



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 registrirano 1,487.128 osobnih vozila, 5023 registrirana autobusa i 165.235 registriranih teretnih vozila (uključena su radna vozila). (Izvor: DZS, stanje 31. prosinca 2007)

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 potpisali Memorandum razumijevanja u Thessalonikiju u ožujku 2001. godine, a 2004. je potpisan Memorandum razumijevanja za izgradnju V. Koridora, gdje su odvojci 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

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

There are 1,487,128 automobiles, 5,023 buses and 165,235 (trucks included) (Source: CBS, December 31, 2007)

MAJOR CORRIDORS THROUGH THE REPUBLIC OF CROATIA

The Republic of Croatia is unique in 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-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

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, a 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 28.436 km (magistralne 6725 km, regionalne 10.544 km i lokalne 10.375 km - podatak za 2005. godinu), od toga 792 km autocesta i 2.037 km E-cesta.

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

- Koridor V.C is 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 45 km

Do potpunog dovršenja mreže autocesta, predviđene Strategijom prometnog razvitka, trebat će postojeću mrežu polovice autocesta dužine 206 km proširiti na puni profil autoceste (144 km Istarski ipilon, 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 TEREJNI 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 Ministarstva mora, prometa i infrastrukture – Uprave za cestovni promet - 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, proglašena za kritičnu dozvolu, 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

- 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 28,436 km (main roads – 6,725 km, regional roads – 10,544 km and local – 10,375 km – data for 2005). Of these, there are 792 km of motorways and 2,037 E-roads.

From 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 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 (designated as critical permits), French time-limited permits (valid for a whole year) and CEMT permits.

The CCE received 190,503 permits for international goods

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 63144 tis. 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 duljina dionice je 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 duljina dionice je 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

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.

- 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. It is 328.7 kilometers long

(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. Hrvatske željeznice kupuju osam novih nagibnih vlakova. Vrijednost ugovora je 32,35 milijuna eura. Ti dvodijelni nagibni vlakovi počeli su voziti u srpnju 2004. godine na relaciji Zagreb - Split - Zagreb. Od 2005. godine voze i na relacijama Zagreb-Osijek-Zagreb, Zagreb-Vinkovci-Zagreb i Zagreb-Čakovec-Zagreb.

Plan poslovanja HŽ-a od 2003. do 2007. godine

Hrvatske željeznice u sljedećem petogodišnjem razdoblju u gradnju i modernizaciju planiraju uložiti 15.262,4 milijuna kuna.

Infrastruktura	10.360,5 mil kn
Mobilni kapaciteti	4.901,9 mil kn
Putnički prijevoz	3.188,9 mil kn
Teretni prijevoz	1.713,0 mil kn

Ulaganja u gradnju i modernizaciju stabilnih i mobilnih kapaciteta predviđeni su ostvarenja planiranih ciljeva uz strategiju razvoja i jačanja konkurentske sposobnosti Hrvatskih željeznica u uvjetima jake konkurencije cestovnog prijevoza i inozemnih željezničkih kompanija. U tom smjeru u sljedećem petogodišnjem razdoblju Hrvatske željeznice ulaganjima planiraju ostvariti sljedeće:

Infrastruktura

Stabilna postrojenja

Povećanje sigurnosti prometa, smanjivanje nepredviđenih smetnji uz povećanje redovitosti prometa. Povećanje propusne moći i nosivosti pruga uz skraćivanje vremena putovanja.

Uređivanjem gornjeg i donjeg ustroja pruga remontima, gradnjom pruga, gradnjom elektrovočnih postavnica i postrojenja za sekcioniranje, telekomandom, elektrifikacijom pruga i drugim zahvatima postigle bi se sljedeće minimalne brzine:

■ na koridorskim prugama	160 km/h
■ na magistralnim prugama	120 km/h
■ na lokalnim prugama	80 km/h

Uz modernizaciju i nabavu mobilnih kapaciteta skratilo bi se vrijeme putovanja:

Relacija	Vrijeme putovanja prije ulaganja	Vrijeme putovanja nakon ulaganja	Skraćenje vremena putovanja
Zagreb - Vinkovci	3 h	2,44 h	16 min.
Zagreb - Osijek	4,09 h	3,06 h	1,03 h
Zagreb - Rijeka	3,42 h	2,45 h	57 min.
Zagreb - Split	7,18 h	4,55 h	2,13 h

Racionalizacija poslovanja smanjivanjem troškova održavanja i broja zaposlenih

Prema Projektu restrukturiranja i modernizacije Hrvatskih željeznica predviđen je 12.781 zaposlenik do kraja 2005. godine. HŽ planira do kraja 2007. godine prirodnim odljevom smanjiti broj radnika za 350, uz primanje 200 radnika prema zahtjevima tehnološkog procesa rada. Potkraj 2007. godine zaposlenih bi bilo 12.631.

Stvaranje uvjeta za razvoj gradskog prometa u većim

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 22nd, 2003, Croatian Railways are now purchasing eight new tilting trains. The contract amounts to €32,350,000.00. These two-unit tilting trains started running between Zagreb and Split in June 2004, and they have been running on the Zagreb-Osijek-Zagreb, Zagreb-Vinkovci-Zagreb and Zagreb-Čakovec-Zagreb lines since 2005, and they have been running on the Zagreb-Osijek-Zagreb, Zagreb-Vinkovci-Zagreb and Zagreb-Čakovec-Zagreb lines since 2005.

Croatian Railways' business plan for the period 2003-2007

Croatian Railways plan to invest HRK 15,262,400.00 in construction and modernisation in the next five-year period.

Infrastructure	HRK 10,360,500.00
Rolling stock	HRK 4,901,900.00
Passenger transport	HRK 3,188,900.00
Goods transport	HRK 1,713,000.00

Investment in construction and modernisation of fixed facilities and rolling stock is conditional for the full achievement of the goals established and for the implementation of the development strategies and stronger competitiveness set by Croatian Railways in circumstances of strong competition of road transport and foreign rail transport companies.

Therefore, Croatian Railways plans to achieve the following goals in the next five-year period:

Infrastructure

Fixed installations

Greater traffic safety, reduced number of unexpected failures along with enhanced traffic regularity. Higher level of service and track load capacity together with shorter travel times.

By fixing and upgrading of lower and upper track structures through repair, railroad construction, construction of electric drive installations and sectionalisation installations, remote control, railroad electrification and other inputs, the following minimum speeds would be achieved:

■ on corridor railroads	160 km/h
■ on mainline railroads	120 km/h
■ on local railroads	80 km/h

The modernisation and procurement of rolling stock would allow shorter travel time.

Section	Travel time before investment	Travel time after investment	Reduction of travel time by
Zagreb - Vinkovci	3 hrs	2 hrs 44 min	16 min
Zagreb - Osijek	4 hrs 09 min	3 hrs 06 min	1 hour 03 min
Zagreb - Rijeka	3 hrs 42 min	2 hrs 45 min	57 min
Zagreb - Split	7 hrs 18 min	4 hrs 55 min	2 hrs 13 min

gradovima i prigradskog prijevoza financiranjem uređenja stajališta te udjelom u gradnji i održavanju prigradskih i lokalnih pruga.

Informatika

Izgradnja optičke mreže, implementacija poslovnog informatizacijskog sustava na najsuvremenijoj računalnoj osnovi radi maksimalne informatizacije poslovanja omogućit će pravodoban i brz protok informacija, a time ubrzati donošenje poslovnih odluka.

Mobilni kapaciteti

Modernizacijom voznog parka, nabavom novih suvremenih vlakova radi racionalizacije troškova eksploatacije i održavanja, skraćivanjem vremena putovanja i podizanjem kvalitete usluga prijevoza Hrvatske bi željeznice bile konkurentne u pružanju usluga.

Hrvatske željeznice u petogodišnjem razdoblju među ostalim planiraju:

U putničkom prijevozu

■ Nabava vlakova nagibne tehnike	13 garnitura
■ Nabava klasičnih motornih vlakova	71 vlak
■ Nabava dizelskih motornih jednodijelnih polovnih vlakova (DMV)	7 vlakova
■ Nabava vagona za spavanje (WL)	10 vagona
■ Modernizacija DMV-a	8 vlakova
■ modernizacija EMV-a	12 vlakova
■ modernizacija i rekonstrukcija	511 vagona

U teretnom prijevozu

■ remont teretnih vagona	5130 vagona
■ rekonstrukcija teretnih vagona	255 vagona
■ nabava novih teretnih vagona	1547 vagona
■ modernizacija lokomotiva	59 lokomotiva

Vlada Republike Hrvatske je 6. srpnja 2006. godine donijela odluku o podjeli trgovačkoga društva HŽ-HRVATSKE ŽELJENICE d.o.o., a 20. srpnja 2006. Odluku o osnivanju Trgovačkoga društva HŽ-Infrastruktura d.o.o., HŽ-Putnički prijevoz d.o.o., HŽ-Cargo d.o.o. i HŽ-Vuča vlakova d.o.o. te Odluku o osnivanju trgovačkog društva HŽ-Hrvatske željeznice Holding d.o.o. za poslovne usluge. U skladu s odlukom Vlade, a na temelju odredbe članka 2. stavak 1. Zakona o podjeli trgovačkog društva HŽ-Hrvatske željeznice d.o.o., imovina trgovačkog društva HŽ-Hrvatske željeznice d.o.o. (u knjigovodstvenoj vrijednosti 4.998,329.102,55 kn), koju čine pokretne i nepokretne stvari, poslovni udjeli, prava i novac, podijeljena je na temelju Plana podjele na novoosnovana trgovačka društva.

Osnova za podjelu bili su Zakon o željeznici (NN 123/03 i 30/04) i Zakon o podjeli trgovačkog društva HŽ-Hrvatske željeznice (NN 153/05) koji predstavljaju stratešku pravnu i organizacijsku reformu željezničkog sustava u Hrvatskoj koja se temelji na pravnoj stečevini EU. Razdvajanjem trgovačkog društva HŽ-Hrvatske željeznice d.o.o. na manja trgovačka društva, prema poslovnim područjima, stvaraju se subjekti sposobni za prihvaćanje tržišnih uvjeta koje nameće potreba otvaranja i liberalizacije pristupa drugih prijevoznika željezničkom prijevoznom tržištu. Takav organizacijski ustroj omogućuje nediskriminirajući pristup željezničkoj infrastrukturi, racionalizaciju poslovanja i učinkovitije upravljanje materijalnim i ljudskim resursima, povećanje vlastitih prijevoznih prihoda i transparentnije korištenje proračunskih sredstava.

Izvor: Hrvatske željeznice

Raising efficiency by reducing maintenance costs and number of employees

The Project for the Restructuring and Modernisation of Croatian Railways envisages 12,781 employees by the end of 2005. Croatian Railways plan to reduce the number of employees through natural reduction by 350 by the end of 2007 and simultaneously hire 200 employees to meet technological operating needs. They should have a total of 12,631 employees at the end of 2007.

Creation of conditions for the development of urban transport in major cities as well as commuter transport: by financing the renovation and construction of stations and by participating in the construction and maintenance of commuter and local railroads.

With regard to this, the Ministry of Maritime Affairs, Transport and Communications drew up a project proposal for the financing and management of local railroads.

Creating conditions for the development of port capacity

Information technology

Building an optical network and implementing the operational IT-system based on the state-of-the-art IT-equipment in order to achieve maximum application of information technology in operational processes will allow fast flow of information on time, thus accelerating making the operational decisions.

Rolling stock

By modernising the rolling stock, procuring new, modern trains in order to achieve higher cost-efficient operation and maintenance, and by reducing travel time and raising the quality of services, Croatian Railways would achieve adequate competitiveness.

Croatian Railways' plans for next five-year period include:

In passenger transport

■ procurement of tilting technology trains	13 trainsets
■ procurement of ordinary railcars	71 train
■ procurement of used single-unit diesel railcars (DMVs)	7 trains
■ procurement of sleeping cars (WLs)	10 cars
■ modernisation of DMVs	8 cars
■ modernisation of EMVs (electric railcars)	12 cars
■ modernisation and reconstruction	511 cars

In goods transport

■ repair of freight cars	5130 cars
■ reconstruction of freight cars	255 cars
■ procurement of new freight cars	1547 cars
■ modernisation of locomotives	59 locomotives

The Government of the Republic of Croatia adopted a decision to split the HŽ-HRVATSKE ŽELJENICE company (Croatian Railways) at the session of 6 July 2006. At the session of 20 July 2006, it adopted the Decision to Establish the HŽ-Infrastruktura d.o.o. (infrastructure), HŽ-Putnički prijevoz d.o.o. (passenger transport), HŽ-Cargo d.o.o. (goods transport) and HŽ-Vuča vlakova d.o.o. (traction) companies, as well as the Decision to Establish the HŽ-Hrvatske željeznice holding d.o.o. za poslovne usluge company (business services). Under the Government's Decision, pursuant to Art. 2 para. 1 of the Division of HŽ-Hrvatske željeznice d.o.o. Act (Zakon o podjeli trgovačkog društva HŽ-Hrvatske željeznice d.o.o.), the assets of HŽ-Hrvatske željeznice d.o.o. (amounting to a book value of HRK 4,998,329,102.55 - consisting of movables and immovables, interests, rights and cash) were divided

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 4,5 milijuna putnika, a u svijetu u međunarodnom prometu godišnje putuje oko četiri milijarde ljudi.

Putnički promet na zračnim lukama Republike Hrvatske daleko je ispod razine na kojoj je bio prije rata, kada je njima prolazilo i do 5,5 milijuna putnika godišnje. Prošlogodišnja 4,5 milijuna putnika bit će premašena 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 2007. godinu te je promet uspoređen s rezultatima poslovanja 2006. 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 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 2007. godine na Zračnoj luci Zagreb manji je 3,8 posto (1,992.455) u odnosu na stanje prije rata. Primjerice 1979. godine prevezeno je 1,917.000 putnika.

Plan poslovanja za 2007. 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 Austrije, Njemačke, Italije,

in accordance with the Plan for Division into New Companies.

The basis for this division were the Railways Act (Zakon o željeznici - NN [Official Gazette] no. 123/03 and 30/04) and the Division of HŽ-Hrvatske željeznice Company Act (NN no. 153/05), implying a strategic legal and organisational reform of the Croatian railway system based on the *acquis communautaire*. The division of HŽ-Hrvatske željeznice into a number of smaller companies according to business segments has created entities capable of responding to market conditions associated with the need to allow and liberalise access to the transport market for other carriers. Such organisation allows non-discriminatory access to the railway infrastructure, higher operational efficiency, efficiency improvements in material and human resource management, higher revenues from transport and more transparent use of budgetary funds.

Source: Hrvatske željeznice

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 4.5 million passengers annually, while the total number of international travellers in the world is 4 billion people. Passenger transport in Croatian airports lags far behind pre-war figures, when airports recorded up to 5.5 million passengers per year. The number of 4.5 million passengers 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 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,

Tablica 1. / Table 1.	Zračna luka / Airport									
	Zagreb	Split	Dubrovnik	Rijeka	Osijek	Brač	Zadar	Lošinj	Pula	Ukupno / Total
Br. Pax. u 2006. No pax in 2006	1,728.413	1,088.593	1,120.453	169.250	2.913	16.682	65.428	10.829	295.342	4.497.903
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
Promjene u odnosu na 2006.god. Change on 2006	15,3%	8,8%	2%	3,8%	4,7%	15,3%	82,2%	7,4%	27,8%	11,3%
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 2007. u odnosu na prijeratne god. 2007 decrease compared to pre-war years	3,8%	2,9%	27,7%	25,6%	1359,5%	~	34,2%	19,1%	71,3%	10%

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

ZL RIJEKA, ZL OSIJEK, ZL BRAČ i ZL LOŠINJ imaju pad prometa u 2007. godini u odnosu na 2006, a ZL RIJEKA dosegla je razinu prijeratnog prometa koji je povećan 25,6 posto (vidi tablicu iznad).

Rijeka airport, Osijek Airport, Brač Airport and Lošinj Airport show a transport decrease when compared with 2006. Rijeka Airport reached the pre-war level with transport increased by 25.6% (see Table 1).

Slovenije, Velike Britanije, Irske, Švedske i Češke. Tako je 2007. godine prevezen 1,714.891 putnik, a 2006. je prevezeno 1,577.275 putnika, što je 8,7 posto više u odnosu na 2006. Istodobno je prevezeno 4608 tona tereta, što je 8,6 posto više u odnosu na 2006. godinu, a popunjenost putničke kabine povećana je 2,9 posto (tablica 2.). U pravilu su ostvareni pozitivni rezultati, no zbog poslovanja u uvjetima gospodarske nestabilnosti i recesijskih tendencija domaćega gospodarstva te učinaka svjetske zrakoplovne krize nakon terorističkih napada na New York još 11. rujna 2001. godine, tvrtka se suočila sa smanjivanjem planiranih prihoda te dodatnim uvećanjem troškova osiguranja, sigurnosti, cijene goriva, aerodromskih usluga i kašnjenja zrakoplova zbog mjera povećane sigurnosti.

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.

Table 1 shows the number of the passengers in 2007, with comparisons made with 2006 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 2007 in Zagreb Airport was 3.8% (1,992.455) below the pre-war figures. For example, a total of 1,917,000 passengers were transported in 1979.

The business plan for 2007 was focused on meeting all high market demands by keeping all regular flights, increasing market share and satisfying increased tourist demand in the Austrian, German, Italian, Slovenian, British, Irish, Swedish and Czech markets. In 2007 the actual number of passengers was 1,714,891 while in 2006 the number of passengers was 1,577,275, that is 8.7% more than in 2006. The transport of good reached 4,608 tonnes, - 8.6% less then compared with 2006, while the cabin occupancy rate increased by 2.9% (Table 2.). Generally, performance achieved was positive. However, due to economic instability, domestic recession and the global crisis in air traffic after the terrorist attacks in New York on 11th September 2001, the company faced a revenue decrease that fell below expectations, due to higher insurance, safety, fuel and airport service costs, and also delays caused by increased safety measures.

Tablica 2. / Table 2	2006.	2007.
Godina Year		
Br. putnika No of pax	1,577.275	1,714.891
Roba i pošta Freight and mail	4.242	4.608
Br. uzlijetanja Departures	23.732	24.349
Pax.faktor popunjenosti Factor (PLF) Rate	62%	64,9%
Ostvareni pax. km Pax km Flown	1,219.964	1,302.806
Ostvareni tonski km Tonne km Flown	112.54 mln	120,163 mln
Nalet (km) Kilometers Flown	15.397	15.722

Izvor: Croatia Airlines / Source: Croatia Airlines



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