



PRE-ACCESSION MARITIME TRANSPORT STRATEGY OF THE

REPUBLIC OF CROATIA



REPUBLIC OF CROATIA
MINISTRY OF THE SEA, TOURISM, TRANSPORT AND DEVELOPMENT



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Zagreb, 6th June 2005



**PhD Ivo Sanader,
Prime Minister**

The decision taken on 3rd October this year marked the commencement of the negotiations on full membership of Croatia to the European Union and has rewarded our efforts towards building a stable

democracy. It also represents a true breakthrough in the modern history of Croatia.

Among the Croatian population, the European Union is perceived as a model way of life which brings about peace, safety, and welfare, along with opportunities for achieving greater social prosperity and improving individual welfare.

This is the reason why preparations for achieving full membership in the European Union present a motivating factor in the process of implementing comprehensive, demanding and, occasionally, costly social, political and economic reforms. A stable democracy and the rule of law, combined with political stability and social tolerance, have been the grounds for successful completion of the period of state formation, transition, and post-war development. Now, Croatia has entered a period of stability, determined to pursue the path of acquiring and adopting European values and standards.

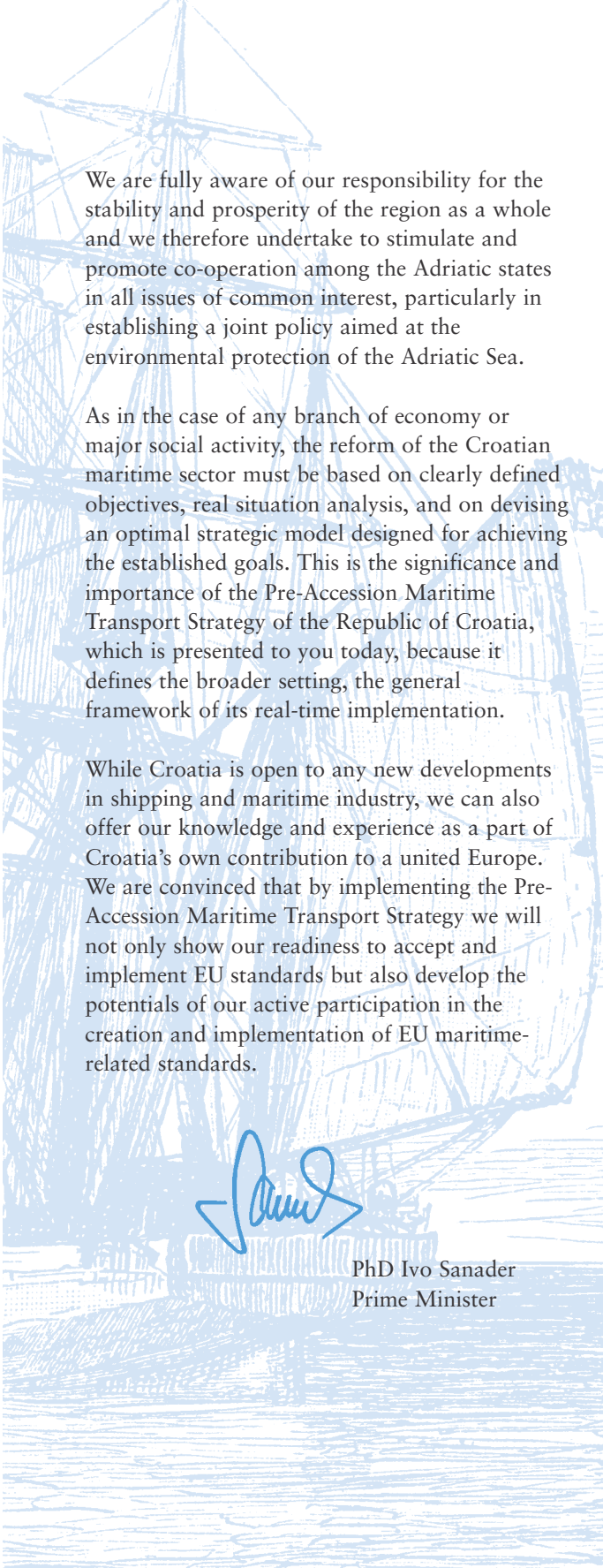
The mission ahead of us is neither easy nor free of obstacles. However, it is with real optimism that we are embarking on the project of reforms. The European future is Croatia's only choice. Therefore, the strengthening of legal state institutions and implementing the rule of law in all sectors of social life are the milestones of economic and overall social development.

In the context of the preparations for the commencement of the negotiations on full membership of Croatia to the European Union,

the Croatian Ministry of the Sea, Tourism, Transport and Development has created the Pre-Accession Maritime Transport Strategy. It is the result of the comparative analysis of the Croatian legislative, institutional and economic system in the maritime sector with the corresponding systems valid in the European Union, which presents a unique programme of the implementation of the goals and objective set forth.

This Maritime Strategy is based on the principle of unconditional and unreserved application of the highest standards of safety at sea and protection of the marine environment. The economic and social development in Croatia is unthinkable without at the same time preserving the diversities of nature in the area and without safeguarding the Adriatic Sea from pollution of any kind. Therefore special and permanent attention is paid to promoting safety culture and environmental awareness.

As far as maritime industry is concerned, the Government of the Republic of Croatia is committed to market competition based on the high quality services. In this regard, we will continue the project of modernisation of the Croatian merchant fleet, which has already yielded positive results. The development projects involving port infrastructure, along with the corresponding institutional measures, will enable the transformation of Croatian ports into modern hub-ports within the European logistic and transport chain. Equally important is the entry of Croatian ports in the network of European traffic corridors and ensuring their prominent position on the modern 'sea motorways' as a necessary pre-condition for a stable economic growth of the entire region. We therefore look upon the Croatian ports as parts of the network of European traffic corridors and as active participants in the European projects such as the "Motorways of the Sea" and "Short Sea Shipping".



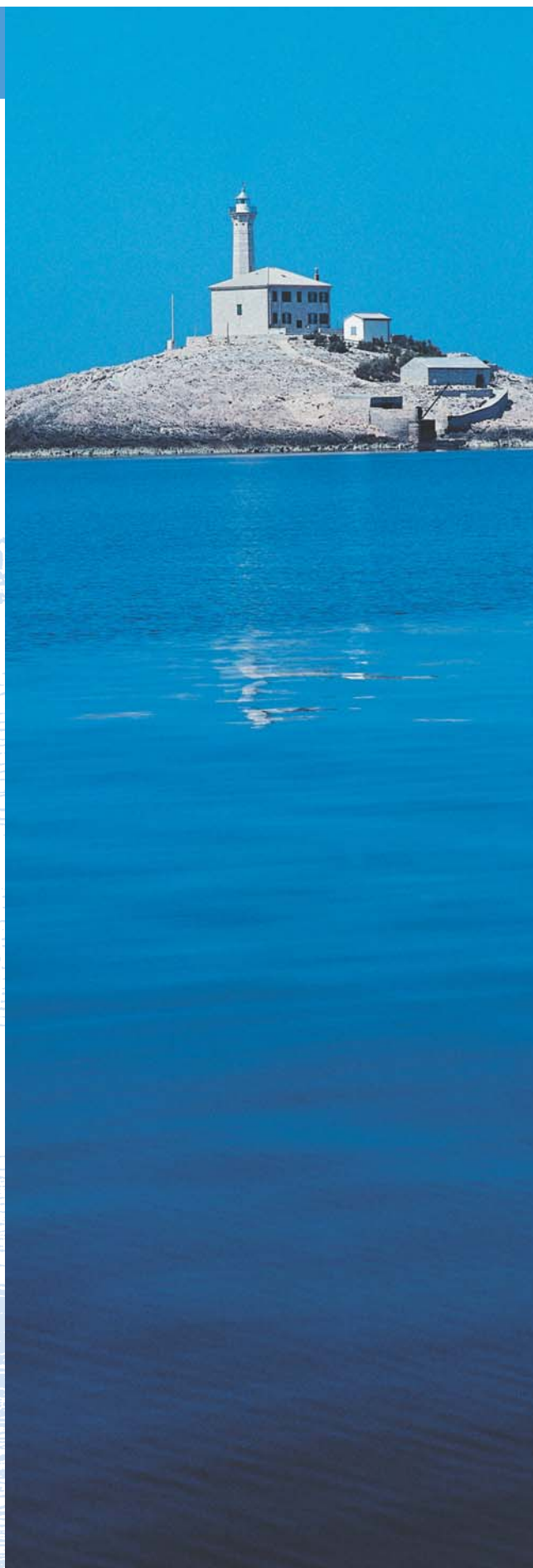
We are fully aware of our responsibility for the stability and prosperity of the region as a whole and we therefore undertake to stimulate and promote co-operation among the Adriatic states in all issues of common interest, particularly in establishing a joint policy aimed at the environmental protection of the Adriatic Sea.

As in the case of any branch of economy or major social activity, the reform of the Croatian maritime sector must be based on clearly defined objectives, real situation analysis, and on devising an optimal strategic model designed for achieving the established goals. This is the significance and importance of the Pre-Accession Maritime Transport Strategy of the Republic of Croatia, which is presented to you today, because it defines the broader setting, the general framework of its real-time implementation.

While Croatia is open to any new developments in shipping and maritime industry, we can also offer our knowledge and experience as a part of Croatia's own contribution to a united Europe. We are convinced that by implementing the Pre-Accession Maritime Transport Strategy we will not only show our readiness to accept and implement EU standards but also develop the potentials of our active participation in the creation and implementation of EU maritime-related standards.



PhD Ivo Sanader
Prime Minister





**BSc Božidar Kalmeta,
Minister**

Dear Sir/Madame,

It is my great pleasure to present you with the Pre-accession Maritime Transport Strategy of the Republic of Croatia, a document that has resulted from the analysis of maritime affairs achievements to date, the anticipation of the

current state and deliberations on its future in the context of Croatia as a part of a united Europe.

It is not necessary to emphasise that maritime affairs as an economic, but also a generally social category, has special importance for Croatia if one is aware that the length of our coastal line including islands is 6287 kilometres, that Croatia's coast, with its 1246 islands and islets is one of the most indented coastal regions in Europe, that there are 104,491 vessels registered in the Croatian registers today, ranging from small boats to trans-oceanic ships, if one is aware that over 17 million tons of cargo are loaded and unloaded and 7 million passengers are embark and disembark in Croatian ports each year, that Croatia has 40,000 seafarers of its total population of 4 million, that there are seven schools and three maritime universities programs which are active in Croatia as well as that in general, the Croatian people are essentially connected to the sea.

Historically viewed, the people from this region have lived with and from the sea. The ships of King Krešimir, the Dubrovnik galleys, the statues of medieval Dalmatian towns, the Lošinj and Kostrena captains are not simply historical facts but syntagms deeply rooted in the being of the Croatian people.

It is precisely upon this tradition and historical experience, and the awareness that joining the European Union of countries and people will open a new historical era, that we contemplate the future of the development of maritime affairs

as one of the strategic guidelines for our economic development, particularly in synergy with tourism, fishing and the development of other aspects of transport.

Croatia is heir to one of the most beautiful seas in the world. This fact additionally compels us to preserve this inherited grandeur and wealth for the generations to come. Economic development and the objective needs that arise from the style of living in the 21st century, which on the one hand is an obligation, but moreover a general need to preserve the natural harmony and wealth, are challenges to all the European countries, including Croatia. In that context, the essence of the idea of »sustainable development« is a key criterion for us in defining the strategic guidelines for economic development. We are particularly sensitive to issues related to the protection of the Adriatic Sea from all kinds of pollution. That is why we immediately accepted all European Union standards concerning the prevention and avoidance of sea pollution from ships. Effective protection of the Adriatic is impossible without collaboration from all the Adriatic states, and as such we have initiated and actively participate in a series of regional projects aimed at improving the level of navigational safety and protection of the Adriatic from pollution. In that manner, we have jointly developed a ship's reporting system and traffic separation system and other routing measures, as well as monitoring the unloading of ballast waters at sea, while the Vessel Traffic Monitoring and Information System (CVTMIS) is currently under preparation in conjunction with European standards. We are certain that in proclaiming the Adriatic Sea a particularly sensitive sea area, in accordance with the guidelines of the International Maritime Organization, we would additionally contribute to its protection, while not impeding freedom of navigation.

Humans are a key factor in every activity and the same is particularly true for safety at sea. Without educated, motivated and rested crew members who live and work in conditions adequate for the 21st century, there can be no safe ship. That is why the education of seafarers, the application of the highest European standards

and ensuring a high level of living and working conditions for seamen, is our constant concern. Maritime transport is the most effective, safest and ecologically acceptable mean of transport and virtually 90% of total world transport of goods is conducted by sea, making its role irreplaceable in the development of world and European economy.

Where and how do I see the development of the Croatian maritime shipping industry? Naturally, on the demanding world market, with business conditions equivalent to those of other European shipping companies and with uncompromised consideration for the highest safety standards and the protection of the maritime environment. In that context, it is necessary to hold consistent dialogue with the shipping industry, unions, classification organisations, maritime education establishments, as well as to additionally strengthen administrative capacities.

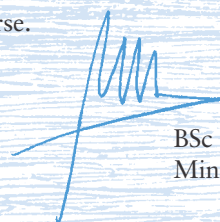
Although regular and safe connections from the 49 inhabited Croatian islands to the mainland is an important issue for enabling sustainable growth in that part of Croatia, it is not just a question of economic development, but also of protecting the fundamental human rights of the island inhabitants. That is why we have dedicated special attention to the development of the system of sea-lines from the islands to the mainland which, along with conventional ships and ferries, also includes modern fast vessels. Ports are sections of the transport corridor on the interchange between the land and maritime section in the same transport chain. The legal framework separating the functioning of infrastructure management in ports from the execution of port activities ensures the improvement of efficacy in ports and by this, their more rapid development. The current state of port infrastructure in the Croatian ports cannot respond to the challenges and demands of tomorrow. That is why the Croatian Government is investing significant resources into the modernisation and development of port infrastructure in Croatia's biggest ports, directly and through port authorities, along with participation by European and world financial institutions.

In that context, I see the Croatian ports of the future as the key transport and logistical points of the modern multimodal transport chain, networked into the trans-European corridors and the starting point for the routes of the project »Motorways of the sea« in this part of Europe. In the Pre-accession Maritime Strategy before you, we have defined the goals and measures for their realisation, in order for us to ensure the complete harmonisation of the legislation in the area of maritime affairs with that of the European Union by the time the Republic of Croatia enters the Union, and to be able to additionally facilitate the adaptation of the maritime economy sector to the trade conditions of a common market. The role of the state and its bodies is altered furthermore in this process. For this reason, a corresponding institutional correction will also follow the implementation of this Strategy.

Namely, this Strategy covers issues concerning maritime affairs that have been placed, in accordance with the Croatian legislation, under the jurisdiction of the Ministry of the Sea, Tourism, Transport and Development. However, its successful implementation entails dialogue with the market and institutions which are directly or indirectly tied to maritime affairs. In order to ensure precisely this type of dialogue and coordinated strategic approach in all segments of the economy influencing maritime affairs on one hand, or which are influenced by maritime affairs on the other, the Ministry will, in accordance with the practices and experience of other European states, form a specific Maritime Cluster as a forum for the debate and harmonisation of the entire sector.

We view these types of activities to be a guarantee of successful implementation of this Strategy.

It will be the implementation of the Strategy in particular that will be the measure of our success on this course.

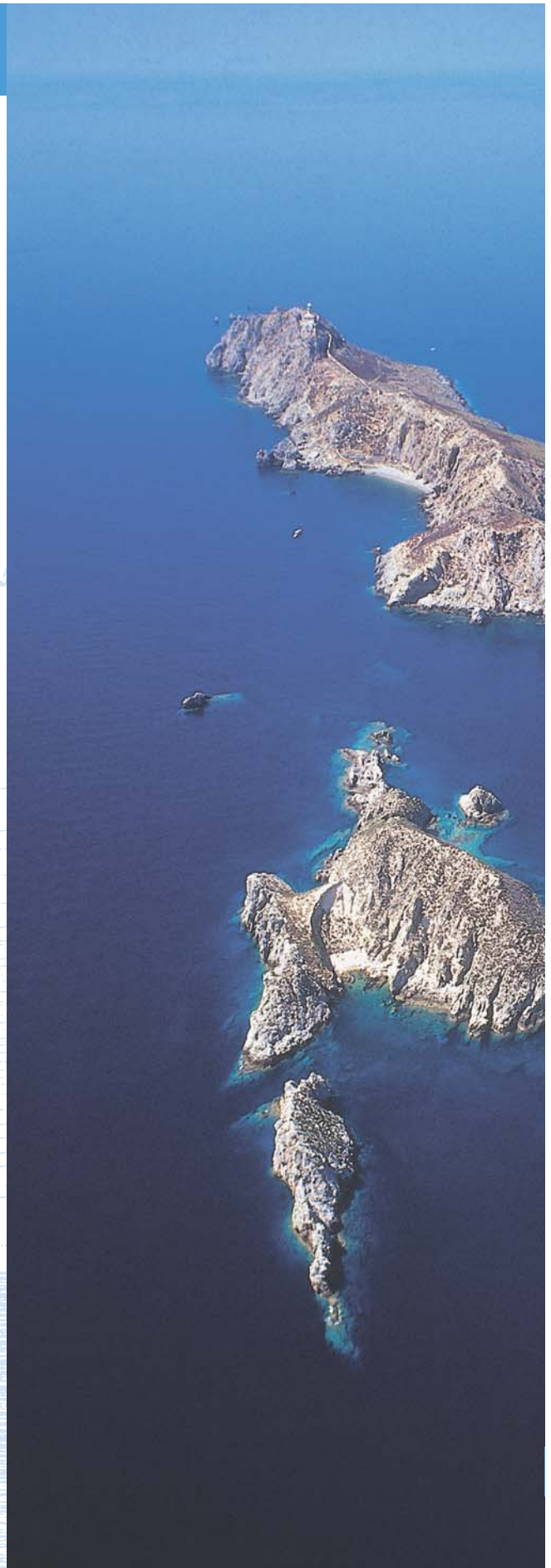


BSc Božidar Kalmeta
Minister

RECOGNIZING the importance of maritime transport and related industries for the economic progress of the Republic of Croatia,
WISHING to ensure a continuous and sustainable development of the Adriatic island and coastal communities, particularly through development and maintenance of an efficient public maritime transport network,
BEING CONSCIOUS that clean and unpolluted waters of the Adriatic Sea are the necessary prerequisites for sustainable development of the Republic of Croatia,
DEDICATED to ensure a continuous implementation of highest viable standards in the area of maritime safety and environmental protection, as adopted by relevant official international organizations and European institutions,
WISHING at the same time to introduce various measures which aim to increase the competitiveness of shipping and related industries on the world market,
TAKING INTO ACCOUNT the significance of the port sector for overall transport efficiency, particularly in the context of existing and future transport corridors,
BEING AWARE that the Government of the Republic of Croatia has assigned the highest priority to political, social and economic integration into the European Union,
THUS DEVOTED to harmonize Croatian legal system with *acquis communautaire*, particularly in the areas of maritime transport, safety at sea and marine environment protection, as soon as possible;
ON THE BASIS of the Transport Development Strategy of the Republic of Croatia, adopted by Croatian Parliament
(Official Gazette, 139/1999)

DECLARES

**PRE - ACCESSION MARITIME
TRANSPORT STRATEGY OF
THE REPUBLIC OF CROATIA**





1 Introduction

This Strategy derives from the Transport Development Strategy of the Republic of Croatia, 1999. It is based on the maritime transport sector gap analysis relative to the EU legal and economic inheritance and takes into account the European Commission Opinion of Croatia's Application for Membership of the European Union in the field of Maritime transport (*COM (2004) 257 final*) as well as the Council Decision on the principles, priorities and conditions contained in the European Partnership with Croatia (*COM (2004) 275 final*). The Strategy contains an action plan aiming to ensure graduate reduction of the differences identified. Therefore, the areas which were found to have already been fully harmonized are not covered in this document, except for the areas dealing with their implementation.

2 Maritime safety, security and environmental protection

2.1 Status

The Ministry considers that safety of navigation and pollution prevention are the most important aspects of its responsibility for maritime sector. Consequently, in cooperation with other responsible institutions it will continue to work on improving safety, security and environmental protection. Due to an increased volume of the maritime traffic in the Adriatic Sea, and particularly due to increased volumes of mineral oils and other dangerous and harmful substances carried by ships, the likelihood of maritime accidents in the Adriatic area will become more pronounced. It has to be emphasized that, because of natural and geomorphologic features of the Adriatic Sea, any maritime accident, involving harmful substances, may result in catastrophic consequences for all the countries in the region.

As presented in the report of the Paris Memorandum of Understanding on Port State Control (Paris MOU on Port State Control) there are a number of old and/or substandard ships entering the Adriatic area. At the same time, the Croatian-flagged vessels, particularly vessels trading within the Croatian territorial sea, are also relatively old.

The ports open for international transport face numerous obstacles while trying to satisfy the requirements concerning the port reception facilities for ship-generated waste and cargo residues.

Accepting the fact that human element is the most important factor contributing to safety of navigation, particular attention is paid to education and training of seafarers. Wishing to successfully prevent any terrorist act against security of ships, persons or port facilities, the IMO ISPS Code, 2002., has been implemented in the Republic of Croatia in due time and fully in accordance with international standards.

A significant field in maritime safety and environmental protection issues are relating to yachts and boats, mainly from the EU countries (more than 60,000 per annum) and sailing within the Croatian internal sea waters and territorial sea. The Ministry makes significant efforts to ensure safety of all persons aboard these craft. At the same time, attention is paid to the impact of nautical tourism upon environmental protection.

Consequently, the Ministry of the Sea, Tourism, Transport and Development will persist in assigning highest importance to the measures aimed at improving maritime safety, security and environmental protection.

M/V Pojišan, operated by the Harbor Master's Office Split, is designed for SAR operations at sea

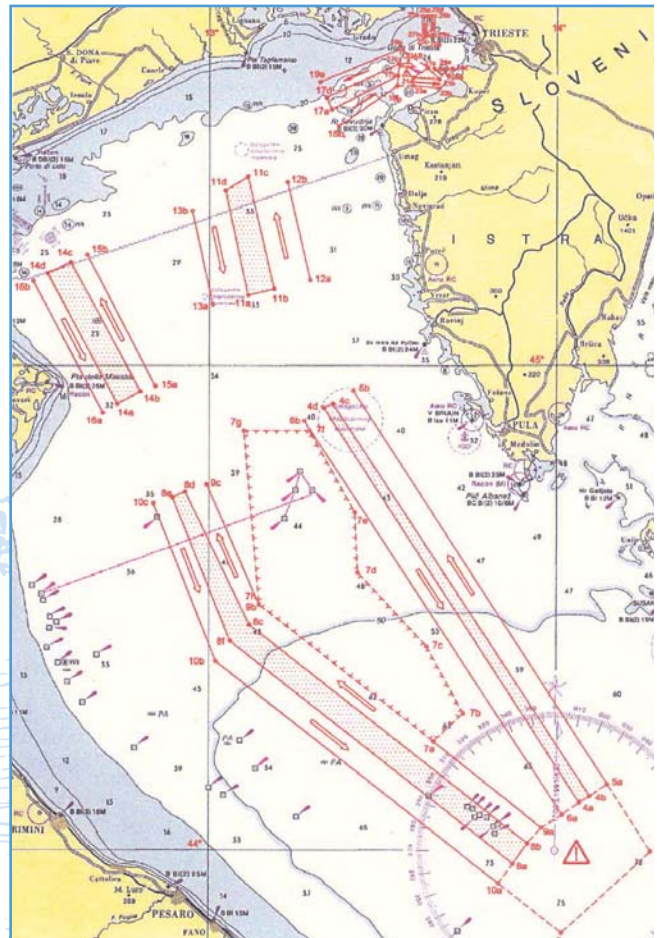


2 Maritime safety, security and environmental protection

2.2 Goals

Taking into account the present status as well as the foreseeable overall development of the Republic of Croatia and the neighbouring countries, the Ministry sets the following as the basic goals in the area of the maritime safety, security and environmental protection:

- Increase of the general level of safety on board Croatian-flagged ships and their inclusion in the White list of the Paris MOU;
- Recognition of the Croatian Register of Shipping in accordance with Directive 94/57 as amended;
- Introduction of the Vessel Traffic Monitoring and Information System (CVTMIS);
- Protection and maintenance of clean waters in the Adriatic Sea;
- Improvement of the maritime education and training system of seafarers;
- Continuous improvement of standards of living and work on board ships;



Traffic Separation Scheme and other Routing measures on the Northern Adriatic as developed by the International Maritime Organization (IMO)

- Increase the level of environmental protection in ports, in accordance with the highest practical standards;
- Strengthening of administrative capabilities and operational effectiveness, particularly in respect of pollution prevention, pollution response and search and rescue operations;
- Harmonization of the Croatian legislation referring to shipping with relevant part of Aquis Communitate, in accordance with the National programme, taking into account that implementation of certain requirements can be postponed if the Government of the Republic of Croatia considers them subject to negotiation and if such later date is agreed during the accession negotiation.

2 Maritime safety, security and environmental protection

2.3 Measures

2.3.1 The proclaimed goals will be reached by means of:

- Promoting renewal of outdated vessels (target date: see Para. 3.3);
- Based on the extended authorization granted to Port State Control inspectors, applying a more rigorous survey and inspection procedure while inspecting Croatian-flagged ship, both in Croatian ports and abroad;
- Strict implementation of the requirements set out in the Maritime Safety Inspection Regulation (target date: continuously);
- Perform additional hydrographical surveys and renew aids to navigation covering approaching routes to traffic separation schemes and other implemented routing measures (target date: start 2006, completion 2010);

In order to accelerate hydrographical surveys the Republic of Croatia and the Kingdom of Norway initiated the realization of CRONO HIP Project in 2005.

Main objective of this project is digitalization of analog hydrographical originals and establishment of the database of digital information, as the introduction of multi-beam echo-sounder hydrographical survey technique and its implementation on research ships of Croatian Hydrographical Institute, all accompanied by the creation of spatial database management system. The Project shall be implemented by the Norwegian Hydrographical Office and the Croatian Hydrographical Institute in the period of three years (2005-2007). Total value of the project is evaluated at € 1,86 million with the Croatian participation of € 0,3 million. For the first phase of the project government of the Kingdom of Norway approved € 1,4 million.

- Define and implement rules and regulations relating to places of refuge, in accordance with Maritime Code and Directive 2002/59/EC (target date: 31/12/2007);



M/V Palagruža, hydrographical research ship, owned by the Croatian Hydrographical Institute

- Completing the measurements of wave heights necessary to define sea areas in accordance with Directives 2003/25/EC and 2003/24/EC (target date: from 2006-2007);
- Installation of port waste reception facilities as required by MARPOL 73/78, as amended, and Directive 2000/59 (target date: start 2005, completion 2010);
- Proposing the Proclamation of the Adriatic Sea as the Particularly Sensitive Sea Area, in accordance with relevant IMO Resolution and in cooperation with other adjacent states (target date for common proposal to IMO: March 2006);
- Passing national regulations on ballast water management in order to minimise the risk of

2 Maritime safety, security and environmental protection



- biological contamination;
- Cooperation with other countries within the Adriatic region in order to increase the level of safety of navigation;
- Active participation in the work of Paris MOU bodies.

2.3.2 Implementation of the National Legislative Alignment Programme in the maritime transport sector, in accordance with target dates as prescribed by the Programme, providing that the following priorities are defined on the basis of sector gap-analyses:

- The Community maritime legislation, as defined in Article 2.2 of the Regulation (EC) No

2099/2002 establishing a Committee on Safe Seas and the Prevention of Pollution from Ships (COSS) and amending the Regulations on maritime safety and the prevention of pollution from ships, as amended by the Commission Regulation (EC) No 415/2004 amending Regulation (EC) No 2099/2002 establishing a Committee on Safe Seas and the Prevention of Pollution from Ships (COSS) and amending the regulations on maritime safety and the prevention of pollution from ships, shall be implemented into Croatian legal system not later than 31st December 2007.

- The system of mandatory surveys of ships operating on regular ro-ro ferry and high speed passenger craft services shall be established in accordance with Council Directive 1999/35/EC on a system of mandatory surveys for the safe operation of regular ro-ro ferry and high speed passenger craft services as embedded, in due time but not later than at least 3 months before accession date.
- In order to implement the requirements of the Directive 2003/25/EC on specific stability requirements for ro-ro passenger ships, the Ministry shall establish a list of sea areas crossed by ro-ro passenger ships operating on regular service to or from Croatian ports as well as the corresponding values of significant wave heights in these areas. Accordingly, the Ministry will endeavour to reach agreement with the neighbouring countries, particularly with the Italian Republic, on applicable values of the significant wave height in these areas. The requirements of the Directive 2003/25/EC shall be implemented not later than 31st December 2007 or at least 3 months before accession, whichever date comes earlier.
- The Ministry will establish a list of sea areas under Croatian jurisdiction, delimiting the zones for all-year-round operation and, where appropriate, restricted periodical operation of the classes of ships, using the criteria for classes set out in Council Directive 98/18/EC on safety

2 Maritime safety, security and environmental protection

rules and standards for passenger ships. The list will be published as a public database available on the Internet site of the Ministry not later than 31st December 2007 or at least 3 months before the accession, whichever date comes earlier.

- The Ministry shall, within its legal framework, develop a Code for conducting marine accident investigations. The Code shall be in accordance with the requirements of IMO Resolution A.849 (20) »Code for the Investigation of Marine Casualties and Incidents«, as amended by IMO Resolution A.884 (21) »Amendments to the Code for the Investigation of Marine Casualties and Incidents« and Council Directive 1999/35/EC on a system of mandatory surveys for the safe operation of regular ro-ro ferry and high speed passenger craft services. The provisions of the Code, as well as appropriate training of accident investigators, shall become effective no later than 31st December 2007.
- The Ministry shall undertake to give full and complete effect to the special measures to enhance maritime security as defined in the Regulation (EC) No 725/2004 on enhancing maritime security as laid down by the Regulation (EC) No 725/2004 on enhancing ship and port facility security. The measures shall be implemented not later than 31st December 2008 or at least 3 months before accession, whichever date comes earlier. In order to improve passenger and cargo traffic between the Adriatic ports, the Ministry is to propose implementation of alternative security agreements or equivalent security arrangements to the neighbouring countries, in line with the provisions of the Regulation (EC) No 725/2004 on enhancing ship and port facility security. The proposal to develop common alternative security system should be communicated during the first half of the year 2006.
- The Ministry is responsible to develop the Croatian Vessel Traffic Monitoring and

Information (CVTMIS) System in accordance with the requirements of the Directive 2002/59/EC establishing a Community vessel traffic monitoring and information system and repealing Council Directive 93/75/EEC. In accordance with international experience, this system is to encompass vessel routing and

The Porer Lighthouse – one of the oldest lighthouses on the Adriatic



2 Maritime safety, security and environmental protection

traffic separation schemes, vessel traffic monitoring and information system and emergency procedures. Functional requirements, duties and responsibilities, organizational and technical framework and project dynamics are outlined in a separate document – the CVTMIS Development Strategy. The information and communication system of the CVTMIS, being a

part of the Integrated Maritime Information System, shall, in respect of data export capabilities, be compatible with the specifications to be developed by the European Maritime Safety Agency, as provided for in Regulation (EC) No 1406/2002 establishing a European Maritime Safety Agency. Measures and obligations arising from the Directive 2002/59/EC which do not depend on the fully functional CVTMIS system, such as fitting of Voyage Data Recorders on certain classes of ships, appointment of ports of refuge and designation and publication of a list of competent bodies, shall be implemented not later than 31st December 2007 or at least 3 months before the accession, whichever date comes earlier.

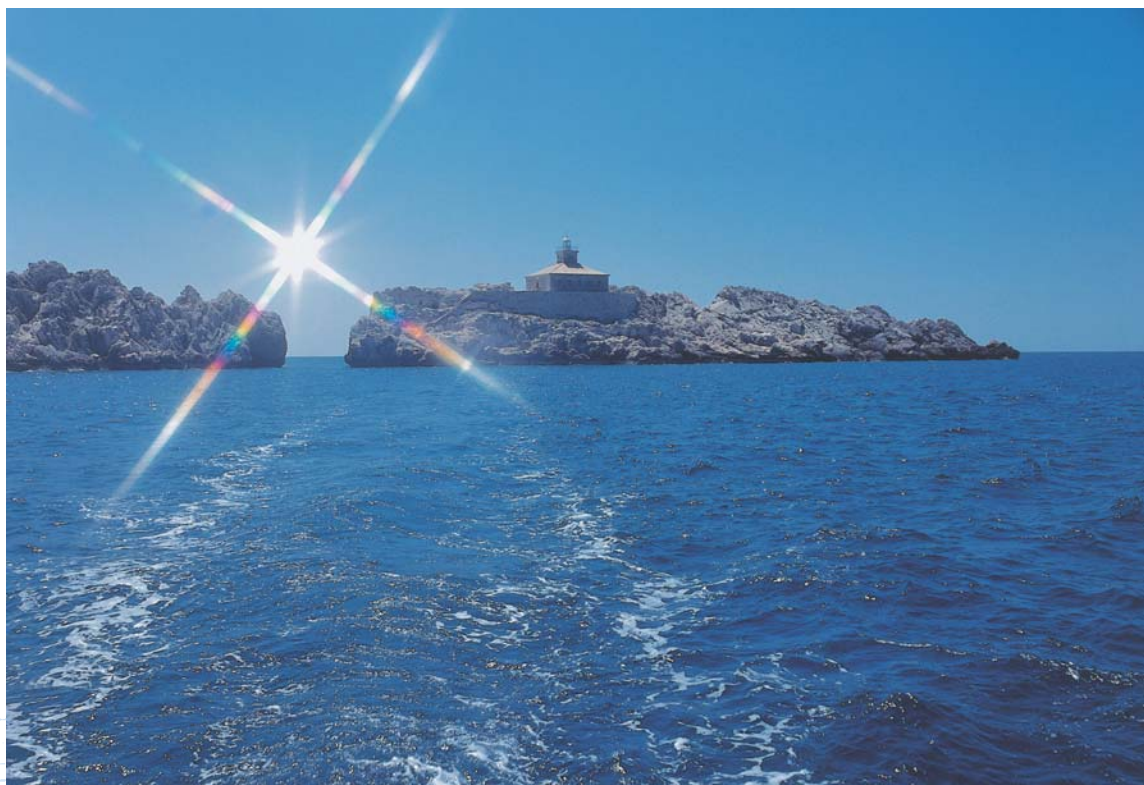
1.1.1 The process of enhancing administrative efficiency shall be accomplished through:

- The project »Maritime Safety: Strengthening of Administrative Capacity, Vessel Traffic Monitoring and Management« (total value of project: € 2.55 million), to be conducted within the PHARE Programme for pre-accession assistance for the year 2005.

The project is designed to complete the existing AIS system (Automatic Identification of Ships) by the installation and integration of additional 13 radio-communication stations along the Adriatic Coast and fitting other information and communication equipment amounting to a total of € 1.5 million (of which € 1.1 million is funded from the PHARE Programme), as well as to introduce an expert and technical support in providing IT/statistical and operational solutions for the CVTMIS system, education and training of the Ministry personnel and design of a system development study valued at € 1.0 million (to be completely funded from the PHARE Programme).



2 Maritime safety, security and environmental protection



The Lighthouse Grebeni placed in the front of the port of Gruž - Dubrovnik

The implementation of this Project by mid 2008 is to result in the establishment of an organizational and technological system for monitoring all vessels exceeding 300 GT in the internal sea waters, the territorial sea, and the Protected Ecological and Fishery Zone of the Republic of Croatia. This is to have a direct impact on the reduction of marine accidents, enhancement of the efficiency of SAR operations at sea and reduction of pollution of the sea from ships, allowing an exchange of information with the corresponding European Commission bodies. When installed, the system will also have positive effect on the business operation of the ports and combined transport.

- The Project »Maritime Safety: Strengthening of Administrative Capacity, Vessel Traffic Monitoring and Management – Phase Two« (total value of project: € 9.00 million) is to be conducted within the Phare programme's pre-access assistance for the year 2006 and 2007.

The Project envisages the completion of the Croatian Vessel Traffic Monitoring &

Information System (CVTMIS) including radar, RDF, communication and power supply sub-systems, as well as the shipping forecast sub-system. The implementation of the project by 2010 is to ensure an overall and functional control of vessel traffic.

- Extension of competences of the inspectors responsible for the application of ship inspection measures over Croatian-flag and foreign vessels entering into Croatian ports;
- Education and training of company security officers;
- Education and training of emergency teams to be engaged in case of pollution;
- Education and training of persons responsible for coordinating search and rescue operations;
- Education and training of inspectors authorized to carry out maritime accident investigations;
- Adjustment of the harbour masters' fleet to the requirements arising from the announcement of the Protected Ecological and Fishery Zone and from the obligation to render assistance within the limits of responsibility of the Croatian Maritime Search and Rescue Coordination Centre.

3 Seafarers

3.1 Status

Since their settlement on the Adriatic Sea coast Croats have been engaged in navigating and exploiting the sea. In this process education and training of seafarers has always had a special role. In 1793 already the Collegium Ragusinum in Dubrovnik permitted young noblemen to study navigation. The first nautical training school was established in Bakar in 1849, followed in the same year by Split and later by Dubrovnik (1852) and other Croatian coastal towns such as Zadar and Lošinj. In Croatia there are today three university-level maritime education and training institutions (Faculties of Maritime Studies in Rijeka, Split, and Dubrovnik) and seven secondary education maritime training schools in Split, Lošinj, and Šibenik, Zadar, Bakar, Korčula and Dubrovnik. Since 1990 as many as 7,312 students have graduated from secondary education maritime training schools whereas

4,626 students have obtained diploma in science or bachelor of science degrees from the above universities.

Today 4,785 Croatian seafarers are employed with Croatian shipowners (members of the »Mare Nostrum« Croatian shipping association) engaged in the international sea-going trade, whereas 850 seafarers are employed in domestic services on near-coastal trade. At the same time it is estimated that as many as 15 000 seafarers are employed on board foreign flag ships.

While fully aware of the role and importance of the human factor in ensuring safety of life at sea, protection of the marine environment and maritime security, special attention is paid to the education and training of seafarers, their living conditions on board, and to the promotion of the maritime profession.

A modern radar navigation simulator at the Faculty of Maritime Studies in Rijeka



3 Seafarers

3.2 Goals

- maintaining highest standards in education, training and certification of seafarers
- inclusion of the seafarers engaged in international trade on board Croatian or foreign ships into the system of health and social insurance / care
- applying highest standards of safety at work on board Croatian ships as well as highest living and working conditions on board
- ensure the keeping of appropriate record/register of employment of Croatian seafarers on board domestic and foreign ships
- create motivating conditions for the choice of seafaring professions.

3.3 Measures

- maintain appropriate quality assurance management system in Croatian maritime education and training institutions and in maritime administration
- application of highest educational and technological standards in maritime training institutions; implementation of the Bologna Declaration processes
- continuation and improvement of the dialogue with the social partners
- alteration of the national legislation in accordance with the provisions of ILO Convention 179 by regulating crewing mediation in the system of employing Croatian seafarers on board foreign ships
- invitation for public tenders by the Ministry of the Sea, Tourism, Transport and Development for granting scholarships to the best students of maritime universities and secondary education maritime schools
- invitation for public tenders for subsidising the cost of onboard training service (for watchkeeping officers as per STCW 1978/1995) on board Croatian ships
- conduct of frequent inspection survey of living and working conditions on board
- continuous monitoring of onboard training of seafarers especially regarding the safety of navigation, security and marine environment protection.

Traditional rowing regatta for future seafarers



4 Shipping

4.1 Status



M/V Marjan – Jadrolinija – Rijeka – the largest ferry built in a Croatian shipyard for a domestic shipping company, capacity 130 vehicles and 1200 passengers; built within the state subsidized program for rebuilding and developing the Jadrolinija passenger fleet in the 2004-2008 period

Throughout its history the Republic of Croatia has been dependent on maritime shipping. The main reasons are its geo-strategic position and long and indented coastline.

Currently, there are 1,575 ships, 102,916 yachts and boats entered in the Croatian registers of ships, yachts and boats.

Due to war hostilities, in the early '90s a major part of Croatian-owned ships, were registered under various flags of convenience. The process of re-flagging back to the Croatian flag started only after the international recognition of the Republic of Croatia.

Unfortunately, in the '80, because of a generally inadequate policy in respect of shipping, non-existence of any private initiative or market economy, renewal of ships sailing in the national trade was rather slow causing over-aging of the

national fleet / ships engaged in the domestic trade today.

It is worth noting that despite a high average lifetime of the passenger fleet, no single maritime accident involving passenger or ro-ro passenger ship with casualties or significant pollution has been recorded within the internal sea waters or the territorial sea of the Republic of Croatia.

The ships engaged in international voyages have a better age distribution, if compared to the world average.

Being a traditional activity of the coastal region as well as of the island communities along the eastern Adriatic coast, fishing has had an important role, even today, in the overall development of the islands. Consequently, the

4 Shipping



M/V Sveti Nikola I, owned by Atlantska plovidba d.d., Dubrovnik, built at the Uljanik Shipyard in Pula



rules and regulations presently regulating the fishing industry follow traditional principles, notwithstanding the fact that a significant number of these rules are today questionable. As in the case of the merchant fleet, due to a number of reasons the average age of the Croatian fishing fleet is extremely high. Another important feature of the national fishing fleet is that it is used primarily for fishing in the areas within the internal sea waters of the Republic of Croatia between the mainland and outer island limits. Only occasionally can Croatian fishing vessels be found fishing in unsheltered areas of the Adriatic Sea. Consequently, in several areas within the internal sea waters a degree of over-fishing has been revealed.

4 Shipping

4.2 Goals

Taking into account the present status as well as the foreseeable overall development of the Republic of Croatia and the neighbouring countries, the Ministry has set out the following goals in the area of national and international shipping:

- Increase of frequency, reliability and quality of shipping services between the mainland and the islands and promotion of sustainable growth of the islands and their tourist industry;
- Establishment of shipping services between the mainland and the islands in the form of public service contracts through an unrestricted and transparent public procurement procedure;
- Renewal and modernization of the vessels engaged on international voyages;
- Re-flagging of Croatian-owned ships back to Croatian flag;
- Renewal and modernization of Croatian fishing fleet in order to reduce the average age of ships as well as to promote their operation in unsheltered/open sea areas of the Adriatic Sea and the Mediterranean;
- Renewal and modernization of passenger vessels up to 100 GT and excursion vessels up to 300 GT;
- Adjustment of the Croatian shipping legislation to relevant legal sources of the EU in accordance with national programme, taking into account that the implementation of certain requirements may be postponed if the Government of the Republic of Croatia considers them to be subject to negotiation and if such later date is agreed during the period of accession negotiation.



M/T Alan Veliki, 166,739 DWT owned by Tankerska Plovidba, d.d., Zadar, passing the Bosphorus Strait. It was built in the Brodosplit Shipyard with a financial support from the state budget funds

4 Shipping

4.3 Measures

The proclaimed goals will be reached by means of:

- Implementation of the public procurement procedure and public service contracts in respect of coastal shipping services between the mainland and adjacent islands, as defined in the new Law on liner and irregular maritime coastal services, (target date: second half of 2006);

world shipping market, and employing the domestic shipbuilding facilities. The state budget funds allocated for promoting the above Programme are to be provided jointly by the Ministry of the Sea, Tourism, Transport and Development (10%) and the Ministry of the Economy, Labour and Entrepreneurship (10%).

From the beginning of the implementation of the



M/Y »Tirena«, a replica of a Dubrovnik galley ship from the 16th century built in 2005 in the »Loger« Shipyard, Omiš, with the support of the state budget within the Government's excursion fleet renewal program

- Promoting the programme of building ships for the Croatian fleet in domestic shipyards, in continuo since 1999;

The above Programme has been devised to renew and modernise the fleet, increasing the competitive power of Croatian shipowners on the

Programme until the end of the year 2005, the domestic shipyards delivered 12 ships for domestic owners. This part of the Programme was subsidised by the Ministry of the Sea, Tourism, Transport and Development contributing a total of HRK 211.7 million (€ 28.8 million).

4 Shipping

In the year 2005, subsidising the construction of ships for the domestic owners continued (involving both the merchant and passenger fleet). As a result, in the same year two oil tankers were delivered to the owners Tankerska Plovidba of Zadar and Uljanik Plovidba of Pula, built by the Split Shipyard and 3. Maj Shipyard respectively, as well as three ro-ro/passenger ferries to the domestic owners Jadrolinija of Rijeka and Rapska Plovidba of Rab. In this part of the Programme the subsidy granted by the Ministry of the Sea, Tourism, Transport and Development amounted to a total of HRK 66.8 million (€ 9.1 million).

- Promoting the Programme of building and renewal of the passenger fleet, in conformity with the Government Decision, 2003 (valid for the period 2004-2008);

The primary aim of the above Programme is targeted to the process of modernisation and renewal of the passenger fleet with a view to promoting demographic and economic revival and development of Croatian islands while at the same time meeting the requirements of heavy traffic demand during the tourist season, as well as increasing ship safety and complying with relevant EU Directives concerning safety of navigation.

The Jadrolinija Passenger Fleet Development Programme for the period 2004-2008 is valued at € 139.6 million. The implementation of this programme will provide Jadrolinija, the leading passenger ship owner, with ten new ships, while at the same time 15 ships are to be laid up. This will reduce the average age of Jadrolinija's ships from 28.1 to 19.0 years (lower than the European average) while at the same time increasing the owner's total carrying capacity by 10%.

The Programme is entirely newbuildings-oriented, except for one car-ferry (M/v Zadar, carrying capacity: 280 vehicles and 1,025 passengers) purchased in 2004 to operate on international services.

In 2004 two ferries were delivered (Sv. Krševan and Supetar, each carrying up to 100 passenger



M/V »Tirena« (detail)

cars and 600 passengers), contract price € 5.7 million, whereas in 2005 two further ro-ro/passenger ferries were built in domestic shipyards (the BrodoSplit Special Craft Shipyard and Kraljevica Shipyard), i.e. the car-ferry Cres, € 5.7 million (carrying capacity: 100 passenger cars and 600 passengers, of which 400 passengers can be accommodated in an air-conditioned passenger saloon) and the car-ferry Marijan, the largest car-ferry to have been built for Jadrolinija so far, € 8.2 million (carrying capacity: 130 passenger cars and 1200 passengers, of which 800 passengers can be accommodated in an air-conditioned passenger saloon).

One ro-ro/passenger ferry, Sveti Marin, € 4.3 million, carrying capacity 50 passenger cars and 250 passengers, was delivered by the Viktor Lenac Shipyard/Shiprepairers for the owner Rapska Plovidba.

The share of state subsidy in financing the construction of the ships in the above Programme was 10% of the total contract price.

4 Shipping



Thanks to its geographical position, the Republic of Croatia will be included in the Program of the »Marco Polo« Community and participate in the »Motorway of the Sea of South East Europe«

- Promoting the Programme of construction and renewal of the fishing fleet, as per Government Decision, 2005 (valid for the period 2005–2010);

The financing model for the above Programme relies on the incentive state budget funds provided by three interested ministries (Ministry of the Sea, Tourism, Transport and Development, Ministry of the Economy, Labour and Entrepreneurship, and Ministry of Agriculture, Forestry and Water Management) which together subsidise 30% of the contract price per ship (10% by each Ministry). The purpose of the incentive funds is to move a part of the fishing load from the internal seaways to the outer fishing waters (i.e. Protected Ecological and Fishery Zone), in order to stop further impoverishment of the fishing fund and to increase safety of navigation and the competitive power of the fishing industry.

The Programme is to encompass the construction of a total of 50 fishing vessels (large seiners/ trawlers), 25 – 34 m in length, and other types of smaller fishing crafts.

The Ministry of Agriculture, Forestry and Water Management has invited public tenders for obtaining Government subsidy in financing and modernisation of the fishing fleet. The tenders received are currently being evaluated in order to commence the operational implementation of the Programme.

The Ministry of the Sea, Tourism, Transport and Development has invited public tenders for the design of project documents for the construction of two different types of fishing vessels. The project documents were designed by the Brodarski Institute (Ship Design and Propulsion Institute) of Zagreb.

4 Shipping

- Promoting the Programme of construction and renewal of passenger vessels up to 100 GT and excursion vessels up to 300 GT, Government Decision, 2005 (valid for the period 2005-2010);

In order to provide the conditions for enhancing the quality of maritime traffic links and for extending tourist supply by offering boat tours arranged and operated by Croatian private entrepreneurs, the Government has passed the Financing Programme for the Renewal of Passenger and Excursion/Boat Tour Fleet for the benefit of vessel-owning entrepreneurs.

This Programme is designed to instigate building of new ships and boats operating on passenger services and providing day-tours and week cruises within internal seawaters and the territorial sea of the Republic of Croatia. The prime objective of the Programme is to provide as high quality and safety of passenger carriage as possible on the one hand, and development of small shipyards along the coast and on the islands on the other.

The financing model of the Programme relies on the incentive funds provided from the Government budget for the year 2005, whereby the Government is expected to subsidise 10% of contract price for the construction of ship hulls.

The Ministry of the Sea, Tourism, Transport and Development has invited public tenders for granting incentive funds allocated for the construction of passenger boat hulls up to 100 GT and excursion boats up to 300 GT in Croatian shipyards. All the tenders received have already been evaluated by a specially appointed evaluating committee.

In compliance with the criteria laid down in Public Tender Documents, ten bidders/owners were elected and on July 18th 2005 they signed the Hull Construction Subsidy Contract with the Ministry of the Sea, Tourism, Transport and Development.

The total price of the Programme, i.e. ship hull construction by all the ten bidders, is HRK

22,698 million (€ 3.1 million), where the Ministry is to provide 10% of the incentive funds amounting to HRK 2,270 million in the year 2005.

- Tax relaxation for Croatian shipping companies engaged in international trade, as provided in the Maritime Code, 2004.

- Establishment of the Short Sea Shipping Promotion Centre. The Centre was established on July 12, 2005 by the Ministry of the Sea, forwarding agents, port authorities, Croatian Railways, Croatian Association of Road Hauliers, and shipping agents. It is expected that the Centre will join the European Network for the Promotion of Short Sea Shipping in October 2005. The objective of the Centre is to encourage evaluation of the advantages of short sea shipping on the trans-European and pan-European level. Furthermore, the Centre is to facilitate integration processes in the logistic chain of inter-modal transport by means of providing support to the Centre members in designing specific projects whereby traffic by road is to be shifted to other modes of transport, with special emphasis on seaborne transport, as well as to provide support in securing subsidy funds from EU sources.

- Reinforcement of administrative measures in order to accomplish eligibility to participate in the projects promoting short sea shipping within the programme of Croatia's participation in the EU Marco Polo Programme. Using financial assistance from the PHARE Programme for the year 2005, the Ministry of the Sea, Tourism, Transport and Development is to join the Marco Polo Programme in 2006. This will provide Croatian carriers the possibility of access to financial support from the above Programme in conducting specific projects designed to reduce the heavily loaded road routes.

The Republic of Croatia is expected to take part in the Marco Polo II Programme, starting in the year 2007.

5 Ports

5.1 Status

Deep penetration of the Adriatic Sea in the European mainland as well as its navigational characteristics have always made Adriatic ports highly attractive for cargoes passing to and from Central and Southeast European countries.

Major infrastructural projects in the Republic of Croatia, particularly the recently opened motorways connecting Croatian ports with the road network in the neighbouring countries (Austria, Hungary and Slovenia), now render Croatian ports highly attractive, particularly the port of Rijeka.

On the other side, thanks to its geographical position the port of Ploče attracts cargoes from Bosnia and Herzegovina, Serbia and Montenegro



Cruiser »Costa Mediterranea« anchored at the Old City port of Dubrovnik

as well as from the eastern parts of Hungary. Over recent years continuous growth of the tourism has resulted in a significant increase of passenger traffic. This is evidenced by a marked increase of the number of large cruisers calling at Croatian ports and the number of voyages between Italian and Croatian ports.

Because of the geo-transport position of the Republic of Croatia it is of utmost importance to strictly follow the European trends of re-routing road cargoes to the ecologically more acceptable modes of transportation, particularly to maritime and river routes.

The present capacity of the container terminal in the port of Rijeka is becoming a limiting factor for further increase of containerised, ro-ro and general cargo traffic.

After re-opening of the steel mills in Bosnia and Herzegovina, bulk cargo traffic has markedly increased, particularly the traffic moving through the port of Ploče where the existing port facilities are already insufficient. At the same time, the recent renewal of the economy in Bosnia and Herzegovina is expected to result in an increase of the volumes of containerized cargo routed through the port of Ploče, where presently there is no container terminal.

The port of Dubrovnik is presently one of the most attractive destinations for cruise ships in the Mediterranean area. Consequently, the port is now unable to accept increasing requests for safe accommodation of such ships.

In Zadar, the old town port facilities are incapable of meeting the requirements of increased passenger traffic to and from adjacent islands or those departing/arriving from abroad. Therefore, relocation of these facilities and building a new passenger terminal in the area of Zadar-Gaženica has become a necessity. The new terminal is also seen as a possible location for new lines connecting the eastern and western part of the Adriatic coast.

In respect of the number of passengers the port of Split is the third largest port in the Mediterranean (3 millions in 2004). The present terminal facilities in the existing port seriously jeopardize undisturbed traffic of passengers. Therefore, it is necessary to build supplementary berths on the outer side of the breakwater. The long-term

5 Ports



Pan-European corridors

development of the passenger terminal in the port of Split is based on partial shifting of international ro-ro traffic to the presently under-exploited port basin of Sjeverna luka.

As a result, additional investments in the construction of state and county ports, as well as in building new and modern passenger ships, are needed in order to meet the requirements of increased passenger traffic, particularly during the tourist season.

In 2004 the total traffic of Croatian ports of national importance (Rijeka, Zadar, Šibenik, Split, Ploče and Dubrovnik) reached 7 million passengers and 17 million tonnes of cargo. The expected increase in the traffic volumes therefore requires additional facilities and equipment to be installed in the ports, as laid down in the MARPOL and relevant EU regulations and directives.

5 Ports

5.2 Goals

Taking into account the present status as well as the foreseeable overall development of the Republic of Croatia and the neighbouring countries, the Ministry of the Sea, Tourism, Transport and Development sets out the following goals in the area of port development:

- Modernization of the port of Rijeka in order to increase the cargo volume, particularly the cargoes in transit and containerized and ro-ro cargoes;
- Increase the volume of bulk and containerized cargoes passing through the port of Ploče and heading for Bosnia and Herzegovina as well as to other countries connected by the Pan-European Vc corridor;
- Modernization and reconstruction of the passenger terminal in the port of Dubrovnik;
- Building of the new passenger and ro-ro terminal in the port of Zadar;
- Building of supplementary seasonal (summer) berths in the port of Split;
- Reconstruction of other state or county ports mostly used for connecting the mainland with the adjacent islands;
- Encourage the introduction of new cross-Adriatic shipping lines as well as between the ports in the Adriatic Sea and the ports in the Ionian Sea;
- Installation of appropriate port facilities necessary for the reception of oily waters, garbage and cargo residuals;
- Harmonization of the Croatian legislation related to port development with the relevant legal sources of the EU, in accordance with national programme, taking into account that the implementation of certain requirements may be postponed if the Government of the Republic of Croatia considers them subject to negotiation and if such later date is agreed during the accession negotiation.

The Port of Rijeka, Croatia's largest port. The project entitled »Rijeka Gateway« is currently ongoing with the support of a loan from the World Bank and the state budget fund



5 Ports

5.3 Measures



The »Brajdica« Container Terminal in Rijeka has seen a constant growth in container transport

The proclaimed goals will be achieved by means of the following:

Port of Rijeka:

- Finalization of the Rijeka Gateway project (€ 46.2 million) in accordance with the Government Decision (30/04/2003 and 12/07/2003) and financed through the loan granted by EBRD to the Port of Rijeka Authority, supported also by budget funds provided by the Government of the Republic of Croatia (target date: 2009);
- The Rijeka Gateway Project includes the following:
 1. Reconstruction of the Bečka Quay and the Praška Quay, offering together a 4 hectare port operational area;
 2. Construction of a new 2.5 km access traffic highway along the western part of the port. Re-construction of the infrastructure and the main installation ducts, as well as the rail tracks, constitutes a part of the corridor.
 3. Construction of a new 1,200 metre long quay along the existing Zagrebačka Quay. In Stage One, 300 metres of quay will be constructed. The new quay covers an area of 10 hectares and is designed for general cargo operations.
 4. Passenger Terminal located at the root of the Rijeka Breakwater. When completed, the terminal will have two passenger ship berths and a passenger accommodation building. Initial re-construction of the breakwater will allow accommodation of passenger ships up to 200 m in length.

5 Ports

The overall project is to provide the necessary conditions for further development of cargo and passenger traffic in the port of Rijeka, specialisation of terminals, also allowing further capital investment in port operations on the PPP/BOT basis.

Port of Ploče

- Successful continuation of loan negotiations with the World Bank for building a bulk cargo terminal (estimated value 42.087.000 €) and a container terminal (estimated value 31.658.476 €) in the port of Ploče;
- The construction of the container terminal is to provide the port of Ploče with further 12 hectares of stacking area and a 300 m long quay for accommodating container ships. Port superstructure facilities are to be built on concession basis by Port Ploče Inc.
- The construction of the bulk cargo terminal is to increase the bulk cargo handling area in the port of Ploče by further 25 hectares, with a new 300 m long quay capable of accommodating ships of 150 000 dwt and more.
- These projects are designed to meet the requirements of the economy of Bosnia and Herzegovina and the businesses in the countries connected to the Vc Corridor. As in the case of Rijeka, the port superstructure facilities in the



The Port of Ploče, the construction site of a large container terminal and bulk freight terminal



The geostrategic position of the Port of Ploče guarantees a further increase in transit transport

port of Ploče are to be built on the PPP/BOT basis.

Port of Dubrovnik:

- Implementation of a loan to be granted by the European bank for building port infrastructure in the port of Dubrovnik (projected value 26.5 M €) and building port superstructure to be financed through concessions granted to private interests (target date: 2007);
- The project covers the construction of a new 1500 m long quay for accommodation of cruise ships and a new port area of 15,000 sq m, allowing simultaneous accommodation of most modern cruise ships and simultaneous disembarkation/embarkation of 10,000 passengers. Infrastructure construction is to create the necessary conditions for setting up land-based facilities such as the passenger terminal, garage, trade centre or hotel and casino, all investments to be financed on BOT/PPP basis.

Port of Zadar:

- Continuation of the negotiation with relevant international financial institutions in order to obtain a loan for building the new passenger

5 Ports



In early 2006, reconstruction of the berth of the Port of Gruž–Dubrovnik will begin, thereby satisfying the needs of the increasing number of cruise ships accommodated here



Future appearance of the passenger Port of Zadar–Gaženica

5 Ports

terminal in the port of Zadar–Gaženica (estimated value 70 M €)

- The project is to reduce the heavy traffic of passenger ships located in the old city harbour (in the historical city centre). The new modern passenger port at Zadar–Gaženica is expected to accommodate all types of passenger and ro-ro ships. The new port will have area of 250,000 sq m and a total quay length of 3,000 metres. The maximum berth depth will be 13 metres, which will allow accommodation of largest cruise ships. This project represents a long-term solution of the problem of seaborne passenger traffic in the City of Zadar.

Port of Šibenik:

- Construction of a passenger terminal in the port of Šibenik (estimated value 4 M €); port superstructure to be financed through concessions granted to private interests on the basis of international public invitation for tenders;
- Presently in the port of Šibenik there is no satisfactory passenger terminal. Therefore passenger traffic partly takes place in the cargo port. Construction of the terminal is to offer a long-term solution of the passenger traffic in the port of Šibenik, accommodation of cruise ships, demand or which already exists. The new terminal will also provide the possibility for the location and construction of the harbourmaster's office, custom house, police and port authority head offices, all of which are now located and operate under unsatisfactory space conditions.

An increasing number of new passengers sailing into the Port of Šibenik calls for the construction of a new passenger terminal



5 Ports



The Port of Split, the third largest passenger port in the Mediterranean in terms of passenger number

Port of Split:

- The Project of constructing supplementary (summer) berths including the extension of the jetty with the construction of ro-ro ramps and the construction of a ro-ro ramp in the Northern port of Split to be financed through a commercial loan granted to the Port of Split, Authority and guaranteed by the Government of the Republic of Croatia; On the other hand, the port superstructure is to be financed through concessions granted to private interests
- on the basis of invitation for international tenders.
- When the Project is completed the number of berths in the old town port of Split will be increased, the port will be able to accommodate cruise vessels, and the heavy occupancy load on the extremely busy Split-Supetar ferry service will be reduced. In this way the problem of insufficient berthing accommodation in the port is to be solved, at least temporarily.
- Long-term solution of marine traffic will be dealt with as a part of the master plan for the area.

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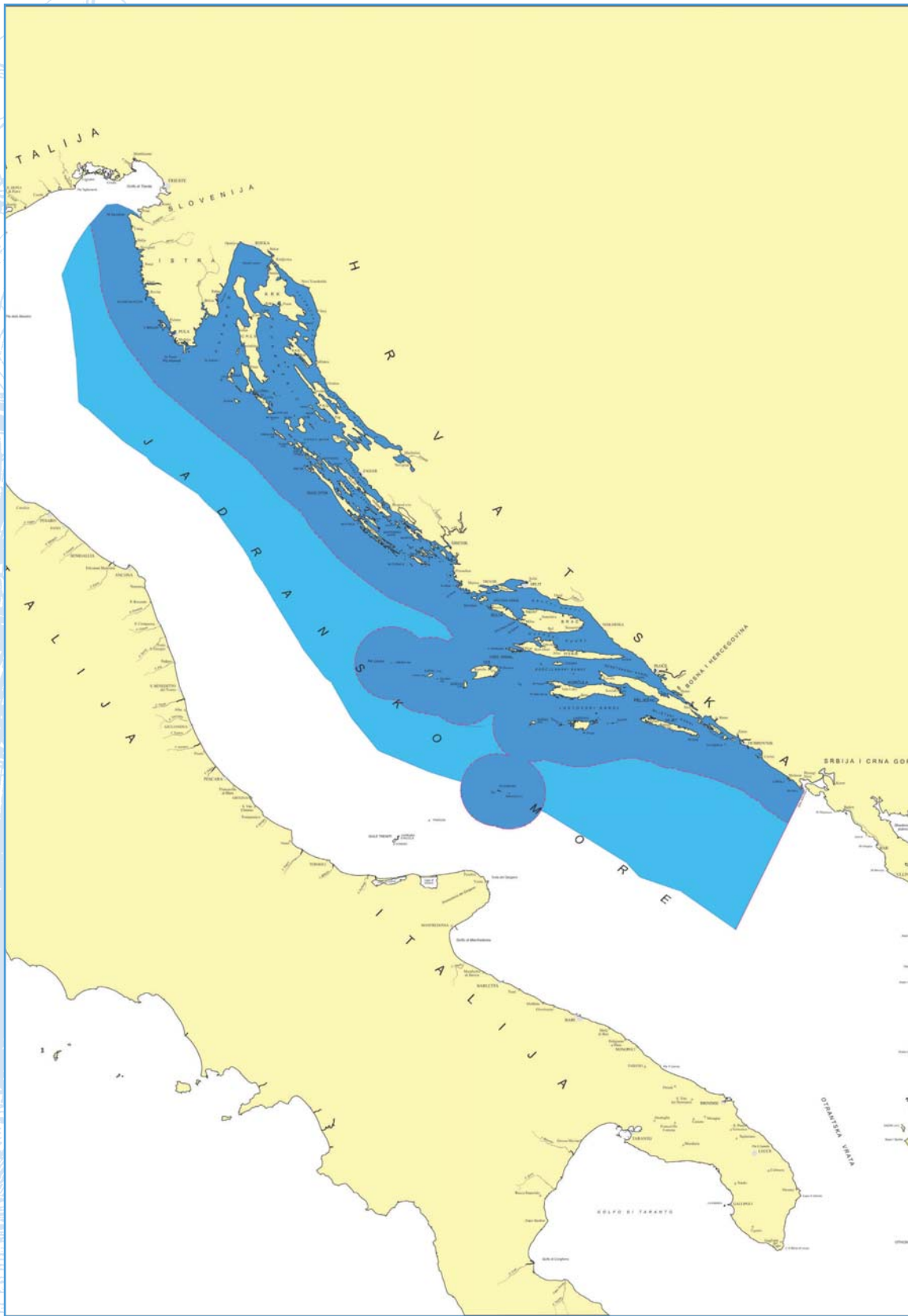
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