



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 1,532.549 registriranih osobnih vozila, 5071 registriranih autobusa i 164.761 registrirana teretna vozila.
(Izvor: DZS, stanje 31. prosinca 2009.)

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 1,532,549 registered passenger cars, 5,071 registered buses and 164,761 registered commercial vehicles.
(Source: CBS, the state of 31 December 2009)

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 29.472,5 km (magistralne, regionalne, lokalne), od toga 1523 km autocesta i 2256 km E-cesta.

Do potpunog dovršenja mreže autocesta, predviđene Strategijom prometnog razvitka, trebat će postojeću mrežu polovine autocesta dužine 144 km proširiti na puni profil autoceste (144 km Istarski ipsilon, te izgraditi preostali dio autocesta od Ploča do Dubrovnika dužine 65 km i dovršiti koridor VC od Belog Manastira preko Osijeka do granice s BiH, te završiti dionicu od Zagreba do Siska.

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 2710 međunarodno licenciranih prijevoznika u 2009. godini (izvor: MMPI – 28. kolovoza 2009., popis licenci) sa 11.381 vozila. Među njima je 4630 crnih vozila, a 6751 ekoloških (E1-181; E2-1961; E3-3212; E4-281; E5-1116).

Hrvatska gospodarska komora raspodjeljuje 57 vrsta dozvola, dok je MMPI zadržao distribuciju austrijskih, koje su proglašene kritičnim dozvolama, vremenskih francuskih (vrijede za cijelu godinu), te CEMT-dozvola. HGK je 2009. godine preuzeo od MMPI-a 165.124 dozvole za međunarodni teretni cestovni promet, među kojima je njih 123.639 izdano prijevoznicima putem Županijskih komora.

Kako bi se podigla kvaliteta djelatnosti cestovnog

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 29,472.5 km (main, regional, local). Of these, there are 1,523 km of highway and 2,256 km of E-roads.

Until total completion of the motorway network, that is foreseen by Traffic Development Strategy, the existing half motorway network that is 144 km long needs to be extended to a full motorway profile (144 km Istrian Epsilon), as well as the remaining 65 km motorway from Ploče to Dubrovnik is to be constructed, and the VC corridor from Beli Manastir through Osijek to the BGH border is to be finished as well as the section from Zagreb to Sisak.

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

There are 2,700 carriers licensed for international transport (Source: Ministry of the Sea, Transport and Infrastructure, August 28th, 2009, list of licences) possessing a total of 11,381 vehicles. 4,630 of these are classified as "black" and 6,751 as "environmentally

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 2009. godine registrirano 5071 autobusa .

U 2009. godini ukupno je prevezeno 58.493.000 putnika s ostvarenih 3498 milijuna putničkih kilometara. (Izvor: DZS, stanje 12. veljače 2010.).

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 -

friendly" (E1-181; E2-1961; E3-3212. E4-281, E5-1116). 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 165,124 permits for international goods transport from the Ministry in 2009, of which 123,639 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 2009, 5,071 buses were registered. A total of 58,493,000 passengers were transported with over 3.498 mil. passenger kilometres 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: CBS, data on 12 February 2010

● 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.

■ 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.

Karlovac - Rijeka. Ukupna je dužina dionice 328,7 km. Ogranak C Budimpeštu preko Osijeka - Đakova - Šamca - 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 2009. godine u HŽ-Hrvatskim željeznicama sa ovisnim društvima bilo je zaposleno 18 445 radnika, ukupni je konsolidirani prihod iznosio 3,452 milijarde kuna a gubitak u odnosu na 2008 godinu smanjen je sa 61,7 milijuna kuna na 18,9 milijuna kuna. U prijevozu putnika prevezeno je 3,8% putnika više nego 2008. godine dok je kod prijevoza tereta zbog krize zabilježen pad od 19,8%.

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 najsvremenijih oblika, primjeren i zaštitni 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 prihvat i otpremu manjih zrakoplova komercijalne namjene.

INFRASTRUKTURA (STANJE u prosincu 2009.)

Ceste: Ukupno 29.472,5 km (državne, županijske, lokalne), od toga 1523 km autocesta, i 2256 km E-cesta
 Željeznica: 2.976,276 km pruga, od čega 980 elektrificirano (31.12.2009. -Izvor HŽ-infrastruktura).
 Cjevovodi: 610 km naftovoda, 2085 km plinovoda
 Ukupno registriranih motornih vozila: 1.532.549, od čega 5071 autobusa, 164.761 teretna vozila.

STRUKTURA PRIJEVOZA PUTNIKA PREMA VRSTAMA PRIJEVOZA U 2009. GODINI

- u cestovnom prijevozu 40%
- u željezničkom prijevozu 50%

■ 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 2009 in HŽ-Croatian Railways there were 18,445 workers employed, the total consolidated revenue amounted to HRK 3.452 billion, and the loss achieved in relation to 2008 decreased from HRK61.7 million to HRK18.9 million. There was 3.8% more of transported passengers compared with 2008, whilst the transport of load registered a fall of 19.8% due to the crisis.

Port of Rijeka, as well as our other ports, should more use the excellent geographical position and excellent prerequisites for the transhipment 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.

INFRASTRUCTURE (state in December 2009)

Roads: total of 29,472.5 km (state, county, local), including 1,523 km of highways and 2,256 km of E-Road:

- u zračnom prijevozu 1%
- u pomorskom i riječnom prijevozu 9%

STRUKTURA PRIJEVOZA ROBE PREMA VRSTAMA PRIJEVOZA U 2009. GODINI

- u cestovnom prijevozu 64%
- u pomorskom i obalnom prijevozu 21,5%
- u željezničkom prijevozu 8%
- u cjevovodnom transportu 6,3%
- prijevoz unutrašnjim vodenim putovima 0,2%

Udio prometnih djelatnosti u BDP-u iznosi 7,2 posto, a u ukupnom broju zaposlenih oko 5,5 posto. (DZS, prosinac 2009.)

Izvor: Hrvatske željeznice

Railway 2,976.276 km of rail, of which 980 km is electrified (December 31, 2009, Source HŽ-Infrastructure)

Pipelines: 610 km of oil pipelines, 2085 km of gas pipelines

Total of registered motor vehicles: 1,532.549, of which 5071 are buses, 164,761 commercial vehicles.

STRUCTURE OF PASSENGER TRANSPORT ACCORDING TO TYPE OF TRANSFER IN 2009

- in road transport 40%
- in railway transport 50%
- in air transport 1%
- in maritime and river transport of 9%

STRUCTURE OF GOODS TRANSPORT ACCORDING TO TYPE OF TRANSFER IN 2009

- in road transport 64%
- in maritime and coastal transport of 21.5%
- in railway transport 8%
- in pipelines 6.3%
- transport by inland waterways 0.2%

Share of transport activities in GDP amounts to 7.2%, while in total number of employees it amounts around 5.5 %.(CBS, December 2009).

Source: Croatian Railways

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 prihvata i otpremu manjih zrakoplova komercijalne namjene. Kroz hrvatske zračne luke godišnje prođe oko 5 milijuna putnika, a u svijetu u međunarodnom prometu godišnje putuje oko pet milijardi ljudi.

Putnički promet na 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 gotovo 5 milijuna putnika pokazalo je kako je ekonomska globalna kriza zahvatila i Hrvatsku te je zabilježen manji broj putnika u odnosu na 2008. godinu (-5,6%) iako se predviđalo da bi u 2010. godini promet putnika mogao biti premašen u odnosu na prijeratne godine.

Iako Zračna luka Osijek bilježi porast broja putnika u 2009. godini (39%), i dalje njeno poslovanje ne donosi korist. Zbog neisplativosti zatvaranja i opet vrlo skupog ulaganja u infrastrukturu, opremu i samu gradnju, izlaz bi mogao biti u dovođenju još više "low cost carrier" 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

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 5 billion people. Passenger transport in Croatian airports lags slightly below pre-war figures, when airports recorded up to 5.5 million passengers per year. Almost 5 million passengers last year showed that the economic global crisis affected Croatia, registering thus a smaller number of passengers in relation to 2008 (-5.6%), although the it had been estimated that the traffic in 2010 might be surpassed compared with the pre-war years.

Although the Osijek Airport registered an increase in the number of passengers in 2009 (39%), its business still fails to bring profit. Due to lack of cost-effectiveness and another highly expensive investment in the infrastructure, equipment and construction, the solution might be in introducing more 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

Tablica 1. / Table 1.

	Zračna luka / Airport									
	Zagreb	Split	Dubrovnik	Rijeka	Osijek	Brač	Zadar	Lošinj	Pula	Ukupno / Total
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
Br. Pax. u 2009. No pax in 2009	2,062.242	1,109.000	1,122.355	113.567	20.438	13.048	215.176	10.103	318.330	4,984.259
Promjene u odnosu na 2008. god. Change on 2008	-5,9%	-7,4%	-5,8%	1,5%	39,2%	-10,8%	38,8%	13,3%	-19,6%	-5,6%
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/rast prometa 2009. u odnosu na prijeratne god. 2009 decrease compared to pre-war years	7,6%	-3,6%	-23%	-6,2%	-49,6%	-	34,5%	-15,5%	-50,8%	-9,5%

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

Airlinesa prema potrebama prometa. Također je vrlo bitno podupirati osnivanje manjih zrakoplovnih tvrtki radi boljšega međuregionalnoga i otočnog povezivanja s priobaljem te većim zračnim lukama.

Kako bi preuzela ulogu regionalnog lidera, povećala broj letova na jugoistok Europe te profitabilnije poslovala u zimskom razdoblju, Croatia Airlines u floti ima četiri A-319, tri A-320 te šest kanadska turboprop zrakoplova Bombardier Dash 8-Q400.

Isto tako Hrvatska je mediteranska zemlja na zavidnom geoprometnom položaju, križanju zračnih putova za južnu, istočnu i srednju Europu, što može i treba iskoristiti te se isto tako treba još više orijentirati na turizam koji će donijeti i porast broja putnika u zračnom prometu.

U tablici 1. prikazan je broj putnika za 2009. godinu te je promet uspoređen s rezultatima poslovanja 2008. godine i prijeratnih godina odnosno osnutka samostalne i neovisne Republike Hrvatske. Analiza obuhvaća

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

In order to take over the role of the regional leader, increase the number of flights to the South East of Europe and have more profit during the winter period, the fleet of Croatia Airlines consists of four A-319 and six Canadian turboprop aircrafts Bombardier Dash 8-Q400.

Moreover, Croatia is a Mediterranean country with a enviable geo-traffic position, crossing of air routes heading to south, east and central Europe, which it can and should take advantage of, as well as orientate more towards tourism which will increase the number of passengers in air traffic.

Tablica 2. / Table 2

Godina Year	2008.	2009.
Br. putnika No of pax	1.868.869	1.750.874
Roba i pošta Freight and mail	4.394	3.672
Br. uzlijetanja Departures	26.013	25.383
Pax.faktor popunjenosti Factor (PLF) Rate	65,2	61,4
Ostvareni pax. km Pax km Flown	1.371.653	1.244.755
Ostvareni tonski km Tonne km Flown	126.360 mln	114.619 mln
Nalet (km) Kilometers Flown	16.465	15.771

Izvor: Croatia Airlines / Source: Croatia Airlines

cjelokupnu mrežu zračnog prometa na području RH odnosno sve veće zračne luke namijenjene prihvatiti i otpremiti 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 je prevezenih putnika 2009. godine na Zračnoj luci Zagreb 7,6 posto veći (2,062.242) u odnosu na stanje prije rata. Primjerice 1979. godine prevezeno je 1,917.000 putnika.

Plan poslovanja Croatia Airlinesa za 2009. godinu bio je usmjeren ostvarivanju boljih tržišnih zahtjeva zadržavanjem svih postojećih odredišta redovitog prometa uz povećanje udjela na tržištu te zadovoljavanje pojačane turističke potražnje na tržištima Velike Britanije, Njemačke, Nizozemske i Francuske. U ljetnom redu letenja novost su izravni letovi iz hrvatskih odredišta u Barcelonu (triput tjedno) i Göteborg (dvaput tjedno) od lipnja te su uvedeni dodatni letovi na pojedinim linijama (iz Zagreba u Kopenhagen), kao i pojačavanje broja tjednih frekvencija (iz Zagreba u Prištinu). Novost su i izravni letovi iz Pule u Pariz (dvaput tjedno).

Tako su 2009. godine prevezena 1,750.874 putnika, a 2008. je prevezeno 1,868.869 putnika, što je šest posto manje u odnosu na 2008. godinu. Istodobno su prevezene 3672 tone tereta, što je 17 posto manje u odnosu na 2008. godinu, a popunjenost putničke kabine je 3,8 posto manja (tablica 2.). Ovi pokazatelji govore kako globalna kriza, problemi i teško stanje zrakoplovne industrije utječu i na poslovanje Croatia Airlinesa te se među najrizičnije čimbenike poslovanja kompanije ubrajaju očekivana kretanja na prodajnom tržištu koje je u recesiji, kretanja na tržištima goriva i kretanje kamatnih stopa.

ZAKONSKA REGULATIVA

- Zakon o zračnom prometu (NN br. 69/09)
- Zakon o zračnim lukama (NN br. 19/98)
- Zakon o obveznim i stvarnopravnim odnosima u zračnom prometu (NN br. 132/98, 63/08, 134/09)
- Zakon o osnutku Hrvatske kontrole zračne plovidbe (NN br. 19/98)

Table 1 shows the number of the passengers in 2009, with comparisons made with 2008 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 2009 at Zagreb Airport was 7.6% (2,062.242) higher with regard to the pre-war figures. For example, a total of 1,917,000 passengers were transported in 1979.

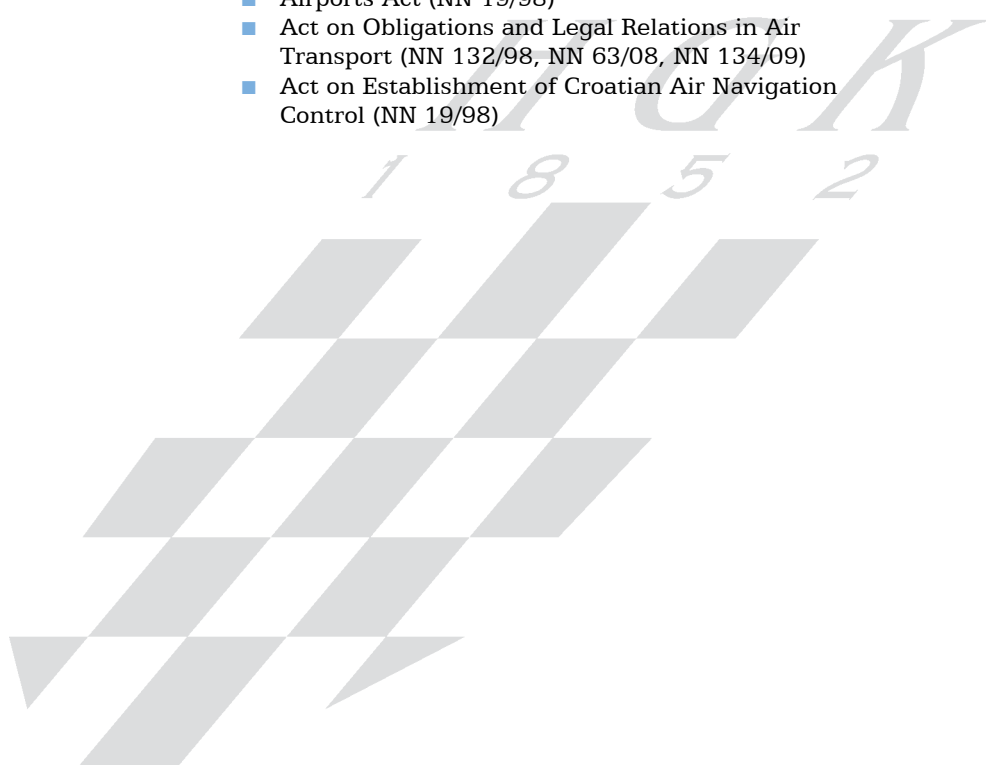
The business plan of Croatia Airlines for 2009 was focused on meeting all high market demands by keeping all regular flights, increasing market share and satisfying increased tourist demand on the British, German, Dutch and French markets.

The summer flight schedule introduced new direct flights from Croatia to Barcelona (three times a week) and Göteborg (two times a week) starting from June. They also introduced additional flights (from Zagreb to Copenhagen, as well as increased the number of weekly flights (from Zagreb to Priština). Direct flights from Pula to Paris (two times a week) are also new.

In 2009 the actual number of passengers was 1,750,847 while in 2008 the number of passengers was 1,868,869, that is 6% more than in 2008. At the same time, 3,672 tonnes of goods are transported, which is 17% less compared with 2008, while the cabin occupancy rate decreased by 3.8% (Table 2.). This indicators show that the global crisis, problems and difficult conditions of the airway industry affect the business of Croatia Airlines, and one of the riskiest business factors of the company includes unexpected movements on the sale market, affected by the recession, movements on the petrol market and movements of interest rates.

LEGISLATION

- Air Traffic Act (NN 69/09)
- Airports Act (NN 19/98)
- Act on Obligations and Legal Relations in Air Transport (NN 132/98, NN 63/08, NN 134/09)
- Act on Establishment of Croatian Air Navigation Control (NN 19/98)





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