped in 2024, based on information from Hungarian logistics entities. Considering the Hungarian market and its neighboring markets served by the intermodal terminals in Budapest, we can estimate that the potential hinterland of the Port of Bar is approximately 700,000 TEU. It is potentially 20 times more than what was transshipped via the Port of Bar in 2024. The market capacities of Serbia and Bosnia and Herzegovina in 2024 amounted to about 255,000 TEU, of which only a little more than 24,000 TEU were transshipped via the Port of Bar, while about 168,000 TEU were transshipped via the Port of Rijeka, that is, 7 times more than via the Port of Bar [27]. Figure 5 shows the competitive advantage of the port of Bar for the markets of Serbia and Bosnia and Herzegovina compared to the North Adriatic ports, which has not been exploited due to the poor infrastructure connection between Montenegro and those two neighboring states.

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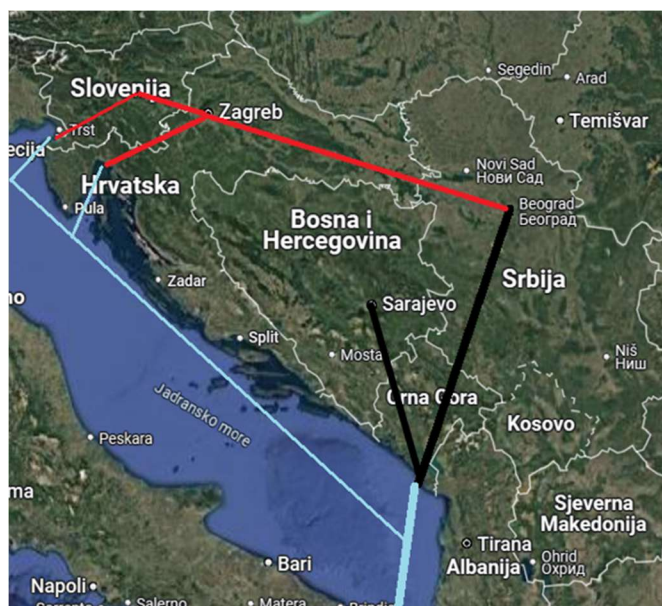


Fig. 5 - Logistics intermodal routes on the Adriatic [25].

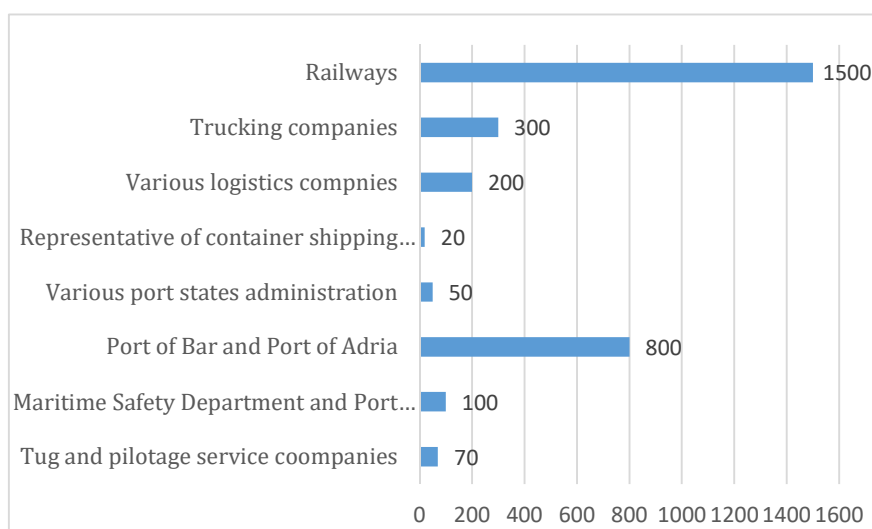


Fig. 6. - Employed citizens of Montenegro in business entities and state administration in the business of shipping goods via the Port of Bar in 2024.

There is no precise statistical data on how many people are employed in Montenegro in the business of shipping goods via the port of Bar. The research on site provides the data presented in Figure 6. This figure

represents approximately 3,000 people. That is, each employee in the port generates three additional jobs in related activities in Montenegro. There is no precise information on how much money the transit of one container via the Port of Bar brings to the Montenegrin economy, considering the different agency costs of different shipping lines, different manipulations with containers in the port, different prices for transporting different goods, the possibility that Montenegrin truckers will not be hired for the transport of cargo but truckers from the region will, and the possibility of hiring additional services such as container inspection, fumigation, different state inspection solutions, etc. However, among logistics entities in Montenegro, there is an opinion that every full container brings 1000-1500 euros to the Montenegrin economy. This belief highlights the significant impact that intermodal transport can have on Montenegrin economy. As such, enhancing the efficiency of logistics operations and ensuring competitive pricing could prove beneficial not only for container shipping lines but also for the broader economic landscape of Montenegro.

4. CONCLUSION

One of the strategic goals of the Government of Montenegro is the diversification of the Montenegrin economy. The valorization of the logistics route through the Port of Bar and the engagement of Montenegrin logistics entities represents a logistics product that Montenegro exports to the countries of the region. The formation of the Bar-Belgrade-Budapest corridor will enable the redirection of goods flows from the Western Balkans and part of Central Europe to the port of Bar and its distribution further to the Eastern and Western hemispheres. In this way, Montenegrin capital infrastructural facilities, such as the highway, railway, and Port of Bar, will be fully utilized. According to the Statistical Office of Montenegro, the transport and storage sector contributed 280 million euros to the Montenegrin economy in 2023. This is 19 times less than in Croatia. In 2024, the Port of Rijeka handled 11 times more full containers than the Port of Bar, even though $\frac{2}{3}$ of the cargo of the Port of Rijeka is located in the markets of Serbia, Bosnia and Herzegovina, and Hungary, where the Port of Bar can offer its services after the infrastructure connection. Intermodal transport contributed 20 to 30 million euros to the Montenegrin economy in 2024. The potential cargo that bypasses the logistics route via Montenegro today is 20 times greater. If it were to be redirected to the logistic direction via the Port of Bar, intermodal transport would contribute over half a billion euros annually to the Montenegrin economy. The absolute priority of the State of Montenegro in the coming period should be the formation of the Bar-Belgrade-Budapest corridor with a branch via Sarajevo. With the proposed

infrastructural connection, the Port of Bar will be more competitive not only for intermodal transport but also for overall overseas transport, which is more than 3 times larger than intermodal transport. Based on everything mentioned so far, it can be concluded that the Montenegrin logistics product could be the main driver of the Montenegrin economy in the future, even more important than tourism.

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