RESEARCH FOR TRAN COMMITTEE - TRANSPORT AND TOURISM IN CROATIA

This overview of the Croatian transport and tourism sectors was prepared to provide information for the mission of the Transport and Tourism Committee to Croatia (3-5 November 2015).

1. INTRODUCTION

The territory of Croatia comprises 1,244 islands (602 islands and islets and 642 rocks and reefs) that makes it second largest archipelago in Mediterranean after Greece. Croatia is a Parliamentary Republic, where the Croatian Parliament, named the Sabor, is the only legislative body (151 members elected for a term of 4 years). The next elections (the 8th since the 1990 multiparty Sabor) will be held on Sunday 8 November 2015. The Croatian Parliament consists of 29 Committees, including the Tourism Committee and the Committee on Maritime Affairs, Transportation and Infrastructure. Croatia has three levels of governance: the national level, the regional level with 20 counties plus the City of Zagreb, and the local level with 429 municipalities and 126 towns. The City of Zagreb has a special status, as it is both a town and a county. Croatia’s decentralisation process started in 2001 when certain functions and responsibilities were transferred from the national to the local level.

Croatia had one of the wealthiest economies among the former Yugoslavian Republics. Unfortunately, the country suffered heavily during the war of 1991-95, and lost part of its competitiveness compared to other economies of central Europe that were benefiting (at the beginning of the 1990s) from democratic changes. Also due to the subsequent introduction of reforms, Croatia had rapidly developed until 2008. Nevertheless, the country's economy turned out to be more vulnerable to shocks than that of the EU-28 average, and the economic crisis affected Croatia strongly. In 2009, its GDP shrank by 6.9 %, and the prolonged crisis has led to Croatia losing over 12 % of its output.

The economy of Croatia is a service-based economy with this sector accounting for 70 % of total GDP (over €43 million in 2014 at market prices). Tourism is one of the most important and visible sectors of the Croatian economy. And the transport sector accounts for 8 % of the total GDP of Croatia.

According to the analysis of the World Bank, even though the outlook in the short term remains difficult, privatisation, the availability of EU funds and structural reforms should help growth prospect, stimulate jobs and social cohesion in the medium term.

<table>
<thead>
<tr>
<th>Table 1: Macro-Economic Forecasts for Croatia</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>GDP growth (% year over year)</td>
</tr>
<tr>
<td>Inflation (% year over year)</td>
</tr>
<tr>
<td>Unemployment (%)</td>
</tr>
</tbody>
</table>

Source: European Commission

---

1 Hydrographic Institute of the Republic of Croatia.
2 The Croatian Parliament website.
3 The World Heritage Encyclopedia - Economy of Croatia.
5 Belgian Economic and Commercial Office in Croatia - Transport and Logistics in Croatia (page 1) - 2012.
2. TRANSPORT

The main strengths of the transport sector in Croatia come from its geostrategic position as a natural access to the Balkan region, an area of natural expansion of Europe towards the East.

There are two Core Network Corridors of the Trans-European Transport Network (TEN-T) that cross Croatia: the Mediterranean Corridor and the Rhine-Danube Corridor. The aim of the multimodal TEN-T Core Network (with the Core Network Corridors) is to strongly contribute to European cohesion and strengthen the internal market. A more competitive economy is expected to produce higher employment. Enhanced multimodality, as well as innovative technologies in the field of transport, will induce modal shift, reduce congestion on road, cut emissions of greenhouse and polluting gases and boost transport safety and security.

The Mediterranean Corridor links the Iberian ports of Algeciras, Cartagena, Valencia, Tarragona and Barcelona through Southern France, with links to Marseille, and Lyon to Northern Italy, Slovenia and a branch via Croatia to Hungary and the Ukrainian border. It covers rail and road, airports, ports, RRT’s and, in Northern Italy, also the Po river inland waterway. The Corridor’s integral part is the Rijeka-Zagreb-Budapest rail and road corridor, i.e. the Rijeka traffic route. The main feature of the Rijeka traffic route is the possibility of intermodal approach which can connect the port of Rijeka with rail and the Danube waterway, representing the shortest distance from the Adriatic to the Danube region. A continuation of the Mediterranean Corridor and its integral part is also the road and rail corridor from Zagreb to Slovenia.

---

7 European Commission - DG MOVE (Mobility and Transport) - TEN-T Country Fiche for Croatia.
The Rhine-Danube Corridor connects Strasbourg and Mannheim via two parallel axes in southern Germany, one along Main and the Danube, the other one via Stuttgart and Munich, and with a branch to Prague and Zilina to the Slovak-Ukrainian border, through Austria, Slovakia and Hungary to the Romanian ports of Constanta and Galati. It covers rail, road, airports, ports, RRT’s and the inland waterways system of Main, Main-Danube Canal, the entire Danube downstream of Kelheim and the Sava river.

Croatia’s Transport Development Strategy (TDS) sets out the basic guidelines for the development of the country’s transport sector over a medium and long-term horizon (2014-2030). Its aim is to define an overall and coherent framework to ensure the linkage of infrastructure and transport policy and enabling decision making. The TDS has taken into account the concern for sustainable development and the environmental criteria. As a result, it constitutes a decisive commitment to the future of Croatia, to its economic development and its competitiveness, to its social and territorial cohesion and to the improvement of the quality of life of its citizens. It includes a set of measures designed to create a transport system which is more integrated, safer, efficient and respectful of its environment.

a) Maritime Transport

The land area of Croatia is 56,594 km² and the sea and interior sea waters account for 31,479 km². The coast line is 6,278 km long (mainland 1,880 km and islands 4,398 km) and Croatia has more than a thousand islands, islets, rocks and reef, a fact that is of importance for the “geographical identity” of the country.

There are six major ports in Croatia (Rijeka, Zadar, Šibenik, Split, Ploče and Dubrovnik) which are located along the mainland coast and all are declared ports of special (international) economic interests for the country. They are essential ports both for freight and passenger transport, especially Split being the most important port of call of cruise ships of the Adriatic, with over 4 million passengers travelled in 2014.

---

9 Split Port Authority website.
The Adriatic Sea is a strategic maritime transport route used by merchant ships in international and national trade, by yachts, cruise ships, fishing vessels, war ships and other non-merchant ships. A significant number of important industrial centres are located along the western Adriatic coast and several mid-European (and in many cases landlocked) countries heavily depend on the northern Adriatic ports (such as Rijeka in Croatia) for the import of energy. In addition, several of the deep-water ports in Croatia could host super-tankers. It is believed that maritime transport will increase in the future: existing routes will be used more intensively, new routes will be introduced and new south-eastern transit ports will gain importance (among others Ploče)\(^{10}\).

Major international container operators are now present in Croatia. An increase in container traffic in the port of Rijeka has had and is expected to have an impact on the rate of rail utilisation. The development plans of the port include the intention to increase its market share in central European-Mediterranean trade flows. A clear advantage of Adriatic ports serving central Europe could be demonstrated by the comparative distance for shipping from Shanghai (China) to Rijeka (Croatia) that is 9,741 nautical miles, while the shipping distance from Shanghai to the port of Hamburg (Germany) is 12,277 nautical miles. Indeed, when geographical advantages of the Adriatic-Ionian route are accompanied with economies of scale and volume of transport, it translates into a reduction of unit transport cost, a reduction of congestion at major European railways and a reduction of transport and energy costs, as well as CO\(_2\) emissions from transport\(^{11}\).

**b) Inland Waterway Transport**

The overall length of the inland waterways in Croatia is 1,016.8 km, of which 601.2 km has been integrated into the European network of inland waterways of international importance. The Danube part of Croatia’s inland waterways system forms a part of the Rhine-Danube Corridor. However, the Croatian network of inland waterways represents a significant, but at the same time, underexploited part of the Croatian national values.

There are four inland waterways ports in Croatia: Vukovar, Osijek, Slavonski Brod and Sisak. The ports of Vukovar and Slavonski Brod are classified as core ports in the TEN-T network, while Osijek and Sisak are classified as comprehensive ports\(^{12}\). All four ports have cargo transport, while only the Slavonski Brod port has no passenger transport. Passenger transport is most important in the Vukovar port and is increasing (mainly due to cruising transport on the Danube). The port of Sisak has also recorded an increase in local passenger transport in 2013\(^{13}\).

Cargo is mostly linked to industry or agriculture activities located in the surroundings of the ports. For instance:

- Port of Vukovar: Trans-shipment of mostly bulk cargo, as well as bagged and liquid cargo.
- Port of Osijek: Trans-shipment of bulk cargo accounts for nearly 60 % of trans-shipped cargo, agricultural products (wheat, sunflower meal, oil seed rape) for 10 %, with bagged and general cargo accounting for the remaining percentage.
- Port of Slavonski Brod: Trans-shipment of crude oil accounts for the greatest cargo transport together with sand, gravel and general cargo.
- Port of Sisak: Trans-shipment of crude oil accounts for the overall cargo transport.

All four ports and port areas have been characterised by an undeveloped infrastructure and unconnected logistical port network. Therefore, according to the TDS, a thoroughly elaborate and rational approach regarding the future development of this transport mode and of inland waterways management is necessary. There is a need for systematic work on the elimination of weaknesses and deficiencies within the sector, in terms of improvement of the organisation, fleet modernisation, education, construction of infrastructure (waterways and ports), as well as maintenance and safety of navigation (full operation of the RIS system).

Croatian inland waterways are specific in that most of the waterways are rivers which follow Croatia’s borders. In consequence, the river bed regulation projects have to be coordinated with neighbouring countries\(^{14}\), which brings added difficulty to the sector’s development. Improved cooperation is therefore also a TDS objective.


\(^{11}\) Upcoming EP study (PE 563.401) on 'Adriatic and Ionian Region: socio-economic analysis and assessment of transport and energy links', P. Pagella and A. Kovacevic, on-going publication (page 51).


c) Air Transport

The aviation sector is mainly composed of air navigation, airlines, airports, and aviation authorities. The main airport is Zagreb but there are eight other relevant airports in Croatia: Osijek, Rijeka, Pula, Mali Losinj, Zadar, Split, Brac and Dubrovnik. The air navigation system is well equipped and aligned with European regulatory framework (Single European Sky I and II, SESAR, European ATM Master Plan, etc.). Demand in aviation is above all linked to the tourism sector, with seasonal behaviour generating bottlenecks especially in some key destinations. The number of competitors (traditional carriers and low cost carriers) in international scheduled traffic increased from 16 in 2004 to 44 in 2013, which mainly operate during the high season (summer)\(^{15}\).

The historical legacy and political, market and financial circumstances resulted in one main national airline, Croatia Airlines, originally registered under the name “Zagreb Airlines d.d.” in 1989, but operating under its current name since July 1990. In 2015, Croatia Airlines had an average of 95 daily departures, to 18 different countries (35 different airports), moving 1.83 million passengers\(^{16}\). In 2014, passenger traffic at Croatian airports totalled 6.703 million passengers\(^{17}\).

Croatia Airlines has been a member of Star Alliance since 2004 and its hub airport is Zagreb. The company contributes significantly to the development of Croatian tourism considering that, annually, one third of all tourists arriving in Croatia by aircraft fly with Croatia Airlines. Moreover, in 2014, the company was the country's fourth largest exporter.

d) Road Transport

Road infrastructure is by far the most developed in Croatia, with nearly 27,000 km of roads including just over 1,400 km of motorways\(^{18}\). Freight transport by road reached 74.5 % in 2014, compared to only 11.7 % by rail or 6 % by inland waterway, whereas passenger transport by road is as high as 71.1 % (compared to 28.9 % by rail)\(^{19}\). As shown in Figure 1 below, road fatalities have decreased by 28 % between 2010 and 2014 (from over 100 to 73 incidents per million inhabitants). However, the fatality rate of 73 is still above the EU average of 51 for 2014.

**Figure 1: Fatality Rate per Member State for 2010 and 2014**

![Fatality Rate per Member State for 2010 and 2014](image)

Source: CARE (EU Road Accidents Database)\(^{20}\)

---


\(^{16}\) Star Alliance - Member Airlines - Facts and Figures for Croatia Airlines.


\(^{20}\) European Commission - Road Safety in the European Union - Trends, Statistics and Main Challenges, March 2015 (page 8).
Croatia used to have the second highest fatality rate in 2010 below only Romania. In 2014, five other Member States had a higher fatality rate than Croatia. In 2010, the EU renewed its commitment to improving road safety by setting a target of reducing road deaths by 50% by 2020, compared to 2010 levels. Croatia is one of the Member States on track to reaching this target, achieving the fourth best reduction between 2013 and 2014 with -16% (please see Figure 2 below).

Figure 2: Percentage change in road deaths between 2013 and 2014

Source: European Transport Safety Council

Another positive aspect regarding road safety in Croatia is that the motorcyclists and the cyclists' share of all road deaths are both below the EU average respectively.

e) Rail Transport

The Croatian railway network comprises 2,604 km and presents a good ratio of railway kilometres over the population of the country, 1,556 people per kilometre, close to countries like Switzerland and higher than others like Czech Republic or Hungary. The Croatian railway network is classified into three categories: International, Regional and Local.

Table 2: Length of the railway network in Croatia

<table>
<thead>
<tr>
<th>Track class</th>
<th>Single track</th>
<th>Double track</th>
<th>Total (km)</th>
<th>Total length of tracks between stations</th>
<th>Total length of tracks in operation</th>
</tr>
</thead>
<tbody>
<tr>
<td>International (M)</td>
<td>1,205,630</td>
<td>253,874</td>
<td>1,459,504</td>
<td>1,713,378</td>
<td>1,713,378</td>
</tr>
<tr>
<td>Regional (R)</td>
<td>626,373</td>
<td>0,000</td>
<td>626,373</td>
<td>626,373</td>
<td>563,149</td>
</tr>
<tr>
<td>Local (L)</td>
<td>518,474</td>
<td>0,000</td>
<td>518,474</td>
<td>518,474</td>
<td>351,215</td>
</tr>
<tr>
<td>Total</td>
<td>2,350,477</td>
<td>253,874</td>
<td>2,604,351</td>
<td>2,858,225</td>
<td>2,627,742</td>
</tr>
</tbody>
</table>

Source: HŽI statistics for 2014

---

21 *National provisional estimates used for 2014, as the final figures for 2014 are not yet available at the time of going to print. **ETSC estimates based on CARE Quick indicator. ***UK data for 2014 is GB provisional total for year ending September 2014 and Northern Ireland total for the calendar year 2014. Numbers of deaths in MT and LU are small and therefore subject to substantial annual fluctuation.

22 European Transport Safety Council (ETSC) - 'Ranking EU Progress on Road Safety' - 9th Road Safety Performance Index Report, June 2015


However, 90% of the railway network is single track lines and only 36% of the lines are electrified. Almost 55% of the network is dedicated to those lines that are significant for international and cross-border transport. Of these 2,604 km of tracks, only 5.4% are capable of reaching speeds between 141 and 160 km/h, 17% have a maximum speed above 100 km/h, and 37.5% have maximum speeds below 60 km/h. The low speeds, together with the long distance between stations and the outdated traffic control and signalling systems have a direct impact on the transportation capacity of the lines.

The particular morphology of the Croatian territory together with the high degree of completion of the motorway network and the existence of several international airports makes the rail transport system hardly competitive against other modes like roads and/or air. However, according to the TDS, the well-developed rail networks in Zagreb and other cities are considered as strengths because of the opportunity they bring for the inclusion of rail within the urban transport system.

Passenger transport by rail is only 3.5% and only 17.4% of freight is transported by rail. Freight traffic has a clear international component as it connects Adriatic ports with the Continent. All ports are connected to the railway network, however the infrastructure is in poor condition. The port of Ploče doesn’t have a direct connection to the Croatian railway network but is connected to it via Bosnia and Herzegovina. The freight railway traffic is predominantly transit, as Adriatic ports serve as an entry-point for international cargo to mid-European countries. To increase intermodal maritime-rail traffic, the TDS suggests developing a logistic intermodal platforms network and building up these platforms at ports sites and at the main consumer centres.

The opportunities for the rail sector in Croatia are connected to the potential increase of its share within the total inland transport which can be achieved by improving or constructing infrastructure, including intermodal terminals and industrial tracks, purchasing or modernising the rolling stock, integration with other transport modes and with a user-oriented approach. Shift-to-rail transport will also increase the effect of intermodal transport, which will result in a reduction of noise and greenhouse gases, using rational energy consumption and increasing efficiency. Indeed, one of the main objectives set out in the TDS for the rail sector is to increase the sustainability of the railway network by performing a reorganisation of the sector, to improve the efficiency of the maintenance, reduce the environmental impact and implement measures to increase the safety and the interoperability of railways.

The reform of the railway sector in Croatia is well underway and the country is in the process of unbundling and liberalising its railway markets. The intention of these reforms is to align the sector with EU rules and regulations, to provide third party access to fixed infrastructure and to increase utilisation of available infrastructure. Growth in utilisation rates in Croatia provides an interesting example: all major international container operators are now present in the country and undertake operations with local rail companies. In the port of Rijeka for instance, the increase in rail utilisation is based on a significant increase in container traffic.

### 3. TOURISM

Tourism is one of the most important economic sectors in Croatia. The tourist attraction is based primarily on the long and indented Adriatic coastline. In 2010, tourist spending directly generated 8.5% of the national gross added value. However, the total effect of tourist spending in Croatia, whether it is direct or indirect, was estimated around 14% of the total added value. Please see Table 3 below for more recent data about tourism and GDP in 2013 and 2014.

In 2011, there were over 95,500 people employed in the tourist industry (including also those working in tourism brokering), accounting for nearly 7% of total employment in Croatia. In addition to this number, there were the public sector employees (Tourism Ministry, tourist boards, chambers of commerce, professional and local tourist bodies, teachers) which would bring the total number of employment in the Croatian tourism sector to 96,500.

---

25 HŽ Infrastructure Limited Liability Company for Management, Maintenance and Building of Railway Infrastructure (HŽI).
Table 3: Travel related revenues

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2014 (Preliminary data)</th>
<th>Index 2014/2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP (in mil. EUR)</td>
<td>43,478</td>
<td>43,112</td>
<td>99.2</td>
</tr>
<tr>
<td>Revenues (in mil. EUR)*</td>
<td>7,202.8</td>
<td>7,402.3</td>
<td>102.8</td>
</tr>
<tr>
<td>Share of tourism in overall economy in %</td>
<td>16.6</td>
<td>17.2</td>
<td></td>
</tr>
</tbody>
</table>

Source: Croatian National Bank

a) Attractions and highlights

In 2013, Jadranjska Hrvatska (HR03 Adriatic Croatia, 7 Counties including Dubrovnik, Split and Zadar on the mainland, and the islands of Hvar and Korcula) was the 5th most popular EU tourist region (61.8 million nights).

Croatia enjoys well-preserved natural resources consisting of eight national parks and 11 natural parks (including Kopacki rit, situated in northeast Croatia in a corner formed by Drava and Danube rivers, lodging the first visitor center for cyclotourists in Croatia). Furthermore, Croatia has seven UNESCO World heritage sites (six cultural and one natural: the Plitvice Lakes National Park). Last but not least, because of the so-called general and social factors of its nautical offer, Croatia can rely on "further quality and competitive development of nautical tourism provided that it does not endanger its fundamental natural development basis".

b) Main Statistical Data

In 2014, the total number of arrivals at tourist accommodation establishments was 12,882,822 i.e. +5.6 % change from the previous year, split between residents (1,444,016 i.e. +0.9 %) and non-residents (11,438,806 i.e. +6.2 %).

The number of overnight stays, including short (1-3 nights) and long trips (4+ nights) in 2014 were 66,124,991 i.e. +2.7 % change from the previous year, split between residents (5,052,330 i.e. +0.3 %) and non-residents (61,072,661 i.e. +2.9 %). The average number of nights was 5.1. Both tourist arrivals and tourist nights have steadily been growing since 2009, with seaside resorts accounting for over 80 % of the total arrivals and over 90 % of the tourist nights. The share of foreign tourists is very high, about (and sometimes above) 90 %. In particular, tourists from more than 75 countries have visited Croatia in the first eight months of 2015. For that period, tourists mainly came from:

- Germany (1.7 million tourists +6 % and 13.1 million bed-nights +6.3 %);
- Slovenia (1.1 million tourists +6.3 % and 7.3 million bed-nights +4.3 %);
- Croatia (1.06 million domestic tourists +9.1 % and nearly 6 million bed-nights +8.2 %);
- Austria (939,700 tourists +6.3 % and 5.2 million bed-nights +5.3 %);
- Italy (913,000 tourists +7.2 % and 4.5 million bed-nights +7 %).

Furthermore regarding other EU countries, tourists came from Czech Republic (number of tourists +2.8 % and number of bed-nights +4.1 %), Poland (+4 % and +5.3 % respectively), Hungary (both +17.4 %), UK (+14.6 % and +17 % respectively), Slovakia (+5 % and +4 % respectively), and the Netherlands (+5.2 % and +2.3 % respectively).
Among other world countries, increases in the number of tourists were recorded from the United States (+20 %), South Korea (+27 %) and from China (+50 %), while from Japan, it decreased by 5 %. Decreases were also recorded from Russia (number of tourists -25 % and number of bed-nights -28.1 % respectively), as well as Norway and Denmark.

With the exception of cruising and maritime tourism (less dependent on local infrastructure and supplies), other forms of tourism remain limited to the relatively short tourism season. Furthermore, regarding the economic perspectives of tourism in Croatia, it is foreseen that "Croatia continues to leverage its GDP formation by increasing its debt and improving its trade balance". In particular, “its tourism performance is improving thanks to an inflow of investments and a decrease in energy prices. There are signals that the scope of tourism in Croatia is extending to markets like the USA (that used to be a traditional market before 1990’s) and China”.

In 2014, the country had 118,000 permanent hotel beds, 25,000 beds in tourist resorts, 266,000 in camps, 414,000 in households and 53 marinas with over 17,000 berths along the coast. The structure of tourist nights are divided as follows: 43 % holiday and other short-stay accommodations, 31 % hotels and similar accommodations, 25 % camping sites and camping grounds, 1 % other accommodation.

Concerning the seasonal variation in the tourist accommodation sector for Croatia, in 2014 it was well above the EU average, while the difference between the peak and the bottom months was even the highest in the EU-28, as shown in Table 4, Table 5 and Figure 3 below.

Table 4: Nights spent at tourist accommodation establishments, distribution per month, 2014

Table 5: Seasonal variation in occupancy of tourist accommodation establishments, 2014 (Thousands)

Figure 3: Seasonality Graphs - Tourism Intensity

37 Croatian Chamber of Economy - Economic Profile on Tourism (page 3).
41 European Commission - DG GROWTH (Internal Market, Industry, Entrepreneurship and SMEs) Tourism in Croatia – 2014, Virtual Tourism Observatory (VTO) - available on the VTO website in a format for dynamic usage.
c) Croatian Tourism Development Strategy

In February 2013, the current Government proposed a strategy of tourism development until 2020\textsuperscript{42} based on ten drivers (inter alia, The "Green" as an operational concept, Beyond the sun and sea, Hotel trade-key of the investment cycle, Authenticity and creativity), a vision (to be by 2020 a globally recognised tourist destination, competitive and attractive to investments) and a main goal (getting ranked among the top 20 tourist destinations in the world)\textsuperscript{43}.

d) EU co-financed Osijek Tourist Project

The aim of the project (over 20 months from September 2013 to May 2015) was to strengthen the development of cultural, technical and natural heritage tourism in cross-border areas (Osijek-Baranja-HR and Baranja County-HU) by creating a thematic route and increasing the tourist flows. The project, covering the locations of old watermills and mills, has been implemented in Osijek, along the river Drava (HR) and at Orfu Lake (HU). By geographical features, the County of Osjek and Baranja belongs to the continental tourism type. Recently, under the influence of events in the global tourism market, "eco-tourism", rural or rustic tourism, educational and health tourism are going to be developed in this County and in the Croatian mainland region\textsuperscript{44}.

---

Disclaimer

This document is provided to Members of the European Parliament and their staff in support of their parliamentary duties and does not necessarily represent the views of the European Parliament. It should not be considered as being exhaustive.

Authors

Christina Ratcliff (Transports) and Piero Soave (Tourism), Research Administrators, Policy Department B: Structural and Cohesion Policies

Feedback

If you wish to give us your feedback please e-mail to Poldep-Cohesion Secretariat: poldep-cohesion@ep.europa.eu

Policy Department B

Within the European Parliament’s Directorate-General for Internal Policies, Policy Department B is the research unit which supplies technical expertise to the following five parliamentary Committees: Agriculture and Rural Development; Culture and Education; Fisheries; Regional Development; Transport and Tourism. Expertise is produced either in-house or externally.

All TRAN publications: http://www.europarl.europa.eu/studies

---


\textsuperscript{43} For more recent info on 2016 perspectives, particularly in the private accommodation industry, see: Early booking shows next tourist season in Croatia will be as successful as in 2015.

\textsuperscript{44} Hungary-Croatia Cross-Border Co-operation Programme - Project database: Along Miller’s route in cross-border area. Also see the First National Catalogue of Rural Tourism in Croatia and Development level of Health Tourism in Osjek-Baranja County.