ENERGY SECTOR IN CROATIA - FIGURES

- Number of employee: 14,693 (2015)
- 844 companies (12 large, 21 middle, 811 small)
- Primary energy production (2014): 243,78 PJ
- Total primary energy supply (2014): 402,22 PJ
- Energy import in Croatia (2014): 254,36 PJ
- Energy export from Croatia (2014): 103,67 PJ

Source: FINA, EIHP, prepared by CCE
BUSINESS IN ENERGY SECTOR

- Long tradition in Croatia – 1st HPP in Europe (in 1895 HPP Krka near Šibenik), 2nd in the world, only 2 days after HPP Niagara Falls
- The largest Croatian company Končar Elektroindustrija d.d. – since 1921
- Number of SMEs in project design – different segments – providing all activities in the energy project
- State of the art technology – i.e. smart meters production

Suggestion how to do business in energy sector in Croatia:
- Identify potential project
- Contract with reliable Croatian companies that may assure competitive service or product (subsuppliers or consortium partners)
- CCE may help in finding the partner, getting information...

Energy Sector in Croatia
**BASIC STRATEGIC DOCUMENT**

- More than a year of preparation, 3 public consultations, controversial opinions, the actual status far from expectations (example in electricity: predicted electrical energy consumption should have been increased from 18 TWh to 27 TWh, today actual consumption is around 17 TWh).

*Energy Sector in Croatia*
EUROPEAN VIEW

Most important innovative potential is expected
MAIN INDICATORS OF DEVELOPMENT (2009-2014)

Source: Energy Institute „Hrvoje Požar”

Energy Sector in Croatia

GDP
Tot. prim. energy cons.
Tot. fin. energy cons.
Gross electr. cons.
Net. electr. cons.
2/1
3/1
4/1
5/1

Source: Energy Institute „Hrvoje Požar”
PRIMARNA ENERGIJA I ZAŠTITA OKOLIŠA

Primary energy production (PJ)

Source: Energy Institute „Hrvoje Požar”

Energy Sector in Croatia
ELECTRICITY TRANSMISSION SYSTEM

Length:

- 400kV 1.247 km
- 220 kV 1.210 km
- 110 kV 4.912 km
- Mid. voltage 144 km

Source: HOPS
GAS TRANSMISSION SYSTEM

Lenght: 2694 km
Underground storage: PSP Okoli
Location for LNG terminal - planned

Source: Plinacro
OIL TRANSPORT SYSTEM

Length: 622 km
4 terminals:
- Krk
- Sisak
- Virje
- Slavonski Brod

Source: FSB
OIL AND GAS EXPLORATION IN CROATIA

ONSHORE

• Expecting to start first oil and gas exploration in Croatia after more than 20 years of waiting
• 18th July 2014 1st ONSHORE LICENSE ROUND FOR LICENCES FOR THE EXPLORATION AND PRODUCTION OF HYDROCARBONS opened
• First Onshore License Round for exploration and exploitation of hydrocarbons closed on February 18th 2014.
• the Government of the Republic of Croatia has adopted Decisions on issuing licenses for exploration and exploitation of hydrocarbons
• 3 companies got licences for onshore exploration and exploitation

Energy Sector in Croatia
OIL AND GAS EXPLORATION IN CROATIA

OFFSHORE

• 2\textsuperscript{nd} April 2014 1\textsuperscript{st} OFFSHORE LICENSE ROUND FOR LICENCES FOR THE EXPLORATION AND PRODUCTION OF HYDROCARBONS opened

• First Licensing Round for exploration and exploitation of hydrocarbons in the Adriatic closed on November 3\textsuperscript{rd} 2014.

• The Government of the Republic of Croatia has adopted Decisions on issuing licenses for exploration and exploitation of hydrocarbons

• 1\textsuperscript{st} OFFSHORE LICENSE ROUND FOR LICENCES FOR THE EXPLORATION AND PRODUCTION OF HYDROCARBONS canceled

• To be reopen again
RENEWABLE HEAT PRODUCTION

- No regular incentives, only occasionally on the regional level and for small projects
- Several examples in Croatia show eligible applications

Energy Sector in Croatia
EQUIPMENT PRODUCTION IN CROATIA

Croatian companies offers:

• Project design
• Equipment production (boilers, raw material delivery, turbine, generator...)
• Plant on-site erecting
• ...

Energy Sector in Croatia
### EU targets till 2020

**Date of issue:** 9 February 2016

**Croatian RES share in total energy consumption in 2005:** 23.8%

**Croatian RES share in total energy consumption in 2014:** 27.9%

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CONCLUSION – ENERGY SECTOR IN CROATIA

- Favourable climate & unpolluted natural environment:
- Over 2,700 hours of sunshine per year
- Windy regions by the Adriatic sea and east Slavonia
- Geothermal energy from natural sources on the continent
- Access to vast amount of biomass
- Substantial, mostly already engaged, hydro-power potential
- Investment possibilities: planned increase in capacity, refurbishment and construction of new power plants (hydro power plants, thermal power plants), LNG terminal; RES; environment protection & production of clean energy

Energy Sector in Croatia
THANK YOU FOR YOUR ATTENTION!

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