



CESTOVNI, ŽELJEZNIČKI I ZRAČNI PROMET

CESTOVNI PROMET

Cestovni promet Hrvatske razvijao se brže nego ostale grane prometa. Tako je uočen i brži rast voznog parka od razvitka cestovne mreže, koja je Programom gradnje i održavanja javnih cesta ipak dovedena u kvalitetnije stanje i na razinu primjerenu zahtjevima koje diktira prometna potražnja.

VOZNI PARK HRVATSKE

U Hrvatskoj imamo 1,535.280 registriranih osobnih vozila, 5099 registriranih autobusa i 170.704 registrirana teretna vozila.
(Izvor: DZS, stanje 31. prosinca 2008.)

GLAVNI KORIDORI KOJI PROLAZE KROZ RH

Republika Hrvatska jedinstvena je država u Europi po svojim prirodnim i geografskim karakteristikama. To je jedina država središnje Europe koja je i panonska i mediteranska, a ujedno spaja jugoistok Europe i Malu Aziju. Leži na dva koridora, prvi se prostire zapadnom Europom ka Crnome moru, a drugi od istočne Europe i Baltika prema Mediteranu, te bi u daljnjoj perspektivi trebala postati dio tih dviju kontinentalnih tranzitnih ruta.

Godine 1994. na Paneuropskoj konferenciji ministara prometa na Kreti definirano je devet koridora, a koridori V. A, B i C; IX. A i B i X. dodani su naknadno na trećoj Paneuropskoj konferenciji u Helsinkiju 1997. godine te su ministri zemalja kojima treba prolaziti X. koridor

ROAD, RAIL AND AIR TRANSPORT

ROAD TRANSPORT

Croatian road transport has developed more rapidly than other transport sectors. In addition, one may observe faster growth in the transport fleet than that of the road network itself. However, the road network has improved in quality since the adoption of the Public Roads Construction and Maintenance Programme, now better meeting the level adequate to the demands of transport volumes.

CROATIAN TRANSPORT FLEET

In the Republic of Croatia, there are 1,535,280 registered passenger cars, 5,099 registered buses and 170,704 registered commercial vehicles.
(Source: CBS, the state of 31 December 2008)

MAJOR CORRIDORS THROUGH THE REPUBLIC OF CROATIA

The Republic of Croatia is unique in Central Europe in terms of its natural and geographical features. That is, it is the only Central European country that spans both the Pannonian plain and the Mediterranean coast, whilst also being a link between South-eastern Europe and Asia Minor. Two corridors run through Croatia. The first leads from Western Europe to the Black Sea, and the second from Eastern Europe and the Baltic Sea to the Mediterranean. These corridors should become part of two continental transit routes in the long term. Nine corridors were identified at the ministerial Pan-

potpisali Memorandum razumijevanja u Thessalonikiju u ožujku 2001. godine, a 2004. je potpisan Memorandum razumijevanja za izgradnju V. Koridora, gdje su odvojeci B i C vrlo bitni za Hrvatsku.

Koridori koji prolaze kroz Hrvatsku:

- V. odvojak B: Rijeka – Zagreb – Budimpešta
- Odvojak C: Ploče – Sarajevo – Osijek – Budimpešta
- X.: Salzburg – Ljubljana – Zagreb – Beograd – Niš – Skopje – Veleš – Thessaloniki
- Odvojak A: Graz – Maribor – Zagreb

Za Hrvatsku je najvažniji X. koridor zbog protoka ljudi i robe te kraćeg čekanja na graničnim prijelazima (sa 70 sati na 40 sati).

Taj koridor prolazi kroz Hrvatsku na 306 km autoceste i 316,4 km željezničkih pruga, počinje s autocestom u Bregani i željezničkom prugom u Dobovi, a završava na granici sa Srbijom odnosno s autocestom u Lipovcu i željezničkom prugom u Tovarniku.

VII. koridor – Dunav također prolazi kroz Hrvatsku.

INFRASTRUKTURA I GLAVNI CESTOVNI SMJEROVI U REPUBLICI HRVATSKOJ

Ukupna dužina cesta u Republici Hrvatskoj je 29.038 km (magistralne, regionalne, lokalne), od toga 959 km autocesta i 2256 km E-cesta.

Nakon 2005. godine u Hrvatskoj će ostati za izgraditi još 370 km autocesta na sljedećim pravcima:

- Koridor V.C iz Belog Manastira preko Osijeka do granice BiH te na jugu od granice BiH do luke Ploče, dužine 107 km
- Od Splita (Dugopolje) do Ploča, dužine 96 km
- Od Rijeke do Žute Lokve, dužine 92 km
- Od Zagreba do Siska, dužina dužine 45 km

Do potpunog dovršenja mreže autocesta, predviđene Strategijom prometnog razvitka, trebat će postojeću mrežu polovine autocesta dužine 206 km proširiti na puni profil autoceste (144 km Istarski ipsilon, 55 km Rijeka - Zagreb i 7 km Zagreb - Macelj) te izgraditi preostali dio autocesta od Ploča do Dubrovnika dužine 65 km.

Gradnja autocesta ujedno je i vrlo važna strateška investicija zbog turista koji stižu u naše krajeve iz zapadne i srednje te južne i istočne Europe.

MEĐUNARODNI CESTOVNI TERETNI PROMET

Zakonom o prijevozu u cestovnom prometu (NN 178/04) Hrvatska gospodarska komora ovlaštena je za raspodjelu dozvola za međunarodni prijevoz tereta. HGK svojim zakonskim ustrojstvom zastupa i promiče interese članica, a slijedom javne ovlasti pod nadzorom Uprave za cestovni promet Ministarstva mora, prometa i infrastrukture obavlja raspodjelu dozvola. MMPI je također donio Pravilnik o raspodjeli dozvola za međunarodni prijevoz tereta koji je stupio na snagu potkraj prosinca 2005. godine (NN 118/05).

U Republici Hrvatskoj ima 2937 međunarodno licenciranih prijevoznika u 2008. godini (izvor: MMPI – 11. ožujka 2008., popis licenci) sa 10.498 vozila. Među njima je 4740 crnih vozila, a 5949 ekoloških (E1-261; E2-2383; E3-2866; E4-439).

Hrvatska gospodarska komora raspodjeljuje 57 vrsta dozvola, dok je MMPI zadržao distribuciju austrijskih,

European Transport Conference held in Crete in 1994, while the corridors V - A, B and C, IX - A and B, and X were added subsequently at the third Pan-European Conference in Helsinki in 1997. Ministers of countries through which the X corridor should run, signed a memorandum of understanding in Thessaloniki in March 2001, while a memorandum of understanding relating to the construction of corridor V was signed in 2004, where the branches B and C are highly important to Croatia.

Corridors through Croatia:

- V branch B: Rijeka – Zagreb – Budapest
- branch C: Ploče – Sarajevo – Osijek – Budapest
- X: Salzburg – Ljubljana – Zagreb – Beograd – Niš – Skopje – Veleš – Thessaloniki
- branch A: Graz – Maribor – Zagreb

Corridor X is the most important to Croatia due to the flow of people and goods and shorter waiting times at border crossings (shortened from 70 to 40 hours).

This corridor covers some 306 km of highway and 316.4 km of railways in Croatia; it begins with the motorway in Bregana and railroad in Dobova, and ends at the border with Serbia, with the Lipovac motorway section and railroad in Tovarnik.

Corridor VII – the Danube also flows through Croatia.

INFRASTRUCTURE AND MAJOR ROAD ROUTES IN CROATIA

The total length of Croatian roads is 29,038 km (main, regional, local). Of these, there are 959 km of highway and 2,256 km of E-roads.

After 2005, a further 370 km of motorways will remain for construction on following routes in Croatia:

- Corridor Vc from Beli Manastir through Osijek to the border with Bosnia and Herzegovina in the south, from the border with Bosnia and Herzegovina to Ploče port, 107 km
- From Split (Dugopolje) to Ploče, 96 km
- From Rijeka to Žuta Lokva, 92 km
- From Zagreb to Sisak, 45 km

Until total completion of the motorway network, that is foreseen by Traffic Development Strategy, the existing half motorway network that is 206 km long needs to be extended to a full motorway profile (144 km Istrian Epsilon, 55 km long Rijeka-Zagreb section and 7 km long Zagreb-Macelj section), as well as the remaining 65 km motorway from Ploče to Dubrovnik is to be constructed. Considering the number of tourists arriving in our region from Western, Central, Southern and Eastern Europe, motorway construction is also a strategically important investment.

INTERNATIONAL ROAD GOODS TRANSPORT

Under the Road Transport Act (NN [Official Gazette] 178/04), the Croatian Chamber of Economy is authorised to distribute permits for international goods transport. Under the law, the CCE is set up to represent and promote its members' interests, and, supervised by the Road Transport Department of the Ministry of the Sea, Transport and Infrastructure; it distributes transport permits under its public authority.

The Ministry has adopted new Rules for the Distribution of Permits for International Goods Transport, which

koje su proglašene kritičnim dozvolama, vremenskih francuskih (vrijede za cijelu godinu), te CEMT-dozvola. HGK je 2007. godine preuzeo od MMPI-a 190.503 dozvole za međunarodni teretni cestovni promet, među kojima je njih 141.516 izdano prijevoznicima putem Županijskih komora.

Kako bi se podigla kvaliteta djelatnosti cestovnog teretnog prometa kao važan element za ulazak na europsko tržište, potrebno je smanjiti broj crnih vozila, odrediti status novolicenciranih prijevoznika, riješiti problem dugog čekanja na graničnim prijelazima i carinskim ispostavama te nadalje uspješno surađivati s resornim institucijama, članicama i drugim gospodarskim subjektima izvan HGK.

● **CESTOVNI PRIJEVOZ PUTNIKA**

Prijevoz putnika cestom obavlja se autobusima kao linijski prijevoz ili kao slobodni prijevoz u unutrašnjem i međunarodnom prometu. U RH je 2008. godine registrirano 5012 autobusa (stanje na dan 31. ožujka 2008. godine).

U 2007. godini ukupno je prevezeno 63,144.000 putnika s ostvarenih 3808 milijuna putničkih kilometara.

(Izvor: Statistički ljetopis RH 2008., DZS).
HGK usklađuje vozne redove za županijske, međuzupanijske i međunarodne linije linijskog prijevoza putnika u cestovnom prometu.

Izvor: MMPI, HGK, DZS.

● **ŽELJEZNIČKI PROMET**

U gotovo dvjestogodišnjoj povijesti željeznice nije joj se dogodilo toliko bitnih promjena koliko u posljednjih deset godina. Te promjene nisu kao do sada ograničene na tehničko-tehnološka rješenja, nego se prvi put obuhvaća organizacijski oblik, vlasnički oblik, tržišna orijentacija, nova zakonska rješenja i sl. Nova orijentacija na tržište i konkurentne odnose te profitabilnost kao novi način poslovanja postale su nove polazne osnove poslovne politike.

U usporedbi s drugim prometnim granama, željeznica ima niz prednosti u pogledu energetske učinkovitosti, ekološke održivosti i ekonomske isplativosti. Uz to, željeznica omogućuje masovan, brz i ekonomičan prijevoz ljudi i tereta.

Zbog navedenih razloga Hrvatske željeznice, uz odličan prometni položaj, obilježava i integriranost njihove pružne mreže u europsku željezničku mrežu.

Dugoročna poslovna orijentacija Hrvatskih željeznica jest izgradnja moderne infrastrukture na prugama koje su dio V. B i C te X. paneuropskoga prometnoga koridora.

■ X. paneuropski prometni koridor zapadnu Europu spaja s Grčkom, Bugarskom i Turskom. Njegova hrvatska dionica je pruga državna granica - Savski Marof - Vinkovci - Tovarnik - državna granica. Ukupna je dužina dionice 316,4 km.

■ Ogranci V. paneuropskoga prometnoga koridora koji Italiju preko Slovenije i Mađarske spajaju s Ukrajinom: ogranak B Budimpeštu preko Koprivnice i Zagreba spaja s Rijekom. Njegova hrvatska dionica je pruga državna granica - Botovo - Zagreb - Karlovac - Rijeka. Ukupna je dužina dionice 328,7 km. Ogranak C Budimpeštu preko Osijeka - Đakova - Šamca -

became effective at the end of December 2005 (NN 118/05).

There are 2,937 carriers licensed for international transport (Source: Ministry of the Sea, Transport and Infrastructure, March 11th, 2008, list of licences) possessing a total of 10,498 vehicles. 4,740 of these are classified as "black" and 5,949 as "environmentally friendly" (E1-261; E2-2,383; E3-2,866. E4-439).

The Croatian Chamber of Economy distributes 57 types of permits, while the Ministry reserves the exclusive right to distribute Austrian permits (which are declared as critical permits), French time-limited permits (valid for a whole year) and CEMT permits.

The CCE received 190,503 permits for international goods transport from the Ministry in 2007, of which 141,516 were distributed to carriers through county chambers.

In order to raise the quality of goods transport, which is essential for entering the European market, it is necessary to reduce the number of "black" vehicles, determine the status of newly licensed carriers, tackle long waiting times at border crossings and customs offices, and further successfully co-operate with competent institutions, members and other economic players outside the CCE.

● **ROAD PASSENGER TRANSPORT**

Buses perform the transport of passengers by road, either as scheduled or chartered transport, domestically and internationally. In the Republic of Croatia in 2008, 5,012 buses were registered (data on March 31 2008). A total of 63,114 passengers were transported with over 3,808 mil. passenger kilometers travelled (Source: Annual Statistics of Republic of Croatia for 2008, CBS). The CCE co-ordinates timetables for scheduled county, intercounty and international services in scheduled road passenger transport.

Source: MSTI, CCE, CBS

● **RAIL TRANSPORT**

In almost 200 years since their introduction, railways have never experienced so many significant changes as has been the case during the last ten years. Unlike previously, these changes are now not limited to technical and technological solutions. For the first time they also affect organisational arrangements, ownership structure, market orientation, new legislative solutions and similar aspects. New market and competition orientation and profitability as additional operating parameters have become the new basis for operational policy.

Compared with other transport sectors, rail transport shows a wide range of advantages in terms of energy efficiency, environmental sustainability and cost efficiency. In addition, rail allows fast and economical mass transport of people and goods.

For the above-mentioned reasons, together with excellent positioning within the traffic network, Croatian Railways' network is also characterised through integration in European railway network.

Croatian Railways' long-term business projections envisage the construction of modern infrastructure on sections, which belong to the V, B and C and X Pan-European transport corridors.

Sarajeva i Mostara spaja s lukom Ploče. Njegove su hrvatske dionice pruga državna granica - Beli Manastir - Osijek - Slavonski Šamac - državna granica (sjeverni krak ogranka C V. koridora) i pruga državna granica - Metković - Ploče (južni krak ogranka C V. koridora). Ukupna je dužina tih dionica 129,6 km.

Zbog svega toga HŽ je napravio projekt modernizacije za razdoblje od 2003. do 2007. godine. Ugovorima s kanadsko-njemačkom tvrtkom Bombardier Transportation i s bankom Westdeutsche Landes Bank potpisanim 22. srpnja 2003. godine.

Tako su Hrvatske željeznice kupile osam novih nagibnih vlakova koji voze na relacijama od Zagreba prema Splitu, Rijeci, Osijeku, Čakovcu i Požegi.

Tijekom 2007. godine na temelju Zakona o željeznici i Zakona o podjeli trgovačkog društva HŽ – Hrvatske željeznice osnovano je pet zasebnih pravnih subjekata, to su HŽ-Infrastruktura d.o.o., HŽ-Putnički prijevoz d.o.o., HŽ-Cargo d.o.o, HŽ-Vuča vlakova d.o.o. te HŽ-Holding d.o.o. Na dan 31. prosinca 2007. godine u HŽ-Hrvatskim željeznicama bilo je zaposleno 13.053 radnika, ukupni je konsolidirani prihod iznosio 3,711 milijardi kuna te je ostvarena dobit od 25,9 milijuna kuna. Tijekom godine HŽ je investirao 1,213 milijardi kuna.

Luka Rijeka, kao i ostale naše luke, trebala bi više iskoristiti svoj izvrstan zemljopisni položaj i odlične preduvjete za prekrcaj svih vrsta tereta (generalnih, rasutih, kontejnerskih, ro-ro, tekućih, žive stoke i dr.) jer se predviđa porast pomorskoga prometa, osobito na sjevernojadranskom pomorskom pravcu, i to ponajprije zbog prekapacitiranosti sjevernoeuropskih luka. Udio kombiniranog prijevoza u ukupnom je prijevozu robe vrlo mali. Kako je ta grana prometa jedan od najsuvremenijih oblika, primjeren i zaštititi okoliša, potrebno ju je (uz državne poticaje) unaprijediti što prije radi uključivanja u europske pravce.

Također, RH treba iskoristiti svoj geoprometni položaj i u zračnom prometu jer se kao jedna od zemalja Mediterana nalazi na križanju zračnih putova za južnu, istočnu i srednju Europu. U RH sedam je zračnih luka, Zagreb, Split, Dubrovnik, Zadar, Rijeka, Pula i Osijek, namijenjenih međunarodnom prometu te tri zračna pristaništa, Brač, Lošinj i Vrsar, za prihvata i otpremu manjih zrakoplova komercijalne namjene.

INFRASTRUKTURA (STANJE u prosincu 2007.)

Ceste: Ukupno 29.038 km (državne, županijske, lokalne), od toga 959 km autocesta, i 2256 km E-cesta
 Željeznica: 2722,41 km pruga, od čega 980 elektrificirano

Cjevovodi: 610 km naftovoda, 2037 km plinovoda
 Ukupno registriranih motornih vozila: 1.949.936, od čega 5043 autobusa, 165.742 teretna vozila i 10.961 kombinirano vozilo

STRUKTURA PRIJEVOZA PUTNIKA PREMA VRSTAMA PRIJEVOZA U 2007. GODINI

- u cestovnom prijevozu 44,7%
- u željezničkom prijevozu 44,7%
- u zračnom prijevozu 1,6%
- u pomorskom i riječnom prijevozu 9%

■ X Pan-European transport corridor which connects Western Europe with Greece, Bulgaria and Turkey. Its Croatian section is state border with Slovenia - Savski Marof - Vinkovci - Tovarnik – state border with Serbia. The total length of this section is 316.4 km.

■ Branches of V Pan-European transport corridor which connects Italy with Ukraine through Slovenia and Hungary are:

B-branch which connects Budapest with Rijeka via Koprivnica and Zagreb. Its Croatian section is from the state with Hungary - Botovo - Zagreb - Karlovac - Rijeka. The total length of the section is 328.7 km.

C-branch which connects Budapest and the Ploče Port via Osijek, Đakovo, Šamac, Sarajevo and Mostar. Its Croatian sections are from the border with Hungary - Beli Manastir - Osijek - Slavonski Šamac – border with Bosnia and Herzegovina (north extension of C-branch within V corridor) and border with Bosnia and Herzegovina - Metković - Ploče (southern extension of C-branch within V corridor). Total length of these sections is 129.6 km.

With all this in mind, Croatian Railways have developed a project for the modernisation of Croatian Railways for the period 2003 – 2007.

By concluding contracts with Bombardier Transportation, a Canadian-German company, and Westdeutsche Landesbank, signed on July 22, 2003, Croatian Railways purchased eight new tilting trains, from Zagreb to Split, Rijeka, Osijek, Čakovec and Požega.

During 2007, according to the Act on Railways and the Act on Division of the Company HŽ - Croatian Railways Ltd., there were established five separate legal entities; the HŽ-Infrastructure Ltd., the HŽ-Passenger Transport Ltd., the HŽ-Cargo Ltd., the HŽ- Trains traction Ltd. and HŽ-Holding Ltd. On 31 December 2007 in HŽ-Croatian Railways there were 13,053 workers employed, the total consolidated revenue amounted to HRK 3.711 billion, and the realized profit was HRK 25.9 million. During the year HŽ has invested HRK 1.213 billion.

Port of Rijeka, as well as our other ports, should more use the excellent geographical position and excellent prerequisites for the transshipment of all cargo types (general, bulk, container, ro-ro, liquid, live cattle, etc.) because the maritime transport increase is anticipated, particularly in the North-Adriatic sea direction, namely primarily because of the over-capacitance of North-European ports.

Share of combined transport in the total goods transport is very small. As this transport sector is one of the most modern forms, and appropriate for environmental protection as well, it is necessary to improve it (by government incentives) as soon as possible for inclusion in the European routes.

Likewise, the Republic of Croatia should use its geo-traffic position in air transport, because as one of the Mediterranean countries it is located at the intersection of air routes for the southern, eastern and central Europe. There are seven airports in Croatia – Zagreb, Split, Dubrovnik, Zadar, Rijeka, Pula and Osijek – intended for international traffic and three air-ports – Brač, Lošinj and Vrsar – for the reception and shipping of small aircrafts of commercial purposes.

STRUKTURA PRIJEVOZA ROBE PREMA VRSTAMA PRIJEVOZA U 2007. GODINI

- u cestovnom prijevozu 53,4%
 - u pomorskom i obalnom prijevozu 25,9%
 - u željezničkom prijevozu 12,6%
 - u cjevovodnom transportu 7,7%
 - prijevoz unutrašnjim vodenim putovima 0,3%
- Udio prometnih djelatnosti u BDP-u iznosi 8,3 posto, a u ukupnom broju zaposlenih oko 7,3 posto. (DZS, 2005.)
Izvor: Hrvatske željeznice

ZRAČNI PROMET

U Republici Hrvatskoj sedam je zračnih luka - Zagreb, Split, Dubrovnik, Zadar, Rijeka, Pula i Osijek - namijenjenih međunarodnom prometu. U njima 55 posto vlasništva ima država, a ostatak vlasništva raspodijeljen je između regionalnih i lokalnih samouprava. Tu su i tri zračna pristaništa, Brač, Lošinj i Vrsar, za prihvat i otpremu manjih zrakoplova komercijalne namjene. U odnosu na ukupni broj zračnih luka u svijetu, oko 1200, to je velik postotak odnosno u Hrvatskoj je 0,8 posto svih svjetskih aerodroma. Kroz hrvatske zračne luke godišnje prođe oko pet milijuna putnika, a u svijetu u međunarodnom prometu godišnje putuje oko četiri milijarde ljudi.

Putnički promet u zračnim lukama Republike Hrvatske malo je ispod razine na kojoj je bio prije rata, kada je njima prolazilo i do 5,5 milijuna putnika godišnje. Prošlogodišnjih 5,2 milijuna putnika bit će premašeno do 2010. godine, kada se očekuje 5,7 milijuna putnika. Stoga bi se Hrvatska trebala okrenuti razvijanju turizma jer je od ukupnog broja putnika prije rata bilo 21 posto turista, a do prije dvije godine svega šest posto. Zračna luka Osijek vrlo je problematična i njeno poslovanje ne donosi korist. Zbog neisplativosti zatvaranja i opet vrlo skupog ulaganja u infrastrukturu, opremu i samu gradnju, izlaz bi mogao biti u "low cost carrierima" ili u sadržajima kao što je primjerice škola za Lufthansine pilote u Zračnoj luci Zadar.

Dakako, da bi se udovoljilo zahtjevima povećanog broja putnika i olakšao protok robe, potrebno je proširiti, opremiti i modernizirati postojeće objekte zračnih luka te povećati flotu nacionalne kompanije Croatia Airlinesa prema potrebama prometa. Također je vrlo bitno podupirati osnivanje manjih zrakoplovnih tvrtki radi boljšeg međuregionalnoga i otočnog povezivanja s priobaljem te većim zračnim lukama. Planira se zamjena flote kratkog doleta (ATR) Croatia Airlinesa radi preuzimanja uloge regionalnog lidera, povećanje broja letova na jugoistok Europe te profitabilnijeg poslovanja u zimskom razdoblju. Tako će Croatia Airlines uz četiri A-319 i četiri A-320 u svojoj floti do 2012. godine imati i četiri kanadska turboprop zrakoplova Bombardier Dash 8-Q400.

Sve to, naravno, nije nemoguće jer je Hrvatska mediteranska zemlja na zavidnom geoprometnom položaju, križanju zračnih putova za južnu, istočnu i srednju Europu, što može i treba iskoristiti. U tablici 1 prikazan je broj putnika za 2008. godinu te je promet uspoređen s rezultatima poslovanja 2007. godine i prijeratnih godina odnosno osnutka samostalne i neovisne Republike Hrvatske. Analiza obuhvaća cjelokupnu mrežu zračnog prometa na području RH odnosno sve veće zračne luke namijenjene prihvatu

INFRASTRUCTURE (state in December 2007)

Roads: total of 29,038 km (state, county, local), including 959 km of highways and 2,256 km of E-Road:
Railway 2,722.41 km of rail, of which 980 km is electrified
Pipelines: 610 km of oil pipelines, 2037 km of gas pipelines
Total of registered motor vehicles: 1,949.936, of which 5043 are buses, 165,742 commercial vehicles and 10,961 combined vehicles

STRUCTURE OF PASSENGER TRANSPORT ACCORDING TO TYPE OF TRANSFER IN 2007

- in road transport 44.7%
- in railway transport 44.7%
- in air transport 1.6%
- in maritime and river transport of 9%

STRUCTURE OF GOODS TRANSPORT ACCORDING TO TYPE OF TRANSFER IN 2007

- in road transport 53.4%
- in maritime and coastal transport of 25.9%
- in railway transport 12.6%
- in pipelines 7.7%
- transport by inland waterways 0.3%

Share of transport activities in GDP amounts to 8.3%, while in total number of employees it amounts around 7.3 %.(CBS, 2005).

Source: Croatian Railways

AIR TRANSPORT

There are seven airports in the Republic of Croatia international - Zagreb, Split, Dubrovnik, Zadar, Rijeka, Pula and Osijek. A 55% stake in each is held by the state, and the rest is divided between respective regional and local government. There are also three landing facilities - Brač, Lošinj and Vrsar - for the arrival and dispatch of smaller commercial aircraft. Compared with the total number of airports globally - around 1,200, this is a large share, accounting for 0.8% of all world airports. Croatian airports register some 5 million passengers annually, while the total number of international travellers globally is 4 billion people. Passenger transport in Croatian airports lags slightly below pre-war figures, when airports recorded up to 5.5 million passengers per year. The number of 5.2 million passengers in the last year will be exceeded in 2010, when forecasts expect 5.7 million. Croatia should therefore focus on the development of tourism, as tourists accounted for 21% of passengers before the war, whereas two years ago it was only 6%.

Osijek Airport remains problematic, as it is not profitable. Shutting down and later reopening would incur very high costs of investment in infrastructure, equipment and construction. One option could be low-cost carriers, or activities such as Lufthansa's Pilot School at Zadar Airport. Naturally, in order to meet the requirements resulting from the growing number of passengers and to facilitate the flow of goods, it is necessary to equip, expand and modernise the existing facilities and to expand the national carriers' (Croatia Airlines') fleet to meet transport needs. It is also very important to encourage

Tablica 1. / Table 1.

	Zračna luka / Airport									
	Zagreb	Split	Dubrovnik	Rijeka	Osijek	Brač	Zadar	Lošinj	Pula	Ukupno / Total
Br. Pax. u 2007. No pax in 2007	1,992.455	1,184.148	1,143.168	162.740	2.777	14.131	119.232	10.030	377.341	5,006.022
Br. Pax. u 2008. No pax in 2008	2,192.453	1,197.508	1,191.474	111.864	14.682	14.629	155.027	8.918	396.092	5,282.647
Promjene u odnosu na 2007.god. Change on 2007	10%	1,1%	4,2%	-31,3%	428,7%	3,5%	30%	-11,1%	5%	5,5%
Max.br.pax.prije Domovinskog rata Max no pax before Homeland war	1,917.000	1,150.000	1,460.354	121.134	40.530	~	160.000	11.950	646.573	5,507.541
Pad prometa 2008. u odnosu na prijeratne god. 2008 decrease compared to pre-war years	14,4%	4,13%	-18,4%	-7,7%	-63,8%	~	-3,1%	-25,4%	-38,7%	-4,1%

Izvor: MMPI i Zračne luke RH / Source: MSTI, Statistics services of Croatian airports

i otpremi putnika, prtljage i tereta u domaćem i međunarodnom zračnom prometu.

Uz to, u toj je tablici navedena segmentacija i analiza postojećega tržišnog potencijala prijevoza putnika. Broj prevezenih putnika 2008. godine u Zračnoj luci Zagreb veći je 14,4 posto (2.192,453) u odnosu na stanje prije rata. Primjerice 1979. godine prevezeno je 1,917.000 putnika.

Plan poslovanja za 2008. godinu bio je usmjeren ostvarivanju visokih tržišnih zahtjeva zadržavanjem svih postojećih odredišta redovitog prometa uz povećanje udjela na tržištu te zadovoljavanje pojačane turističke potražnje na tržištima Velike Britanije, Njemačke, Francuske i Italije. Tako je 2008. godine prevezeno 1,868.869 putnika, a 2007. je prevezen 1,714.891 putnik, što je 9 posto više u odnosu na 2007. Istodobno su prevezene 4394 tone tereta, što je 4,9 posto manje

the establishment of smaller air companies in order to create better interregional links and those between islands the coast and larger airports.

The national carrier, Croatia Airlines, plans to replace its short range airliners (ATR) in order to assume the position of leading regional carrier by increasing the number of flights to south-east Europe and to achieve a steady turnover in the winter months. Croatia Airlines also plans to significantly enlarge its fleet capacity until 2012 and to add four Canadian turboprop Bombardier Dash 8-Q400s to its fleet of four A-319s, four A-320s, three ATRs and three ATR-42s.

Indeed, none of this is impossible to achieve, because Croatia is a Mediterranean country with an enviable geographic position at the intersection of air routes to Southern, Eastern and Central Europe - something that can and must be used to Croatia's advantage.

Tablica 2. / Table 2

Godina Year	2007.	2008.
Br. putnika No of pax	1,714.891	1,868.869
Roba i pošta Freight and mail	4.608	4.394
Br. uzlijetanja Departures	24.349	26.013
Pax.faktor popunjenosti Factor (PLF) Rate	64,9%	65,2%
Ostvareni pax. km Pax km Flown	1,302.806	1,371.653
Ostvareni tonski km Tonne km Flown	120,163 mln	126,360 mln
Nalet (km) Kilometers Flown	15.722	16.465

Izvor: Croatia Airlines / Source: Croatia Airlines

u odnosu na 2007. godinu, a popunjenost putničke kabine povećana je 0,3 posto (tablica 2.). U pravilu su ostvareni pozitivni rezultati, no zbog poslovanja u uvjetima gospodarske nestabilnosti i recesijskih tendencija domaćeg i međunarodnoga gospodarstva te učinaka svjetske zrakoplovne krize, tvrtka se suočila sa smanjivanjem planiranih prihoda odnosno dodatnim uvećanjem troškova osiguranja, sigurnosti, cijene goriva, aerodromskih usluga i kašnjenja zrakoplova zbog mjera povećane sigurnosti.

ZAKONSKA REGULATIVA

- Zakon o zračnom prometu (NN br. 132/98)
- Zakon o izmjenama i dopunama Zakona o zračnom prometu (NN 178/04, 46/07)
- Zakon o zračnim lukama (NN br. 19/98)
- Zakon o obveznim i stvarnopravnim odnosima u zračnom prometu (NN br. 132/98)
- Zakon o osnutku Hrvatske kontrole zračne plovidbe (NN br. 19/98)

Table 1 shows the number of the passengers in 2008, with comparisons made with 2007 and the pre-war operating performance and to the performance during the first years of Croatia's independence. The analysis covers the whole air transport network of the Republic of Croatia, that is, all major airports receiving and dispatching passengers, luggage and goods in both domestic and international air traffic.

In addition, the table also gives a breakdown and analysis of the current market potential in passenger transport. The number of transported passengers in 2008 at Zagreb Airport was 14.4% (2,192.453) higher with regard to the pre-war figures. For example, a total of 1,917,000 passengers were transported in 1979. The business plan for 2008 was focused on meeting all high market demands by keeping all regular flights, increasing market share and satisfying increased tourist demand in the British, German, French and Italian markets.

In 2008 the actual number of passengers was 1,868,869 while in 2007 the number of passengers was 1,714,891, that is 9% more than in 2007. At the same time, 4,394 tonnes of goods are transported, which is 4.9% less compared with 2007, while the cabin occupancy rate increased by 0.3% (Table 2.). Generally, performance achieved was positive. However, due to economic instability, domestic and international economy recession tendencies and the global crisis in air traffic, the company faced a planned revenue decrease i.e. expectations, additional cost increase in insurance, safety, fuel and airport service, and also delays caused by increased safety measures.

LEGISLATION

- Air Traffic Act (NN 132/98)
- Act on Amendments to the Air Traffic Act (NN 178/04, 46/07)
- Airports Act (NN 19/98)
- Act on Obligations and Legal Relations in Air Transport (NN 132/98)
- Act on Establishment of Croatian Air Navigation Control (NN 19/98)





HRVATSKA GOSPODARSKA KOMORA
SEKTOR ZA PROMET I VEZE

Direktor:

Ljubica Herceg, dipl. oec.

Osobe za kontakt:

Pavao Zuanović, dipl. ing.

Saša Subotić, dipl. ing.

Štefanija Lukić, dipl.ing.

Rooseveltov trg 2

HR-10000 ZAGREB

Tel.: +385 (0)1 4561-510, 4561-511

Fax: +385 (0)1 4561-540

E-mail: promet@hgk.hr

CROATIAN CHAMBER OF ECONOMY
TRANSPORT AND COMMUNICATIONS DEPARTMENT

Managing Director:

Ljubica Herceg, B.Sc.Oec.

Contact Persons:

Pavao Zuanović, B. Sc. Mech.

Saša Subotić, B. Sc. Mech.

Štefanija Lukić, B. Sc. Mech.

Rooseveltov trg 2

HR-10000 ZAGREB, CROATIA

Tel.: +385 (0)1 4561-510, 4561-511

Fax: +385 (0)1 4561-540

E-mail: promet@hgk.hr

HRVATSKA GOSPODARSKA KOMORA
SREDIŠNJICA

Rooseveltov trg 2

HR-10000 ZAGREB

p.p. 630

Tel.: +385 (0)1 4561-555

Fax: +385 (0)1 4828-380

E-mail: hgk@hgk.hr

www.hgk.hr

CROATIAN CHAMBER OF ECONOMY
HEADQUARTERS

Rooseveltov trg 2

HR-10000 ZAGREB, CROATIA

p.p. 630

Tel.: +385 (0)1 4561-555

Fax: +385 (0)1 4828-380

E-mail: hgk@hgk.hr

www.hgk.hr