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Transport market: Intermodality & Liberalisation

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&

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Under the Auspices of
Ministry of the Sea, Transport and Infrastructure



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Ministarstvo mora, prometa i infrastrukture
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6. Međunarodno znanstveno savjetovanje
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LUKE I PLOVNI PUTOVI - *PORTS AND WATERWAYS*
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Prometno tržište: Intermodalnost & Liberalizacija
Transport market: Intermodality & Liberalisation

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PREFACE

The Faculty of Transport and Traffic Sciences – University of Zagreb, Faculty of Maritime Studies – University of Montenegro, Intermodal Transport Cluster and Croatian Chamber of Economy, under the auspices of the Ministry of the Sea, Transport and Infrastructure, organized the sixth International Scientific Conference on Ports and Waterways – POWA 2011 entitled “Transport market: Intermodality & Liberalisation”, which took place on October 12, 2011 at Croatian chamber of economy, Rooseveltov trg 2, Zagreb.

Ports and waterways development is undergoing significant changes in response to the world’s changing conditions. The objectives of this conference is to analyze the intermodal transport systems as well as existing and future transport strategies from the aspect of transport market liberalisation of water and land transport. This international conference serve as a good medium for exchange of ideas and know-how-transfer, discussion about intermodality, environment as well as transport liberalisation, legal issues and transport strategies related to management and planning of ports and water transport in the world with an emphasis on the Republic of Croatia and the Adriatic sea.

The conference provides a forum for discussion and exchange of ideas, methods, and knowledge between managers, operators, designers and the scientific and academic communities.

POWA 2011 is largely supported by the Croatian academic community, economic sector and port communities. The authors of contributions are experts and practitioners from faculties, institutes, colleges and transport studies, from transport economy, from the port authorities, municipal authorities for traffic, logistics operators and business people.

The papers, posters and presentations are focused on the environmental protection, ICT & E-Learning, intermodal transport systems, transport safety and security, legal issues, education & training and transport strategies of water and land transport.

We are grateful to all authors for their contributions and to the members of the International scientific committee for their help and great effort invested in activities contributed to the success of the Conference and the publishing of scientific papers.

*Editor –in – chief
Prof. Natalija Jolić, Ph.D.
Zagreb, October 2011*

MARKETING AFFIRMATION OF SEA PORTS IN PASSENGER TRAFFIC

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SUMMARY

Marketing implies orientation on the consumer, development of integrated business operation program and goal-orientedness. It is based on the establishment of the needs and wants of consumers, recognition of their differences, meeting their specific needs and desires, long-term opportunity evaluation and coordinated decision-making and control.

All types of traffic imply service activities. Service is every action or performance one party can offer to another. Its production may, but does not necessarily have to do with a physical product.

This paper will present marketing affirmation of sea ports in passenger traffic. The goal of this paper is to present and compare the operation of seaports in the Republic of Croatia with that of some of the largest ports in the world, give a short account of the possibilities provided by marketing in the function of advancement of operation of sea ports and analyze what that means for the advancement of the tourist offer of the Republic of Croatia.

KEY WORDS

marketing, sea traffic, ports

1. INTRODUCTION

Marketing is a phenomenon of the modern society emerging as a logical consequence of identification of more appropriate, rational and efficient solutions in the area of connecting production and consumption, i.e. sellers and buyers, or service providers and service users. Simultaneously, sea transportation is one of the strongest transportation activities taking up the most prominent position in the transportation system. It connects the manufacturer and consumer, buyer and seller and similar. Its development is accompanied with the general global development. Since the demand for ship space stems from the demand for sea transportation of goods and passengers, a statement can be made that this is a matter of simultaneous interdependence of the development of shipbuilding and development of the need for transportation by sea. The best possible reconciliation of supply and demand, i.e. the meeting of the needs of buyers, transportation service seekers and service providers, requires that ship owners and service providers abide by the basic marketing principles in their operation, at the same time observing the policy of the best profitability of their companies.

Lately, all maritime companies worldwide reached a stage of development at which the realization that defining of the business and developmental policy and thus successful survival on the global maritime market must be based on elements arising from the previously established needs on the market of the transportation of goods and passengers by sea, as made possible by marketing, is reaching full maturity. The very philosophy of the management of companies in general, including those in sea shipping and ports, on marketing principles came into being and developed in the countries with more developed market economy, i.e. countries with developed market economy. Starting from the premise that sea shipping companies and ports are doing business in the conditions of international market of transportation services, it becomes apparent that the implementation of the concept of marketing is becoming a precondition of successful business operation. Marketing is thus an active relation towards market conditions and a principle according to which the scientific-research activity has to be the foundation of business policy and policy of development of shipping and ports.

This paper will provide an overview of the marketing affirmation of sea ports in passenger traffic. The goal of the paper is to present and compare the operation of sea ports in the Republic of Croatia with that of some of the largest ports in the world, give a short account of the possibilities provided by marketing in the function of advancement of operation of sea ports and analyze what that means for the advancement of the tourist offer of the Republic of Croatia.

2. CHARACTERISTICS OF MARKETING IN TRAFFIC

Marketing is a dynamic, exciting and modern area of business economics based on exchange. Exchange is best defined as a transfer of tangible and intangible values between two or more involved parties, or to be more precise, exchange is a process in which two or more involved parties are willingly acquiring some values for each other, providing that exchange is only realized if the following preconditions are met: there must be a minimum of two involved parties, each must have something to give in which the other is interested, each must be able to communicate and deliver, each must be free to accept or reject any offer of the other party and each must consider relationship with the other desirable or at least acceptable.

Marketing exchange rests on two foundations. First, consumers are impelled to participate in the exchange by the needs and desires they crave to satisfy. Second, companies, organizations or institutions manufacture and offer products, services and ideas on the market, wherewith the needs and desires, i.e. demand can be met.

Marketing implies orientation on the consumer, the development of integrate business program and orientation on goals. It is based on the establishment of needs and desires of consumer, recognition of their differences, meeting of specific needs and desires, long-term evaluation of opportunities and coordination in decision-making and control. According to the classic approach, companies, organizations and institutions act on the market as providers of three basic groups of objects of marketing exchange. They are material products, services and ideas.

Services, as intangible objects of exchange, are defined as acts, actions and processes performed for users. Services are used for the obtainment of educational, financial, legal, medical and similar gain. Services can also be intended for individual users and organizations.

All types of traffic imply service activities. Service is every action or execution one party can offer to the other. Its production can but needn't necessarily be related to a physical product. When discussing traffic services (air, rail, water), in the sense of passenger traffic, the main service with auxiliary lesser foods and services is implied. In this case, the offer consists of the main service and some additional services and/or additional goods. For example, passengers in sea traffic purchase the transportation service. They arrive to their destinations bearing nothing that could serve as a tangible outcome of their expense.

However, travelling also involves some tangible items, like food and beverage, travel ticket and similar. Although the realization of service requires capital – intensive good called ship, airplane, train, the item is – service.

The appropriate quality and creation of values for the user are the bases for success of any service, including the traffic service. Services were not afforded the necessary attention for years. Early economists like Adam Smith from the 18th ct. were of the opinion that an activity with intangible outcome creates no added value. It was not until the transition of the 19th into the 20th ct. that Alfred Marshall pointed to the equality of intangible and tangible products in respect of the ability to generate new values. Lately, services have dominated the developed market economies and the transition of economies from agricultural through industrial to service is a worldwide occurrence.

3. APPLICATION OF MARKETING CONCEPTS IN SEA PORTS IN THE REPUBLIC OF CROATIA

The gathered and processed information suggest that, in spite of advances in the form of investment into the construction of new terminals / port expansions currently in progress, passenger traffic in the Republic of Croatia is not characterized by any significant advances in the sense of increased number of passengers and consequently increased revenue.¹ Conclusion can

be made that inadequate marketing activity of companies dealing in sea traffic is one of the causes of such state of affairs.

Lately, all maritime companies worldwide reached a stage of development at which the realization that defining of the business and developmental policy and thus successful survival on the global maritime market must be based on elements arising from the previously established needs on the market of the transportation of goods and passengers by sea, as made possible by marketing, is reaching full maturity. Starting from the premise that sea shipping companies and ports are doing business in the conditions of international market of transportation services, it becomes apparent that the implementation of the concept of marketing is becoming a precondition of successful business operation.

Since traffic is an extension of production allowing for the exchange and consumption of products on the market, the specificity of marketing in shipping and ports is reflected in the specificity of its functions in the establishment of business policy on the provision of passenger transportation services.²

Marketing has three basic functions in shipping and ports, as depicted in image 1.

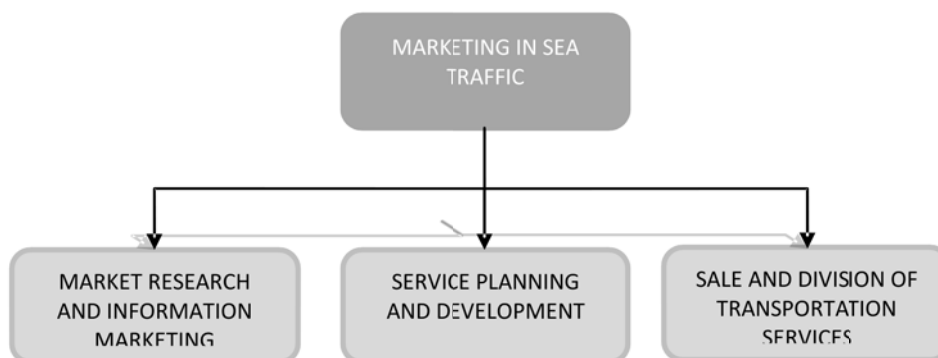


Image 1. Depiction of functions of marketing in sea traffic

Source: compiled by authors

Market research and information marketing are essential for contemporary approach to market and successful conduct of the business policy of shipping and port companies. The area of research primarily defines and analyzes markets on which the ship owner and his ship space act as offeror and passengers as consumers of transportation services realized through ports. Studies pertaining to the policy of passage fares as price of provided transportation service are included in this paper. All these studies have the relevance of microeconomic research in the planning and organizational sense.

By defining the market of the sea transportation services, marketing studies aim to establish the actual outlines of present, possible and future market in which certain ship space³ will be contracted and the knowledge of the development of needs and production on the global and domestic market of individual types of goods⁴ a need.

The establishment and study of the users of transportation services is an area without which market research would be incomplete. The analysis of bearers of demand – service buyers is one of the fundamental marketing researches. The information obtained by such analyses are also used to define fleets individual ports.

¹Data of Croatian carriers from [www.http://www.hrvatskiprijevoznik.hr](http://www.hrvatskiprijevoznik.hr)

²Previšić, J., Ozretić Došen, Đ.: Marketing, Adverta, 2004, pg. 82-96

³Kotler, P., Lee, N.: Marketing in the public sector, Road to better execution, Biblioteka Gospodarska misao, Grafotisak, 2007, pg. 200-243

⁴ Kotler, P.: Marketing management, Analysis, planning, application and control, Informator, 1999, pg. 246-255

4. INTERNATIONAL EXPERIENCES WITH THE APPLICATION OF MARKETING IN SEA PORTS

In line with the current social-economic changes on the international maritime market, maritime flows are being regrouped and with them the relevance of European ports. Regardless of the current changes, the first place has long been claimed by the Rotterdam port, followed by the ports of Antwerp, Hamburg and Marseille. North Sea ports obviously have supremacy, primarily because western and part of central Europe realize a significant portion of their commercial relations with the rest of the world through these ports.

The marketing concepts and methods and techniques used by companies to implement marketing actions are similar on the foreign and domestic market. Some authors therefore hold that the differences between international and domestic marketing are irrelevant and that both are the same. Any difference is reduced exclusively to differences in the foreign and domestic market surroundings.⁵

The situation is actually far more complex. Of course, there are some similarities in methods and techniques used on foreign and domestic markets. The Concept of marketing is universal and applicable throughout the world.

Some of the more important differences are:

- *international surroundings*; external forces in the international environment operate in a much more complex manner than on the domestic market. On each foreign market, companies, provider of service of transportation by sea must face different risks, culture, laws, currencies, level of development, etc., significantly aggravating, lengthening and making analysis and planning and execution of marketing activities more costly. In the Republic of Croatia, providers of service of transportation by sea offer their services to domestic and foreign users, but in their case, the scope of users is smaller, resulting in the lesser number of specificities than faced by foreign users.
- *different application*; different application of marketing principals, concepts, methods and techniques is very frequent on foreign markets. This is a result of different effects of individual elements in foreign environments.
- *international competition*; is immeasurably stronger in foreign than on the domestic market. Although international competition is entering the domestic market by the back door due to increasingly present globalization, it is far more present, numerous and provides more opportunities on the international market.⁶

5. POSSIBILITIES OF MARKETING IN THE FUNCTION OF ADVANCEMENT OF BUSINESS OPERATION OF SEA PORTS

In the overall tourist offer of the Republic of Croatia, nautical tourism ports are of first-rate economic significance. The issue of nautical tourism ports must be seen in the big picture, especially in the sense of interconnectedness with ports open to public traffic and sports ports, anchorages and moorings. That does not mean that ports open to public traffic and sports ports can substitute nautical tourism ports in the legal and economic sense.

The application of nautical tourism regulations and practice is currently opening a number of issues, especially with regard to the optimum economic options and potential of the tourist port system, which is as yet not adequately evaluated.

⁵A. Jugović, V. Seršić, B. Debelić, Economic interest group of port authorities, Pomorstvo, 2009, pg. 459-476

⁶Babić M.: Global maritime policies, Zagreb, 1972, pg. 169-173

It is sometimes necessary to protect and reconcile the opposing public interest, interest of the resident population, interest of small ship owners, catering and tourist offer on the shore and finally, the interest and safety of yachtsmen and guests of nautical tourism ports.

At the same time, nautical tourism ports are a link between seafaring and tourism, activities which together comprise a unitary offer. It is to yachtsmen-tourists who are the most frequent users of services especially in marinas, that a safe berth, vessel supply and all ancillary activities closely linked to seafaring and tourism are provided.

Legal regulations are mostly under the jurisdiction of the Ministry of the sea and Ministry of tourism. Ministry of the sea proscribed the classification of ports by the Maritime Good and Sea Ports Act (MGSPA) (Articles 41-46) and Ordinance on the Classification of Ports Open to public Traffic and Special Purpose Ports. In accordance with the said regulations ports are classified by purpose as follows:

- Ports open to public traffic
- Special purpose ports

Ports open to public traffic are sea ports which can be used by any physical and legal person under the same conditions in keeping with their intended use and within the limits of available capacities.⁷

They can be open to international traffic and open to domestic traffic. Their port area is established in accordance with the physical plan and they are governed by the port authority, a non-profitable legal person consisting of the managing council and head appointed by that council.

The equal treatment principle is not characteristic for the use of special purpose ports (special ports, so called purpose ports).

Special purpose ports are sea ports under special use or economic exploitation by legal or physical persons (nautical tourism port, industrial port, shipbuilding port, fishing port and similar) or a governmental body (military port).

When looking at the role of sea traffic in tourism, it can be concluded that the largest number of tourists arrive to Croatia by roads (approx. 93%), but among these, there are those whose final destination are the Croatian islands, and such tourists are the largest users of services in sea passenger traffic. Since the demand for transportation services is a derived demand, the number of tourist arrivals in the Republic of Croatia is in direct correlation with the increased demand for transportation of passengers by sea. When quality inland traffic connections between passenger sea ports in the Republic of Croatia and emitting tourist area are ensured, the fundamental developmental aspect of Croatian tourism and sea passenger ports is defined. Consequently, the following working hypothesis is formed: Owing to the appropriate connectedness of sea passenger ports and roads and the increased number of tourist arrivals, a significant increase of sea passenger traffic in the Republic of Croatia can be anticipated. This prognosis is based on the similar experiences of EU countries in which the construction of contemporary highways to passenger ports resulted in traffic increase by 5% per annum. Furthermore, the extant prognoses of passenger traffic in ports of special interest for the Republic of Croatia were fortunately proven to be overly pessimistic.

The Program of Renovation of the Passenger Fleet of Jadrolinija will improve the quality of the sea traffic service. The goal of the Program is to modernize and renew the passenger fleet with the aim of demographic and economic recovery and development of Croatian islands and the best possible meeting of the traffic demand in the tourist season, as well as the increased safety of navigation.

⁷ Ministry of the Sea, Transport and Infrastructure, Act on Maritime Good and Sea Ports, Articles 41-46 and Ordinance on the Classification of Ports Open to Public Traffic and Special Purpose Ports

The project involves the construction of identical ships, regardless of the fact that they are being built in different shipyards at the price of EUR 5,7 million apiece, partially funded by the state through the competent ministries by budgetary incentives (10% Ministry of the sea, tourism, transportation and development and 10% Ministry of economy, labor and entrepreneurship).

The value of the Program of Renovation of the Passenger Fleet of Jadrolinija 2004-2008 is EUR 130 million, with the realization of which the fleet will be expanded by a total of 10 new ships, with simultaneous dismissal from service of 15 ships, thus decreasing the average age of Jadrolinija's fleet from 28,1 to 19,0 years (under the European average). Once the Program is realized, instead of the present 50 ships having the average age of 28,1 years, over the following 4 years, Jadrolinija should have at its disposal 45 ships in average 19 years old, but a 10% higher transportation capacity.

The processed data of the Agency for Coastal Maritime Transportation show that 11.576.795 passengers were transported in 2009, which is 2,6% less than in 2008 and 2.852.823 vehicles, or 2,1% less. Although realized in an economy-wise exceptionally difficult year, it is only slightly under that realized in the record years. The busiest ferry ports in 2009 were Split-Supetar in which 1.545.633 passengers and 331.511 vehicles were transported, Zadar-Preko with 1.615.439 passengers and 260.970 vehicles and Jablanac-Mišnjak with 1.093.628 passengers and 348.448 vehicles. On all three lines, traffic was several percentages under the 2008 figures. A more significant decrease in traffic occurred in the Split region, especially on lines Stari Grad-Split, Ubli-Vela Luka-Hvar-Split and Vis-Split, as well as on the ferry line Prizna-Žigljen. The largest traffic decline occurred on the coastal ferry line Rijeka-Split-Hvar-Korčula-Dubrovnik which suffered a 17% decline of both passengers and vehicles in comparison with 2008. This is merely a continuation of the trend of continuous decrease in traffic on the longest line on the Adriatic, on which the number of passengers and vehicles suffered a 50% reduction.

The rising traffic trend was also halted on state fast ship lines. A total of 1.044.657 passengers or 4,1% less than in 2008 were transported. A noticeable decline is also discernable on line Pula-Unije-Mali Lošinj-Ilovik-Zadar, with a 15% traffic reduction, line Ubli-Vela Luka-Hvar-Split with 12% less passengers and lines Jelsa-Bol-Split and Rogač-Split with an 8% decline.⁸

6. CONCLUSION

The regressive analysis of the macroeconomic assessment of demand for passenger traffic by sea confirmed the hypothesis that the higher number of tourist arrivals, as a dependent variable, resulted in the increased demand for passenger traffic by sea in the Republic of Croatia, as an independent variable. The assessment of demand for passenger traffic by sea indicates that there will occur a 10,4% increase in passenger traffic by sea in 2012 in comparison with 2006. Such data guarantee the perspective of development of maritime line passenger shipping, especially with regard to the need for the development of tourism on islands.

The efforts of every company to ensure new sources of funding for its operation, development of new products, investment into modernization and increase of the original capital start with the preparation of the business plan. Business plan is a detailed program of goals of the company for a certain time period, strategy of their realization, calculation of the required funds and assessment of anticipated outcomes. The main content of every business plan are goals, strategy, result and persons who will make all that happen.

Since apart from production and financing, marketing is the most important function of every company, special attention needs to be paid to market processing and marketing strategy of a company.

⁸ Data of the Agency for Coastal Maritime Transportation, according to the study of Drago Pupavac, Ph.D., Senior Lecturer, Rijeka

Advertising is the predominant form of promotion (ads should focus on tangible service-related elements). Transmission of information through oral communication of users with their surroundings is invaluable.

Quality service will make the user interested, enable sale, influence satisfaction levels, create and maintain user loyalty. The difficulties relating to the establishment of the level of service quality are numerous and there are no universal, generally accepted models and methods. Users will be satisfied with the service if their perceptions are higher or similar to the expectations preceding the service provision. Satisfied users communicate their positive experiences with the service to potential users and become loyal both to the service and to the company.

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