



UNECE

TRANS-EUROPEAN NORTH-SOUTH MOTORWAY (TEM)

Workshop: Functioning and financing of national road
management

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Croatia

Croatia – simple facts:

- Area: 56.594 km²
- Population: 4.4 million
- EU member: since 2013
- Capital: Zagreb



Croatia – geography:



- Land borders: 2.237 km
- Costal line: 1.777 km
- Most of Croatia is lowlands (north)
- High elevations (costal and south region)

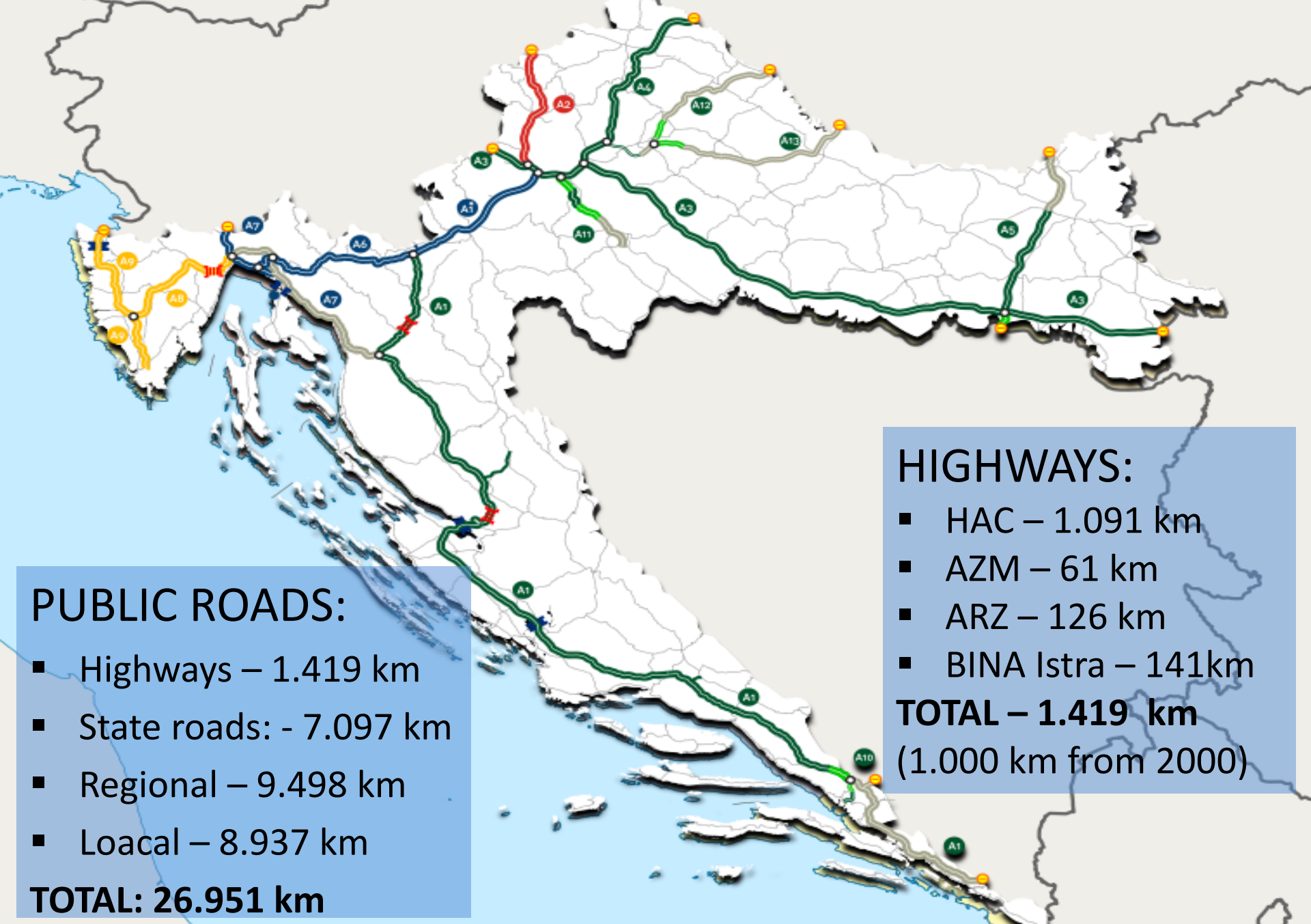
Territorial organization:



- 20 counties
- City of Zagreb
- 26 public road operators

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Croatia road network:



PUBLIC ROADS:

- Highways – 1.419 km
- State roads: - 7.097 km
- Regional – 9.498 km
- Local – 8.937 km

TOTAL: 26.951 km

HIGHWAYS:

- HAC – 1.091 km
- AZM – 61 km
- ARZ – 126 km
- BINA Istra – 141km

TOTAL – 1.419 km
(1.000 km from 2000)

Overview of the road sector financing:

- *Basic document for financing of public roads is „Road act”*
 - *highway national operator (HAC)*
 - *state road national operator (HC)*
 - *county road operator (21 ŽUCs)*
- *Basic document for financing of concessionary companies are concession agreement*
 - *highway road operator (ARZ) – 100 % state owned*
 - *highway road operator (AZM) – 51 % private owned*
 - *highway road operator (Bina-Istra) 1995.g. – 56% private owned*

Income of public roads sector:

INCOME (mil. €)	2012.	2013.	2014.	2015.	2016.	2013.-16.
Fuel tax	€ 405.024	€ 384.412	€ 306.716	€ 317.861	€ 315.617	€ 1.324.607
Tolls	€ 279.008	€ 294.533	€ 302.210	€ 320.363	€ 325.022	€ 1.242.128
Registration tax	€ 103.644	€ 114.367	€ 118.297	€ 122.096	€ 111.516	€ 466.275
Exceptional transport charges	€ 2.611	€ 2.658	€ 3.922	€ 2.438	€ 2.867	€ 11.886
Road land usage	€ 13.016	€ 12.732	€ 13.482	€ 12.542	€ 12.859	€ 51.615
State budget funds	€ 28.424	€ 50.891	€ 49.749	€ 47.711	€ 50.157	€ 198.508
Other incomes	€ 37.962	€ 46.865	€ 36.213	€ 24.744	€ 26.571	€ 134.392
TOTAL	€ 869.690	€ 906.459	€ 830.589	€ 847.755	€ 844.609	€ 3.429.412

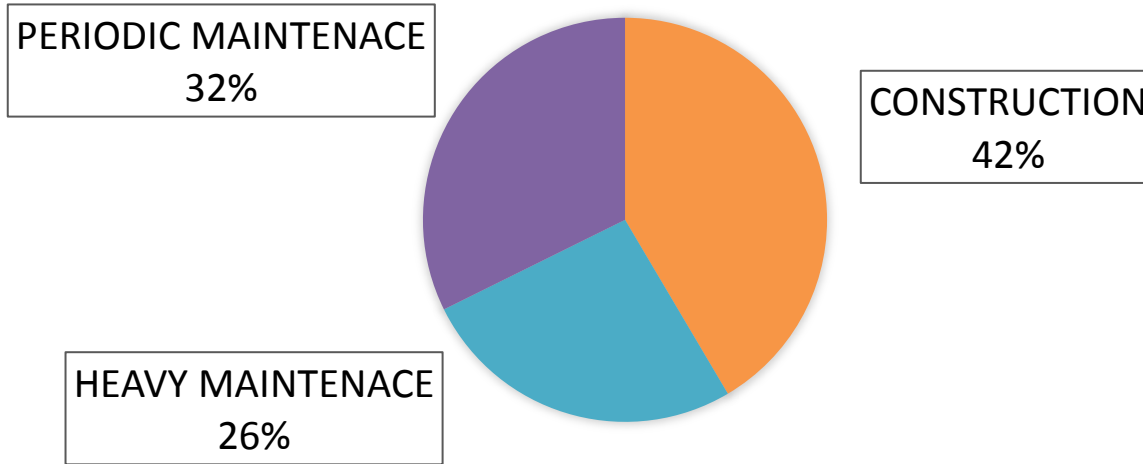
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Expenditure of public roads sector:

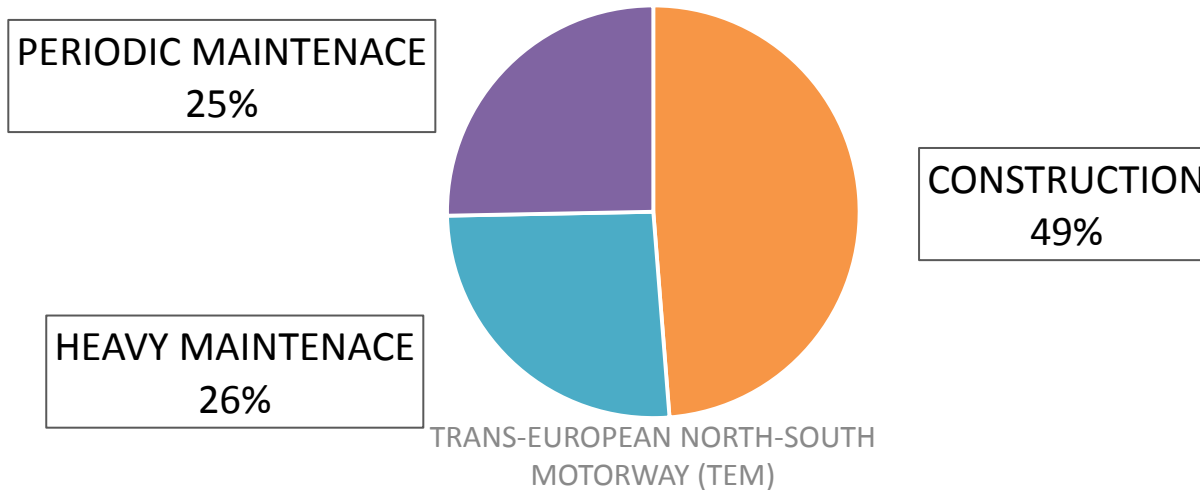
ROAD / Expenditure	2013. – 2016.	2017.-2020.	2017.	2018.	2019.	2020.
HIGHWAYS	€ 592.935	€ 636.233	€ 140.947	€ 172.151	€ 182.331	€ 140.803
Construction (CAPEX)	€ 403.347	€ 340.248	€ 69.962	€ 91.180	€ 104.517	€ 74.589
Heavy maintenance (CAPEX)	€ 54.584	€ 158.761	€ 36.450	€ 46.911	€ 43.585	€ 31.815
Periodic maintenance (OPEX)	€ 135.003	€ 137.225	€ 34.536	€ 34.061	€ 34.228	€ 34.400
STATE ROADS	€ 872.514	€ 1.251.483	€ 229.708	€ 295.260	€ 362.791	€ 363.723
Construction (CAPEX)	€ 352.443	€ 761.507	€ 105.575	€ 175.719	€ 240.859	€ 239.353
Heavy maintenance (CAPEX)	€ 302.915	€ 286.871	€ 74.800	€ 69.295	€ 70.681	€ 72.095
Periodic maintenance (OPEX)	€ 217.155	€ 203.105	€ 49.333	€ 50.246	€ 51.251	€ 52.276
COUNTY AND LOCAL ROADS	€ 373.285	€ 377.976	€ 99.763	€ 90.605	€ 93.363	€ 94.244
Construction (CAPEX)	€ 7.294	€ 13.055	€ 4.205	€ 2.814	€ 2.857	€ 3.179
Heavy maintenance (CAPEX)	€ 123.997	€ 132.019	€ 38.828	€ 29.208	€ 31.618	€ 32.364
Periodic maintenance (OPEX)	€ 241.994	€ 232.902	€ 56.729	€ 58.583	€ 58.888	€ 58.701
CAPEX	€ 1.244.580	€ 1.692.460	€ 329.820	€ 415.128	€ 494.118	€ 453.394
OPEX	€ 594.153	€ 573.232	€ 140.599	€ 142.889	€ 144.367	€ 145.377
TOTAL	€ 1.838.733	€ 2.265.692	€ 470.419	€ 558.017	€ 638.485	€ 598.771

Structure of expenditures

2013. - 2016.



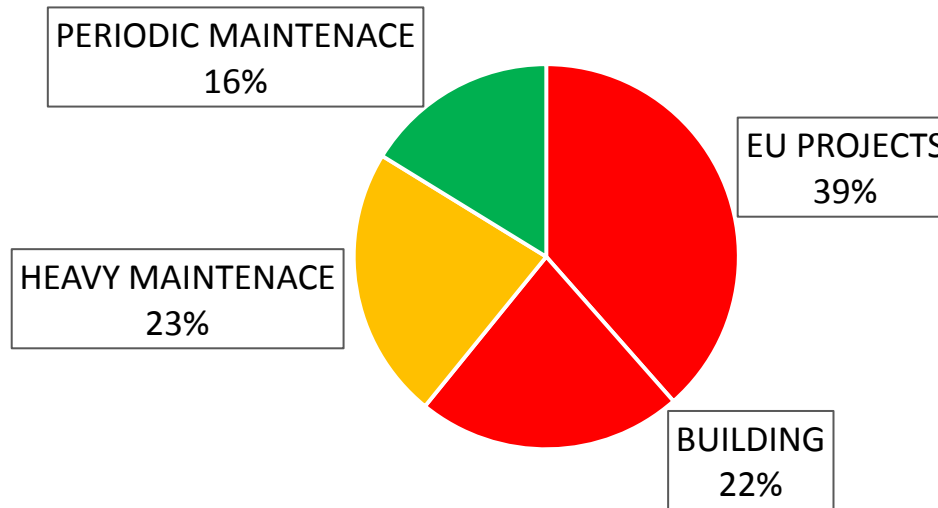
2017. - 2020.



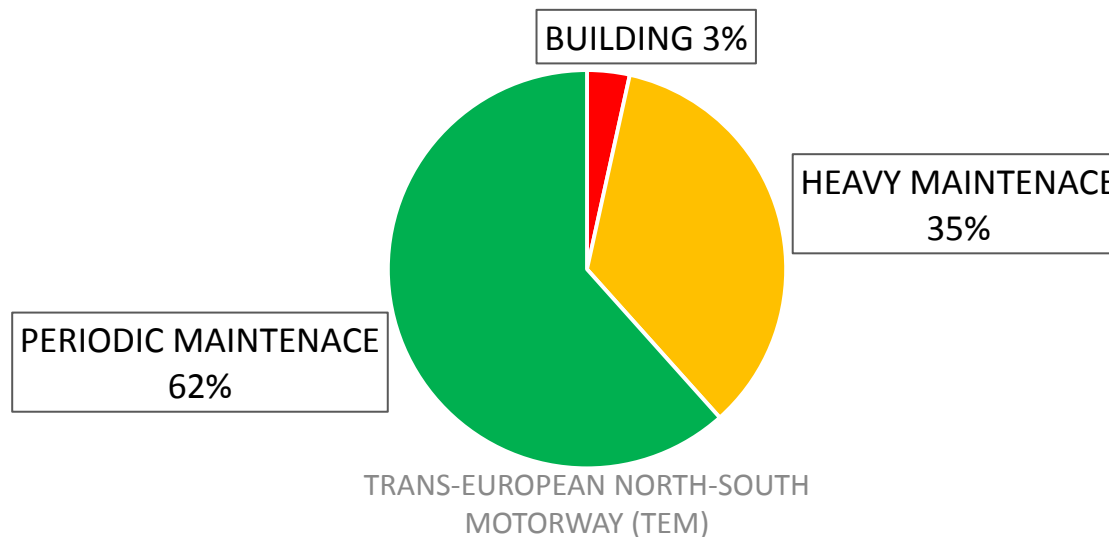
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Structure of expenditures 2017. - 2020.

STATE ROADS



COUNTY AND LOCAL ROADS



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Public roads sector debts

ROAD OPERATORS	
Hrvatske ceste d.o.o.	1.242.570.477 €
Hrvatske autoceste d.o.o.	2.915.562.534 €
Autocesta Rijeka-Zagreb d.d.	813.948.547 €
Autocesta Zagreb - Macelj d.d.	299.528.106 €
Bina Istra d.d.	534.117.214 €
TOTAL:	5.805.726.878 €

Public-private partnership (PPP)

- Road sector 2 PPPs projects:
 - Bina-Istra highway - ongoing, y 1997, 32 y duration, 140 km
 - AZM highway - ongoing, y 2003, 28 y duration, 60 km
 - Zagreb – Goričan - failed, y 1995, 425 m. €, (HR lost 37 m €)
 - Tunnel Sv. Ilija - failed, y 2003, 40 m. €
- Zagreb airoport - ongoing
- Dubrovnik cruise ship port - in process

PPP: BINA *istra*

- 141 km of highways
- 1995 y, first PPP, CA for 32 years
- Concession agreement / Phases of project:
 - 1A (Rogovići-Vodnjan), 50 km, 1998-2002, 115 m. €, IR 7-12 %
 - 1B (Medaki-Umag i Vodnjan-Pula), 2003, 210 m. €, IR 5,5-8%
 - 2A (full profile of 1A nad 1B), 305 m. €, 2007-2010, IR
 - 2B1 (Rogovići – Tunnel Učka), upgrade 30km, 170 m.€ - preparation
 - 2B2 (tunnel Učka) – in future
 - 2B3 (tunnel Učka-Matulji) – in future

Discussion

Please be ready to discuss:

- How to get balance between capex and opex within road sector?
- Do we need special policy in terms of funding allocation?
- How to split funding between national and regional roads?
- How we can support our decision making process?
- PPP – real alternative?

Thank you for attention!

Questions?

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