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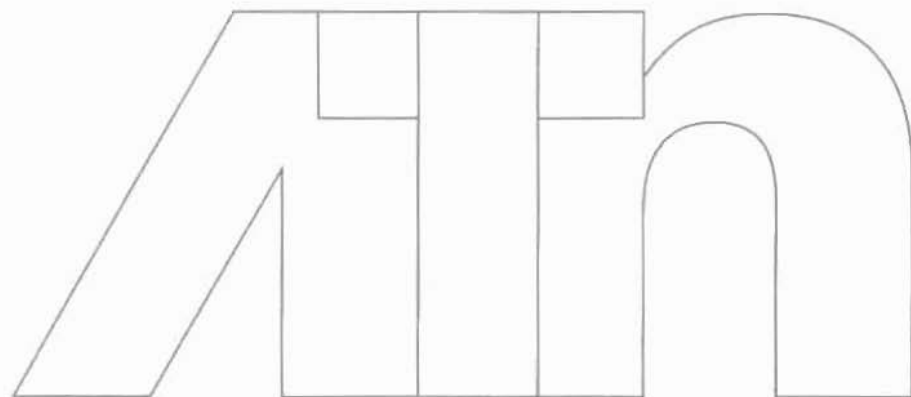
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**BENZINSKE POSTAJE U
FUNKCIJI HRVATSKOG
TURIZMA**

**PETROL STATIONS IN THE
SERVICE OF CROATIAN
TOURISM**

SAŽETAK: Hrvatski turizam najvažnija je grana hrvatskog gospodarstva. Godišnje se od turizma uprihodi 6 – 6,7 mlrd eura, koji ovise o broju noćenja i posjećenosti. Turistička ponuda Hrvatske vrlo je raznolika, a sastoji se od nautičkog, izletničkog, ronilačkog, kongresnog, kulturnog, ekološkog, seoskog, vjerskog, pustolovnog, zdravstvenog, lovnog ili ribolovnog turizma.

U Republici Hrvatskoj 90% tržišta benzinskih postaja danas drži 5 velikih opskrbljivača: INA, TIFON, OMV, PETROL, LUKOIL, dok preostalih 10% drže mali privatnici. Da bi sirova nafta došla do krajnjeg potrošača kao naftni derivat, mora proći cijeli proces od istraživanja, prerade, skladištenja i distribucije. Osnovni je princip utvrditi što rade spomenuti tržišni lideri kako bi proširili svoje poslovanje otvaranjem novih benzinskih postaja i širenjem mreže.

Predmet rada izraz je zanimanja za položaj (lokaciju) i funkciju benzinskih postaja u današnjem turbulentnom okruženju, kada svi žele biti najbolji na tržištu. Da bi to uspjelo, poduzeće mora biti konkurentno.

ABSTRACT: Tourism is the most important branch of the Croatian economy. Annual revenue from tourism amounts to between EUR 6 and 6.7 billion depending on the number of overnight stays and the number of tourists. The scope and supply of tourism in Croatia is very diverse and includes nautical, excursion, diving, business (congress), cultural, ecological, rural, religious, adventure, health, hunting and fishing tourism.

As much as 90% of the petrol station market in the Republic of Croatia is in the hands of five large suppliers: INA, TIFON, OMV, PETROL, LUKOIL, while the remaining 10% is owned by small private companies. For crude oil to reach its end consumer as an oil derivative, it must go through an entire process from discovery, refining, storage to distribution. The main idea here is to identify what the above-mentioned market leaders are doing to develop their business activities by opening new petrol stations and expand their network.

The subject of this paper is the position (location) and function of petrol stations (PSs) in today's

Svrha i cilj ovog rada jest definirati pojam turizma, benzinske postaje, nafte i naftnih derivata te ukazati na lokaciju benzinskih postaja na teritoriju Republike Hrvatske. Također je cilj dati odgovor jesu li benzinske postaje svojom lokacijom u Hrvatskoj u funkciji turizma ili su građene po nekom drugom planu.

Ovaj rad sastoji se od nekoliko sadržajnih cjelina koje se međusobno nadovezuju i nadopunjavaju. U uvodnom dijelu donosi se aktualnost teme, predmet, svrha i cilj seminarskog rada, te kratak sadržaj rada. Nadalje se objašnjava sam pojam i navode glavni konkurenti. U nastavku su objašnjene faze dobivanja gotovog proizvoda od rafinerije do krajnjeg potrošača. O turističkim potencijalima govori dio naslovljen *Hrvatska – mala zemlja za veliki odmor*. Na kraju rada dan je odgovor na pitanje jesu li benzinske postaje u Hrvatskoj u funkciji turizma.

KLJUČNE RIJEČI: benzinske postaje, hrvatsko gospodarstvo, hrvatski turizam

turbulent environment where everyone wants to be the market leader. In order to succeed in this, a company must be competitive.

The aim of this paper is to define the concept of tourism, the concept of a petrol station, of oil and oil derivatives and to identify the position of petrol stations on the Croatian market. Another aim is to provide an answer to the question whether petrol stations, with their locations in Croatia, are in the service of tourism or whether they were built for some other purpose.

This paper consists of several different sections which are interconnected and supplement each other. The introductory part identifies the topic, the subject, the purpose and objective of the research paper, and provides a summary. This is followed by an explanation of the concept itself and by listing the main competitors. The paper then goes on to describe different stages in the development of the final product, from the refinery to the end consumer. The part entitled *Croatia – A Small Country for a Great Vacation* focuses on the tourism potential. The final part of the paper answers the question whether petrol stations in Croatia act in the service of tourism.

KEY WORDS: petrol stations, Croatian economy, Croatian tourism

PREGLED TRŽIŠTA NAFTE I NAFTNIH DERIVATA U HRVATSKOJ

Tržište nafte i naftnih derivata u Hrvatskoj je po svom volumenu relativno malo u usporedbi s tržištem regije, odnosno svjetskim tržištem nafte. Međutim, kao i u većini država u svijetu, nafta zauzima značajan udio u ukupnoj potrošnji energije, koji u Hrvatskoj iznosi čak 45 posto. Vlastitom proizvodnjom Hrvatska zadovoljava manje od 20 posto potreba za sirovom naftom, dok se veći dio potreba osigurava uvozom putem Jadranskog naftovoda. Jadranski naftovod preko terminala Omišalj omogućava dopremu sirove nafte do rafinerija u Hrvatskoj iz bilo kojeg dijela svijeta, kao i dopremu ruske nafte iz smjera Mađarske. Osim sirove nafte, preko terminala Omišalj mogu se dopremiti i naftni derivati, što također omogućava opskrbu tržišta Hrvatske iz cijeloga svijeta. Maloprodajne cijene naftnih derivata u Hrvatskoj regulirane su zakonom, a direktno ovise o kretanju cijena na tržištu Mediterana. Zakonsko reguliranje cijena posljedica je još uvijek nedovoljne konkurencije na tržištu naftnih derivata, što će se zasigurno promijeniti razvojem infrastrukture, a posebice skladišnih kapaciteta sudionika na naftnom tržištu Hrvatske.¹

U Hrvatskoj danas ima ukupno 710 benzinskih postaja. Po broju benzinskih postaja, tržište se iz godine u godinu povećava zbog trenda rasta novih benzinskih postaja. Tako danas INA, kao najveća naftna kompanija u državi, ima 390 benzinskih postaja, zatim slijedi Petrol s 91 postajom, OMV ih ima 64, Tifon 43, Lukoil 41, a privatnih postaja je osamdesetak.

U zadnjih nekoliko godina INA provodi strategiju zatvaranja nerentabilnih i dotrajalih benzinskih postaja te modernizaciju postojeće mreže. Tako je u periodu od godine dana zatvoreno tridesetak postaja, a istovremeno ih je 35 modernizirano radi pružanja kvalitetnije usluge. Lukoil je nakon kupnje benzinskih postaja Europa Mil i Crobenz nastavio s otvaranjem novih postaja. Tifon unatrag 3 godine nije otvorio novu

OVERVIEW OF THE OIL AND OIL DERIVATIVES MARKET IN CROATIA

The oil and oil derivatives market in Croatia is relatively small in volume compared to regional and international oil markets. However, as in the majority of countries in the world, oil makes up a significant share of total energy consumption in Croatia and amounts to as much as 45%. Croatia's own production meets less than 20% of demand for crude oil, while the majority is satisfied by imports via the Adria Pipeline. The Adria Pipeline, via the Omišalj Terminal, supplies crude oil to Croatian refineries from everywhere in the world, and supplies Russian oil via Hungary. In addition to crude oil, oil derivatives may also be delivered through the Omišalj Terminal, which also enables the Croatian market to be supplied from all over the world. Retail prices of oil derivatives in Croatia are regulated by law and depend directly on the prices on the Mediterranean market. Legal regulation of prices is a consequence of imperfect competition on the oil derivatives market, which will change with the development of infrastructure, in particular of storage capacities of Croatian oil market stakeholders.¹

There are a total of 710 petrol stations in Croatia today. The market has been increasing year by year due to the growing trend of new petrol stations. Today, INA is the largest oil company in Croatia with 390 petrol stations (PSs), followed by Petrol with 91, OMV with 64, Tifon with 43, Lukoil with 41, and around 80 private petrol stations.

In the last few years, INA has been implementing a strategy of closing inefficient and old petrol stations and has been modernising its existing network. In one year, around 30 petrol stations were closed, and 35 were modernised in order to provide a higher quality service. After having bought Europa Mil and Crobenz, Lukoil continued to open new petrol stations. Tifon has not opened a new PS for three years, while OMV has been slowly and gradually expanding its network of PSs. By taking over Europetrol's

postaju, a OMV polako i postupno širi mrežu svojih postaja. Petrol je kupnjom Europetrolove mreže benzinskih postaja značajno proširio svoju mrežu i nacionalnu pokrivenost, a nastavlja s otvaranjem novih postaja. Broj benzinskih postaja u privatnom vlasništvu postupno se iz godine u godinu smanjuje, zato što se pojedini poduzetnici/ obrtnici sve teže nose s negativnim trendovima na tržištu maloprodaje naftnih derivata te oštrom konkurencijom, pa su primorani ili zatvoriti tvrtku ili je prodati nekom od vodećih konkurenata.

GLAVNI KONKURENTI

S obzirom na broj benzinskih postaja, odnosno pratećih uslužnih objekata, danas možemo izdvojiti 5 glavnih konkurenata, koje ćemo nabrojati te o svakoj tvrtki navesti osnove djelatnosti. To su: INA, OMV, Petrol, Tifon i Lukoil.



INA – Industrija nafte d.d.

INA – Industrija nafte d.d. (INA d.d.) je srednje velika europska naftna kompanija, koja ima vodeću ulogu u naftnom poslovanju u Hrvatskoj te značajnu ulogu u regiji.

INA je osnovana 1. siječnja 1964, spajanjem Naftaplina (tvrtke za istraživanje i proizvodnju nafte i plina) s rafinerijama u Rijeci i Sisku. Danas je INA naftna kompanija sa značajnom ulogom u jugoistočnoj Europi u istraživanju i proizvodnji nafte i plina, preradi nafte te distribuciji nafte i naftnih derivata. Po ostvarenom prihodu, INA Grupa nalazi se među vodećim kompanijama u Hrvatskoj. Ukupni rezultati INA Grupe ostvareni u 2010. i 2011. godini pokazuju obnovljenu profitabilnost na razini operativnog poslovanja i na razini neto dobiti te značajno poboljšanje financijske pozicije.

INA d.d. je dioničko društvo čiji su najveći dioničari naftna kompanija MOL i Vlada

network of PSs, Petrol significantly expanded its network and national coverage and it continues to open new PSs. The number of privately owned petrol stations has been decreasing year by year because individual small businesses are unable to cope with negative trends in the retail oil derivatives market and with fierce competition, and are thus forced to close down or to sell out to one of the bigger competitors.

MAIN COMPETITORS

Considering the number of petrol stations and the accompanying service areas, it is possible to identify the following five main competitors and their main activities: INA, OMV, Petrol, Tifon and Lukoil.



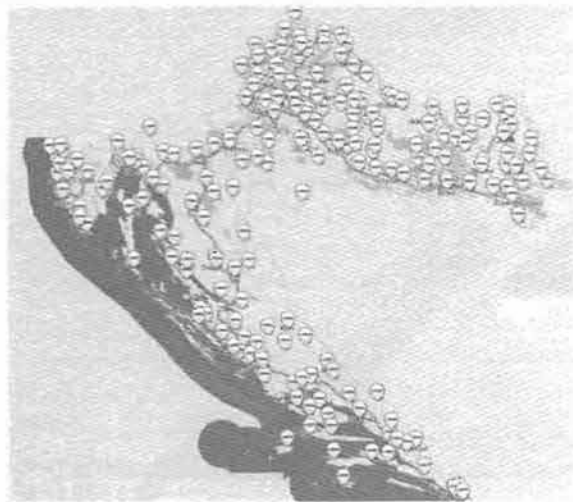
INA – Industrija nafte d.d.

INA – Industrija nafte d.d. (INA d.d.) is a medium-sized European oil company with a leading role in the oil market in Croatia and with a significant one in the region, too.

INA was established on 1 January 1964 after the merger of Naftaplin (a company involved in the discovery and production of oil and gas) with refineries in Rijeka and Sisak. Today, INA is an oil company that plays a significant role in South Eastern Europe in the discovery and production of oil and gas, oil refining and distribution of oil and oil derivatives. In terms of its revenue, the INA Group is among the leading companies in Croatia. The overall results of the INA Group in 2010 and 2011 indicate increased operating profit, increased levels of net profit and a significant improvement in the company's financial position.

INA d.d. is a joint stock company, the main shareholders of which are the MOL oil company and the Government of the Republic of Croatia, and a small amount of shares are owned by private

SLIKA 1. RASPORED POSTAJA TVRTKE INA
FIGURE 1. DISTRIBUTION OF INA PETROL STATIONS



Izvor / Source: INA, <http://www.ina.hr/default.aspx?id=8>

Republike Hrvatske, a manji dio dionica nalazi se u vlasništvu privatnih i institucionalnih investitora. Od 1. prosinca 2006. godine Inine dionice izlistane su na Londonskoj i Zagrebačkoj burzi. INA Grupu čini više ovisnih društava u potpunom ili djelomičnom vlasništvu INA d.d. Sjedište Grupe nalazi se u Zagrebu. INA Grupa broji 14 703, a INA d.d. 9 061 zaposlenika (podatak od 31. prosinca 2010. godine).

U području istraživanja i proizvodnje nafte i plina, INA danas posluje, osim u Hrvatskoj, u Angoli i Egiptu. U Ininim rafinerijama nafte Rijeka i Sisak proveden je opsežan razvojni program s kapitalnim ulaganjem od oko 4 milijarde kuna te Inine rafinerije danas proizvode visokokvalitetna goriva u skladu s europskim standardima. INA upravlja regionalnom mrežom od oko 400 benzinskih postaja u Hrvatskoj i u susjednim zemljama. Krajem 2010. godine započela je modernizacija i revitalizacija maloprodajne mreže.

INA se opredijelila za poslovanje u skladu s održivim razvojem, što znači da teži integraciji

and institutional investors. Since 1 December 2006, INA's shares have been listed on the London and Zagreb Stock Exchanges. The INA Group consists of several dependent companies fully or partially owned by INA d.d. The headquarters of the Group are in Zagreb, Croatia. INA Group employs 14,703, and INA d.d. 9,061 people (data as of 31 December 2010).

In the areas of exploration and oil and gas production, INA's business operations expand to Angola and Egypt, in addition to Croatia. An extensive development programme with HRK 4 billion in capital investments was implemented in INA's oil refineries in Rijeka and Sisak, and INA's refineries are now producing high-quality fuel in compliance with European standards. INA manages a regional network of around 400 petrol stations in Croatia and neighbouring countries. Modernisation and revitalisation of the retail network started in late 2010.

INA is committed to doing business in compliance with sustainable development, which means that it is trying to integrate economic, environmental and social factors into its everyday business operations. By making energy more accessible, INA is trying to promote social and economic development, while, at the same time, taking into account people and their environment and promoting corporate responsibility and local partnerships.²



OMV

OMV Aktiengesellschaft, established in 1956, is one of the biggest Austrian industrial joint stock companies and the leading energy group in Central and Eastern Europe. In its business segment of oil refining and oil trade, OMV is active in 12 countries where it has more than 2,400 petrol stations, while in the business segment of exploration and production it operates in 16 countries on four

gospodarskih, okolišnih i društvenih čimbenika u svakodnevno poslovanje. Nastojeći energiju učiniti dostupnom, INA želi biti pokretač društvenog i gospodarskog razvoja, vodeći brigu o ljudima i okolišu, njegujući odgovorno poslovanje i lokalna partnerstva.²

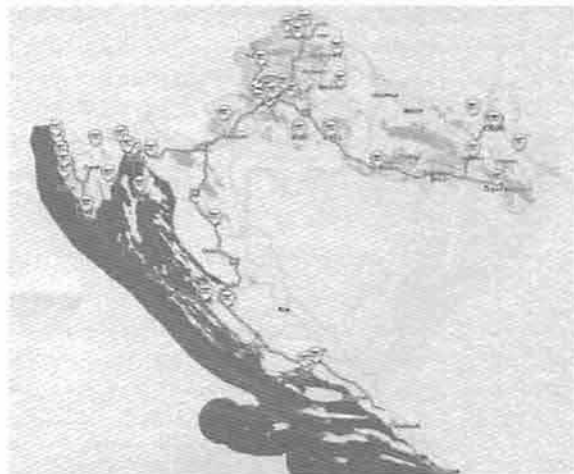


OMV

OMV Aktiengesellschaft, osnovan 1956. godine, jedno je od najvećih austrijskih industrijskih dioničkih društava i vodeća energetska grupacija u Srednjoj i Jugoistočnoj Europi. U svom poslovnom segmentu prerade i trgovine naftom, OMV je aktivan u 12 zemalja, gdje ima više od 2 400 benzinskih servisa, dok je u poslovnim segmentu za istraživanje i proizvodnju aktivan u 16 zemalja na četiri kontinenta. Na hrvatskom tržištu OMV je prisutan od srpnja 1992. godine, kada su OMV AG i Istrabenz zajednički osnovali OMV Istrabenz d.o.o. Od travnja 2005. godine djeluje pod novim nazivom, OMV Hrvatska d.o.o., kao tvrtka kći društva OMV Refining & Marketing GmbH iz Beča. Njihova osnovna djelatnost je trgovina naftom i naftnim derivatima u Hrvatskoj, gdje trenutno imaju mrežu od 62 benzinska servisa.

OMV benzinski servisi su multifunkcionalni uslužni centri, koji uključuju strukturirane VIVA trgovine, kompletnu ponudu OMV-ovih ulja i maziva, kafiće/restorane, najmodernije autopraonice te dječja igrališta. Broj novih benzinskih servisa u stalnom je porastu. OMV benzinskim servisima upravljaju nalogoprimci, koji s OMV Hrvatska d.o.o. imaju potpisan Ugovor o nalogu. Sredstva za gradnju mreže, odnosno gradnju novih benzinskih servisa, uglavnom su dobivena dokapitalizacijom tvrtke, kao i sredstvima dobivenima iz dobiti poslovanja. Tržište opskrbljuju sa skladišta na otoku Krku

SLIKA 2. RASPORED POSTAJA TVRTKE OMV
FIGURE 2. DISTRIBUTION OF OMV PETROL STATIONS



Izvor: OMV, <http://www.omv.hr/portal/01/hr> (18.08.2012)
Source: OMV, <http://www.omv.hr/portal/01/hr> (18/08/2012)

continents. OMV has been present on the Croatian market since July 1992 when OMV AG and Istrabenz jointly established OMV Istrabenz d.o.o. (a limited liability company). Since April 2005, it has been operating under a new name, OMV Hrvatska d.o.o. as a subsidiary of OMV Refining & Marketing GmbH from Vienna. Its main activity is trade in oil and oil derivatives in Croatia, where it currently has a network of 62 petrol stations.

OMV filling stations are multifunctional service areas including structured VIVA shops, a full supply of OMV oils and lubricants, coffee shops/restaurants, the most modern car-wash facilities and play areas for children. The number of new petrol stations has been continuously growing. OMV filling stations are managed by agents who have signed an agency contract with OMV Hrvatska d.o.o. Funds for network expansion, that is, for the building of new petrol stations, were mostly obtained through company recapitalisation and from business revenue. The market is supplied from storage facilities on the island of Krk (Omišalj) with

(Omišalj), kapaciteta 60 000 m³. Naftne derivate uvoze sa slobodnog tržišta Mediterana, a bave se i veleprodajom goriva i maziva.

Tvrtka OMV Hrvatska d.o.o. iz Zagreba nastala je kao pravni sljednik poduzeća OMV – Istra d.o.o. Umag, osnovanog 24. srpnja 1991. Društvo pod tim nazivom djeluje do 18. ožujka 1998. godine, kada se preimenovalo u OMV Istrabenz d.o.o. Društvo je tada bilo *joint venture* u 50-postotnom vlasništvu OMV Refining & Marketing iz Beča i 50-postotnom vlasništvu Skupine Istrabenz iz Kopar.

U travnju 2005. godine OMV Refining & Marketing otkupio je preostalih 50% udjela i tvrtka otada djeluje pod imenom OMV Hrvatska d.o.o.³



Tifon

Tvrtka Tifon tržišni je lider po kvaliteti naftnih derivata u Hrvatskoj već duži niz godina. Osnovana je 1998. godine, a danas je u 100-postotnom vlasništvu mađarske naftne grupacije MOL. Bavi se trgovinom nafte, naftnih derivata te ostale trgovačke robe. Na području Republike Hrvatske ima mrežu od 43 benzinske postaje, koje u svojoj ponudi, između ostalog, imaju i caffè barove/ restorane, autopraonice te dječja igrališta.

U svom sustavu Tifon d.o.o. zapošljava više od 550 visoko motiviranih i obrazovanih djelatnika. Osnovni poslovni koncept, ujedno i slogan Tifona, glasi "Garancija europske kvalitete". Tifon d.o.o. na tržište Republike Hrvatske plasira goriva, ulja i maziva koji odgovaraju najvišim europskim standardima kvalitete i zaštite okoliša. Goriva koja nude imaju najnižu razinu sumpora i odlikuju se visokom iskoristivošću te smanjenom potrošnjom u motorima. Uz to, Tifon d.o.o. pruža visoku razinu usluga na svojim benzinskim postajama te potpunu logističku, tehničku i tehnološku potporu svim svojim kupcima.⁴

a capacity of 60,000 m³. Oil derivatives are imported from the free Mediterranean market, and they are also involved in wholesale of fuel and lubricants.

OMV Hrvatska d.o.o., a limited liability company from Zagreb, is the legal successor of OMV – Istra d.o.o., an Umag-based company, which was established on 24 July 1991. The company was operating under this name until 18 March 1998 when it became OMV Istrabenz d.o.o. At that time, it was a joint venture company, 50% of which was owned by OMV Refining & Marketing from Vienna and 50% by the Istrabenz Group from Kopar.

In April 2005, OMV Refining & Marketing bought the remaining 50% share and the company has since been operating under the name OMV Hrvatska d.o.o.³

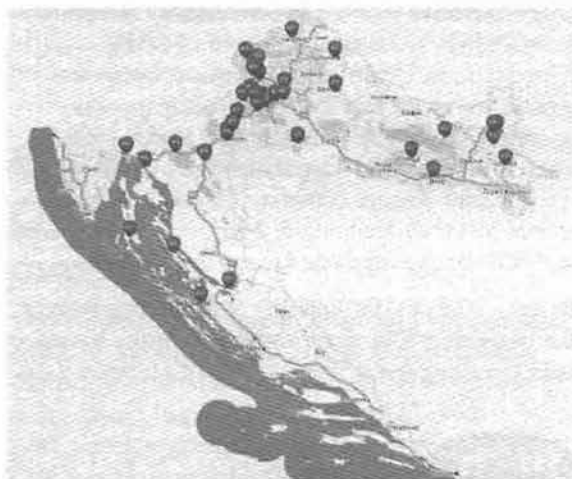


Tifon

In terms of quality, Tifon has been a leading company on the market of oil derivatives in Croatia for a number of years. The Tifon company was founded in 1998 and is now 100% owned by the Hungarian oil group, MOL. It trades in oil, oil derivatives and other market goods. The company has a network of 43 petrol stations in the Republic of Croatia, which, among other things, have service areas with coffee shops/restaurants, car-wash facilities and play areas for children.

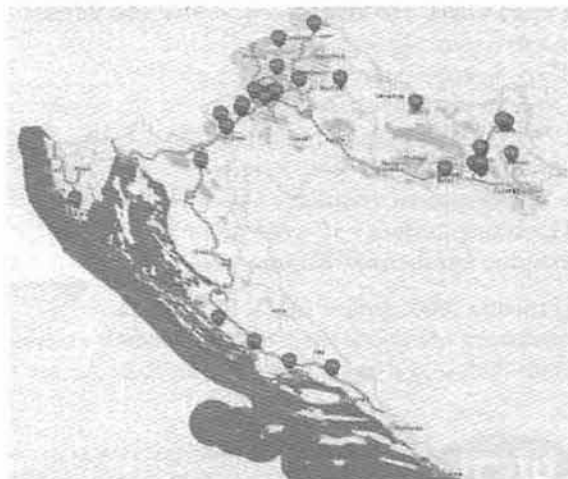
Tifon d.o.o. employs more than 550 highly motivated and trained people. Tifon's main business concept, which is at the same time its slogan, reads: "European quality guarantee". Tifon d.o.o. places on the Croatian market fuels, oils and lubricants which comply with the highest European quality and environmental protection standards. Fuels sold by Tifon have the lowest sulphur level and are characterised by high performance and lead to reduced engine consumption. Furthermore, Tifon d.o.o. offers a high quality of services at its petrol stations and provides full logistic, technical and technological support to its consumers.⁴

SLIKA 3. RASPORED POSTAJA TVRTKE TIFON
FIGURE 3. DISTRIBUTION OF TIFON
PETROL STATIONS



Izvor / Source: Tifon, <http://www.tifon.hr/default.aspx?id=30>

SLIKA 4. RASPORED POSTAJA TVRTKE PETROL
FIGURE 4. DISTRIBUTION OF PETROL
PETROL STATIONS



Izvor / Source: Petrol, <http://www.petrol.hr/o-petrolo>

PETROL

Petrol / Europetrol

Grupa Petrol posluje u Republici Hrvatskoj preko svojih ovisnih društava Petrol Hrvatska d.o.o. i Petrol d.o.o. Poduzeće Petrol Hrvatska d.o.o. osnovano je 1996. godine. U Hrvatskoj trguje proizvodima od nafte, naftnim derivatima te ostalom trgovačkom robom.

Prve tri godine poduzeće je poslovalo samo na području veleprodaje, a 1999. godine počinje razvijati vlastitu maloprodajnu mrežu. Grupa Petrol u Hrvatskoj danas ima 91 benzinsku postaju, koje su raspoređene po svim regijama.⁵

Tvrtka Petrol je 2008. godine kupila 51-postotni udio u Euro-Petrolu, a tijekom 2011. godine i preostalih 49 posto tvrtke. Tom transakcijom Petrol ispunjava planove postavljene u strategiji razvoja Grupe do 2014. godine. Grupa Petrol je krajem lipnja ove godine imala 454 benzinska servisa, od toga 313 u

PETROL

Petrol / Europetrol

The Petrol Group operates in the Republic of Croatia via its subsidiaries Petrol Hrvatska d.o.o. and Petrol d.o.o. A limited liability company, Petrol Hrvatska d.o.o. was established in 1996. It trades in oil products and oil derivatives and other goods on the Croatian market.

In the first three years, the company was active only on the wholesale market, but in 1999 it started developing its own retail network. The Petrol Group today has 91 petrol stations in Croatia spread over all regions.⁵

Petrol bought 51% of shares in Euro-Petrol in 2008, and in 2011 it took over the remaining 49% of the company. With this transaction, Petrol completed all the plans defined in the Group development strategy up to 2014. In late June, the Petrol Group owned 454 petrol service stations, out of which 313

Sloveniji, 91 u Hrvatskoj, 38 u Bosni i Hercegovini, 6 u Srbiji, 3 na Kosovu i 3 u Crnoj Gori.⁶



Lukoil

Lukoil je jedna od vodećih svjetskih vertikalno integriranih kompanija za proizvodnju nafte i plina. Osnovne poslovne djelatnosti Kompanije su istraživanje i proizvodnja nafte i plina, proizvodnja naftnih i petrokemijskih proizvoda te njihov plasman na svjetsko tržište. Prema potvrđenim rezervama ugljikovodičnih goriva, Lukoil je druga po veličini privatna naftna kompanija u svijetu. Ujedno, Lukoil zauzima dominantan položaj u ruskom energetske sektoru, s preradom gotovo 19% ukupne proizvodnje nafte.⁷

Tvrtka Lukoil Croatia osnovana je 2007. godine i u 100-postotnom je vlasništvu ruske nafte

were in Slovenia, 91 in Croatia, 38 in B&H, 6 in Serbia, 3 in Kosovo and 3 in Montenegro.⁶

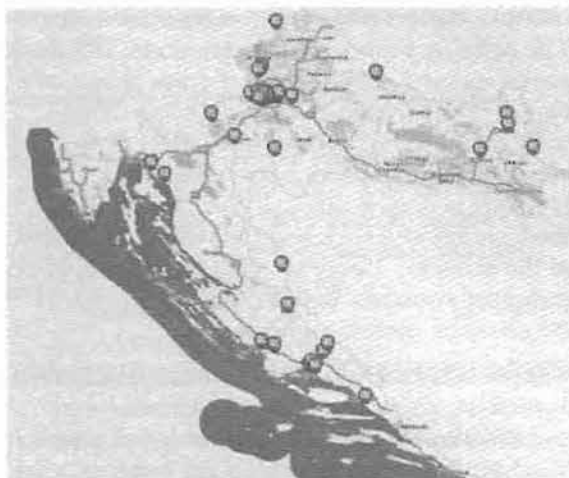


Lukoil

Lukoil is one of the leading international vertically integrated companies in the production of oil and gas. The company's basic business activities include exploration and production of oil and gas, the production of oil and petrochemical products, and their placement on the international market. According to confirmed reserves of hydrocarbon fuels, Lukoil is the second largest private oil company in the world. At the same time, Lukoil has a leading position in the Russian energy sector since it refines almost 19% of total oil production.⁷

The company Lukoil Croatia was established in 2007 and it is 100% owned by the Russian oil company, Lukoil Europe Holdings. In 2008, the company bought a Zagreb company, Europa Mil, which has nine petrol stations in Zagreb and Split. Since then, Lukoil has been constantly investing in the expansion of its retail network of petrol stations and in 2010 bought Crobenz, a company which had 14 filling stations and was part of the INA Group. Then, it continued its expansion on the Croatian market and today, with 41 PSs, it is a serious competitor on the market. For the supply of oil derivatives, the company has been using the Vukovar river terminal on the Danube River and the Omišalj maritime terminal on the island of Krk.

SLIKA 5. RASPORED POSTAJA TVRTKE LUKOIL
FIGURE 5. DISTRIBUTION OF LUKOIL
PETROL STATIONS

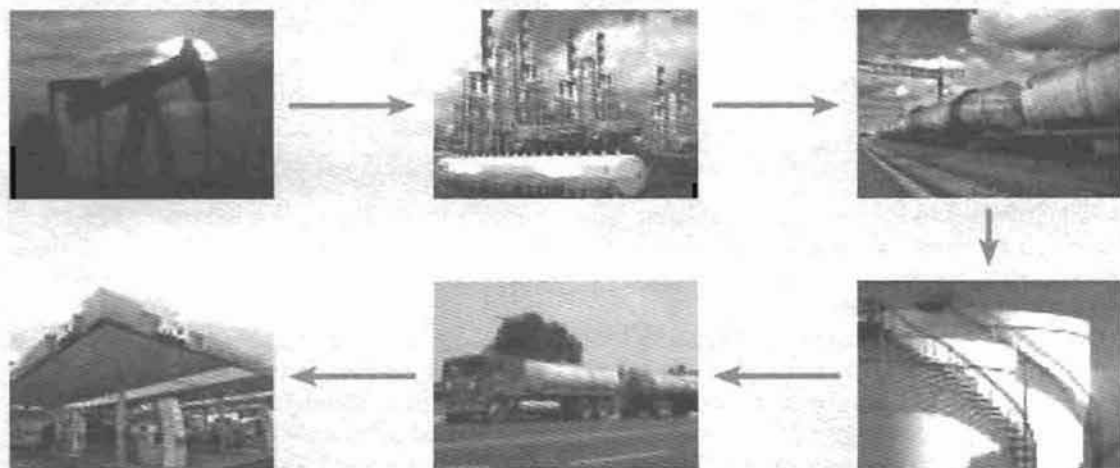


Izvor / Source: Lukoil, <http://www.lukoil.hr/content/view/12/28/>

FROM REFINERY TO END USER

The entire process of producing end products from oil derivatives consists of the following:

- ☞ research and development,
- ☞ refining and production in refineries,

SLIKA 6. PRIKAZ LANCA OPSKRBE / FIGURE 6. SUPPLY CHAIN


Izvor / Source: Alacs, L.: *SCM philosophy*, Business education program, MOL, 2011

kompanije Lukoil Europe Holdings. Tijekom 2008. godine tvrtka je kupila zagrebačku tvrtku Europa Mil, koja ima devet benzinskih postaja u Zagrebu i Splitu. Od tada Lukoil konstantno ulaže u širenje maloprodajne mreže benzinskih postaja. Tijekom 2010. godine kupili su tvrtku Crobenz, koja je s 14 benzinskih postaja bila u sastavu INA Grupe, i nastavili svoje širenje na hrvatskom tržištu, pa danas, s 41 postajom, vrlo oštro konkuriraju ostalim tvrtkama na tržištu. Za dobavu naftnih derivata tvrtka koristi riječni terminal Vukovar na Dunavu i morski terminal Omišalj na Krku.

OD RAFINERIJE DO KRAJNJEG POTROŠAČA

Cijeli proces dobivanja naftnih derivata kao krajnjih proizvoda sastoji se od:

- ☞ istraživanje i razvoj,
- ☞ prerada i proizvodnja u rafinerijama,
- ☞ primarna distribucija i skladištenje,

- ☞ primary distribution and storage,
 - ☞ secondary distribution,
 - ☞ retail sales at filling stations,
- as illustrated in Figure 6.

The refining process starts with surveying, both geological and geophysical, of areas potentially rich in oil by scientists and engineers. If oil (gas) is discovered compressed under high pressure in small pores between rocks, a borehole is drilled through thick layers of sand, sludge and rock and the oil is transported to the refinery. There are different means of transport available: tankers, rail, road, and, as the cheapest option, pipelines.

The processes that take place in a refinery include: distillation, alkylation, hydrodesulphurization, isomerisation, catalytic conversion and process blending. The products, that is, oil derivatives resulting from the process include the following:

- ☞ sekundarna distribucija,
 - ☞ prodaja u maloprodaji na benzinskim postajama,
- kako je i prikazano na Slici 6.

Sam proces prerade nafte počinje istraživanjem, i to geološkim i geofizičkim, područja potencijalno bogatog naftom od strane znanstvenika i inženjera, ukoliko se utvrdi postojanje nafte (plina). Nafta se nalazi zbijena pod vrlo velikim pritiskom u sitnim porama između stijena. Kroz debele slojeve pijeska, mulja i stijena iz kojih se vrši crpljenje nafte buši se eksploatacijska bušotina, odakle se nafta transportira do rafinerije na preradu. Transport se može obaviti na različite načine: tankerima, cisternama, željezničkim odnosno cestovnim putem te naftovodima, što je ujedno i najjeftinija opcija.

Procesi koji se odvijaju u rafineriji su sljedeći: destilacija, alkilacija, hidrodosulfurizacija, izomerizacija, katalitički *reforming* i proces *blending*. Proizvodi, odnosno naftni derivati koje tom prilikom dobijemo su: tekući plin, benzin, dizelsko gorivo, mlazno gorivo, motorna ulja, bitumen, parafin i loživo ulje.⁸

Od skladišta do benzinskih postaja naftni derivati distribuiraju se cestovnim ili željezničkim putem, i to najčešće u cisternama.

Stanovništvo se gorivom odnosno naftnim derivatima opskrbljuje na benzinskim postajama, koje su u današnje vrijeme sve modernije te uz goriva nude sve više sadržaja i dodatnih usluga: caffè barove, trgovine, mjenjačnice, motele i dječja igrališta (najčešće uz autoceste), autopraonice, parking, sanitarne čvorove itd.

HRVATSKA – MALA ZEMLJA ZA VELIKI ODMOR

Uz navedeni slogan, kao i slogan: "Mediteran kakav je nekad bio", Hrvatska je posljednjih godina, zbog svoje iznimne turističke atraktivnosti,

SLIKA 7. PROMETNA OZNAKA ZA BENZINSKU POSTAJU
FIGURE 7. TRAFFIC SIGN FOR A PETROL STATION



liquid gas, petroleum, diesel fuel, jet fuel, motor fuel, bitumen, paraffin, and fuel oil.⁸

Oil derivatives are distributed from storage facilities to petrol stations by road or rail, most frequently in cisterns.

People buy fuel, that is, oil derivatives, at filling stations that have been modernised and include, in addition to fuel, additional services: coffee shops, shops, foreign exchange offices, motels and play areas for children (most frequently alongside motorways), car-wash facilities, parking, toilet facilities, etc.

CROATIA – A SMALL COUNTRY FOR A GREAT VACATION

The slogan above and "The Mediterranean as it once was" have helped Croatia become one of the most popular destinations for the summer vacation of numerous international celebrities because of its exceptional appeal for tourists. Croatia has become recognisable and maintains a very high position on the international tourism market as a result of an increasing number of foreign guests and numerous awards received by Croatia from leading international institutions, which is regularly reported by the most influential international media:

"Croatia is ranked 24th on the UNWTO's list of most visited places in the world. It has been

postala hit destinacija za ljetni odmor brojnih svjetskih uglednika i poznatih osoba. Hrvatska je postala prepoznatljiva i vrlo je dobro pozicionirana na svjetskom turističkom tržištu, čemu u prilog ide sve veći broj inozemnih gostiju, kao i brojna priznanja koje Hrvatska prima od vodećih svjetskih institucija, o čemu redovito izvješćuju najutjecajni svjetski mediji.

“Na ljestvici UN-ove svjetske turističke organizacije po broju dolazaka gostiju Hrvatska zauzima 24. mjesto u cijelome svijetu. Neprestano se penje na toj ljestvici i jedna je od budućih top destinacija, uvjeren sam u to”, rekao je Javier Blanco, direktor UN-ove Svjetske turističke organizacije.

Podaci Instituta za turizam govore sljedeće: u 2011. godini zabilježeno je više od 60 milijuna noćenja, odnosno 7% više nego prethodne godine. Najveći broj noćenja ostvarili su Nijemci (21%), zatim Slovenci (11%), Talijani (8%) i Austrijanci (8%) – zajedno skoro polovinu ukupnih noćenja (48%). U ukupnim noćenjima domaći turisti sudjeluju s 9%. U 2011. godini većina noćenja (86% ili 52 milijuna) ostvarena je u privatnom smještaju (35%), zatim hotelima (26%) i kampovima (25%). U strukturi noćenja glavne sezone (srpanj-kolovoz) udio privatnog smještaja iznosi 44%, kampova 27%, a hotela 17%.

Najveći udio u ukupnim noćenjima u 2011. godini imali su Istra s 19 milijuna noćenja (32%), Kvarner i gorje s 13 milijuna noćenja (22%) i splitsko-makarsko područje s 10 milijuna noćenja (17%). Te tri regije zajedno ostvaruju 42 milijuna noćenja, što je gotovo 71% ukupnog turističkog prometa Hrvatske. Ostale primorske regije ostvarile su zajedno oko 25%, a Zagreb i Kontinentalna Hrvatska oko 4% ukupnog broja noćenja. Iako je na razini Hrvatske ostvaren porast broja noćenja od oko 7%, na razini pojedinih regija postignuti su različiti rezultati.

U kolovozu 2011. godine na raspolaganju je bilo ukupno 852 tisuće stalnih ležajeva (ne uključujući luke nautičkog turizma), i to 415

climbing up the list and I am convinced that it will become one of the future top destinations”, said Javier Blanco, Director of the Affiliate Members of the UN World Tourism Organization.

Data from the Institute for Tourism illustrate the following: more than 60 million overnight stays were recorded in 2011, which is 7% more than the previous year. The majority of overnight stays are attributed to Germans (21%), followed by Slovenians (11%), Italians (8%) and Austrians (8%) – together almost half of all overnight stays (48%). Domestic tourists make up 9% of total overnight stays. In 2011, the majority of overnight stays (86% or 52 million) were recorded in private accommodation (35%), followed by hotels (26%) and campsites (25%). The share of private accommodation in the structure of overnight stays during high season (July-August) amounts to 44%, while the share of campsites is 27%, and hotels 17%.

The largest share in total overnight stays in 2011 belongs to Istria with 19 million overnight stays (32%), Kvarner and the inland areas with 13 million overnight stays (22%) and the territory of Split and Makarska with almost 10 million overnight stays (17%). These three regions together record 42 million overnight stays, which is almost 71% of the total tourism traffic in Croatia. Other coastal regions contribute around 25% of overnight stays, and Zagreb and inland Croatia around 4% of the total number of overnight stays. Although the number of overnight stays in Croatia increased by 7%, individual regions show different results.

In August 2011, there were a total of 852,000 permanent beds available (excluding nautical tourism ports). A total of 415,000 beds were in private accommodation facilities (49%) and 216,000 in camps (25%). The structure of accommodation capacity has not changed significantly in five years (2007 - 2011).

For 38% of guests who stayed in coastal areas of Croatia in the summer of 2010, this was their first

tisuća u privatnom smještaju (49%) i 216 tisuća u kampovima (25%). U petogodišnjem razdoblju (2007-2011) struktura smještajnih kapaciteta nije se značajnije mijenjala.

Za 38% gostiju koji su boravili u primorskim mjestima Hrvatske u ljeto 2010. bio je to prvi posjet mjestu. Po drugi put u mjesto je došlo oko petine gostiju (21%). Na razini Hrvatske oko 16% gostiju dolazi u isto mjesto 6 i više puta.

Na ljetovanje u Hrvatsku putuje se automobilom. I taj izbor vrijedi za 67% gostiju Hrvatske. Na to se čak odlučuje i gotovo polovina gostiju (46%) čije je krajnje odredište u najjužnijoj Dubrovačko-neretvanskoj županiji. Automobil je glavno prijevozno sredstvo za sve županije. Udio gostiju koji automobile navode kao glavno prijevozno sredstvo kreće se od 62% u Istri do 82% u Šibensko-kućanskoj županiji. Dolazak na destinaciju zrakoplovom karakterističan je za Dubrovačko-neretvansku županiju (udio takvih dolazaka je 5 puta veći od prosjeka za Hrvatsku i iznosi oko 38%), zatim za Splitsko-dalmatinsku županiju (12%) te Istru (6%). Kada je riječ o autobusu, onda je to češće izbor turista koji putuju u Splitsko-dalmatinsku (8%), Primorsko-goransku (7%) ili Šibensko-kućansku županiju (6%). Najmanje ga koriste gosti koji putuju u Istru (2%).⁹

Iz gore navedenog možemo zaključiti da se postupno, iz godine u godinu, broj noćenja te broj dolazaka gostiju povećavaju. Dvije najveće hrvatske tvrtke HAC i ARZ bilježe blagi porast broja vozila i veće prihode nego proteklih godina (nova cijena cestarina). S obzirom na činjenicu da 67% gostiju na odmor putuje osobnim automobilom, prateći uslužni objekti, odnosno benzinske postaje na autocesti, na svim važnijim državnim cestama, kao i u svim većim primorskim i dalmatinskim gradovima, moraju biti u funkciji turizma, prilagođene potrebama korisnika, kako bi se olakšalo putovanje većeg broja gostiju i ponudio bogat i širok spektar kvalitetnih proizvoda i usluga za sve zahtjevnije goste.

visit. Approximately one fifth of all visitors (21%) were visiting for the second time. In Croatia, around 16% of visitors visit the same place 6 or more times.

People travel to Croatia on vacation by car. This is the main means of transportation for 67% of Croatian guests. Almost half of all visitors (46%) whose final destination is in Dubrovnik-Neretva County, which is the southernmost part of the country, chose this type of transportation. The car continues to be the main means of transportation for all counties. The share of visitors who identified cars as their main means of transportation ranges from 62% in Istria to 82% in Šibenik-Knin County. Arrivals by plane are typical of Dubrovnik-Neretva County (the share of such arrivals is 5 times higher than the Croatian average and amounts to 38%). In Split-Dalmatia County it amounts to 12% and in Istria to 6%. Buses are most frequently chosen by tourists travelling to Split-Dalmatia County (8%), Primorje-Gorski Kotar (7%) and Šibenik-Knin County (6%). They are most rarely used by visitors travelling to Istria (2%).⁹

It may be concluded from the above that the number of overnight stays and of arrivals has been increasing year by year. The two largest Croatian companies, HAC and ARZ, have recorded a slight increase in the number of vehicles and more revenue than in the previous years (new toll prices). Since 67% of visitors travel on holiday in their personal vehicles, service areas, or filling stations, must be in the service of tourism on all the more important motorways, state roads, and in all larger coastal and Dalmatian towns. They must cater for consumer needs in order to facilitate the travel of an increasing number of visitors and must offer a wide range of high-quality products and services for demanding visitors.

BENZINSKE POSTAJE U FUNKCIJI TURIZMA

Hrvatska u zadnjem desetljeću vrlo mnogo ulaže u izgradnju autocesta i ima sreću jer se nalazi na odličnom geografskom položaju, koji omogućuje brz dolazak turista iz Europe. Da bi mogla još više konkurirati drugim zemljama, treba osim na samu ponudu u određenim destinacijama obratiti pozornost i na zadovoljstvo turista tijekom putovanja. Najveće pitanje koje se postavlja jest kako podići razinu usluge na prometnicama tako da i one budu dio atrakcije na putovanju. Cestovni promet je u Hrvatskoj u turističkim dolascima zastupljen s oko 95%, pa je cestovna prometna dostupnost najvažnija za daljnji razvoj hrvatskog turizma.

Prateći uslužni objekti trebali bi biti u službi turizma, jer potrošnja putnika tijekom putovanja nije zanemariva, posebno ako će prateći uslužni objekti biti dio turističkog doživljaja, jer tada možemo očekivati i veće prilode.

Pratećim uslužnim objektima (PUO) smatraju se svi objekti u kojima se pružaju usluge vozačima i putnicima. Pored benzinskih postaja to su i restorani, moteli, trgovine, autoservisi itd. Prateći uslužni objekti putnicima omogućuju sigurnu i udobnu vožnju te zadovoljavanje potreba za gorivom, jelom, pićem, raznim tehničkim i servisnim uslugama, ali isto tako i upoznavanje turističkih i ambijentalnih znamenitosti okruženja te pružaju mogućnost korištenja dostupnih informacija, interneta, bankarskih usluga, zadovoljavanje specifičnih potreba invalida, djece itd.

Najbitnije je na putovanju zadovoljiti fiziološke potrebe putnika (sanitarne potrebe, jelo, piće) i imati dobru vanjsku i unutarnju signalizaciju (npr. jednostavno pronalaženje info-pulta, jasne oznake za gorivo). Dodatni sadržaji koji su poželjni na benzinskim postajama su mogućnost autokampa, mjenjačnica, bankomat, autopraonica, pomoć na cesti, praonica rublja, prva pomoć, pošta itd.

Hrvatski autoklub (HAK) objavio je rezultate istraživanja sigurnosti i kvalitete pratećih uslužnih

PETROL STATIONS IN THE SERVICE OF TOURISM

For the past decade, Croatia has been investing significant amounts in the building of motorways and it is lucky because its excellent geographical position permits all visitors from Europe to arrive quickly. In order to compete with other countries, Croatia must take into account, in addition to the facilities in specific destinations, the satisfaction of tourists en route. The most important question is how to improve the quality of services on roads to develop them into part of the tourism attraction. Road traffic in Croatia accounts for around 95% of tourist arrivals, which is why accessibility by road is the most important factor for the further development of Croatian tourism.

Service areas should be in the service of tourism because tourist spending en route is not negligible, and, if service areas contribute to the overall destination experience, this can lead to more revenue.

Motorway service areas at petrol stations (MSA) include all facilities where services are provided to drivers and travellers. In addition to the fuel pumps, they include restaurants, motels, car repair shops and other facilities, ensuring safe and comfortable travel and catering to customers' needs for fuel, food, drink, and various technical and repair services. They also provide information about the tourist destination and its sights and the use of the available information, internet, banking services and the meeting of the specific needs of disabled persons, children and other.

The most important thing is to satisfy the physiological needs of travellers (sanitary needs, food, drinks) and to provide good external and internal signalisation (e.g. easily identifiable information desk, unambiguous petrol station signs). Additional amenities that are desirable at petrol stations are the possibility of a campsite, foreign currency exchange, ATM machine, car wash, roadside assistance, laundry service, emergency medical assistance, post office, and the like.

objekata na autocestama, provedenog u sklopu međunarodnog programa procjene EuroTest. Istraživanje su u organizaciji partnerskih nacionalnih autoklubova početkom 2012. proveli stručnjaci njemačkog instituta "Knapp quality solutions", specijaliziranog za sustave upravljanja kvalitetom u turističkom sektoru, uzduž glavnih europskih prometnih pravaca u Njemačkoj, Italiji, Francuskoj, Austriji, Španjolskoj, Nizozemskoj, Švicarskoj, Belgiji, Luksemburgu, Hrvatskoj, Sloveniji, Češkoj i Srbiji. Sve značajnije prometnice obuhvaćaju odmorista sa ili bez dodatnih sadržaja, pri čemu su područja s dodatnim sadržajima poznata kao prateći uslužni objekti, a fokus ovogodišnje inspekcije bile su potrebe prosječne obitelji s djecom na proputovanju prema mjestu za odmor.

Prateći uslužni objekti na autocestama predstavljaju dio cestovne infrastrukture koji je posebno značajan tijekom turističke sezone. Prema provedenim istraživanjima, turistima je najvažniji čimbenik u odabiru destinacije – sigurnost, na što značajno utječu cestovna sigurnost i kvaliteta usluga.

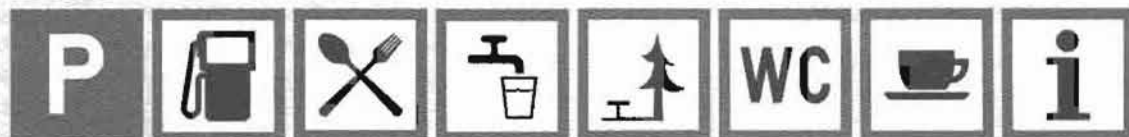
Hrvatska je u ukupnim rezultatima na ovogodišnjem testu bila vrlo uspješna. Prateći uslužni objekt Dragalić Jug na četvrtom je mjestu ukupnog poretka, a Zir Zapad i Sv. Križ Začretje Istok dobili su ocjenu "dobar" prema EuroTest terminologiji (odnosno "vrlo dobar" prema "školskoj" terminologiji) i mjesto među prvih dvadeset. Pristup vanjskim sadržajima prilagođen je za osobe s invaliditetom u kolicima

Hrvatski autoklub (HAK) published the results of a survey on the safety and quality of motorway service areas as part of the international EuroTest programme. This test, organised by partner national motoring organisations, was carried out in early 2012 by experts from the German institute "Knapp quality solutions", specialised in quality management systems in the tourist sector on the main European traffic routes in Germany, Italy, France, Austria, Spain, the Netherlands, Switzerland, Belgium, Luxembourg, Croatia, Slovenia, the Czech Republic and Serbia. All the more significant motorways have service areas with or without amenities. Areas with amenities are regarded as service areas and this year's inspection focused on catering for the needs of an average family with children en route for their holiday destination.

Motorway service areas are part of the roadside infrastructure which is of particular importance during the tourism season. Research shows that safety is the most important factor for tourists when selecting their holiday destination, which is significantly influenced by road safety and the quality of services.

Croatia had very good results among this year's overall test scores. The Dragalić Jug service was ranked fourth in the overall list of service areas, Zir Zapad and Sv. Križ Začretje Istok were also rated as "Good" in the EuroTest terminology (which is very good in "school" terminology) and are placed among the first twenty service

SLIKA 8. MEĐUNARODNE PROMETNE OZNAKE ZA PRATEĆE USLUŽNE OBJEKTE
FIGURE 8. INTERNATIONAL TRAFFIC SIGNS FOR SERVICE AREAS



i osobe s ograničenom mobilnošću, a higijenski test bio je u samom vrhu na svim hrvatskim pratećim uslužnim objektima. Međutim, ostalo je puno mjesta za poboljšanje u kategoriji sigurnosti pješaka, bolje prikladnosti i usluge za obitelj, posebice s malom djecom, pristupačnosti za sve osobe te umjerenost u cijenama. Besplatni bežični pristup internetu (Wi-Fi hot-spot) za goste objekata bilo bi najjeftinije poboljšanje, koje je jednostavno ostvariti, a donijelo bi dodatnu razinu usluge.

Kod gotovo polovine testiranih pratećih uslužnih objekata cijene su bile visoke ili gotovo dvostruko veće nego što bi turisti za testnu košaricu potrošili u obližnjoj trgovini (bočica vode, osvježavajući napitak i čokoladica). Osobe s invaliditetom često nemaju slobodan pristup objektima ili su parkirna mjesta namijenjena njima smještena daleko od zgrade, često bez pješačkih staza. Higijenski test pokazao je dobre rezultate, a kao najčešći nedostatak spominjan je nedostatak pješačkih staza i prijelaza.

Zahvaljujući vrhunskim rezultatima domaće infrastrukture, u HAK-u kao popratnu korist testiranja ističu veliko priznanje Hrvatskoj te informiranje građana EU o zavidnoj razini sigurnosti i udobnosti prometne infrastrukture, što je posebice bitno prije početka turističke sezone. Pozitivne informacije o Hrvatskoj i našim prometnicama putem medija i nacionalnih autoklubova dopiru do više od 120 milijuna Europljana. Odmor je ključni element sigurnosti na duljim putovanjima motoriziranih turista te je održavanje dobrih, prikladnih i sigurnih odmorišta i benzinskih postaja sastavni dio upravljanja sigurnošću prometne infrastrukture.¹⁰

Odgovor na pitanje jesu li benzinske postaje u Hrvatskoj u funkciji potreba hrvatskog turizma ili nisu glasi: *još uvijek ne*, ali smo na pravom putu.

Iako je na hrvatskom tržištu ukupno prisutno oko 710 benzinskih postaja, odnosno pratećih uslužnih objekata, možda je samo njih dvadesetak potpuno opremljeno da zadovolje potrebe stranih

areas. Access to external facilities is well adapted for disabled persons and persons with limited mobility, and hygiene was rated as very high in all Croatian service areas. However, there is still a lot of room for improvement in the category of pedestrian safety, family friendliness, especially for families with small children, accessibility for all persons, and reasonable pricing. Free Wi-Fi for visitors is the cheapest improvement which may be easily achieved and would result in a higher level of service.

Prices in almost one half of the tested service areas were higher or almost double for items in the test basket compared to prices in a nearby store (bottle of water, soft drinks and chocolate bars). Disabled persons often either do not have easy access to facilities, or the parking spots reserved for disabled persons are located far away from the main building, often without any crossings. The hygiene test showed good results but the lack of pedestrian safety and crossings were most often identified as the weak areas.

HAK stresses that an additional benefit of these tests, thanks to the high results of the domestic infrastructure, is that Croatia receives recognition, and EU citizens are informed about the high level of safety and the comfort of the transport infrastructure, which is particularly important before the beginning of the tourist season. Favourable information about Croatia and our roads reach more than 120 million European citizens through the media and national motoring clubs. Rest is a key safety element on long journeys of motorised tourists, and maintaining good, suitable and safe rest areas and service areas is a constituent part of the transport infrastructure safety management.¹⁰

The answer to the question about whether petrol stations in Croatia really act in the service of Croatian tourism is *still no*, but we are on the right path.

Although there are approximately 710 petrol stations or service areas on the Croatian market, only 20 are fully equipped to satisfy the needs of

i domaćih gostiju. Kako se naše društvo, gradovi i država razvijaju, tako se i mijenjaju potrebe ljudi tijekom putovanja. Širenjem infrastrukture te otvaranjem novih cesta i pristaništa za luksuzne jahte, pojedine manje, zastarjele, nedovoljno opremljene benzinske postaje, građene na lokalnim cestama i u manjim sredinama, u novije vrijeme više nisu profitabilne. Vlasnici u njih više ne žele ulagati, jer su neodržive i neisplative, pa ih zatvaraju (npr. INA).

Standard u ponudi pratećih uslužnih objekata u zadnjih 20 godina drastično se promijenio. Benzinske postaje u Hrvatskoj ne zaostaju više za postajama u zapadnoj Europi, što turisti iz tih zemalja i primjećuju, koristeći u velikom broju naše benzinske postaje ne samo za točenje goriva nego i za osveženje, odmor i kupnju usputnih namirnica, jer im omogućavaju različitost i bogatstvo ponude (npr. postaje Tifon u suradnji s Marché restoranima).

Evo i par usporedbi nekoliko hrvatskih gradova prema broju benzinskih postaja domaće tvrtke INA-e i broju stanovnika: grad Pag – 1 benzinska postaja, otok Pag – 8 398 stanovnika, a tijekom ljetne sezone i više od 200 000 gostiju; Zagreb – 35 postaja, 718 249 stanovnika; Split – 10 postaja, 171 162 stanovnika, a tijekom ljetne sezone više od 250 000 gostiju u široj okolini; Dubrovnik – 4 benzinske postaje, 28 681 stanovnika, gosti uglavnom dolaze u dogovorenim turističkim aranžmanima, avionom i *cruiserima*, a manjim dijelom cestovnim putem; Poreč – 2 postaje, 9 961 stanovnika, a u sezoni u Poreštini ljetuje do 120 000 ljudi. Cijeli otok Pag ima 4 benzinske postaje, a otoci Cres i Lošinj zajedno 5 postaja.

Iz navedenog proizlazi da je tijekom turističke sezone, kada se broj gostiju rapidno poveća, mali broj benzinskih postaja kapacitiran za usluživanje gostiju bez zastoja, pa nisu rijetkost redovi za točenje goriva, nedostatnost pojedinih namirnica u trgovinama u sklopu benzinskih postaja itd.

foreign and domestic guests. As society, cities and countries develop, the needs of travellers change. With the expansion of infrastructure, the opening of new roads or docks for luxurious yachts, smaller and older petrol stations, which are insufficiently equipped and which were built on local roads or in smaller communities, are no longer profitable and owners do not to invest in them because there are unsustainable. For this reason they are closed down (e.g. the case of INA).

The standard of service areas has significantly changed in the last 20 years and filling stations in Croatia are no longer lagging behind those in Western Europe, which was noticed by foreign tourists who are using our filling stations not only to obtain fuel but also to refresh themselves, rest and buy snacks thanks to their diverse and rich range of products (e.g. Tifon PSs in cooperation with Marché restaurants).

Here are a few comparisons of Croatian towns according to the number of petrol stations belonging to the national company INA and the number of inhabitants: the town of Pag has 1 PS, the island of Pag has 8,398 inhabitants, and in summer more than 200,000 guests; Zagreb has 35 PSs (718,249 inhabitants); Split has 10 PSs catering for 171,162 inhabitants and more than 250,000 guests in the wider surroundings; Dubrovnik has 4 PSs catering for 28,681 inhabitants, while tourists mostly come as part of travel packages by plane and on cruise ships, rarely by road; Poreč has 2 PSs catering for 9,961 inhabitants and during the tourist season, up to 120,000 people visit the surrounding area. The entire island of Pag has 4 PSs, and the islands of Cres and Lošinj have 5 PSs all together.

What follows from the above is that during the tourist season, when the number of guests significantly increases, the small number of petrol stations does not have the necessary capacity to serve all guests, which is why there are often queues for fuel and a lack of certain groceries in the shops at petrol stations, as well as similar problems.

ZAKLJUČAK

Na kraju iznesenog, možemo zaključiti da Hrvatska, kao omiljena ljetna turistička destinacija mnogim stranim i domaćim turistima, iz godine u godinu povećava broj dolazaka gostiju, ulaže i razvija svoju infrastrukturu, odnosno mrežu autocesta kojima turisti najviše putuju svojim automobilima. Paralelno s time, grade se novi prateći uslužni objekti, podiže se kvaliteta ponude na već postojećim objektima, i samo s takvim pristupom i proširenjem benzinskih postaja moći ćemo konkurirati zapadnim zemljama, iako su prema istraživanju HAK-a naše benzinske postaje već sada odlično ocijenjene.

Ključno je definirati strategiju hrvatskog turizma za narednih 10 godina, s obzirom na to da se trendovi mijenjaju, povećava se broj gostiju i sve su zahtjevniji. Hrvatska će se turistički morati što bolje pozicionirati, što znači da i razvoj benzinskih postaja biti u službi hrvatskog turizma. Danas je na svim autocestama prema moru situacija s benzinskim postajama vrlo dobra, jer se nalaze na 25 do 30 km udaljenosti, što je postalo standard, i sve bolje su opremljene dodatnim sadržajima, kako bi svima koji se nakon dugog putovanja žele malo odmoriti i osvježiti pružile što bolju uslugu. Nažalost, situacija s pratećim uslužnim objektima na autocesti od Zagreba kroz Slavoniju prema krajnjem istoku još uvijek ne zadovoljava sve što je potrebno prosječnom turistu, stoga su na tim benzinskim postajama nužna ulaganja ukoliko se želi privući što više gostiju, a time i ostvariti profit.

Dakle, možemo reći da benzinske postaje, a time i prateći uslužni objekti sa što boljom ponudom i sadržajima dodatno osnažuju hrvatski turizam, jer turisti na taj način dobivaju bolju sliku Hrvatske, kao zemlje koja je prepoznala potrebe svojih gostiju dok putuju na svoja odredišta i time se svrstala uz bok najrazvijenijim zapadnoeuropskim zemljama.

CONCLUSION

It may be concluded that Croatia, as a favourite summer tourism destination for many foreign and domestic tourists where the number of guests increases year by year, is developing and investing in its infrastructure, that is, in the network of motorways used by tourists to drive to their destination. At the same time, new service areas are being built and the quality of what is offered on the existing motorway service areas is improving. Only if we continue with this approach and the expansion of petrol stations will we be able to compete with Western countries, although, according to HAK's survey, our PSs have already received a good rating.

It is of key importance to define a strategy for Croatian tourism for the next 10 years since trends change, the numbers of tourists increase and they are becoming more demanding. Since it is necessary for Croatia to achieve a good position on the tourism market, the development of petrol stations must truly be in the service of Croatian tourism. The situation on all sea-bound motorways is today very good because the distance between petrol stations is about 25-30 km, which has become a standard, and they have better equipped service areas to cater for all the needs of those wishing to rest and refresh themselves during a long journey. Unfortunately, the situation with motorway service areas on the motorway from Zagreb via Slavonia towards the East still does not cater for all the needs of an average tourist, which is why those PSs need investment in order to attract as many guests as possible and to be profitable.

Therefore, it may be said that petrol stations and MSAs may contribute to the development of Croatian tourism with their range of products and amenities, thus giving tourists an impression of Croatia as a country which has recognised the needs of its guests en route to their destinations and which can be compared with the most developed countries in Western Europe.

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