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Traffic Policy
Review
U. D. C.: 656.61:629.5.046(497.5)
Accepted: Jun. 14, 2003
Approved: Sep. 6, 2004

ECONOMIC ASPECTS OF IMPROVING THE CROATIAN MARITIME PASSENGER SHIPPING

ABSTRACT

This paper analyses the features of passenger liner shipping compared to tramp shipping as well as human resources of liner companies. The biggest Croatian passenger liner company, Jadrolinija d. d., Rijeka is analysed as well as the capacity of the Croatian passenger liner companies in terms of the needs of tourism and promotion of the Croatian shipbuilding. Trends that appear in the capacity and characteristics of ships used in liner shipping and for cruising indicate the necessity of complex approach to stimulating the development of these branches. A complex approach to shipping, tourism and shipbuilding is expected to significantly contribute to restructuring of the Croatian economy and to stimulating the export sector.

KEY WORDS

maritime passenger shipping, tourism, shipbuilding

1. INTRODUCTION

Maritime shipping is an economic activity of transporting goods and passengers by ship and is accordingly divided into cargo and passenger shipping. Contemporary passenger shipping is part of liner shipping and plays a very important role in the development of the entire coastal economy and especially tourism.

The leading passenger liner company in Croatia is Jadrolinija d. d., Rijeka, which currently disposes of a passenger fleet of 50 passenger vessels (ships, ferries and catamarans) and has around 1200 employees. Other passenger shipping companies, with fewer vessels in their fleets and much less revenues in passenger transport, cannot significantly influence the development of passenger shipping in Croatia.

This paper analyses the role of capacity and human resources of the Croatian passenger shipping with an emphasis on studying the position of the biggest passenger liner company in Croatia - Jadrolinija d. d., Rijeka. The conditions of the Croatian passenger shipping are analysed in terms of introducing domestic shipbuilding in that activity as well as the interde-

pendence of tourism and maritime passenger shipping.

2. LINER AND TRAMP PASSENGER SHIPPING

According to business organisation and market there is liner and (tramp) tourist shipping. In passenger shipping, passengers and/or passengers and various vehicles are transported. Liner passenger shipping provides regular lines by similar or same ships. In the tramp passenger shipping the shipping services are provided by the big modern ships intended for cruises. Currently, the importance of passenger shipping in the world has been increasing which can be proven by data provided by the official world maritime statistics which indicate a continuous increase of the share of the world passenger ship tonnage in the total world ship tonnage.

Liner passenger shipping has features similar to those of liner cargo shipping. Lines are provided by a group of same or similar ships which transport passengers and often vehicles as well. Sailing timetable depends on the market on which the passenger shipping company sails. Changes in sailing timetables depend on seasonal fluctuations in transport demand. Maritime transport is done according to regular and special timetables. The transport is provided by passenger ships, fast passenger ships and passenger RO/RO ships. Fast passenger ships are used more often in maritime transport of passengers on small-, medium- and large distance areas.¹

Passenger RO/RO ships are necessary in connecting all the destinations which dispose of modern roads which is the result of contemporary symbiosis between man and vehicles. Traditional passenger ships are becoming less significant and are used for transport of passengers to smaller islands which do not have road infrastructure.

Croatian passenger shipping companies are still mostly state-owned enterprises, as for instance Jadro-

linija plc, Rijeka, which, in comparison to private shipping companies, has the advantage of receiving state support. The state supports those Jadrolinija lines which are not profitable but the state also takes care about their fares. They should be stimulating for both population of the island and tourists, who by coming to the islands stimulate the development of the entire island economy.

Providing passenger line between the coast and the islands is of a national importance. Law on the islands² pays special attention to connecting islands with the land and islands among themselves. It has been determined that public passenger and passenger cargo transport in liner shipping between islands and the land as well as in interinsular transport is organised and managed as a system of maritime and road transport. According to the Law on the islands the maritime transport should daily provide at least three lines with the land or a town i. e. an administrative centre on another island for every inhabited island which is not connected with the land by a bridge;³ and at least two of these lines should be fast.

Since introduction of fast shipping line requires considerable financial effort the Law on the islands specifies that part of the means from the state budget which are available for the development of the islands can be used for purchasing of the suitable ships which would be leased to shipping companies of coastal-island counties i. e. to private shippers in public transport. However, such a way of improving fast shipping lines with islands is yet to become a reality. Providing public passenger fast line transport⁴ on state lines which connect islands with land and island among themselves is based only on the approval⁵ given by the government of the Republic of Croatia following the suggestion of the Ministry of the Sea, Tourism, Transport and Development.

The island population should pay the fare which equals the fare in road transport calculated on the basis of the number of kilometres covered and for cars calculated on the basis of the number of kilometres covered on motorways. The difference between that price and the market price should be financed from the budget. Other passengers should pay the market price.

Big modern ships, which are used for cruises, operate in tourist shipping, smaller boats for daily excursions or smaller boats for cruises of longer duration. Mega ships for cruises are in the category of ships with more than 140000 BT and more than 3000 berths in passenger cabins. The number and size of these ships increases and shows a growing trend, and their visits to domestic ports have become more frequent thus significantly increasing the revenues of port and tourist companies⁶.

Regarding smaller passenger boats for cruises and daily excursions it has been noticed that they also play

an important role in the economy and the tourist offer of the coastal area. They are owned by small shipping companies and sole traders who provide hospitality services.

Big passenger ships for cruises are of great significance for Croatia because of the possibility to engage domestic shipbuilding in their construction or reconstruction. They present an additional source of revenues in coastal economy in terms of providing services for the guests of those boats offering excursions, catering and selling souvenirs in the ports of call.

There are four major passenger shipping companies in Croatia: Jadrolinija in Rijeka, Mediteranska plovdba in Korčula, Lošinjska plovdba in Lošinj, SEM Marina in Split, Uljanik plovdba in Pula and Rapska plovdba in Rab. The leading shipping company is Jadrolinija with 50 out of a total of 63 domestic passenger ships (Table 1). It owns 6 out of 13 passenger ships in Croatia, 6 fast passenger ships and 38 RO/RO-passenger ships out of 45. Out of the total number of passengers which Croatian shipping companies can carry, that is 22,930 passengers, Jadrolinija itself can carry 20,739, which makes 90% of the total capacity. Out of the total number of vehicles, which all the shipping companies can carry, that is 2730, Jadrolinija RO/RO-passenger ships can carry 2,450 vehicles, which claims a share of 89.74% of the total capacity⁷. These data confirm that Jadrolinija is the leading liner passenger shipping company in Croatia.

Nowadays, the ships which can transport both passengers and vehicles have an advantage over other types of ships. There are significant seasonal fluctuations in market trends, therefore passenger shipping companies try to reduce the fluctuations by lessening the peak demand in the following ways:

- by reducing the fares during off-peak season,
- more frequent lines in the peak season,
- renting the ships of other shipping companies in the peak season,
- signing contracts with other shipping companies which provide the same line,
- signing contracts with tourist agencies on ship transport in off-peak periods.

Concerning the renting of passenger ships it has become a common practice to engage the passenger ships owned by the companies from the countries on the south hemisphere in the periods when there is dead season in those countries and peak season in our country.

Human resources are the most important part in the process of providing maritime transport services by any shipping company and the same applies to the liner passenger shipping company. Maritime staff presents a very important factor in the organisation of a shipping company. Most of the employees in shipping companies have to be interdisciplinary and

Table 1 - Structure of capacity of Croatian shipping companies' fleet, members of Croatian Association of Shipping Companies Mare Nostrum, December, 31st 2002

No.	Type of ship by shipping companies	No. of ships	BT	DWT	No. of vehicles	No. of berths	No. of passengers
A Passenger ships							
1	Jadrolinija	6	1 616	1 076	0	0	2 200
2	Uljanik plovidba	1	5 619	2 018	0	300	300
3	Meditranska plovidba	2	154	0	0	0	304
4	SEM Marina	4	788	0	0	0	607
Total A		13	8 266	2 094	0	300	3 411
B Fast passenger ships							
1	Jadrolinija	6	2 167	0	0	0	1 666
Total B		6	2 167	0	0	0	1 666
C RO/RO passenger ships							
1	Jadrolinija	37	70 652	5 417	2 450	1 736	16 873
2	Lošinjska plovidba-brodarstvo	1	1 417	0	50	0	320
3	Rapska plovidba	4	1 008	0	150	0	580
4	Meditranska plovidba	2	790	0	80	0	890
Total C		44	73 867	5 417	2 730	1 736	17 853
Total passenger fleet		63	84 300	7 514	2 730	2 036	22 930

Source: Mare Nostrum, 2003 (author's calculation)

multidisciplinary educated and they have to gain further training through the whole working life. Employees' structure of shipping companies has to adjust constantly to technical, technological, organisational, economic and legal changes in liner passenger shipping⁸.

Liner passenger ships have crews that can run the ship and provide different services for passengers. Such vessels have numerous crews because they have trained general staff in charge of providing services for passengers. Deck crew should also be trained to communicate with passengers but also to handle the loading and unloading of vehicles. The bigger the capacity of the liner passenger ship the larger the number of general staff. They have to prepare and serve food and drinks, clean and maintain passenger areas. The majority of the general staff of liner passenger ships are hospitality crew members (waiters, cooks and chambermaids)⁹.

Human resources of the leading Croatian liner shipping company, Jadrolinija in Rijeka, are considerable. However, 1,200 Jadrolinija employees worked 100,000 hours overtime in 2001. This indicates the fact that Jadrolinija lacks employees, especially in the summer months when the ships sail more frequently. There are ships that have a relief crew while there are many, especially smaller ships which do not have room for accommodating the relief crew and therefore, the

number of ships should be increased. Namely, in summer, the crews work under difficult conditions, whereas at the same time, the salary average lags behind other public enterprises in Croatia by 13.5%¹⁰, which influences the quality of the service.

Following the international system of regulations which promotes security culture and environmentalism, the Croatian shipping companies should pay more attention to it. Security on a ship is based primarily on good working conditions and management which can organise and manage the ship and the crew. In order to gain complete security it is necessary to apply the same security principles on land as well, that is, in the entire company¹¹.

3. MARITIME PASSENGER SHIPPING AS MEANS FOR DEVELOPING TOURISM

Tourism is a vital export sector of the Croatian economy and it is of great importance for the island economies and the island social communities. Improving the service of passenger shipping logically follows from the development of road infrastructure and is a prerequisite of its efficiency in the sector of tourism¹². Tourism is of great importance for the national economy.¹³

Table 2: Croatian Adriatic passenger ports - Structure of passengers (1989- 2000) -in 000-

	1989	1995		1999		2000	
	Number	Number	Growth rate (%) 95/89	Number	Growth rate (%) 99/95	Number	Growth rate (%) 00/99
Rijeka	144,40	141,90	- 2	87,58	-38	134,00	53
Split	1967,00	1410,00	-28	1563,00	11	1900,00	22
Zadar	1820,00	999,00	-45	1242,00	24	1431,00	15
Ploče	94,00	38,00	-60	31,00	-18	85,00	174
Dubrovnik	569,00	122,00	-89	213,00	25	325,00	53
Total	5894,40	2710,90	-54	3136,58	16	3875,00	24

Source: (author's calculation).

Economic sectors connected with tourism are:

- travel agencies,
- transport,
- hospitality and catering, and
- trade.

Out of these activities only the travel agencies are "true" tourist activity, while the others provide services both for the foreign tourists and the rest of population¹⁴. Tourists buy goods/services before, during and after their tour; they buy goods and the services of transport, accommodation, catering, and entertainment in different locations¹⁵.

It is often forgotten that the transport infrastructure and suprastructure can have a determining role in choosing the tourist destination¹⁶. The fact that the Adriatic coast of Croatia has not yet been fully evaluated by the tourists can be attributed to the war in Croatia and the neighbouring Bosnia and Herzegovina and to the weak infrastructure, especially road and maritime infrastructure. This is proved by a year-long lagging behind of tourism in Split-Dalmatian County which came partly as a result of transport isolation caused by slow ferry lines, often uncomfortable ferries and ships and long queuing in passenger ferry ports. Fall in traffic in the ports of the central and south Adriatic coast compared with 1989 (Table 2) can illustrate the influence of the quality of overall transport infrastructure and suprastructure (road infrastructure, maritime passenger shipping, passenger terminal and similar) on tourism.

Tourist tours begin and end with transport. Transport increases the quality of service in tourism. However, it can also have a negative impact on tourism by discouraging tourists from choosing the given destination either for the reasons of price, comfort, reliability, safety or for the time needed for arrival and return to and from the given tourist destination. Globalisation with the effect of increase of general competitiveness which also applies to tourism requires innovation and continuous improvement of quality.

It is interesting to note the change in the tourist policy in the countries with the developed tourism concerning the improvement of offer that concern:

- ensuring quality and efficiency in the development of human resources,
- stimulating innovation,
- improving infrastructure,
- preserving natural, cultural and urban tourist areas, and
- diversification and specialisation of tourist destinations and brands¹⁷.

Apart from these measures, governments of the tourist countries use measures for stimulating demand. Among the measures for stimulating tourism there are also those directed towards strengthening of the related industries and services. As a transition country, Croatia should carry out an active tourist and developmental policy. In the sphere of maritime transport Croatia should follow the example of the countries which aim at the improvement of quality of transport for tourists¹⁸.

Therefore, improvement of transport infrastructure, modernising the maritime passenger shipping fleet and providing new services of better quality would lead to the increase in revenues in tourist enterprises as well as the increase of the profitability and employment in Croatian shipping companies. Modernising the fleet would reduce the cost of maintenance and increase the number of passengers and accordingly it would increase the revenues or, in other words, the profit of the shipping companies.

Improvement of the quality of transport services in tourism requires:

- construction/purchase of the new comfortable passenger ships and ferries,
- favourable price/quality relation (e. g. vehicle fares),
- providing various services to passengers on lines which take longer than 1.5 hour (information, entertainment and similar facilities), and
- improvement in services in passenger ferry ports.

Interdependence of maritime shipping and tourism has not yet been exploited enough in increasing profit and employment. An example of an activity where the offer of the new products can result in valuable economic effects are cruises and all-inclusive packages which could be offered by shipping companies in the off-season.¹⁹

Cruises still present an unexploited potential which could be used in high season as well as in off-season periods. However, in order to be exploited in high season cruises require huge investments in acquiring suitable ships. To be able to offer such tours in off-season big domestic RO-RO passenger ships could be used for tours to south hemisphere destinations (Caribbean, Australia, and Oceania). This is common practice in cruising companies which move their fleet twice a year. Cruising potential can be seen from the data about the growth of world cruising fleet (30% according to the number of ships and 100% measured in BRT) in the period from 1995 to 2001, and from the data about the increase in the number of transported passengers in the period from 1996 to 1999, about 41% (see Table 3).

Table 3: World cruising fleet

Year	BRT	Passenger capacity	Number of ships
1995	6 279 838	233 576	336
1996*	-	-	-
1997	7 881 328	246 335	363
1998	9 157 274	275 172	387
1999*	-	-	-
2000	12 877 237	400 506	443
2001	12 630 089	401 443	439

Source: Drnjević, 2002

* Data not available

Out of 439 ships in the cruising fleet, 50 of them sailed in the Mediterranean in 2001. The leading arrival and departure ports according to the number of ships are Piraeus in Greece and Venice and Civitavecchia in Italy. The experience of tourist companies has proved that passengers who visit the Mediterranean ports, besides entertainment and relaxation on a ship, want to go ashore sightseeing. They want to visit at least one new port a day which guarantees the ports of cruiser destinations regular visits of cruisers and consequently a large number of tourists and the corresponding profit.

The contemporary passengers are more demanding and expect the same or better service for a more reasonable price. Our passenger ports have strong competition in the ports of the neighbouring countries²⁰.

Croatian Adriatic passenger ports which aim to attract a larger number of passengers on cruises have to offer top-notch services in coordination with tourist and shipping companies, in order to share their positive experience with other people.

The most recent figures indicate another record year in cruising. According to the data supplied by CLIA, a Cruise Line International Association of North America, more than 7 million passengers sailed on cruisers in the first three quarters of 2003 with a trend of growth. 9-day cruises in the Adriatic aboard M/S Dalmacija visiting the ports of Venice, Korčula, Dubrovnik, Corfu, Kotor, Split and Rovinj²¹ is a novelty on the US market.

Such examples are in favour of a closer cooperation of shipping companies and tourist workers, subjects of economic development (chambers, entrepreneurial centres and others) and tourist boards in the units of local governments and self-government in order to exploit indirect effects of tourism, to exchange knowledge and insights, and within the framework of active tourist policy to stimulate improvement of the image of Croatia and restructuring of its tourist offer²².

This approach would be based on the mutual marketing and development programmes which would ensure the introduction of the concept of a tourist destination, a destination which would be seen as a functional and spatial unit rather than an administrative unit. Accordingly, more attention should be paid to defining multi-destination schemes in tourism (visiting more destinations during the tour). These schemes are ever more present in contemporary tourism, and apart from package holidays with one main destination they include regional package holidays and chain package holiday (with no main destination), and accommodation in the main destination with visits to other destinations in the region²³.

4. INTERDEPENDENCE OF PASSENGER SHIPPING AND SHIPBUILDING IN CROATIA

Most frequently built passenger ships in the world are RO/RO passenger ships. They are used for the transport of passengers and vehicles to destinations of several NM to several hundred NM. For about ten years traditional passenger ships have been substituted by RO/RO-passenger ships. Modern RO/RO passenger ships have a capacity of 3000 passengers and 1300 vehicles with a corresponding number of cabins, hospitality, entertainment, sports, shopping and other facilities in order to satisfy the passengers' needs²⁴.

According to the type of accommodation of passengers, safety and comfort provided for the passengers, big modern RO/RO passenger ships resemble cruisers and are therefore sometimes used for that purpose. Smaller RO/RO passenger ships which do not have cabins are used for transport to closer destinations. They are slower and they have less room for accommodation of passengers and smaller capacity for vehicles. RO/RO passenger ships are built without bulkheads and are equipped with a stern-ramp for embarkation of vehicles or with more ramps either on the bow or the side of the ship.

Cruisers are built more often and their market is growing. Shipyards willingly accept the building of such ships because their price can reach up to 500 million euros and they belong to the category of the most expensive ships in the world. Building such ships in Croatian shipyards would mean achieving multiple effects. Besides exploiting the full capacity of domestic shipyards, it would also guarantee an increase in the production of domestic industries especially in electrical, timber and wood, and engineering industry. Domestic production can, namely, claim a bigger share in building of these ships than it is the case with building of merchant ships.

Cruising fares are the highest aboard smaller, luxurious boats which can take 50-100 passengers. Excursion boats are built with the capacity of 100 passengers and the speed of 15 NM/h. These boats are run by only a few members of the crew who then have to carry out nautical, machine, catering and commercial tasks²⁵.

All passenger ships are characterised by safety, pleasant atmosphere (recreational-entertainment facilities) and comfort (with minimum noise, vibration and gases)²⁶. Passenger ships are nowadays built in order to achieve certain economic goals which are reflected in the accomplished financial results. The times when particular countries competed in building the biggest and fastest ships for prestige are history. Designers should take care that the ship is profitable and not just a monument of beautiful, harmonious lines which promote the designer himself. Once economic framework in which the passenger boat is going to operate is set, the designers have to choose such solutions which will help achieve economic exploitation of the ship.

Market research should be conducted prior to designing a ship. When designing the size of the cabins, the designer has to make the right choice. Usually, the size of the cabin increases with the time that the passengers spend aboard a ship. It applies also to the cruisers and it may determine the type of the clientele, in other words their purchasing power. For short distances e. g. one-night accommodation, smaller cabins are constructed, although comfort of the passengers

and the competition make the designers and shipping companies increase those dimensions. Designers and shipping companies cannot decide whether to enlarge the communal areas to the disadvantage of individual areas or vice versa. If the designers perform their job well, they will make it easier for the crew to work on the ship, above all to general staff who are in direct contact with the passengers. Simple and functional building also makes the maintenance of the ship easier, especially the maintenance of those rooms used by the passengers²⁷.

Considering the current building of passenger ships in the Croatian shipyards, it should be pointed out that domestic shipyards have decades of experience in building all kinds of ships, RO/RO passenger ships being one of them. At the moment three RO/RO passenger ships with the capacity of 600 passengers and 100 vehicles are being built in the Croatian shipyards for Jadrolinija, and should be delivered to the consignee in the first part of 2004. In the meantime, the building of the fourth ship with the same characteristics should begin. These new ships as well as purchasing of some used ships should improve the conditions of passenger transport and make the transfer of passengers and their vehicles easier especially during high season²⁸.

5. CONCLUSION

Liner passenger shipping provides regular lines with similar or same ships. Liner passenger shipping includes traditional passenger ships, fast passenger ships, and RO/RO passenger ships. Liner passenger ships have crews that can run the ship and provide different services for passengers. Such vessels have numerous crews because they have trained general staff in charge of providing services for passengers. Deck crew should also be trained to communicate with passengers but also for handling loading and unloading of the vehicles.

Tourist tours begin and end with transport. Transport increases the quality of service in tourism. However, it can also have a negative impact on tourism by discouraging tourists from choosing the given destination either for the reasons of price, comfort, reliability, safety or for the time needed for arrival and return to and from the given tourist destination. Improvement of transport infrastructure, modernising the maritime passenger shipping fleet and providing new services of a better quality would lead to the increase in revenues in tourist enterprises as well as the increase of the profitability and employment in Croatian shipping companies.

Modernising the fleet would reduce the cost of maintenance and increase the number of passengers

and accordingly it would increase the profit of the shipping companies.

Such examples are in favour of a closer cooperation of shipping companies and tourist workers, subjects of economic development (chambers, entrepreneurial centres and others) and tourist boards in the units of local governments and self-government in order to exploit indirect effects of tourism to exchange knowledge and insights, and within the framework of the active tourist policy to stimulate improvement of the image of Croatia and to restructure its tourist offer.

Building ships for domestic shipping companies would help in the process of restructuring and recovering of domestic shipyards. It would also help achieve a profitable production and positive effects could be expected in the sphere of export. Shipbuilding industry has an important role in the Croatian export and consequently has effects on the domestic balance of payment. Positive results of restructuring the passenger fleet in domestic shipyards are reflected in considerable influence on the overall economic development. Beside the increase in profitability of domestic shipping companies it also means a better quality of service and bigger profits in the sector of tourism as well as a significant influence on the shipbuilding industry itself. Faster, more comfortable ships which would sail on regular lines would increase the interest of tourists in island destinations and in coastal and cross-Adriatic lines. It would also mean bigger profit for the Croatian shipping companies. Building new ships and reconstructing the existent ones as well as improving the structure of domestic shipping companies fleet (introducing cruisers and fast ships) would help to restructure the Croatian shipyards and stimulate the domestic production.

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SAŽETAK

GOSPODARSKI ASPEKTI UNAPREĐENJA HRVATSKOG MORSKOG PUTNIČKOG BRODARSTVA

U radu se analiziraju obilježja linijskoga putničkog brodarstva u odnosu na slobodno putničko brodarstvo, te ljudski potencijal linijskih brodara. Analizira se najveća kompanija hrvatskoga linijskog putničkog brodarstva, Jadroliniju, d. d. Rijeka. Analiziraju se kapaciteti hrvatskih putničkih brodara s aspekta potreba turizma te promocija hrvatske brodogradnje. Trendovi u kapacitetima i obilježja brodova, koji se koriste u linijskom brodarstvu kao i za kružna putovanja preporuča se kompleksan pristup u stimuliranju razvitka ovih djelatnosti.

Kompleksnim pristupom brodarstvu, turizmu i brodogradnji očekuje se važan doprinos u restrukturiranju hrvatskoga gospodarstva i stimuliranju izvoznoga sektora.

KLJUČNE RIJEČI

morsko putničko brodarstvo, turizam, brodogradnja

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