REGIONAL ANALYSIS OF CHALLENGES AND NEEDS

for the Győr – Moson - Sopron & Burgenland Regions

D.T1.2.6

Final version
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Partner name

CORCAP partner(s)	*Related catchment area (area of analysis)*	*Related cross-border relations*
KTI & GYSEV	Győr-Moson-Sopron & Burgenland counties	-

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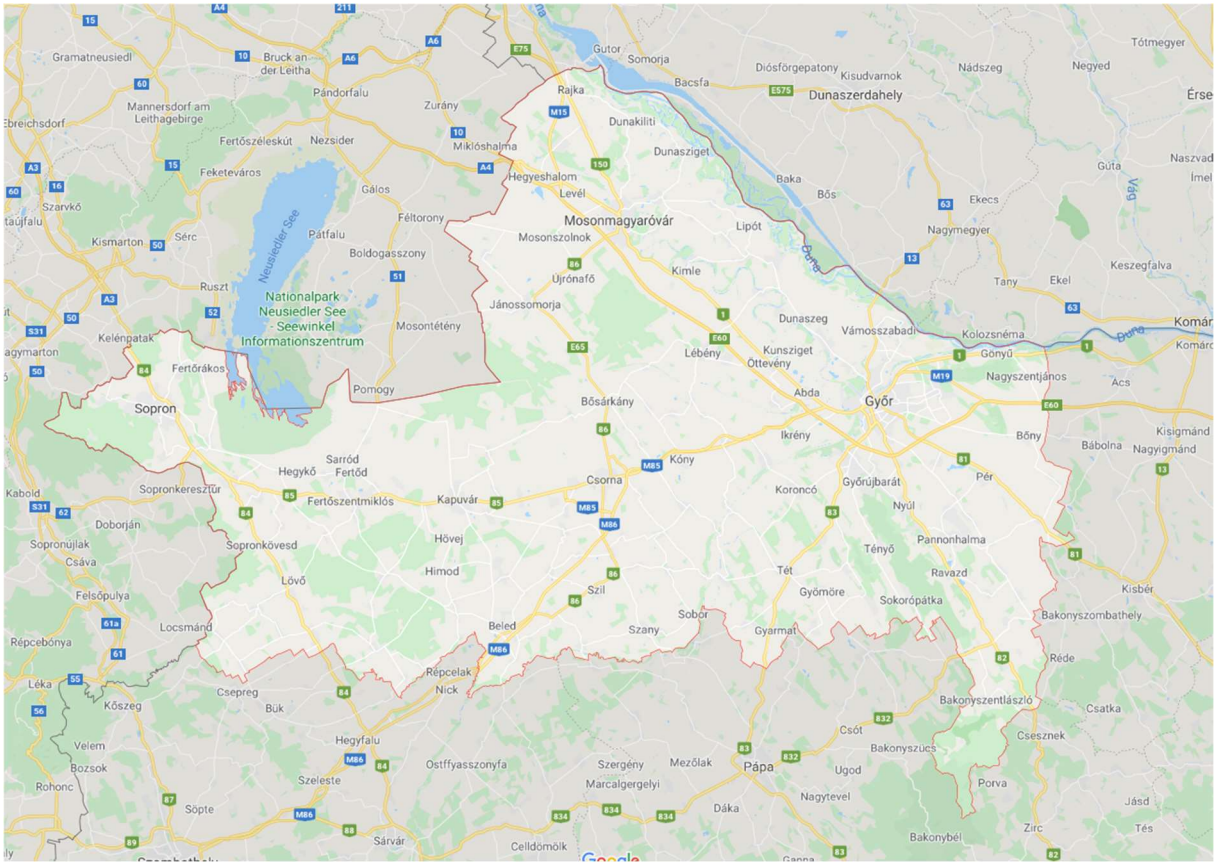
1.1. Geographical and socio-economic description of the area, delimitation and definition of its catchment area

1.1.1. Geographical data, relief, natural and administrative boundaries

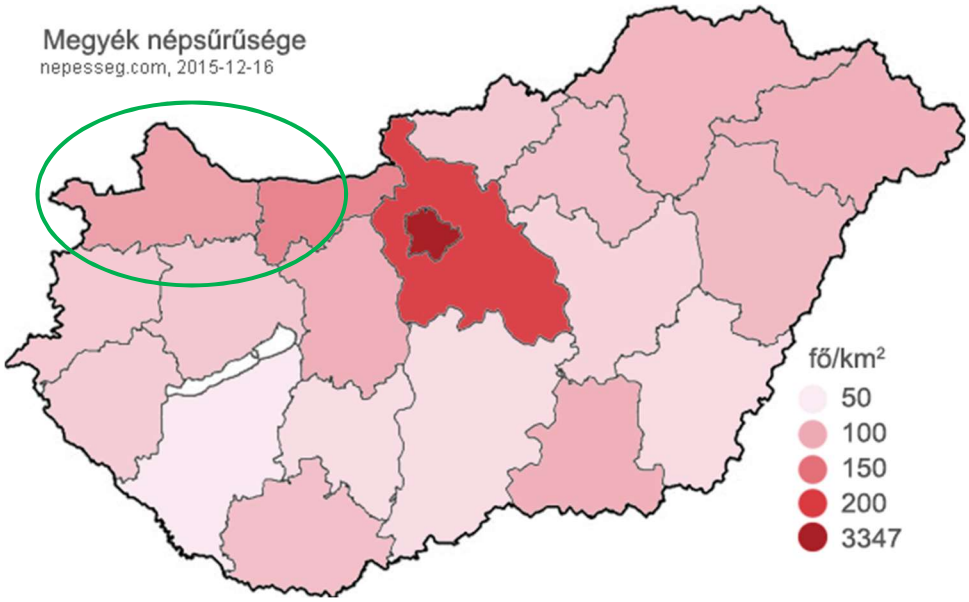
Győr-Moson-Sopron County

Győr-Moson-Sopron County lies in the western part of Hungary, its territory is 4 208 km^2 (figure 1.), the county town is Győr. In the county there are 183 settlement, with 12 cities. The population is 450.000 inh., the density is 109 inh./km^2 (figure 2.). The 60 % of the population live in cities. The biggest towns are: Győr, 129.000 inh., Sopron, 62.000 inh. and Mosonmagyaróvár, 32.000 inh.

The county lies on „Kisalföld", the northern boundary is the river Danube, the western boundary is the state border near the river Leitha. From the South the boundaries are the two neighbour counties: Vas and Veszprém, from East the county Komárom-Esztergom.



1. Figure Győr-Moson-Sopron county (source: maps.google.hu)



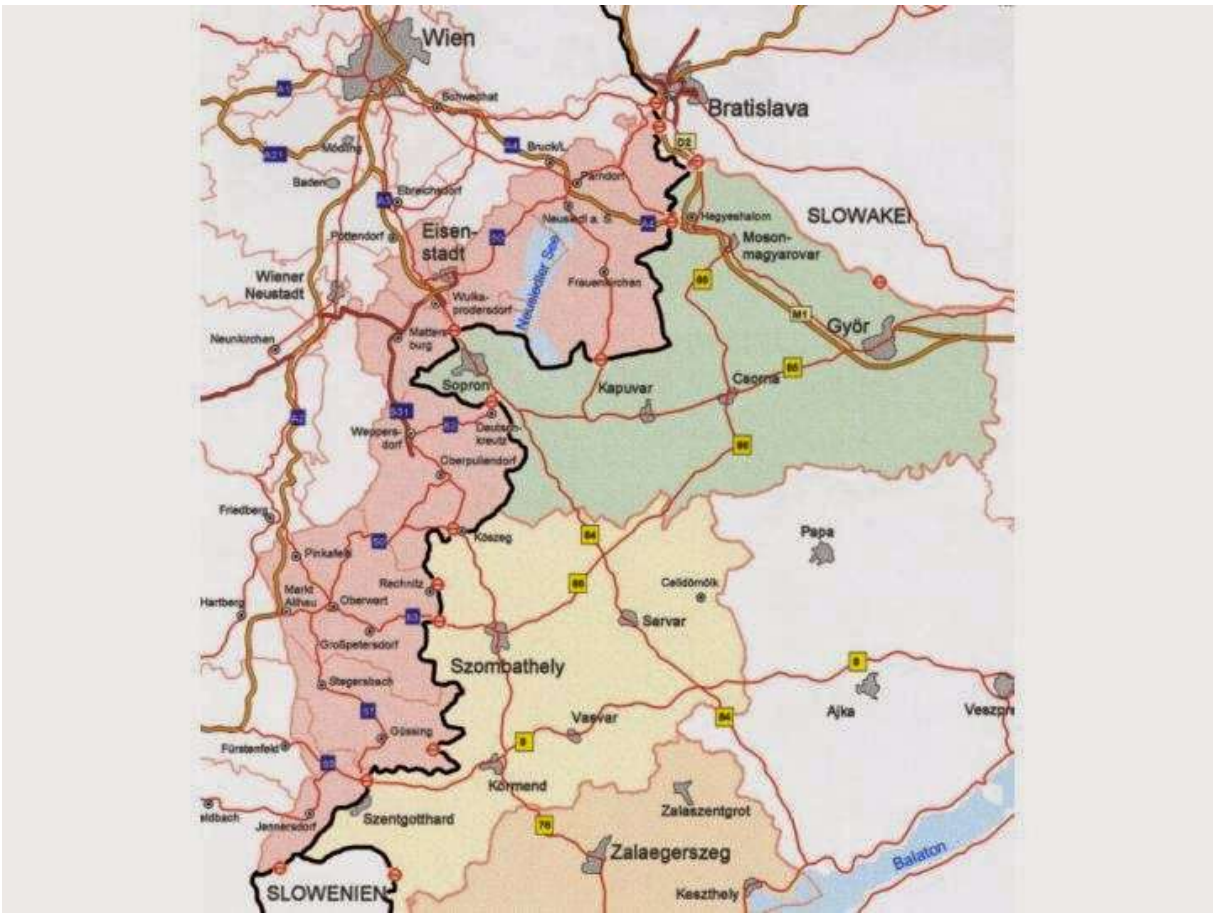
2. Figure Population density in Hungary 2015 (source: nepesseg.com)

Burgenland

Burgenland is the most eastern county of Austria, territory is 3 966 km^2, the county town is Eisenstadt (figure 3.). The territory can be divided geographically into two parts: the flat part (north) is the western section of „Kisalföld”), the mountain part (south) is the „Alpokalja”. Its extent is mostly north-south, in east-west direction is only a thin band of Austria.

The settlement system is made up of small cities and villages. The population is 291.000 inh., the population density is 72 inh./sqkm. The biggest city is Eisenstadt with 14.500 inh. Other larger municipalities: Oberwart 7.500 inh., Mattersburg 7.400 inh., Pinkafeld 5.800 inh. The most significant settlements are shown in figure 3.

From the North and West the boundary is Niederösterreich, from the West and South Steiermark and from the East Vas and Győr-Moson-Sporon counties.



3. Figure Burgenland (source: http://korutazasok.blogspot.com/2014/05/burgenland-egy-kicsit-mienk-is.html)

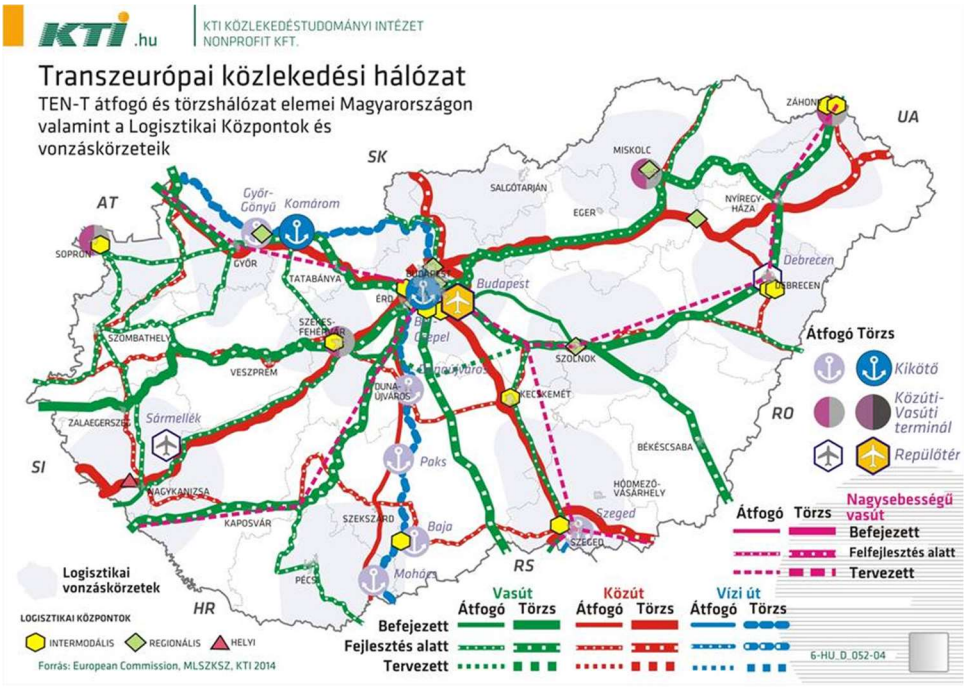
1.1.2. Identifying the corridor and determining its catchment area

The CORCAP relevant fright corridor is located along the Budapest – Bratislava and Budapest – Vienna axes. The corridor includes the M1 motorway and main road Nr. 1, which are important for the road transport, the Budapest – Hegyeshalom (- Vienna) – Rajka – Bratislava railway line and the Danube waterway from Budapest to Vienna and Bratislava, and the regional airport Győr-Pér.

The catchment area is the neighbour counties in Hungary, namely: Komárom-Esztergom, Veszprém and Vas. The part of the catchment area is in Austria the Land Niederösterreich and Steiermark. From the North the Bratislava area is also the part of the catchment area.

1.1.3. Connections with relevant TEN-T and RFC corridors in the area

The Hungarian part of TEN-T corridors are shown in figure 4. Győr-Sopron county is affected by the corridor Orient/East-Med (road and rail), and the corridor of Danube waterway). The Rail Freight Corridors 7 (Orient/East-Med) & 9 (Rhine-Danube) and 11 (Amber) run through the county. RFC 5 (Baltic-Adriatic) runs through the northern part of the Burgenland. The corridors feature the figure 4.



4. Figure TEN-T network in Hungary. (source: KTI)

1.1.4. Examination of technical parameters of the area

The main traffic direction of Győr-Sopron County is East – West traffic. The motorway M1 and the railway line Nr. 1 are the part of the Budapest – Vienna corridor. The significant part of the freight transport is concentrated on these routes. The only line of water transport is represented by the Danube River, which is part of the European waterway corridor of the Rhine-Danube, the freight bearer of the North-West-South-East European traffic route. The regional port is located in Győr-Gönyű. The port has a railway connection (Figure 5) The regional airport is located in Győr-Pér (Figure 6). The airport only has regional traffic both in the personal and freight traffic.

In Burgenland run through the Budapest – Vienna motorway (A4) and the main railway line (700). The A3 – S1 motorway/highway connects Vienna and Oberpullendorf. The land doesn't have regional airport, the nearest airport can be found in Vienna, the international airport. This used to be by the burgenlander inhabitants and firms. There is no significant waterway in the region.

5. Figure Port of Győr-Gönyű (source: https://logisztika.com/atadtak-magyarorszag-uj-dunai-kikotojet/)

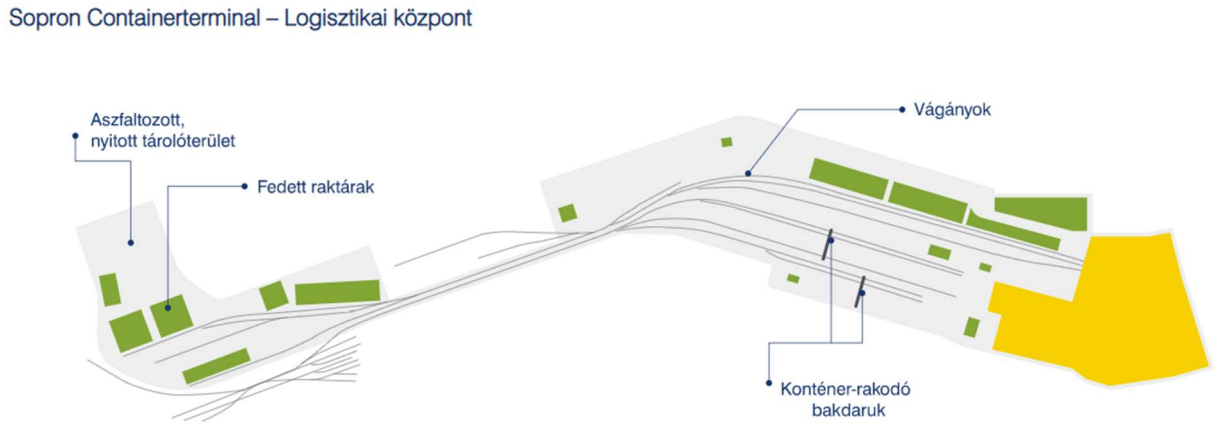
6. Figure Győr-Pér airport (source: http://www.lhpr.hu/repuloter)

1.1.5. Examination of intermodality and terminals in the area

In the region the only container-terminal is established in Sopron (Figure 7). In the terminal 72.000 containers are handled yearly and the loading capacity is 2.000 TEU. The following services are available in Sopron-Terminal:

- moving, storing (deponing) loading, setout, rail/road reexpedition, repairing, cleaning of multi/intermodal transport vehicles;
- complying direct trains with road/rail forwarding financing,
- storage of dangerous goods,
- full custom logistics,

- property protection and security services.



7. Figure Sopron Container terminal (source: https://www.gysevcargo.hu/hu/szolgaltatasok)

In the catchment area there are more terminals for the combined traffic:

- Wien Süd/Inzersdorf (AT)
- Dunajksá Streda (SK)

1.1.6. Bottlenecks, barriers

Road traffic

The roads of the region are used by many commuters, living in Győr-Sopron County, working in Buregnland and Vienna. There are peak time traffic jams in the bigger cities like Győr and Sopron. Győr can be by-passed ont he M1 motorway but with toll. The cities of Sopron and Mosonmagyaróvár cannot be by-passed, so you must run into the inner cities by running through. In case of Sopron, the congestion is further increased by the fact that the traffic from Austria to Lake Balaton also burdens the city.

In Burgenland the traffic jams are not typical, the capacity of the roads are enough for the car traffic.

Railway traffic

The neuralgic point of the railway traffic is the station Győr. If the station cannot handle any train means the collapse of the rail traffic between Austria and Hungary. Győr cannot be by-passed by rail, so the capacity of the station is a key element in the train traffic.

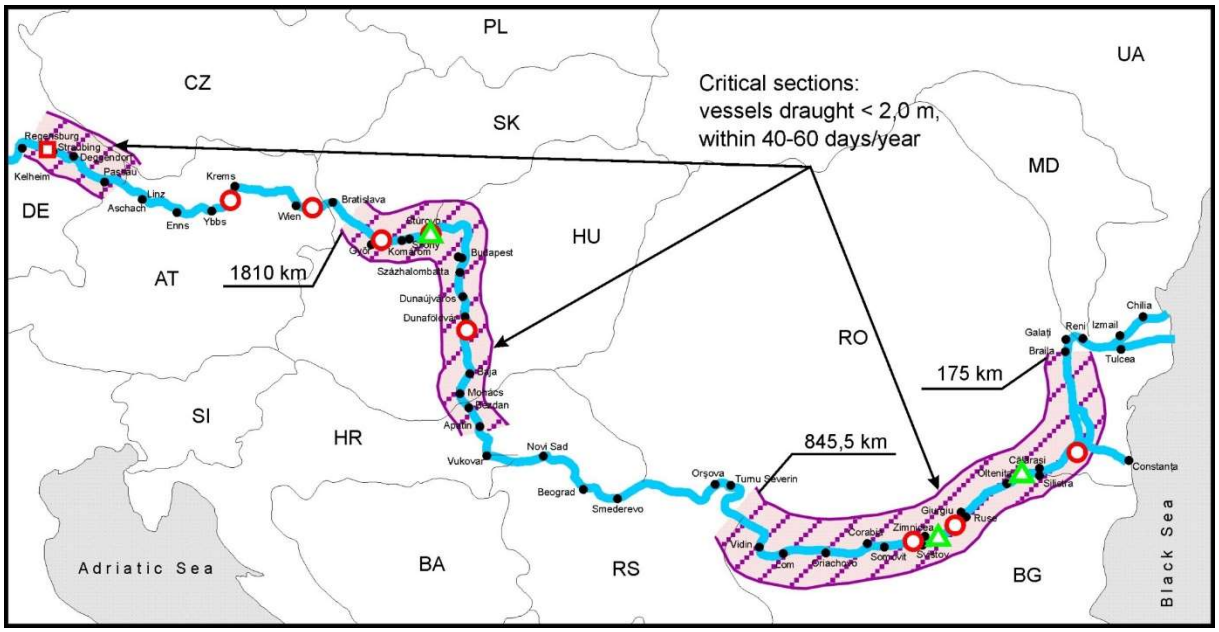
There are further major bottlenecks in the rail network of the region:

- Line 8 (Győr- Sopron), Hungary's busiest single-track line
- Sopron node (passenger station and terminal)
- Lack of triangle track in Ebenfurth
- Lack of implementation of TEN-T minimum standards, in particular 740m train length and 22,5 t axle-load on major parts of the GYSEV network
- Lack of electrification of the Sopron – Wiener Neustadt line

Waterbone transport

A key factor in the inland navigation system is the capacity of the Danube waterway, which is primarily determined by the prevailing navigability conditions (i.e. the Danube's navigability over a year, in a cost-effective manner, with a fully loaded dive). Navigability has a direct impact on the potential capacity utilization of infrastructure along the river. Provided they have adequate navigability conditions and ongoing maintenance of the waterway infrastructure, the sector provides reliable and competitive freight services. All these are key prerequisites for integrating inland shipping as an environmentally friendly mode of transport into the logistics system of a modern economy.

The Danube canals and bottlenecks are significant (figure 8. & 9.), which also limits the flow of the Danube-Main-Rhine waterway system. Integrated water management and river management are needed not only for navigation but also for upset sediment balance, water base protection, groundwater subsidence, backwaters and flood protection.



8. Figure Critical navigation sections oft he River Danube

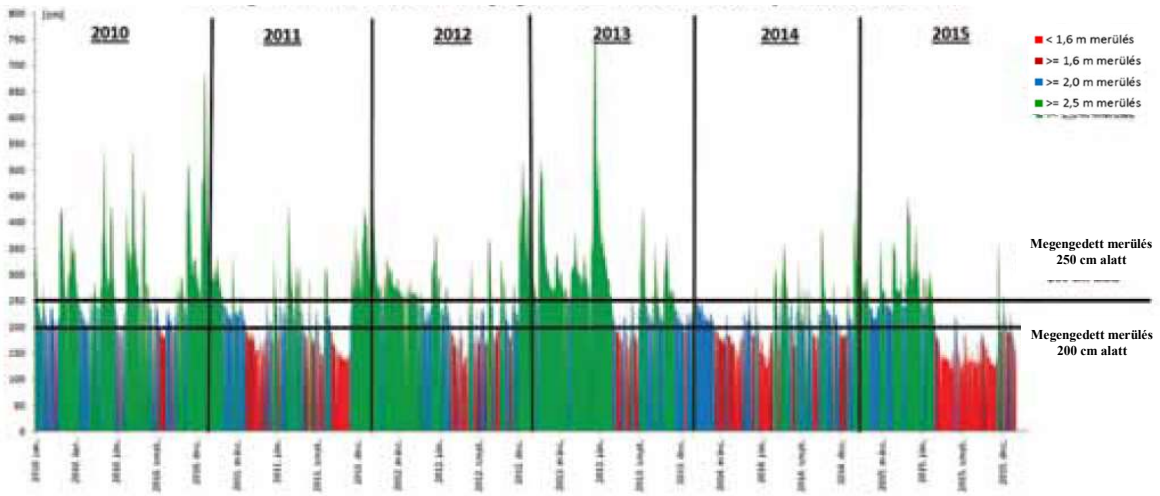
9. Figure Location of gasifiers and bottlenecks on the Hungarian Danube section

Source Figure 8 & 9: Presentation of Capt. Szalma Béla, Főmterv Conference, 30. 01. 2019

There are three critical sections of the Danube where the depths of vessels are less than 2 meters for 40-60 days a year. One of them is the Danube section of Hungary.

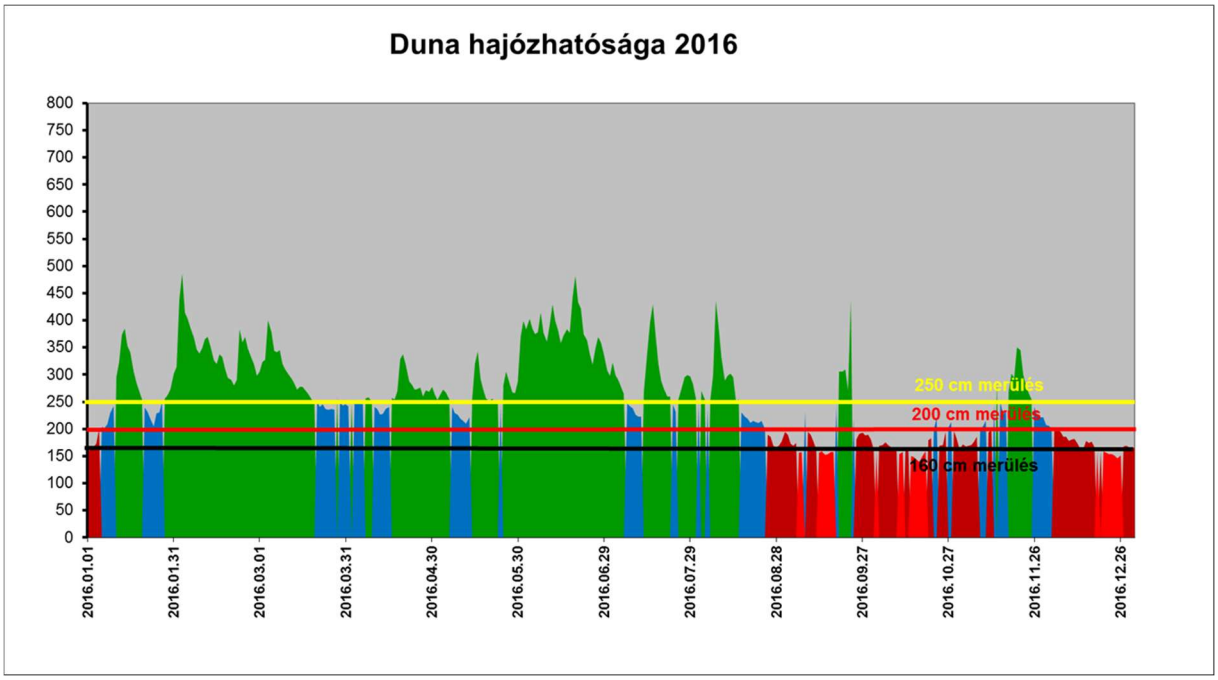
In the Hungarian and Hungarian-Slovakian Danube sections, at low navigable water levels, there are 21 wading and 28 seaway bottlenecks and 6 ice barrier sites at 378 river kilometres, which, due to an average depth of 50 cm (50-100 m wide) shipping (figure 10. & 11.). The fairway has been virtually unmanaged on the Danube for 20 years, with the result that navigation at low water levels is limited or at times not possible at all, with European standards.

The hectic change in the water level of the Danube, because of melting and drought, affects the navigability of the Danube and the capacity utilization of cargo vessels.



10. Figure: Shipping possibilities ont he River Danube 2010-2015

Soruce: A dunai vízi út fenntartható kihasználhatóságának vizsgálata, Horváth Gábor-Kozma Bence, 2017.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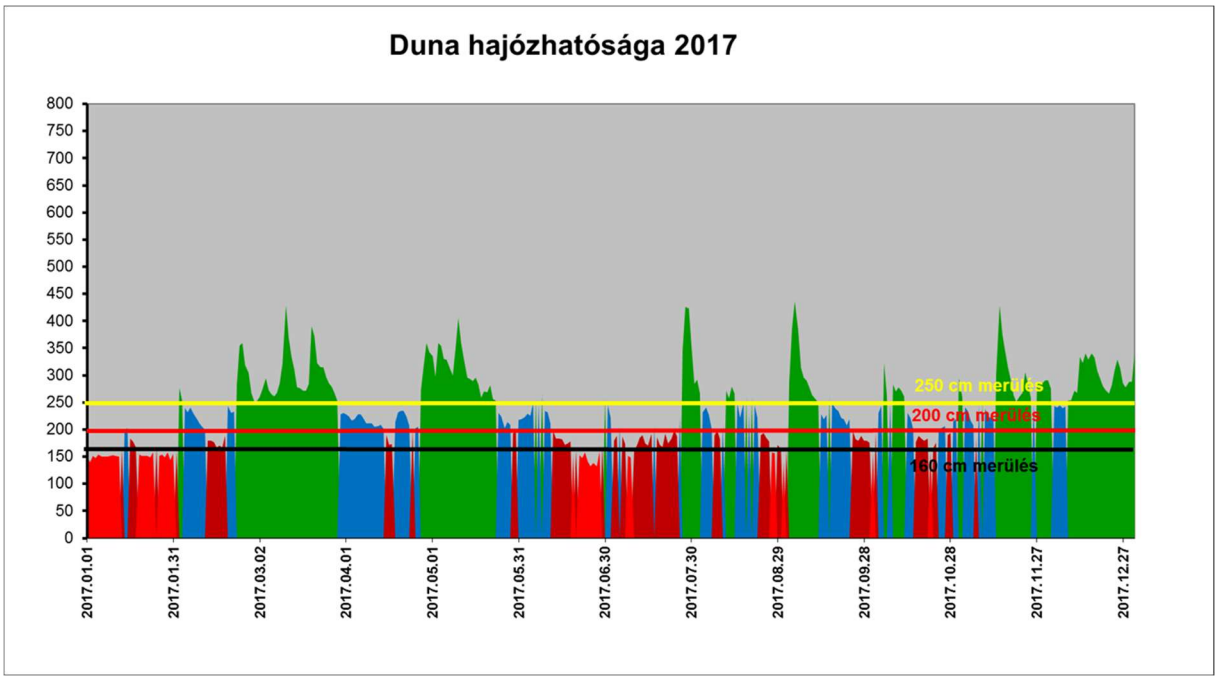
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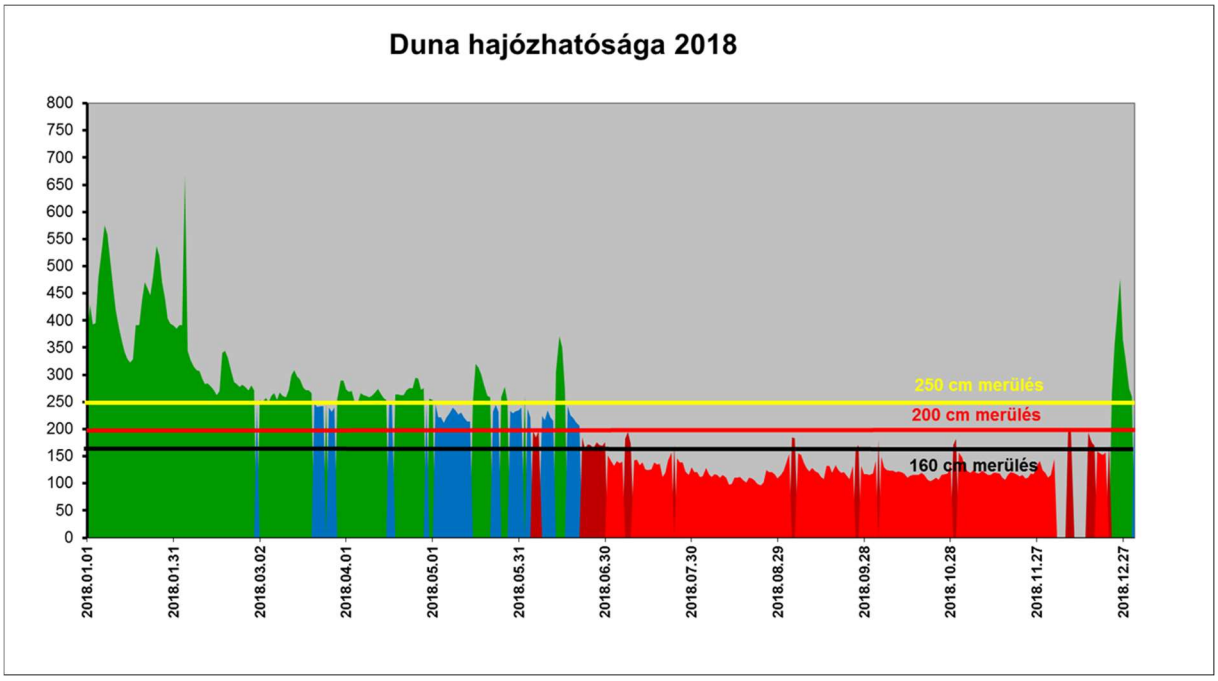


11. Figure Shipping possibilities ont he River Danube 2016-2018

Source: Plimsoll Zrt.

In recent years, the most dramatic situation was in 2018 when inland waterway transport became impossible for half a year after favourable water conditions at the beginning of the year.

Air traffic

The airport Győr-Pér only has a regional role. There is no scheduled traffic, only charters are landing for the Audi concern. Because of the regional formation of the airport, bigger aircrafts cannot use the runway and the capacity is not enough for a bigger traffic.

1.2. Presentation of the transport infrastructure system

1.2.1. Transport infrastructure characteristics (road, railways, waterways, airports)

Road infrastructure

Both Bratislava and Vienna are connected with Budapest by the M1 motorway, which runs 2x2 lanes and with a few exceptions, with a maximum speed of 130 km/h. Due to the terrain the speed limit is 120 km/h on a short stretch of the Tatabánya area.

In the direction of Bratislava, the new highway has been completed, so the speed can reach the 110 km/h, the Budapest-Győr-Bratislava-Brno-Prague road connection has been fully completed. The construction of the third traffic lane between Budapest and Győr is urgently needed as this section is the most significant congestion on the highway network.

No. 1. main road has 2x1 lane and parallel to the M1 motorway. Towards Bratislava you can drive from Mosonmagyaróvár on the No. 150 road on 2x1 lanes.

The highway between Győr and Sopron (M85) is now being prepared with the estimated finish time in 2025. The highway towards the centre of Vas county (Szombathey) is already finished in 2018 (2x2 lanes).

The street of Győr and Sopron were built in the XIX. Century and consequently to another big European cities, their capacity possibilities are not suited neither the transit nor the local traffic. Today's urban and transport policies require the humanisation of the city roads, but not the development. The basic goal is the displacement of the transit traffic from the city, which requires the development of the ring roads at the same time. Both the historical city of Győr and Sopron are car free.

Railway infrastructure

On the transport routes covered by CORCAP project, there are several international main lines. These are:

- Budapest - Győr - Hegyeshalom/Rajka – Vienna/Bratislava
- Győr – Sopron – Vienna
- (Slovenia / Croatia) – Zalaszentiván – Szombathely – Csorna – Hegyeshalom – Bratislava

The main route of CORCAP runs via Hegyeshalom, but the Route via Sopron provides an alternative, which is used by some international traffic Central Europe – South-Eastern Europe, and as a floating point for the transport towards Burgenland

The railway line Budapest – Győr – Rajka is a double track line between Budapest nad Hegyeshalom, and a single track line between Hegyeshalom and Rajka. The line is electrified with DC 25 kV 50 Hz, and equipped with automatic blockline system. The up-to-date safety system ETCS level 2 is under construction. The maximum speed of the line is 160 km/h. The trains cannot run with this speed the whole line, but the 120 km/h speed for the freight trains is allowed in full length.

The railway line Győr – Sopron - Ebenfurth is a single-track line, is electrified and equipped with automatic blockline system.

The line Zalaszentiván – Sombathely – Csorna – Hegyeshalom – Rajka – Bratislava provides a North-South line bypassing the Alps to the east. The line is single track and electrified throughout from Slovenia to Slovakia. In direction to Croatia electrification is still missing south of Zalaszentiván.

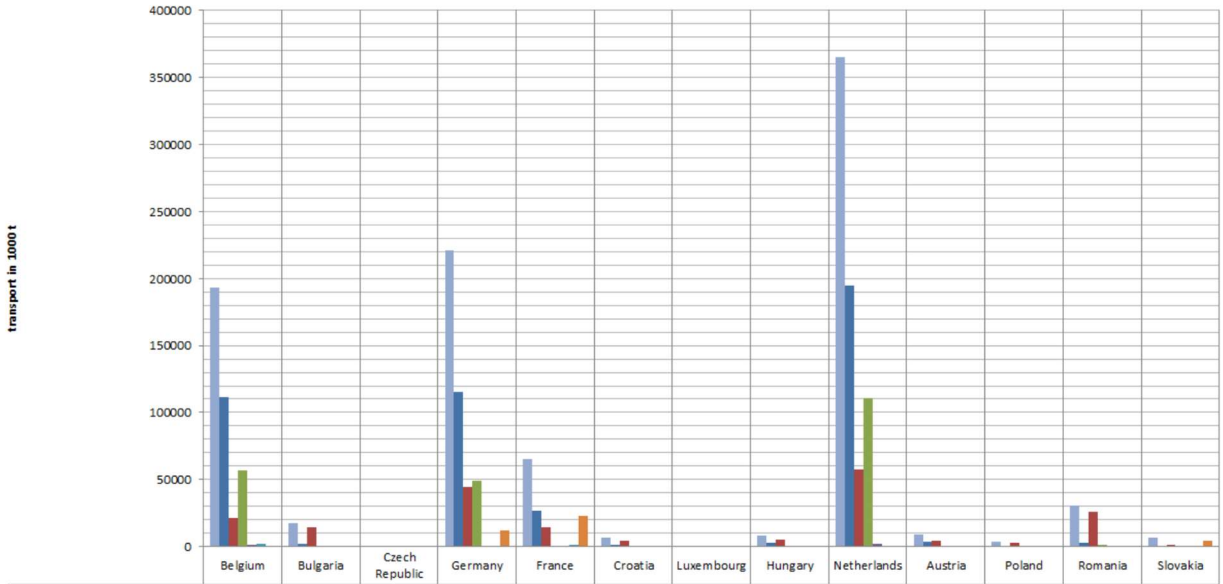
Water infrastructure:

The following map shows the major ports along the Danube that generate the whole waterway transport volume along the Danube (Figure 12).

12. Figure Danube river navigation map

Source: *www.folyamhajo.hu*

The volume of the Hungarian inland waterway freight transport has represented 2,5-5% share of the total freight volume in the recent years. The Figure below shows the freight volume compared to other countries' in 2016. It also represents the proportions of vessel types in each county (Figure 13).



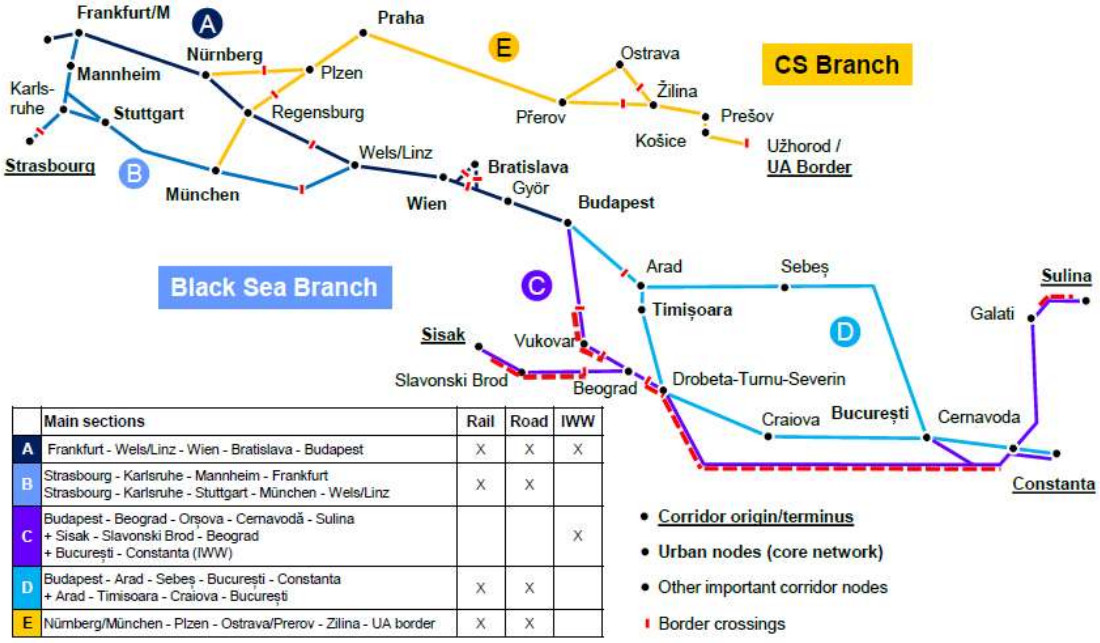
	Belgium	Bulgaria	Czech Republic	Germany	France	Croatia	Luxembourg	Hungary	Netherlands	Austria	Poland	Romania	Slovakia
Total	192938	17467	832	221349	65162	6409		8224	365230	9071	3911	30484	6758
Self-propelled barge	111480	2179	321	115153	26762	1091		2481	195048	3703	457	2956	385
Not self-propelled barge	21174	14112	439	44241	14505	4526		4866	57616	4039	2870	26289	1628
Self-propelled tanker barge	57015	767		49352	2	425		548	110836	630	585	1027	68
Not self-propelled tanker barge	987	154		839		239		317	1698	700		177	
Seagoing vessel	2186	0			956								
Other goods carrying vessel	97	255	72	11763	22936	128		12	32			35	4677

13. Figure Inland waterway transport by countries and by type of vessels in 2016

Source: HFIP

The total transported amount on waterways was 80 million mto in 2016, of which the Hungarian Danube turnover is 8 million mto and the Austrian is 11 million mto. These data indicate that there is still a lot of untapped capacity and potential in the Hungarian section.

The Hungarian section of the Danube, as part of the Danube – Rhine – Main waterway system connects not only with countries affected by inland-waterway, but also with the North – Sea and the Black – Sea. The Danube, as part of the Rhine-Danube corridor, is the main east-west link in continental Europe (Figure 14).



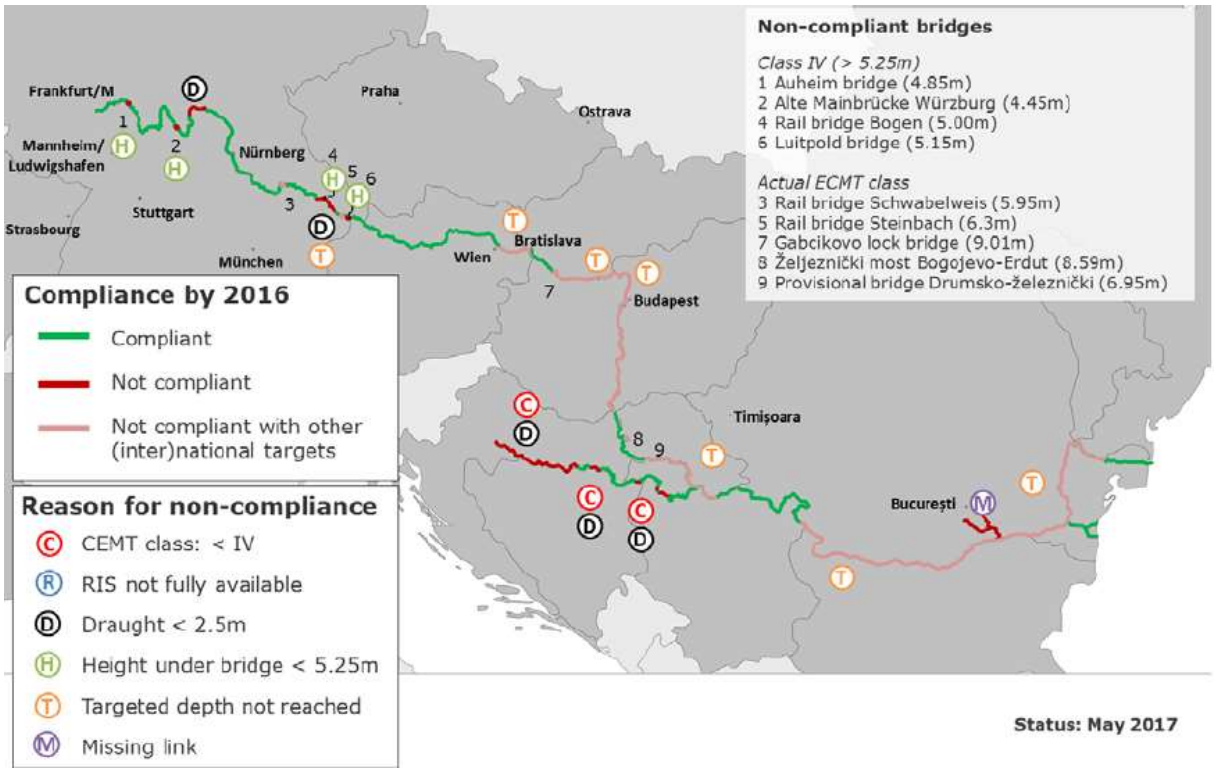
	Main sections	Rail	Road	IWW
A	Frankfurt - Wels/Linz - Wien - Bratislava - Budapest	X	X	X
B	Strasbourg - Karlsruhe - Mannheim - Frankfurt Strasbourg - Karlsruhe - Stuttgart - München - Wels/Linz	X	X	
C	Budapest - Beograd - Orșova - Cernavodă - Sulina + Sisak - Slavonski Brod - Beograd + București - Constanta (IWW)			X
D	Budapest - Arad - Sebeș - București - Constanta + Arad - Timisoara - Craiova - București	X	X	
E	Nürnberg/München - Plzen - Ostrava/Prerov - Zilina - UA border	X	X	

14. Figure The elements of the corridor of Rhine – Danube

Source: Rhine Danube Third Work Plan of the European Coordinator
(*https://ec.europa.eu/transport/sites/transport/files/3rd_workplan_rd_0.pdf*)

The corridor consists of 5715 km railroad network, 4488 km public road and 3656 river km inland seaway altogether, which crosses 9 EU countries and 4 non-EU countries. 18 inland ports and 1 seawater port can be found in its territory. 11 airports belong to it, and 16 trimodals and 27 railroads – public road terminals are part of the corridor.

The following chart below demonstrates the inland way of the corridor in 2016 with its infrastructural characteristics of navigability (Figure 15).

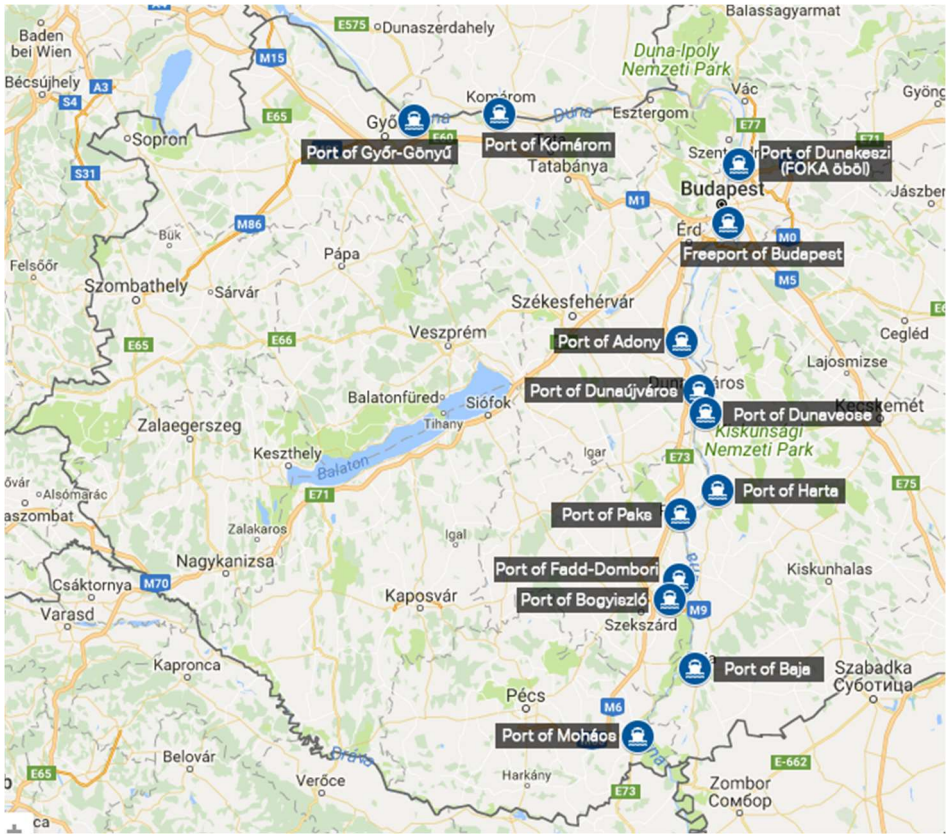


15. Figure The characteristics of the inland waterway in 2016

Source: Rhine Danube Third Work Plan of the European Coordinator
(*https://ec.europa.eu/transport/sites/transport/files/3rd_workplan_rd_0.pdf*)

Hungary's main international shipping route is the Danube, which has several ports. The largest port in the area examined by CORCAP is Budapest Freeport. Other ports: Győr-Gönyű, Komárno (Slovakia), Dunaújváros, Baja south of Budapest. The Danube is in principle a navigable route throughout the year, but the water level does not allow shipping during certain periods. The reason for this is that the low-slope bed is not properly designed for shipping.

The figure below shows the name and the location of Hungarian ports (Figure 16).



16. Figure Hungarian ports

Source: Own editing based on Google Maps

The length of the Danube main riverbank is 417 km within the territory of Hungary. The Danube enters the country at Győr-Gönyű at the 1794 rkm and crosses the border at the port of Mohács at the 1450 rkm.

In the examined region, there are numerous waterways along the Danube. The sections and classification of the surface waters concerned are shown in the following figure (Table 1).

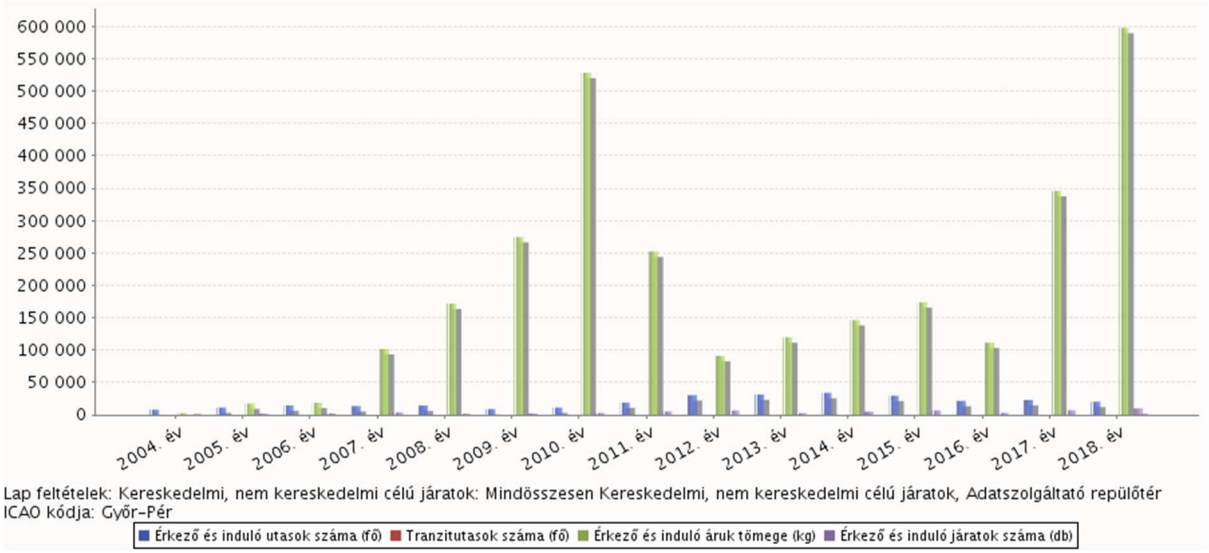
The name of the waterway	Location (rkm-rkm)	Classification of waterway	Affected county
Danube (international waterway)	1641-1586	VI/C	Pest
Danube (international waterway)	1708-1641	VI/B	Pest
Ráckevei Duna	58-0	III	Pest

1. Table Internationally and nationally important waterway sections of the affected counties

Source: Spatial development plans of affected counties

Air traffic

The Győr-Pér Airport has only regional traffic. Charters fly only to Ingolstadt, and used by the employees of AUDI between the two cities. Air cargo is only ad-hoc at this time. As a result of forthcoming developments, the airport may be added to the IATA (International Air transport Association) list of official cargo airports, so the growth of cargo traffic is expected. The Figure 17 shows the cargo traffic of the airport.



17. Figure The traffic of Airport Győr-Pér

1.2.2. Multimodal interfaces

The multimodal interfaces in the region are:

- Sopron Terminal (road – rail)
- Port Győr-Gönyű (ship – road – rail)

The Hungarian combiterminals are presented in Figure 18.

18. Figure Logistic centers and combiterminals in Hungary (source: KTI)

1.2.3. Cross-border links

Between Győr-Moson-Sopron county and Burgenland there are 20 possibilities for road border crossing (because of Schengen area). Towards Slovakia these possibilities only 4. There are 6 rail border crossings towards Austria and only 1 towards Slovakia:

- Harka – Deutschkreuz (line Sopron – Deutschkreutz)
- Ágfalva – Loipersbach-Schattendorf (line Sopron – Wiener Neustadt)
- Sopron – Baumgarten (line Sopron – Ebenfurth)
- Fertőszentmiklós – Pamhagen (line Fertőszentmiklós – Neusiedl am See)
- Hegyeshalom – Nickelsdorf (line Budapest – Vienna)
- Rajka – Rusovce (line Hegeshalom – Bratislava)

Water border crossing operates on Lake Fertő towards Austria, and there is a ferry in Dunaremete towards Slovakia, but at this moment out of order.

1.3. Presentation of major economic activities and the settlement system

1.3.1. Description of the settlement system

The settlement structure of Győr-Moson-Sopron County consists of medium and small towns as well as villages. The biggest town is Győr, it has more than 100.000 inhabitants. The other towns

have inhabitants between 3 and 63 thousands. The population of the villages in the county ranges from a couple of 10 to 7.500. The population of the big towns are in table 2.

Town	Population
Győr	132 000
Sopron	62 700
Mosonmagyaróvár	34 000
Kapuvár	10 200
Csorna	10 100

2. Table Towns with population more than 10 thousand inhabitants in Győr-Moson-Sopron megye (2019)

source: KSH

Burgenland has a rural structure; there are small towns in the area. The larger settlements are listed in table 3.

Town/village	Population
Eisenstadt	14 800
Pinkafeld	5 900
Oberwart	7 600
Neusiedl am See	8 600
Mattersburg	7 500

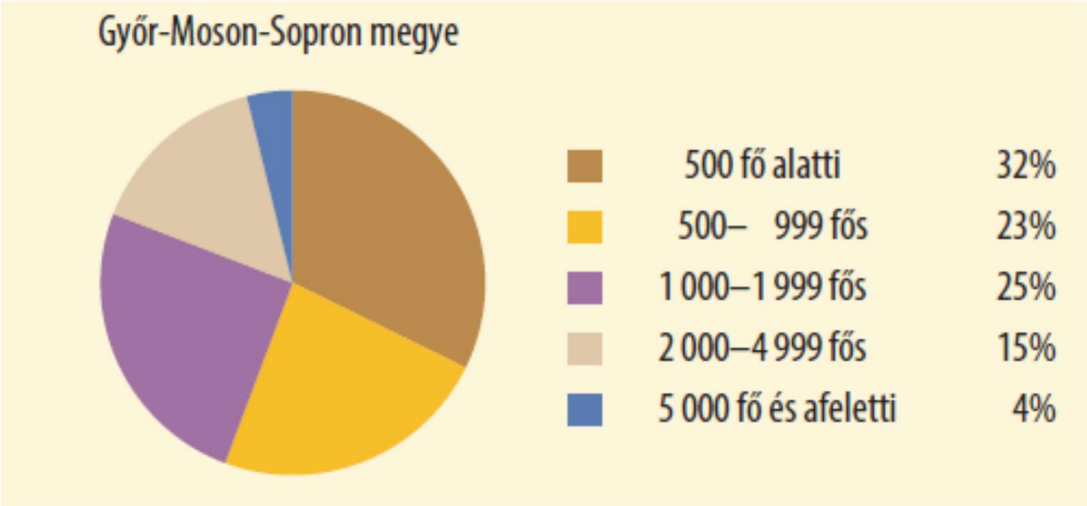
3. Table Towns with population more than 5 thousand inhabitants in Burgenland (2020)

source: https://www.citypopulation.de/de/austria/burgenland/

1.3.2. Demographical and socio-economic situation

Being the most significant industrial and manufacturing area of the country outside of Budapest, the Northwest Hungarian region boasts rather balanced demographics as compared to the rest of the Hungarian regions with declining and aging population.

Figure 19 shows the proportion of people living in towns and villages.

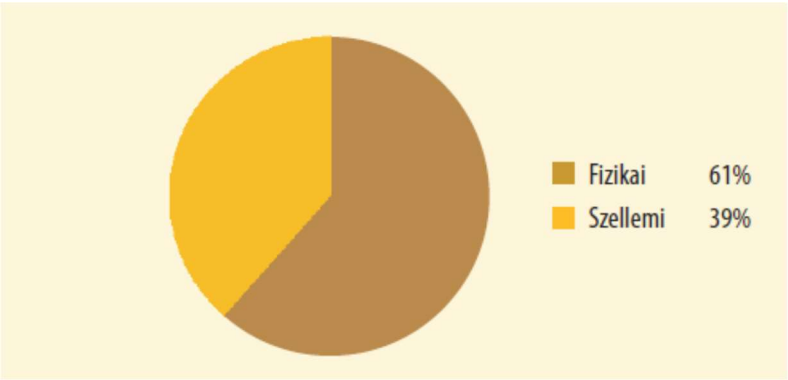


19. Figure The split of inhabitants per population of settlement

source: KSH

Blue: more than 5.000 inh.; light brown: 2.000-4.999 inh.; purple: 1.000-1.999 inh.; orange: 500-999 inh.; brown: under 500 inh.

The split of employees is illustrated in Figure 20.

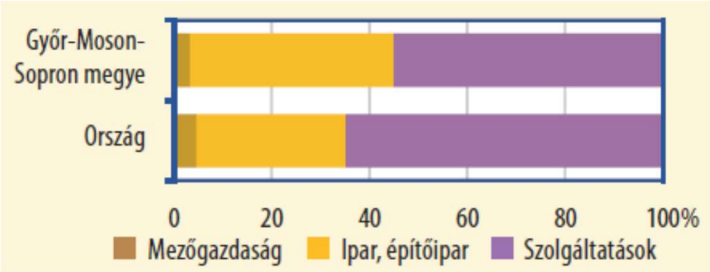


20. Figure The split of employees

source: KSH

Brown: physical workers; orange: intellectual employees

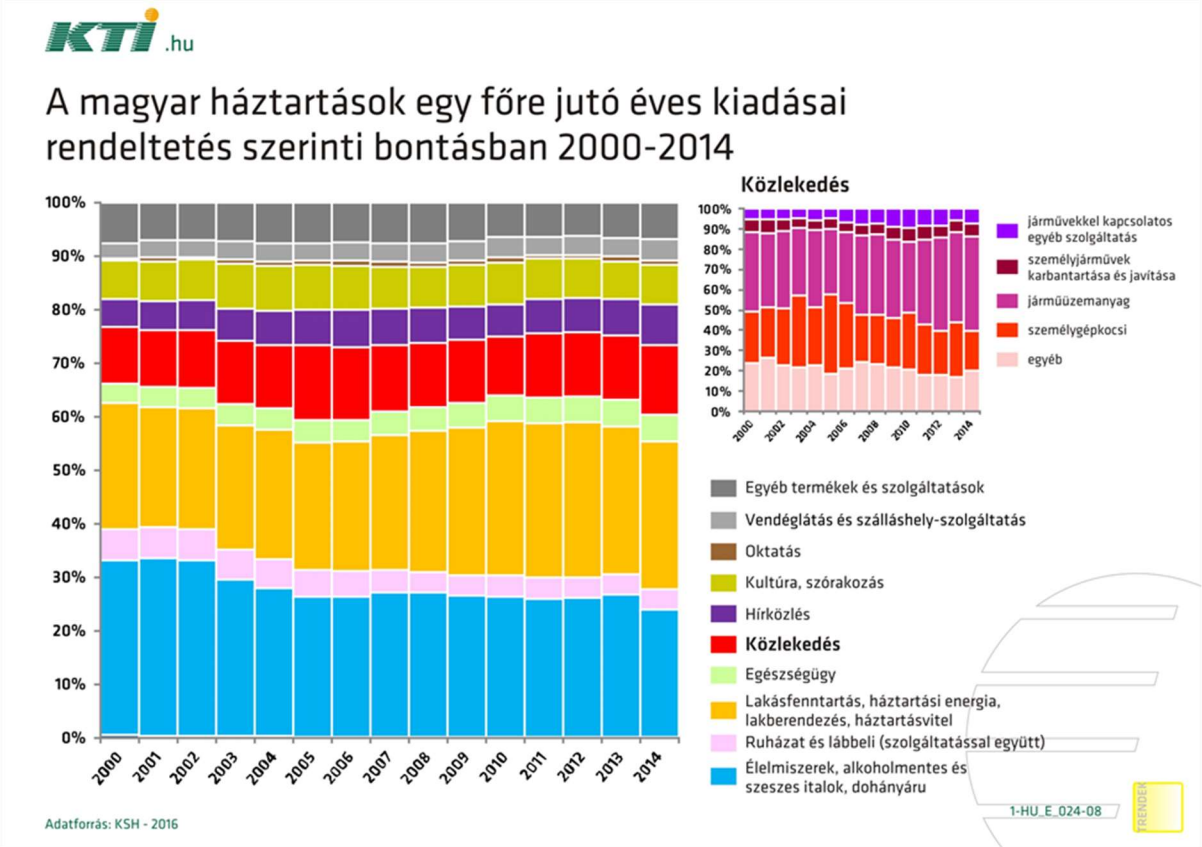
The Figure 21 represents the split of employees by aggregated sectors of national economy in 2014. The upper row shows the data of Győr-Moson-Sopron County, the lower row shows the data of Hungary. It can be read from the figure that in Győr-Moson-Sopron County more people work in industry than the national average, which is mainly due to AUDI factory in Győr.



21. Figure Split of employees by aggregated sector

source: KSH

The following figure represents the data of the Hungarian households (Figure 22):



22. Figure Data of Hungarian households

source: KTI

The most expenditures are the foodstuffs (blue) and the overhead costs (orange). By the transport costs (small diagram) fuel cost is the most significant (purple).

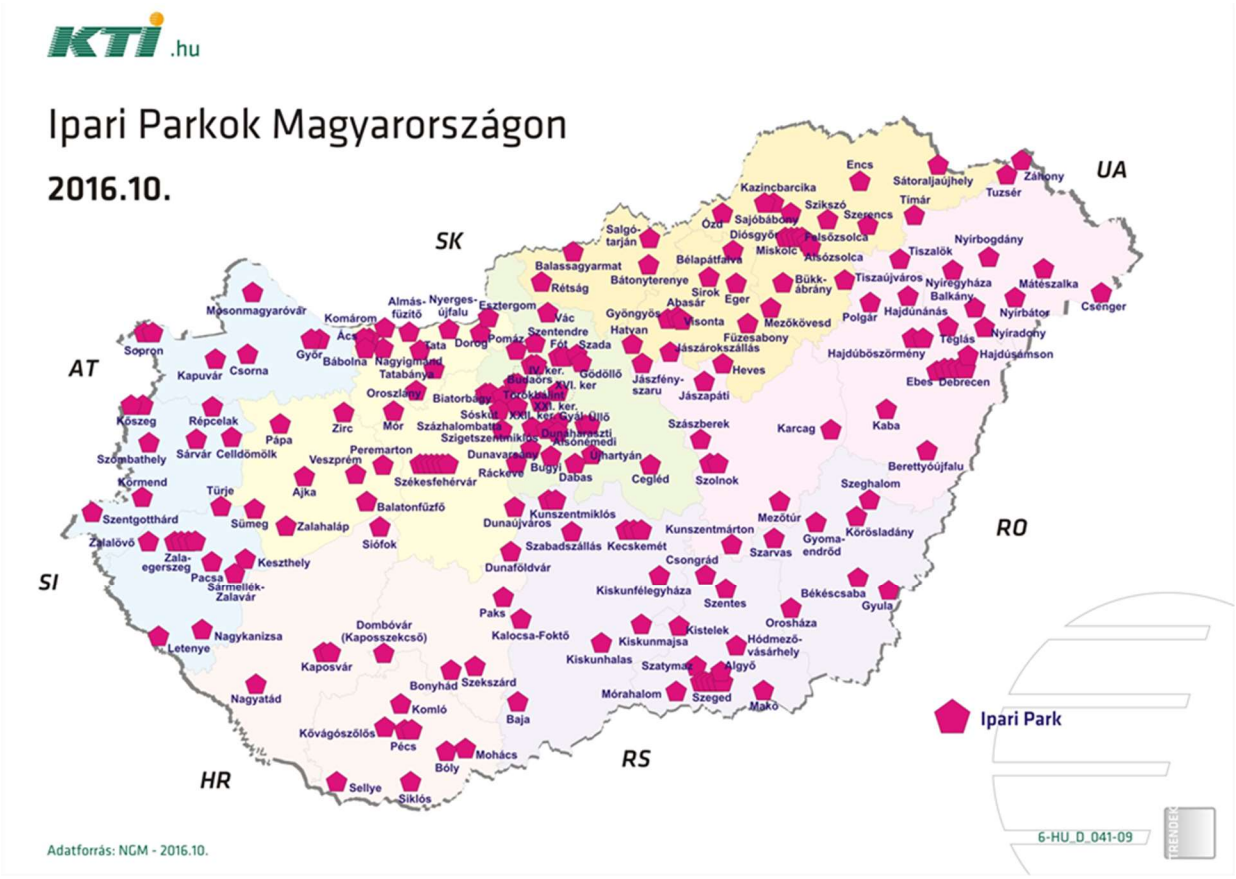
1.3.3. Description of cross-border relations

The Northwest Hungarian region is border mainly with Austria along its western edge and shortly with Slovenia on the Southwest. The cross-border relations are exquisitely strong due to the economic ties

between Eastern Austria and Western Hungary which is also indicated by the large group of Hungarians that commutes between the to two countries. Sopron is also an important touristic destination for the Vienna and Burgenland region.

1.3.4. Presentation of companies in the area (manufactures, logistics, transport), identifying their activities

Firstly, the following map presents the industrial areas of Hungary. Industry parks can be found in larger cities (Figure 23). The industry park means more than a logistics centre. This field is prepared for all kind of industry not only for logistics.



23. Figure Industrual centres in Hungary

Source: KTI

The next figure shows the logistic centres in Hungary (Figure 24).

24. Figure Logistic centres in Hungary

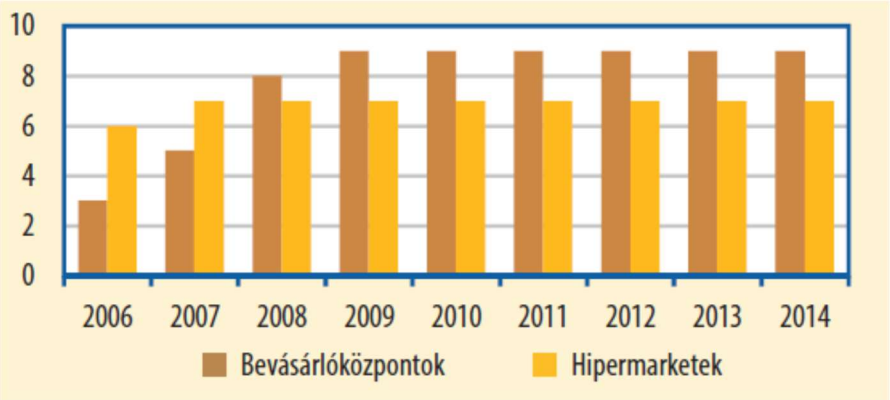
source: KTI and MLSZKSZ

The automotive industry is well represented in the region, namely the General Motors factory in the western part (Szentgotthárd) and the Audi Company in Győr which is among the most productive industrial facilities of the country.

1.3.5. Industrial production, major origin and destination points

The main industrial product of the area is the cars made by Audi. The automotive industry accounts for 82,5% of production, to which 52% of employees contribute. The export activity of the automotive industry accounts for 89,4% of total sales. The largest industrial production is in Győr. Audi operates direct trains to Ingolstadt.

The transportations, they are typical in Győr-Moson-Sopron County are represented by the development of the major shopping centres in the area (Figure 25).



25. Figure Shopping centres and malls in Hungary

source: KSH

Shopping centers (brown), malls (orange).

1.3.6. Agriculture production, food processing

After the Great Hungarian plain, the Northwest Hungarian region boasts the second greatest grain production in the country. The region also hosts the Bábolna farmlands renowned as one of the most innovative agricultural enterprises of Hungary. The most important agricultural products are grains, sugar beet, potato, beef, pork, grapes and berries.

In the agricultural areas in Győr-Moson-Sopron County, crop production is the most characteristic, although the proportion of agricultural areas is decreasing (Figure 26).

Művelési ág	2000	2014	
	hektár		2000 = 100,0
Szántó	219 088	225 083	102,7
Konyhakert	4 937	3 468	70,2
Gyümölcsös	3 236	1 960	60,6
Szőlő	3 368	2 258	67,0
Gyep	29 845	20 160	67,5
Mezőgazdasági terület	**260 474**	**252 929**	**97,1**
Erdő	72 361	80 927	111,8
Nádas	10 894	13 155	120,8
Halastó	127	161	126,8
Termőterület	**343 856**	**347 172**	**101,0**
Művelés alól kivett terület	67 345	73 598	109,3
Összesen	**411 201**	**420 770**	**102,3**

26. Figure Agricultural products in Győr-Moson-Sopron County

source: KSH

Livestock production in this area does not exceed 10% of the national data (Figure 27).

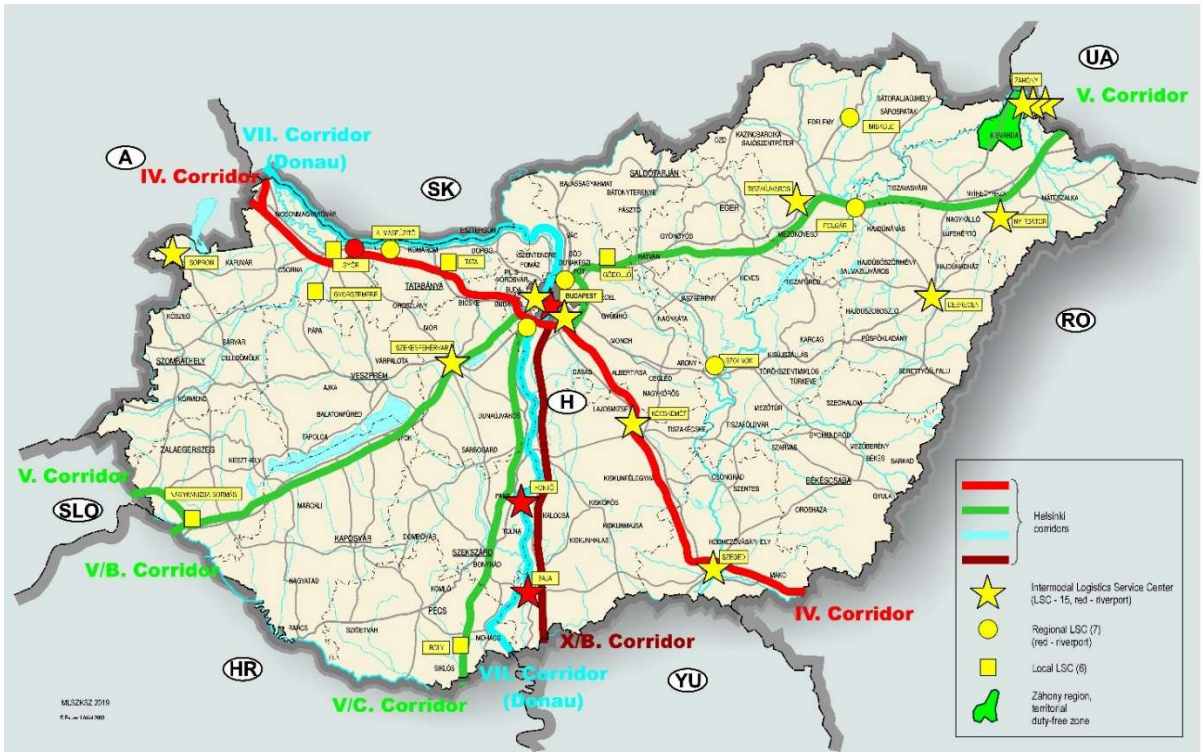
Megnevezés	Szarvas-marha	Sertés	Juh	Tyúk
Főbb gazdasági haszonállatfajok állománya				
Győr-Moson-Sopron megye, ezer egyed	59	172	10	1 418
Az országos százalékában	7,4	5,5	0,8	4,6

27. Figure Livestock production in Győr-Moson-Sopron County, 2014

source: KSH

1.3.7. Logistic, storage and distribution points

Logistic centres (Figure 28) play an important role in stimulating the foreign relations of Hungary, in the day-to-day trading activities, as well as in the exchange of expertise in the area of human resources. In order to ensure that the logistic service centres are able to meet the expectations dictated by the changes of the accelerated economic processes, to satisfy the development needs of combined transport and complex logistic systems as well as the approved guidelines of transport policy,



28. Figure Qualified logistics services centers in Hungary 2019

Source: MLSZKSZ

Intermodal Logistics Services Centres

Its territory is at least 15 hectares, at least 2 transport mode actively operate, the covered storage capacity is at least 10,000 sqm or 10,000 TEU (container, swap body, semi-trailer, RO-LA, RO-RO, other combined consignment) traffic volume/year, open for public traffic. Table 4.

Nr	Company name	Address	Connection	Logo
001/ I /2007	Bajai Országos Közforgalmú Kikötőműködtető Kft.	6500 Baja, Szentjánosi út 12.	Web: www.portofbaja.hu E-mail: info@portofbaja.hu Tel: +36/79/422-502	
002/ I /2007	BILK Logisztikai Zrt.	1239 Budapest, Európa u. 6.	Web: www.bilk.hu E-mail: bilk@bilk.hu Tel: +36/1/354-3180	
	Rail Cargo Terminal - BILK Zrt.	1239 Budapest, Európa u. 4.	Web: www.railcargobilk.hu E-mail: info.rct.bilk@railcargo.com Tel: +36/1/289-6000	
003/ I /2007	Budapesti Szabadkikötő Logisztikai Zrt.	1211 Budapest, Szabadkikötő u. 5-7.	Web: www.bszl.hu E-mail: info@bszl.hu Tel: +36/1/278-3102	
004/ I /2007	DELOG Kft.	4030 Debrecen. Vámraktár u. 3.	Web: www.delog.hu E-mail: info@delog.hu Tel: +36/52/510-100	
006/ I /2007	GYSEV Cargo Zrt.	9400 Sopron, Ipar körút 21.	Web: www.gysevcargo.hu	

			E-mail: info@gysevcargo.hu Tel: +36/99/517-139	
007/ I /2007	LOGALBA Kft. LOGISZTÁR Kft.	8000 Székesfehérvár, Vásárhelyi út 7.	Web: www.eurosped.hu E-mail: info@logalba.hu Tel: +36/22/510-001	
009/ I /2008	Kelet-Trans2000 Kft.	4625 Záhony, Ady Endre út 37/B.	Web: www.kelettrans2000.hu E-mail: kelettrans@kelettrans2000.hu Tel: +36/45/525-122	
010/ I /2008	Transit Speed Kft.	4625 Záhony, Rákóczi út 16.	Web: www:transitgroup.eu E-mail: info@transitgroup.eu Tel: +36/45/535-002	
011/ I /2008	Záhony Port Zrt.	4625 Záhony, Baross Gábor út 1.	Web: www.zahony-port.hu E-mail: info@zahony-port.hu Tel: +36/1/513-3010	
014/ I /2009	Trans-Sped Logisztikai Szolgáltató Központ Kft.	3581 Tiszaújváros, TVK-Ipartelep	Web: www.trans-sped.hu E-mail: info@trans-sped.hu Tel: +36/52/510-120	

015/ I /2011	DEPO Logisztikai Központ Kft.	2046 Törökbálint, Hosszúrét 062/61. hrsz.	Web: www.depologisztika.hu E-mail: titkarsag@depologisztika.hu Tel: +36/23/338-044	
016/ I /2015	Gabonatároló és Logisztikai Kft.	6331 Foktő, Baráka 7.	Web: www.gabonatarolo.hu E-mail: info@gabonatarolo.hu Tel: +36/1/451-4010	
017/ I / 2015	TVP-Gabona Kereskedőház Kft.	4300 Nyirbátor Árpád út. 0203/4 hrsz	Web: www.tvpkft.hu E-mail: iroda@tvpkft.hu Tel: +36/30/995-9928	
018/ I / 2017	SYGNUS Kereskedelmi Kft.	7030 Paks, külterület HRSZ: 012	Web: www.sygnus.hu E-mail: paksport@sygnus.hu Tel: +36/75/510-187 Fax: +36/75/413-160	
019/ I / 2017	METRANS Konténer Kft.	1211 Budapest, Salak u. 1-39.	Web: www.metrans.eu E-mail: azahalka@metrans.hu Tel: +36/1/814-1202 Fax: +36/1/814-1229 Tel: +36/30/956-0997	

020/ I / 2017	Sygnus Kereskedelmi Kft.	6725 Szeged, Medencés kikötő	Web: www.sygnus.hu E-mail: szeged.execution@sygnus.hu Tel: +36/20/440-2998	PORT OF SZEGED
021/ I / 2017	Adony Logisztikai Központ Kft.	2457 Adony, Rév utca 8.	Web: www.portofadony.hu E-mail: transhipment@portofadony.hu Tel: +36/25/222-181 Fax: +36/25/222-191	Port of Adony

4. Table International Logistic Center companies

source: MLSZKSZ

Regional Logistics Services Centres

Its territory is at least 10 hectares, at least 2 transport mode connecting, the covered storage capacity is at least 5,000 sqm, open for public traffic. Table 5.

Nr	Company name	Address	Connection	Logo
001/ R /2007	ÁTI Depo Zrt.	3526 Miskolc, Repülőtéri u. 6.	Web: www.atidepo.hu E-mail: vojdyla.judit@atidepo.hu Tel: +36/46/501-621	ÁTI DEPO ZRt.
003/ R /2007	Harbor Park Ingatlanfejlesztő Kft.	1225 Budapest, Campona u. 1.	Web: www.prologis.com E-mail: info-hu@prologis.com Tel: +36/1/577-7700	PROLOGIS
004/ R /2007	Győr-Gönyű Kikötő Zrt.	9011 Győr-Károlyháza, Kikötő 1.	Web: www.portofgyor.hu E-mail: info@portofgyor.hu Tel: +36/96/544-200	Győr-Gönyű

009/ R /2008	Magyar Területfejlesztési és Vagyonkezelési Társaság	1145 Budapest Emma köz 16.	Web: www.inverg.hu E-mail: inverg@inverg.hu Tel: +36/1/201-7883	
012/ R /2009	M3 Logisztikai Kft.	1151 Bp. Székely Elek u. 11.	Web: www.m3logisztika.hu E-mail: kereskedelem@m3logisztika.hu Tel: +36/1/305-2830	
013/ R /2010	BI-KA Logisztika Kft.	5000 Szolnok, Tószegi út 2.	Web: www.bikalogisztika.hu E-mail: info@bi-ka.hu Tel: +36/56/524-050	
014/R/ 2013	Polgár Ipari Park és Logisztikai Szolgáltató Központ	InfoGroup Ingatlanfejlesztési Cégcsoport 1115 Budapest Bartók Béla út 105-113.	Web: www.infogroup.hu E-mail: info@infogroup.hu Tel: +36/1/481-4530	
015/R/2017	P-Development Vagyonkezelő Kft.	6000 Kecskemét, Wéber Ede utca 10/A.	Web: www.pdev.hu E-mail: drcsima@pdevelopment.hu Tel: +36/76/999-160 Fax: +36/76/999-170	

5. Table Regional Logistics Services Centers companies

Source: MLSZKSZ

Local Logistics Services Centres

Its territory is at least 5 hectares; the covered storage capacity is at least 3,000 sqm, open for public traffic. Table 6.

Nr	Company name	Address	Connection	Logo
001/ H /2007	Trans-Sped Trint Raktározó és Szállítmányozó Kft.	2890, Tata Barina u.1.	Web: www.trans-sped.hu	

			E-mail: info@trans-sped.hu Tel: +36/34/586-600	
002/ H /2007	Kanizsa Sprint Kft. Real-Amnon Kft. Agro Boy Kft.	8881 Sormás Ipartelep 1.	Web: www.kanizsasprint.hu E-mail: info@kanizsasprint.hu Tel: +36/93/312-321	
003/ H /2007	R. Quehenberger Spedition Kft.	9026 Győr, Szentiváni út 2.	Web: www.quehenberger.com/hu/ E-mail: gabriella.szovati@quehenberger.com Tel: +36/96/500-703	
005/ H /2007	TEVA Magyarország ZRt.	2100 Gödöllő Liget utca 2.	Web: www.teva.hu E-mail: Tel: +36/1/577-5600	
007/ H /2009	Rail Cargo Logistics Hungaria Kft.	Győrszemere Raabersped út 1. 9121	Web: www.railcargologistics.hu/hu/ E-mail: rcl.hu@railcargo.com Tel: +36/1/430-8500	
008/ H /2010	Agro Boy Kft, Czett-Trans Kft, Reiso-Hungária Kft.	7754 Bóly Kodály Zoltán u. 2.,	Web: www.agroboy.hu E-mail: ugyvezeto@agroboy.hu Tel: +36/69/569-940	
009/ H /2016	MAXX Pont Kft.	4600 Kisvárda Városmajor út 86-90.	Web: www.hadakft.hu E-mail: lakatos.krisztian@hadakft.hu Tel: +36/30/955-1561	

010/ H /2017	Innovativ Special Transport Kft.	9012 Győr, Zsigmond Király út 21.	Web: www.innovativ-special.hu E-mailt: info@innovativ-special.hu Fax: +36/96/411-680	
011/ H /2017	LOCARGO Nemzetközi Szállítmányozó és Logisztikai Kft.	8200 Veszprém, Házgyári u.1.	Web: www.locargo.eu E-mail: info@locargo.hu Telefon: +36/88/590-800 Mobil: +36/30/946-5328	
012/ H /2017	Botlik-Trans Kft.	2534 Tát, Nefelejcs utca 5.	Web: www.botliktrans.hu E-mail: roland.botlik@botliktrans.hu Tel: +36/33/514-801 Fax: +36/33/514-808 Mobil: +36/30/366-8066	
013/ H /2017	GlobalLog Kft.	6728 Szeged, Budapesti út 34.	Web: www.szilk.hu E-mail: globallog@szilk.hu Tel: +36/62/557-500	
014/ H /2017	Galambos Logistic Kft.	9751 Vép, Kassai u. 73.	Web: www.galamboslogistic.hu E-mail: info@galamboslogistic.hu Tel: +36/30/845-2520	
015/ H /2017	Alföldi Hűtőház Szövetkezet	5600 Békéscsaba, Kétegyházi út 12-14.	E-mail: drszigetibela@t-online.hu Tel: +36/30/862-6641	

016/ H /2017	ICE Solution Kft.	9027 Győr, Hütőház u. 2.	Web: www.hutohaz.eu E-mail: iroda@hutohaz.eu Tel: +36/96/528-737 Fax: +36/96/528-738	
017/ H /2017	K és V Nemzetközi Fuvarozó Kft.	3200 Gyöngyös, Déli külhatár út 10-12.	Web: www.k-v.hu E-mail: raktar@k-v.hu Tel: +36/30/983-3162	
018/ H /2017	Zoll - Sped Spedíciós és Szolgáltató Kft.	9700 Szombathely, Tátika u. 5	Web: www.zollsped.hu E-mail: zollsped@t-online.hu Tel: +36/94/327-842 Fax: +36/94/344-640	
019/ H /2019	TRANSDANUBIA Logisztikai Kft.			

6. Table Local Logistics Services Centers companies

Source: MLSZKSZ

Duty free zone

Customs free zone, according to the conditions as stipulated by legislation. Table 7.

Nr	Company name	Address	Connection	Logo
	Záhony Port Zrt.	4625 Záhony, Baross Gábor út 1.	Web: www.zahony-port.hu E-mail: info@zahony-port.hu Tel: +36/1/513-3010	

7. Table Duty free zone company

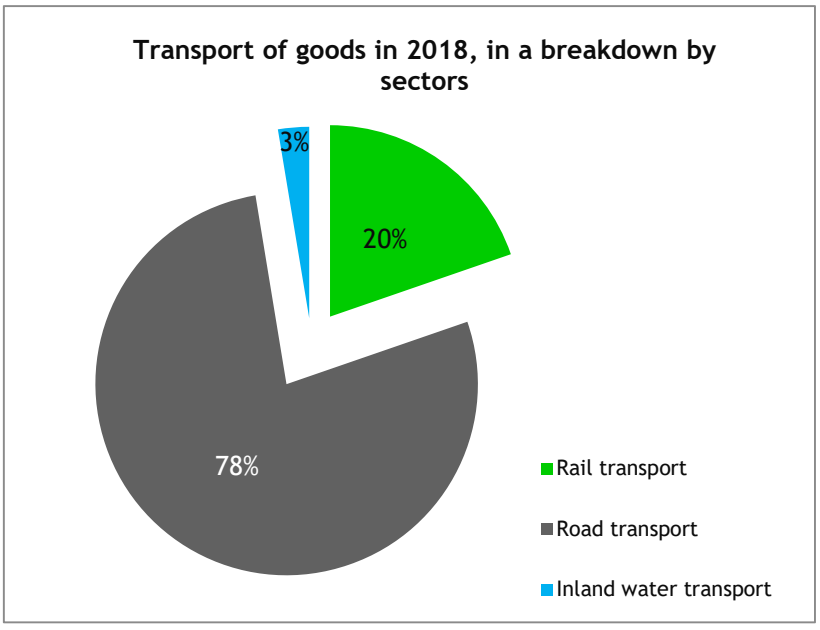
source: MLSZKSZ

1.4. Presentation of freight characteristics

Road transport

According to data published by the Central Statistical Office (CSO) the volume of goods transported by road started to grow again in 2018, after a period of decline in 2016 and 2017. A 1.45% decrease in 2015/2016 and another drop of 6.41% in 2016/2017 was followed by an increase of 10% in 2017/2018. An analysis of the transport directions reveals change in the dominant trend: the amount of goods transported to international destinations decreased by 10.6%, while domestic transport increased by a substantial 15.8%. Since the Hungarian economy has been on a growth path for years now, the massive increase in the domestic road transport of goods is partly a result of the outstanding growth rates recorded in the construction industry (motorways, railways, homes). The decrease in international freight transport is somewhat more interesting, because it is not accompanied by an increase in transport by rail or inland waterways – that is, this traffic has disappeared for some reason from roads or become invisible to the statistical system. The reasons may only be guessed – the EKÁER effect or an increase in the share of third country carriers.

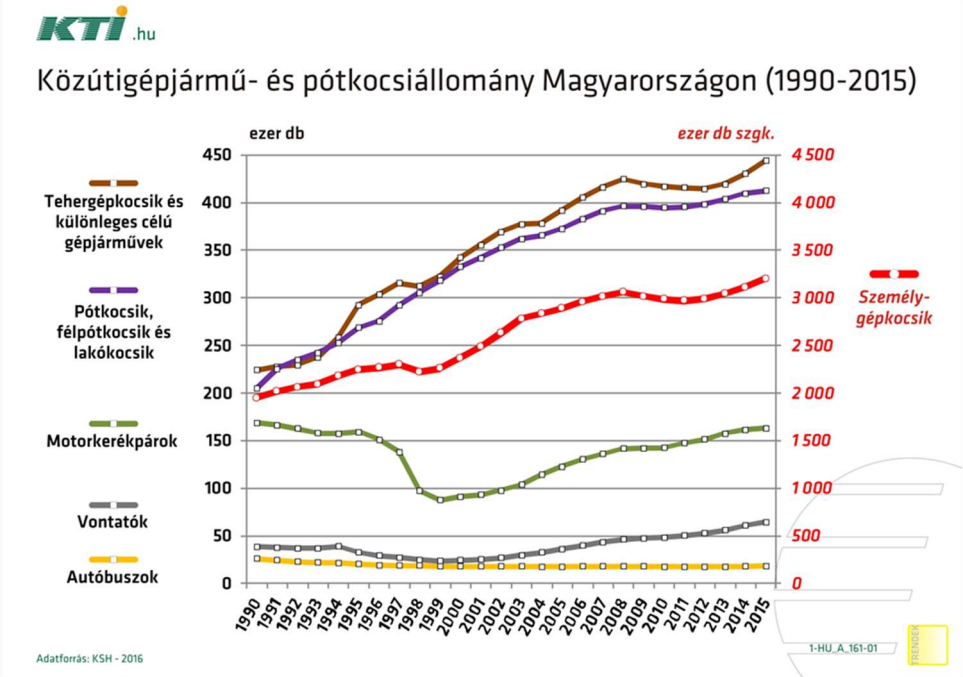
The CSO's 2018 data show that a total of 78% of the goods carried by transport operators registered in Hungary were transported by road (Figure 29). This equals goods of a total of some 169.3 million tons carried by road, involving the use of roads by a total of over 10.5 million freight transport vehicles, up 15% year-on-year.



29. Figure Transport of goods in 2018, in a breakdown by sectors

Source: KSH

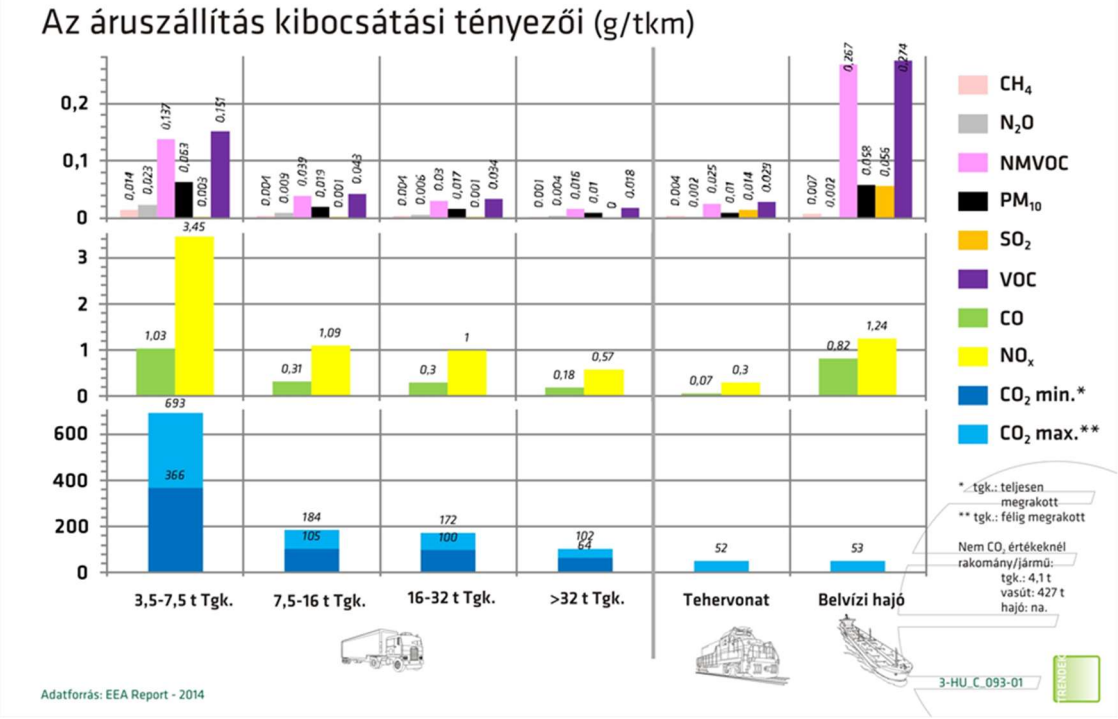
The total volume of goods carried by road national across borders was 36.7 million tonnes in 2018. Most of the goods were transported by heavy articulated vehicles exceeding 40 tonnes in total weight, that is, some 2.29 million lorries on the roads. The number of road vehicle (brown) and trailer stocks (purple) are shown on the figure 30, below:



30. Figure Number of road vehicles per year

source: KTI

Today's one of the most important question is the emission of the freight vehicles. On the next figure, the emission data are presented (Figure 31). The data confirm the outstanding environmental performance of rail.



31. Figure Emission factors for freight transport (g/tkm)

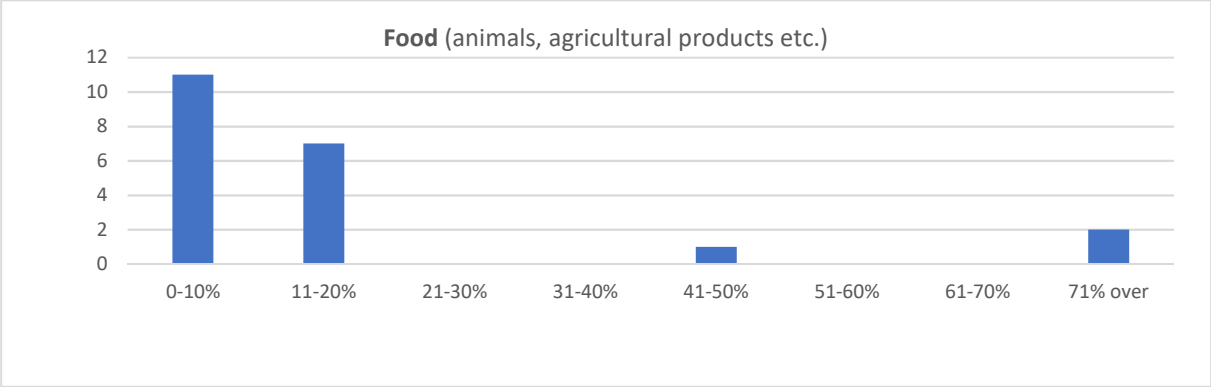
Source: KTI

Survey

According to the report of the companies participating in the survey, 90.5% of the transported goods classified by the type of packaging were palletised.

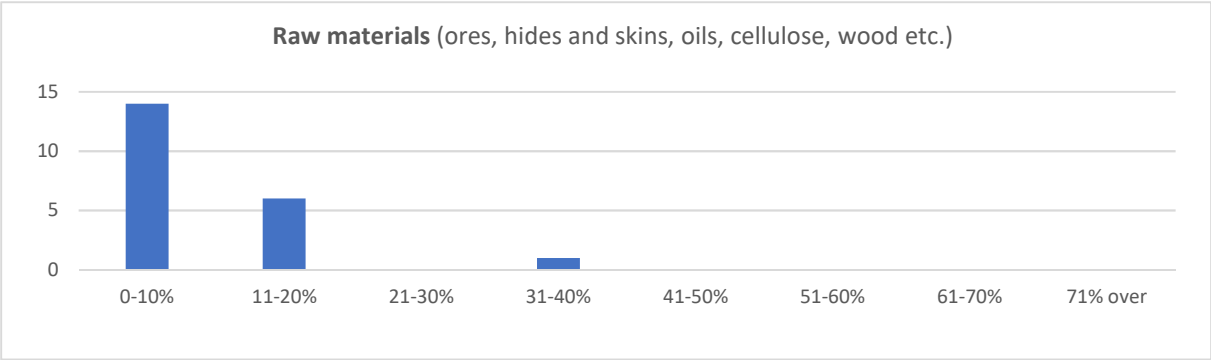
The main types of classification for the transported goods are the following (Figures 32-36):

Food (animals, agricultural products etc.): these goods represented a share of less than 20 % in 85 % of the companies; there was one example of a share of 50 %, and in two cases, the rate was over 70 %. The quantity of food related goods transported by the companies, which participated in the survey and submitted their reports was not significant.



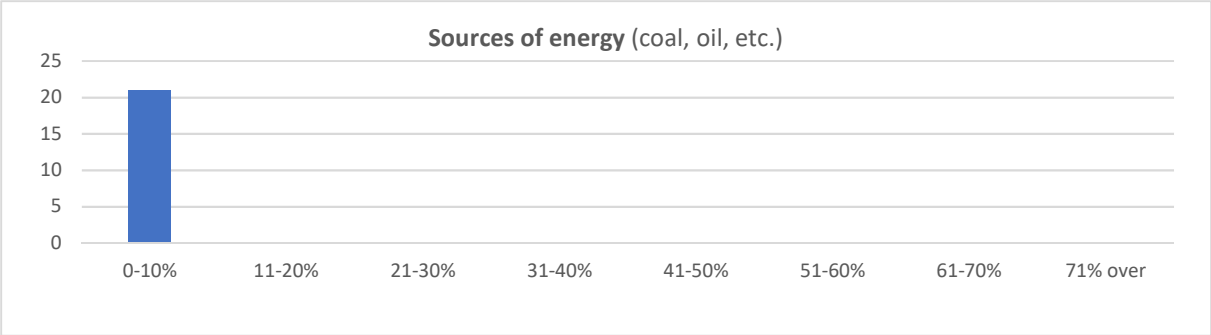
32. Figure Food - animals, agricultural products etc. Road transport (source: own editing)

Raw materials (ores, hides and skins, oils, cellulose, wood etc.): represented less than 20 % in the case of 95 % of the companies, only 5% of the companies reported a share of over 30 %. The quantity of raw materials transported by the companies, which participated in the survey and submitted their reports was not significant.



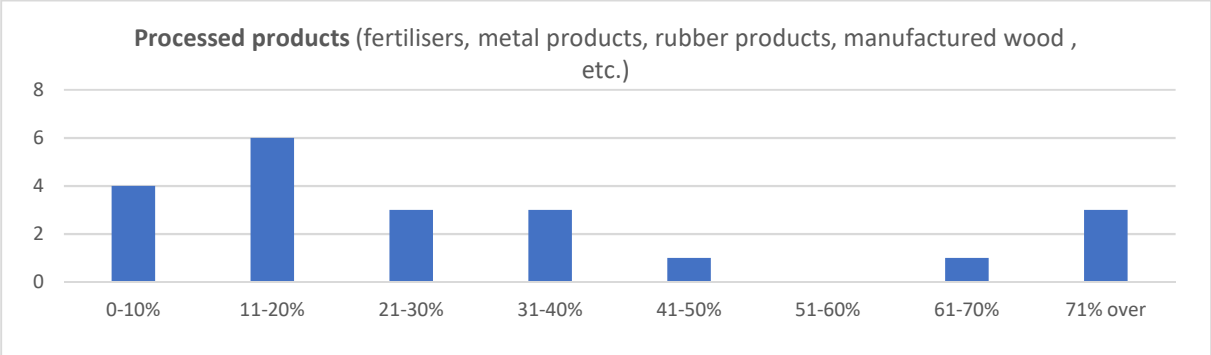
33. Figure Raw materials Road transport (source: own editing)

Sources of energy (coal, oil, etc.): they represented 0-10 % of the transported goods for 100 % of the respondents, which means that they transport hardly any sources of energy.



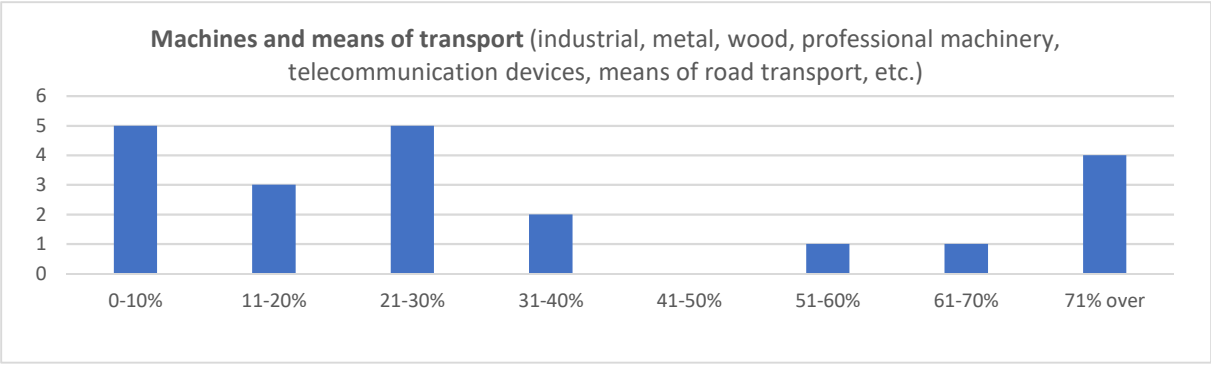
34. Figure Sources of energy Road transport (source: own editing)

Processed products (fertilisers, metal products, rubber products, manufactured wood, etc.): 50 % of the companies reported a lower than 20 % share, whereas 7 companies reached a rate between 20-40 %, and 3 companies reported a rate over 70 %. Here the difference was already bigger – several companies transported bigger quantities.



35. Figure Processed products Road transport (source: own editing)

Machines and means of transport (industrial, metal, wood, professional machinery, telecommunication devices, means of road transport, etc.): 38 % of the companies reported a share of less than 20 %, in 7 cases the rate was between 20-40 %, in 6 cases over 50 %. The majority of the respondent companies transported this type of goods.

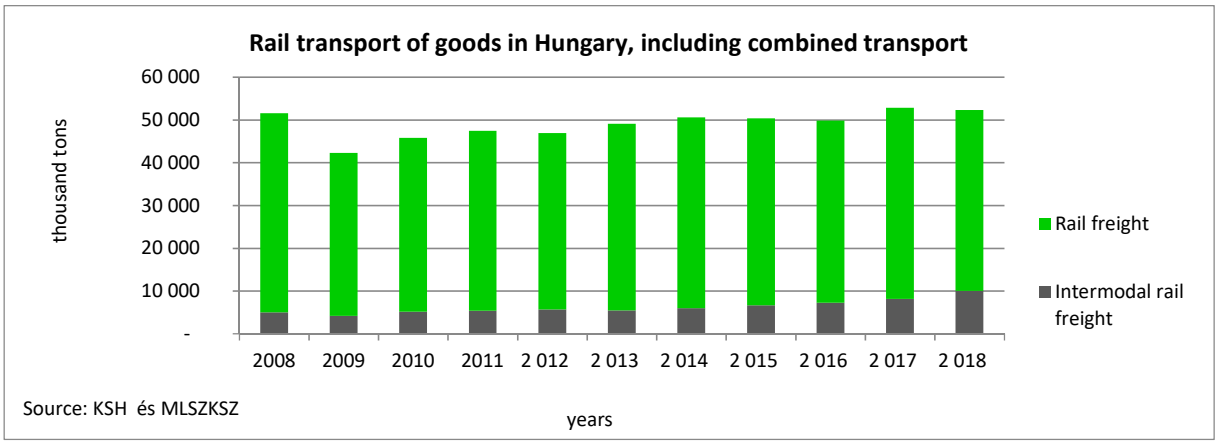


36. Figure Machines and means of transport Road transport (source: own editing)

The results show that the majority of the transported goods belong to the categories of processed products and machines as well as the means of transport.

Railway transport

A look at the CSO's figures for the past 5 years shows that rail transport remained in 2018 at the previous year's level. Rail transport dropped by 0,9% between 2017 and 2018, which is regarded as stagnation in comparison with the modest growth rates recorded in earlier years. Some 20% of the total amount of goods were carried by rail in 2018 (Figure 37). Among the main factors for the stagnation in rail transport were track closures necessitated by refurbishment projects, delays caused by de-tours, capacity restrictions,an outdated system of regulations and a lack of level playing field between transport modes.



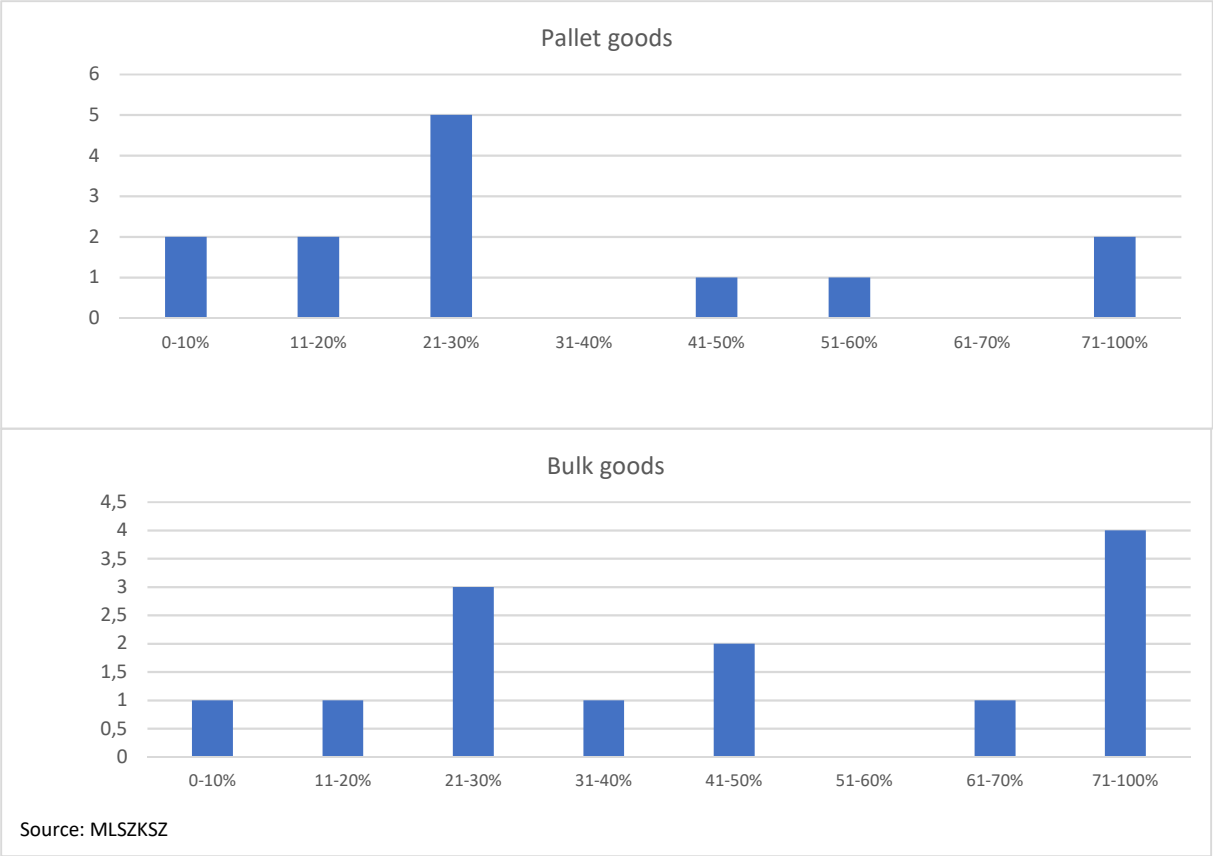
37. Figure Rail transport of goods in Hungary, incl. combined transport (source: CSO and MLSZKSZ)

According to data gathered by AHLSC domestic intermodal transport (including Ro-La up to end-2012) increased within the rail transport segment between 2017 and 2018 by 10%, which is quite a substantial rate in comparison to earlier years. The share of domestic intermodal transport in rail transport increased in 2018 to over 20%, which is regarded as a favourably high level, as we have reached the lower end of the 20-25% range that is characteristic of West European countries. The increase, of a ratio exceeding the ratios recorded in earlier years, was a result of the attraction of the new METRANS terminal in Csepel: 2018 was the first full business year of the combi-terminal delivered in 2017.

Survey

Both bulk cargo and palletised goods were represented in the transported goods classified by the type of packaging. Four companies account for 30 % of the palletised turnover, which amounts to over 50 % in terms of the quantity of the transported goods. Nine companies had less than 30 % of palletised transport. Bulk cargo amounted to less than 40 % of their total turnover for 6 companies, in 7 cases the share of bulk cargo transport was over 50 %. Considering the rate of transported goods according to their type of packaging the railway represents mostly the transport of bulk cargo (Figure 38).

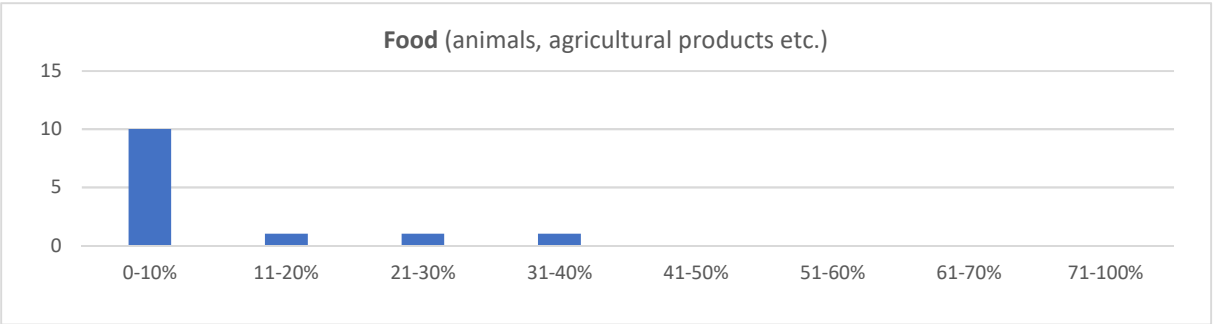
31 % share of single wagon traffic, and 69 % share of block train traffic.



38. Figure Rail transport share of Pallet and bulk goods per companies (source: own editing)

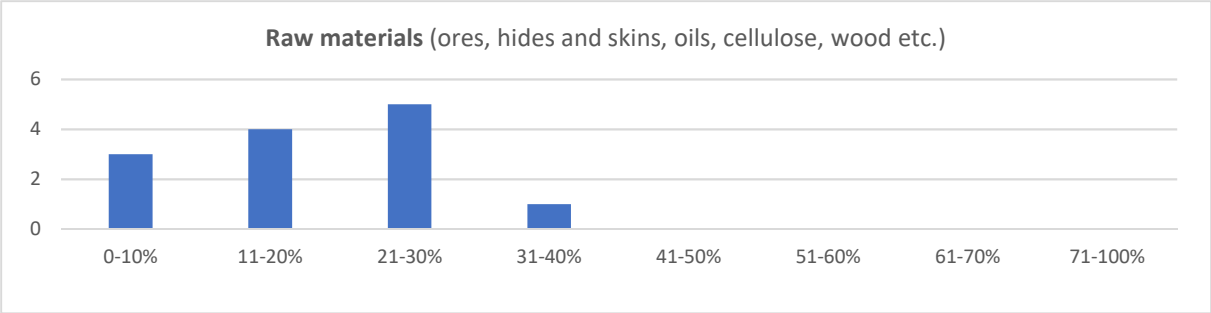
The main types of classification for the transported goods are the following (Figures 39-43):

Food (animals, agricultural products etc.): these goods represented a share of less than 20 % in 85 % of the companies, and 15 % of the companies reported a share below 40 %. The quantity of food transported by the respondent companies was not significant.



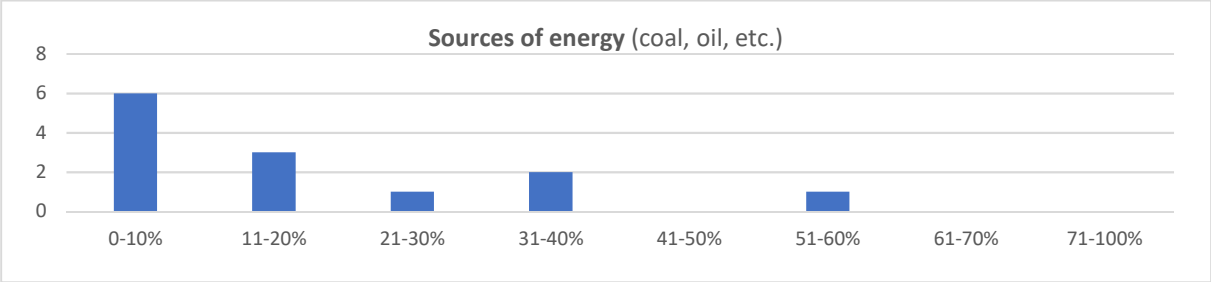
39. Figure Transport of food materials per companies (source: own editing)

Raw materials (ores, hides and skins, oils, cellulose, wood etc.): these goods represented a share of less than 20 % in 54 % of the companies, and they have not reached the rate of 30-40 % in 46 % of the companies. Considering the traffic of raw materials, the respondent companies reported a substantial quantity.



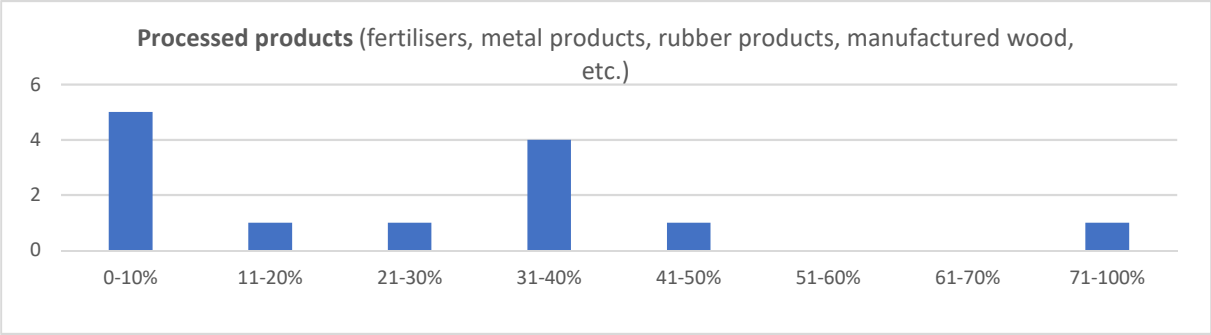
40. Figure Transport of raw materials per companies (source: own editing)

Sources of energy (coal, oil, etc.): 70 % or the companies reported a less than 20 % share for this type of goods, 23 % of the companies reached a share of 30-40 % and 1 company reported a share of over 50 %. Considering the traffic of the sources of energy the respondent companies reported a medium level traffic.



41. Figure Transport of sources of energy per companies (source: own editing)

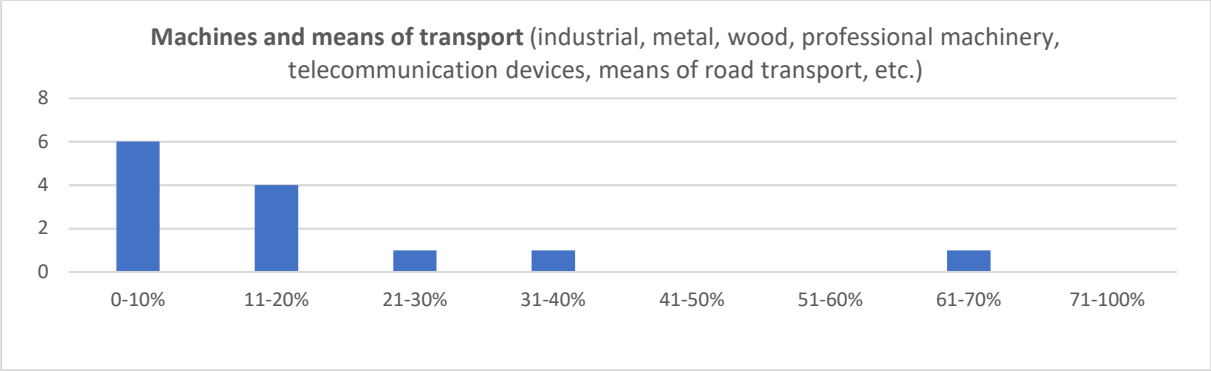
Processed products (fertilisers, metal products, rubber products, manufactured wood, etc.): 46 % of the companies reported a lower than 20 % share, whereas 39 % of the companies reached a rate between 20-40 %, moreover, 15 % of the companies reported a rate over 50 %. Considering the traffic of processed food, the respondent companies reported a medium level of traffic.



42. Figure Transport of processed products per companies (source: own editing)

Machines and means of transport (industrial, metal, wood, professional machinery, telecommunication devices, means of road transport, etc.): these goods represented a share of less than 20 % in 77 % of the companies, and 33 % of the companies reported a share between 30-70 %. In this case we can speak of a medium level of traffic.

The results show that the majority of the transported goods belong to the categories of raw materials, processed products and machines as well as the means of transport.



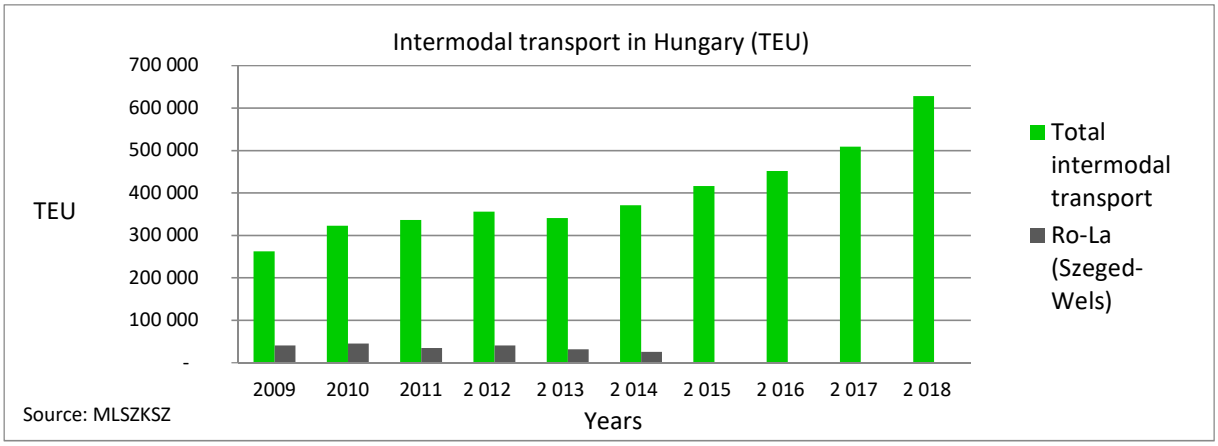
43. Figure Transport of machines and means of transport per companies (source: own editing)

Combined Terminal

Intermodal transport in Hungary has been growing steadily in the last 6 years, with a 10% in-crease between 2017 and 2018.

The increase resulted in part from an upswing in the overall economic output (with a 4,9 growth in GDP in 2018) and partly from an increase in the transport of goods suitable for containerisation and the increase in the quantity of goods transported through the METRANS combi-terminal in Csepel.

AHLSC data show that the combi-terminals of the logistics service providing centres in Central Hungary manage practically the entire intermodal transport taking place in Hungary. This is where international through goods trains arrive and depart from. Some 92,5% of the total domestic in-termodal traffic arrived in Hungary through the three combi-terminals in Central Hungary (BILK Kombiterminál, Mahart Container Center, METRANS) in 2018 (Figure 44). Törökbálint Kombiterminál was closed down in 2019, its traffic has been redirected to Mahart Container Center. Of the terminals in rural Hungary the traffic through one in Sopron decreased by 14% while container traffic through Záhony plummeted by 27%. The traffic through Záhony and Sopron typically involves reloading, with a small proportion of the goods being carried on locally by road.



44. Figure Intermodal transport in Hungary (source: MLSZKSZ)

As to the future, the ratio of intermodal transport in the total quantity of transport will increase (and this process is already under way) for the following reasons: Up to 1200 km in 24 hours (by rail, the time to delivery is somewhat longer by water), it can be well-organised, competitive rail transport costs, favourable total costs, substantially lower environmental pressures, reduced risk of migration, reduced stationery time/exhaust emission on congested roads, direct cost reduction on the part of road fleet operators: 1 locomotive driver instead of as many as 30 car drivers: fewer drivers, fewer tractors, reduced tire wear, reduced repair and maintenance, longer trailer replacement cycles.

1.4.1. Partners (market actors)

Road transport

The above mentioned questionnaire was sent out to 36 significant road transport companies, which have their registered domicile and site(s) in the region of Central Hungary (Budapest Region), or in West-Hungary (Sopron-Burgenland region).

The representative survey had been conducted with 36 road transport companies, out of which 19 companies sent back questionnaires that could be evaluated. This results in a performance of 53 %.

1. Alba-Zöchling Kft.
2. Industria Kft.
3. K & V Nemzetközi Fuvarozó Kft.
4. Horváth Rudolf Intertransport Kft.
5. Raben Trans European Hungary Kft.
6. RBT Europe Kft.
7. Versteijnen Logistics Kft.
8. G.E.B.E. Kft.
9. BI-KA LOGISZTIKA Kft
10. EKOL Logistics Kft.
11. Galambos Logistic Kft.
12. BÁBOLNA Sped Kft.
13. FLOTT-TRANS Szállítmányozó és Fuvarozó Kft.
14. Liegl internationale Transporte Kft.
15. Innovatív Speciál Transport Kft.
16. LOCARGO Nemzetközi Szállítmányozó és Logisztikai Kft.
17. Kanizsa Sprint Kft
18. Waberer's International NyRt.
19. Trans-Sped Kft.
20. Duvenbeck IMMO Logisztikai Kft.
21. P-Development Kft.
22. Maglog Kft.
23. Botlik - Trans Kft.
24. F-Trans
25. Gartner Intertrans Hungária Kft.
26. Transdanubia Logisztikai Kft.
27. cargo-partner Hungary Kft.
28. DOÓR & DOÓR TRANS Fuvarozási és Kereskedelmi Kft.
29. J&S Speed Kft.
30. EUROSPED Zrt.
31. Szám Sped Kft.
32. Transintertop Szállítmányozó és Fuvarozó Kft.
33. BHS Trans Kft.
34. Gászler Fuvarozási és Kereskedelmi Kft.
35. Gelbmann Kft.
36. Fiala-Trans Kft.

Rail transport

The questionnaire mentioned above was sent out to 15 significant railway transport companies, which have their registered domicile and site in the region of Central Hungary (Budapest Region), or in West-Hungary (Sopron-Burgenland region).

During the survey we were hindered by the same obstacle as in the case of road transport, namely that the majority of the companies do not make separate statements, where the transport is broken down by the types of goods according to the region. Therefore, the respondents had to be specifically asked about the types of classification as introduced above. Luckily, the bigger companies could provide us with a classification broken down by region. Consequently, the received figures represent 90% of the Central-Hungarian region, and 8 % of the West-Hungarian region.

Out of the 15 posted questionnaires 10 were sent back filled in, which shows a participation of 66 %.

1. GYSEV Cargo Zrt.
2. Rail Cargo Carier Kft.
3. Rail Cargo Hungaria Zrt.
4. Rail Cargo Operator - Hungaria Kft.
5. Rail Cargo Logistics Hungária Kft.
6. AWT Rail HU Zrt.
7. LTE Hungária Kft.
8. MMV Zrt.
9. Floyd Zrt.
10. METRANS Danubia Kft.
11. DB Cargo Hungária Kft.
12. VTG Rail Logistics Hungaria Kft.
13. FOXrail Zrt
14. TRAIN HUNGARY MAGÁNVASÚT Kft.
15. CER Hungary Zrt.

Combiterminals

The location of the combiterminals are presented on Figure 45.

45. Figure Combi terminals

source: MLSZKSZ

Sopron:

GYSEV Cargo Zrt. - Kombiterminál

H - 9400 Sopron, Ipar körút 21.

Budapest:

1. **Mahart Container Center Kft. – Kombiterminál**

H - 1211 Budapest, Weiss Manfréd út 5-7.

2. **Rail Cargo Terminal - BILK Zrt. - Kombiterminál**

H-1239 Budapest, Európa utca 4.

3. **METRANS Konténer Kft. - Kombiterminál**

H-1211 Budapest, Salak utca 1-39

Záhony

Záhony-Port Zrt. – Kombiterminál, vámszabadterület

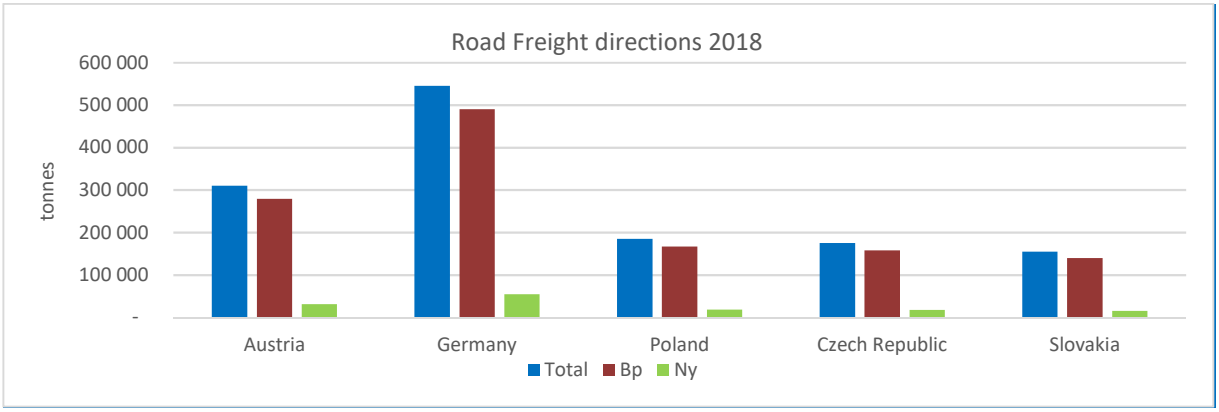
H-4625 Záhony Európa tér 12.

1.4.2. Current major directions

The traffic that flows through the northwest region has two main directions that happen to be perpendicular to each other. One is the east-west corridor that goes from Budapest to Vienna thus connecting Southeast and Western Europe. The main routes of this corridor are the M1 Highway in Hungary, the Budapest-Vienna Railway and the Danube River. Part of the east-west rail traffic is even using the Győr – Sopron – Ebenfurth line. The other main corridor of the region has only evolved in the last decades when the north-south road freight traffic was seeking an alternative route to circumvent the Austrian highways. Currently a significant part of the Polish-Italian truck traffic goes along the Western border of Hungary between Slovakia and Slovenia, mainly using the 86 and M86 highways. Even rail traffic in North-South direction through Western Hungary is evolving, especially container traffic between the seaport of Koper and destinations in Slovakia as well as destinations in Central Hungary (Budapest). The development of this traffic was one of the reasons for establishment of the Amber Rail Freight Corridor connecting Slovenia, Hungary, Slovakia and Poland.

Road transport

During the survey, an obstacle hindered us, as the companies do not make separate statements, where the types of goods according to the region break down the transport. Therefore, the respondents had to be specifically asked about the types of classification as introduced above; therefore, the majority of the figures given by the respondents were estimates. Consequently, the received figures represent 90% of the Central-Hungarian region, and 10 % of the West-Hungarian region (Figures 46-47).

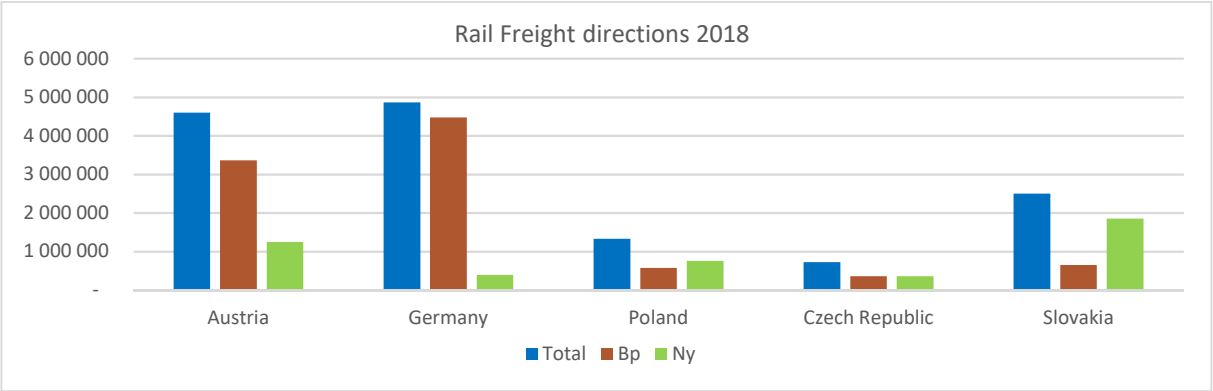


46. Figure Road freight directions 2018 (source: own editing)

47. Figure The volume of the road freight traffic 2018 (source: MLSZKSZ)

Rail transport

During the survey, the same obstacle as in the case of road transport hindered us, namely that the majority of the companies do not make separate statements, where the types of goods according to the region break down the transport. Therefore, the respondents had to be specifically asked about the types of classification as introduced above. Luckily, the bigger companies could provide us with a classification broken down by region. Consequently, the received figures represent 92% of the Central-Hungarian region, and 8 % of the West-Hungarian region (Figures 48-49).



48. Figure Rail freight directions 2018 (source: own editing)

49. Figure The volume of rail freight traffic 2018 (source: MLSZKSZ)

1.4.3. Dimensions of the freight traffic

This analysis was prepared by the Association of Hungarian Logistics Service Centres together with the analysis of Budapest Region.

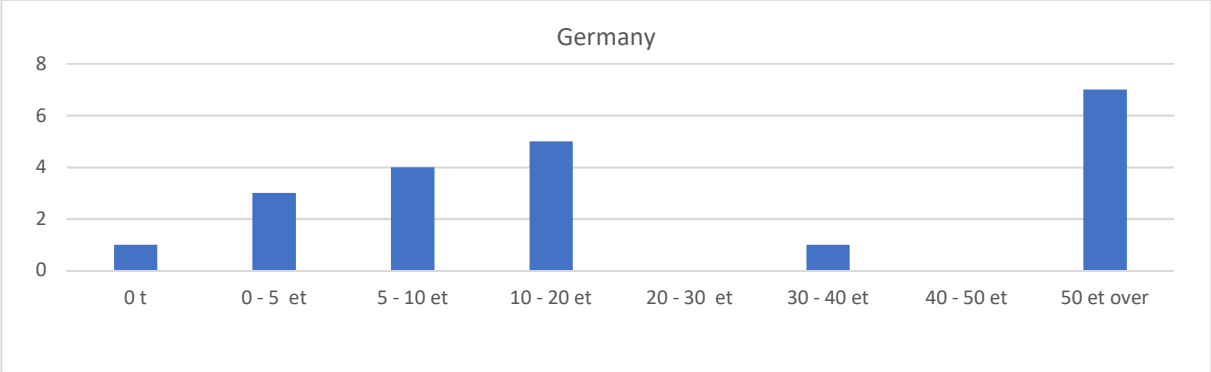
Road transport destinations – trend analysis.

The questionnaire mentioned above was sent out to 36 significant road transport companies, which have their registered domicile and site(s) in the region of Central Hungary (Budapest Region), or in West-Hungary (Győr-Moson-Sopron-Burgenland region).

During the survey, an obstacle hindered us, as the companies do not make separate statements, where the types of goods according to the region break down the transport. Therefore, the respondents had to be specifically asked about the types of classification as introduced above, and the majority of the figures given by the respondents were estimates. Consequently, the received figures represent 90% of the Central-Hungarian region, and 10 % of the West-Hungarian region.

Evaluation of traffic destinations (Figures 50-54):

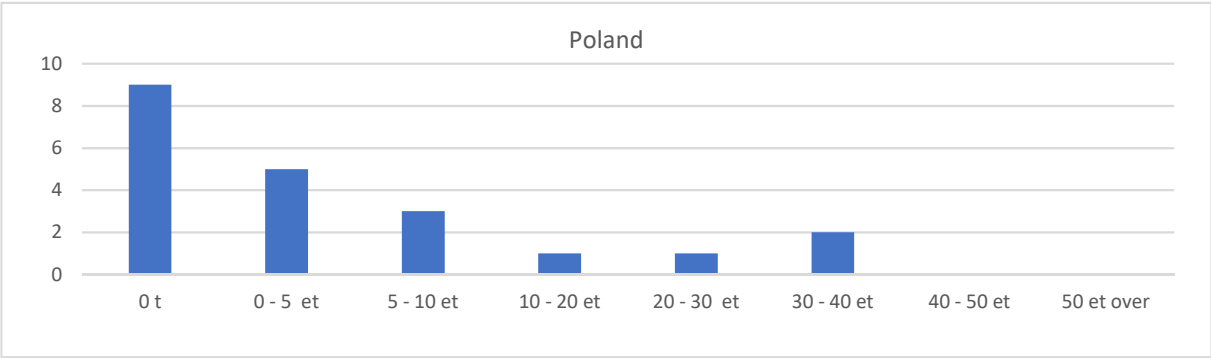
This proportion represents at least 545.000 tonnes of goods traffic between Hungary and Germany, 490.500 tonnes of it went out from the Budapest region and 54 500 tonnes from the Győr-Moson-Sopron-Burgenland region.



50. Figure Road transport traffic Hungary-Germany (source: own editing)

Legend: x axe: transported volume (thousand ton/year), y axe: number of firms

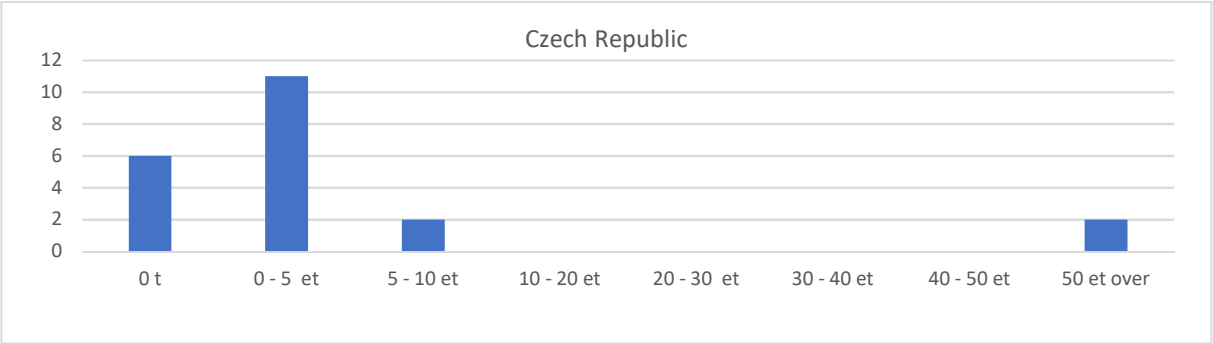
This proportion represents at least 185.000 tonnes of goods traffic between Hungary and Poland, 165.500 tonnes of it went out from the Budapest region and 18.500 tonnes from the Győr-Moson-Sopron-Burgenland region.



51. Figure Road transport traffic Hungary-Poland (source: own editing)

Legend: x axe: transported volume (thousand ton/year), y axe: number of firms

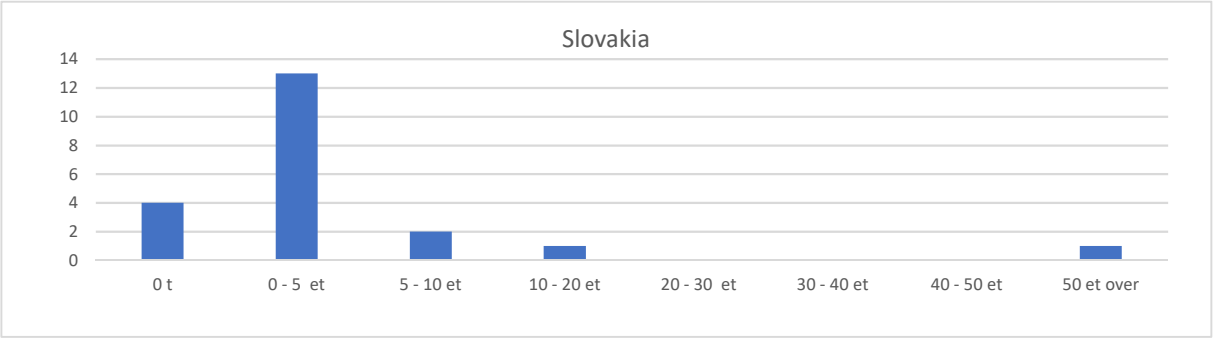
This proportion represents at least 175.000 tonnes of goods traffic between Hungary and Czech Republic, 157.500 tonnes of it went out from the Budapest region and 17.500 tonnes from the Győr-Moson-Sopron-Burgenland region.



52. Figure Road transport traffic Hungary-Czech Republic (source: own editing)

Legend: x axe: transported volume (thousand ton/year), y axe: number of firms

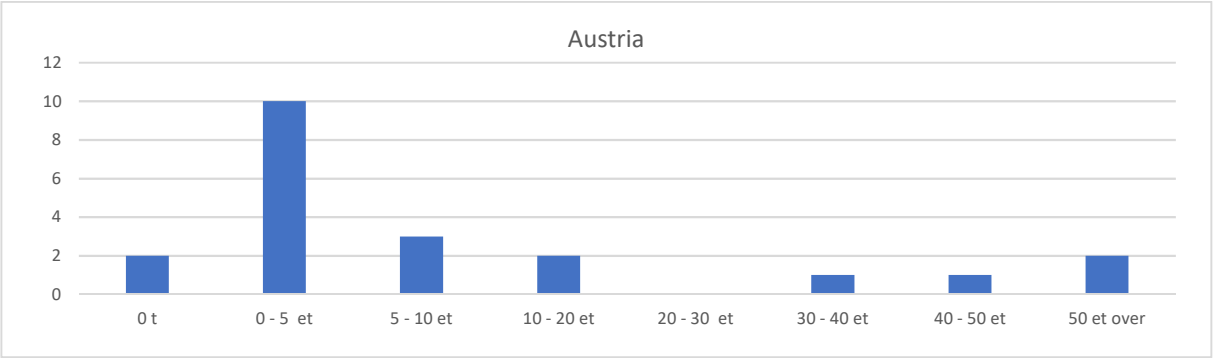
This proportion represents at least 155.000 tonnes of goods traffic between Hungary and Slovakia Republic, 139.500 tonnes of it went out from the Budapest region and 15.500 tonnes from the Győr-Moson-Sopron-Burgenland region.



53. Figure Road transport traffic Hungary-Slovakia (source: own editing)

Legend: x axe: transported volume (thousand ton/year), y axe: number of firms

This proportion represents at least 310.000 tonnes of goods traffic between Hungary and Austria Republic, 279.000 tonnes of it went out from the Budapest region and 31.000 tonnes from the Győr-Moson-Sopron-Burgenland region.



54. Figure Road transport traffic Hungary-Austria (source: own editing)

Legend: x axe: transported volume (thousand ton/year), y axe: number of firms

Rail transport destinations – trend analysis.

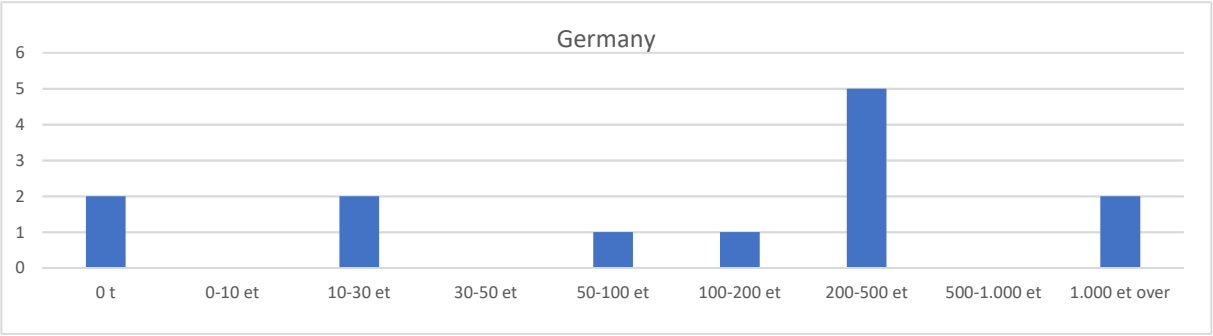
The questionnaire mentioned above was sent out to 15 significant rail transport companies, which have their registered domicile and site(s) in the region of Central Hungary (Budapest Region), or in West-Hungary (Sopron-Burgenland region).

During the survey we were hindered by the same obstacle as in the case of road transport, namely that the majority of the companies do not make separate statements, where the transport is broken down by the types of goods according to the region. Therefore, the respondents had to be specifically asked about the types of classification as introduced above. Luckily, the bigger companies could provide us with a classification broken down by region. Consequently, the received figures represent 92% of the Central-Hungarian region, and 8 % of the West-Hungarian region.

Out of the 15 posted questionnaires 10 were sent back filled in, which shows a participation of 66 %.

Evaluation of traffic destinations (Figures 55-59):

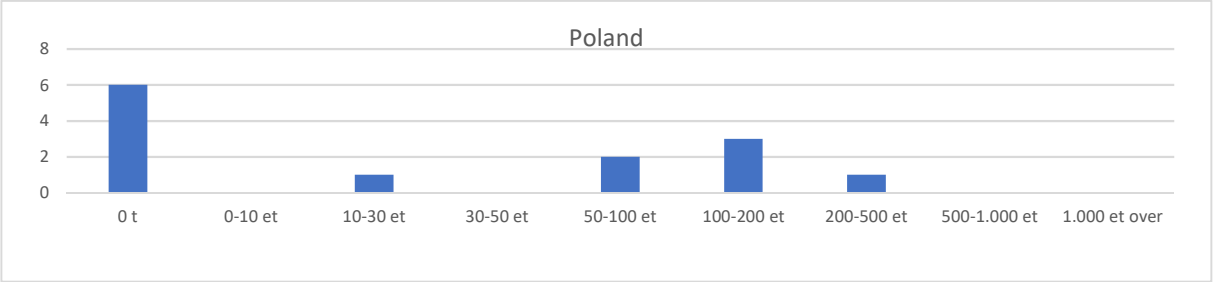
This proportion represents at least 4.860.000 tonnes of goods traffic between Hungary and Germany; 4471.200 tonnes of it went out from the Budapest region and 388.800 tonnes from the Sopron-Burgenland region. Consequently, the received figures represent 92% of the Central-Hungarian region, and 8 % of the West-Hungarian region.



55. Figure Rail transport traffic Hungary-Germany (source: own editing)

Legend: x axe: transported volume (thousand ton/year), y axe: number of firms

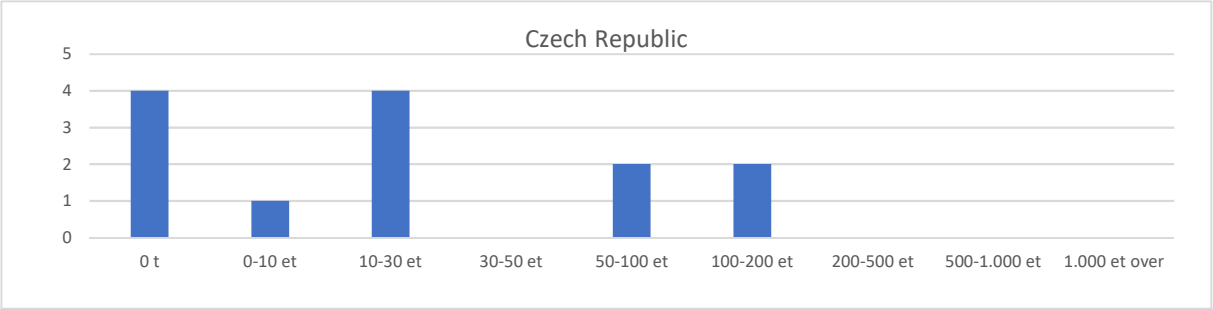
This proportion represents at least 1330.000 tonnes of goods traffic between Hungary and Poland; 571 900 tonnes of it went out from the Budapest region and 758 100 tonnes from the Sopron-Burgenland region. Consequently, the received figures represent 43% of the Central-Hungarian region, and 57 % of the West-Hungarian region.



56. Figure Rail transport traffic Hungary-Poland (source: own editing)

Legend: x axe: transported volume (thousand ton/year), y axe: number of firms

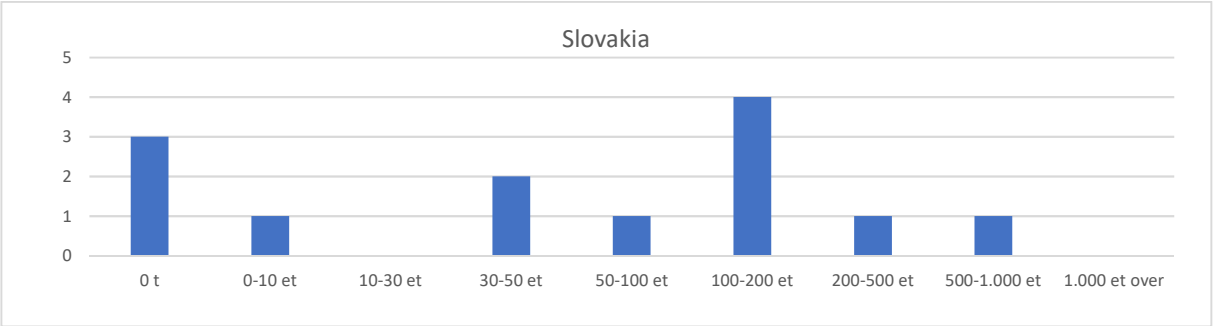
This proportion represents at least 720.010 tonnes of goods traffic between Hungary and Czech Republic; 360 005 tonnes of it went out from the Budapest region and 360.005 tonnes from the Győr-Moson-Sopron-Burgenland region. Consequently, the received figures represent 50% of the Central-Hungarian region, and 50 % of the West-Hungarian region.



57. Figure Rail transport traffic Hungary-Czech Republic (source: own editing)

Legend: x axe: transported volume (thousand ton/year), y axe: number of firms

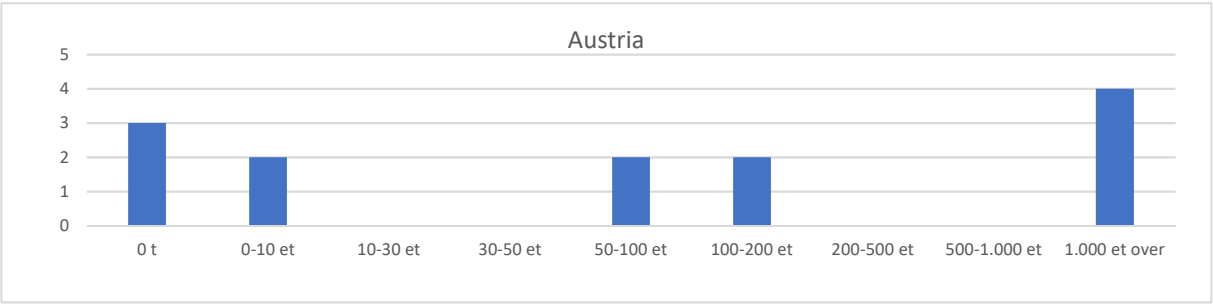
This proportion represents at least 2 500 010 tonnes of goods traffic between Hungary and Slovakia; 650 003 tonnes of it went out from the Budapest region and 1 850 007 tonnes from the Győr-Moson-Sopron-Burgenland region. Consequently, the received figures represent 26% of the Central-Hungarian region, and 74 % of the West-Hungarian region.



58. Figure Rail transport traffic Hungary-Slovakia (source: own editing)

Legend: x axe: transported volume (thousand ton/year), y axe: number of firms

This proportion represents at least 4 600 020 tonnes of goods traffic between Hungary and Austria; 3 358 015 tonnes of it went out from the Budapest region and 1 242.005 tonnes from the Győr-Moson-Sopron-Burgenland region. Consequently, the received figures represent 73% of the Central-Hungarian region, and 27 % of the West-Hungarian region.



59. Figure Rail transport traffic Hungary-Austria (source: own editing)

Legend: x axe: transported volume (thousand ton/year), y axe: number of firms

1.4.4. Presentation of loading devices

Road:

The respondent companies have 237 lorries of 3.5 -12 tonnes capacity, and 3.786 vehicles in the category over 12 tonnes. The company, which has 150 tow vehicles and 250 trailers used these vehicles for short-haul transports and exchanges at the plant (while one is loading the other one is on the way).

Rail:

The number of locomotives used by the companies categorized by the main types and accumulated:

- 26 high power diesel locomotive - 609 "Sulzer"
- 8 low power diesel locomotives
- high power electric locomotive – 6 pc Montana, Lema, Phoenix, 24 Vectron, 48 Taurus, 5 Traxx,
- additional electric locomotive: 1 pc Herkules, 1 pc LE5100, 1 pc LE3400,
- additional diesel locomotive: 2 pc CZ 753, 4 pc CZ 740
- Rental equipment:

- medium power electric locomotives - 2 pc Plehac (242 sor), 24 pc Gigant (V63)

The number of wagons used by the companies categorized by the main types and accumulated:

- 4.773 Eas open
- 134 Zas tanc
- 750 pc Sggmrs container chassis
- 1.100 tipper (Fals, Tams, Tagps)
- 900 flats (Ks, Rgs, Lgs, Shimms)
- 300 Coil Carrier (Habbinss)

Combi Terminals:

GYSEV Cargo Zrt. – Sopron - Combi Terminal facilities

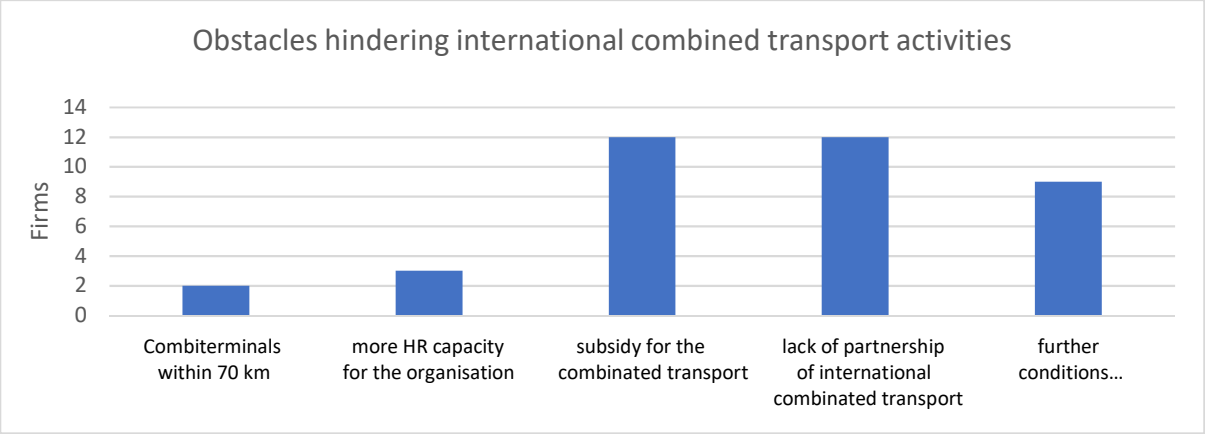
- crane tracks: 6
- holding tracks: 4
- lifting apparatus: 2 gantry cranes (40 t – 45' container, swap body, semi-trailer)
- 1 mobile crane (40 t – 45' container, swap body, semi-trailer)
- storage space: 30 000 m2
- container handling (lifting):
  - 72 000 pcs/year
  - storage: 2 000 TEU

1.4.5. Presentation of current technology (workflow and operation), capacity limits

Road

81 % of the companies do not use combined transport.

The following answers were received to the question „Are there any obstacles that make it difficult to carry out the international transport activities"? (Figure 60)



60. Figure Road transport obstacles hindering international combined transport activities (source: own editing)

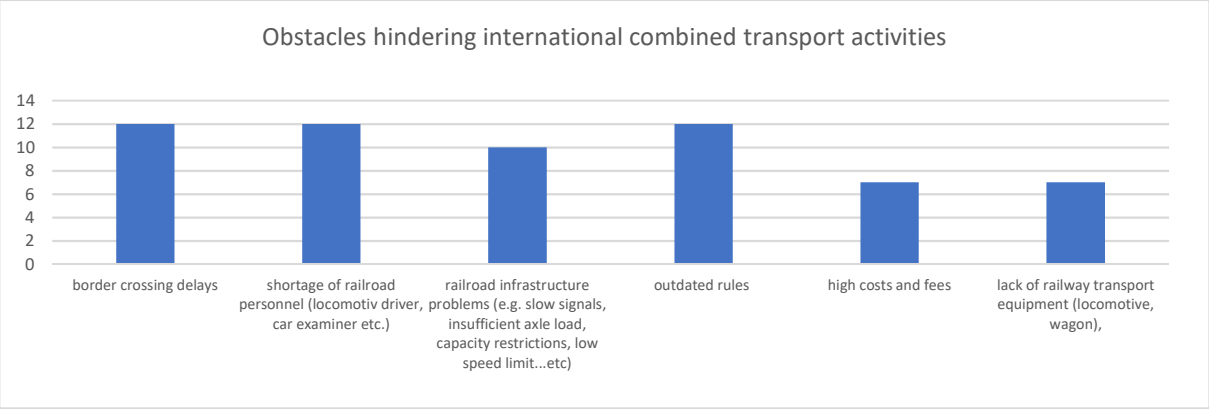
Respondents mainly highlighted the lack of public (governmental) stimuli; furthermore, the existing combined transport connections do not wholly cover these needs.

As to further conditions, they made the following remarks:

- flexibility, precision, as the car industry companies do not tolerate uncertainty and delay,
- value for money service door to door,
- there are not enough parking lots, roadbuilding activities slow down transport,
- extension of road network,
- long lasting reliable service with shorter delivery times,
- lack of labour force, the principals do not need combined transport either, road transport is more convenient and faster; the cost savings of using combined transport do not offset its disadvantages
- on the whole, combined transport is more expensive and slower than road transport,
- mobility package, different legal regulations by each country.

Railway

The obstacles are presented on Figure 61.



61. Figure Rail transport obstacles hindering international combined transport activities (source: own editing)

According to the respondents crossing the borders, railway staff, railway infrastructure and outdated regulatory systems constitute the biggest problems.

33% of the companies do not have combined transport services.

Further remarks on other conditions:

- the regulations are not uniform (protection wagon, change of braking types, etc.)
- lack of interoperability on the borders between the railway and the infrastructure

1.5. SWOT analysis

1.5.1. SWOT analysis of the system of freight transport

Strengths	Weaknesses
1. Most rail lines electrified 2. Low gradients providing favourable conditions for rail freight 3. Sopron terminal 4. Port of Gönyű 5. High attention given by GYSEV to rail freight in traffic management	1. Several railway lines not fulfilling TEN-T requirements (in particular train length of 740m and 22,5 t axle-load) 2. Need of changing direction on some stations (Ebenfurth, Zalaszentiván, Komárom, Komárno) 3. Most lines single-track 4. Capacity constraints in the Sopron railway node 5. Sopron-Wiener Neustadt line is not electrified
Threats	**Opportunities**
1. Increasing competition from constantly upgraded road network (highways M85 and M86) 2. Path-conflicts between passenger and freight traffic as a consequence of increasing frequency of passenger services 3. Upgrading of alternative railway routes outside the region 4. Slow progress in implementation of rail investments 5. Lack of (regional) political support for development of the rail system	1. General long-term growth in the transport market 2. Planned construction of triangle tracks 3. Upgrading of Sopron intermodal terminal for more efficient terminal operations 4. Building good road access to intermodal terminals 5. Upgrading of railway lines to TEN-T standard 6. Planned double-tracking of Sopron – Győr line 7. Rail freight well in line with environmental and climate policy targets, incl European “New Green Deal”

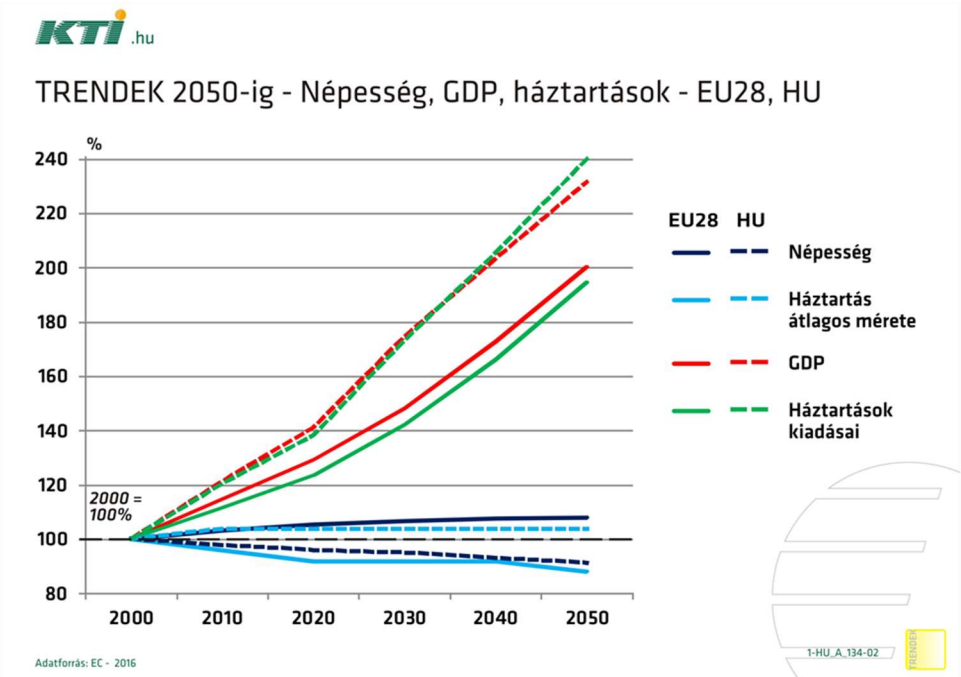
1.5.2. SWOT analysis of the framework conditions for the pilot action

Strengths	Weaknesses
1. **Short decision-making channels within the organisation** and partners 2. **…Established contacts with customers and stakeholders in the framework of the Rail Freight Corridors** 3. …	1. Few stations with 740m-sidings create constraints in timetable 2. Different regulatory frameworks in different countries 3. …
Threats	Opportunities
1. **Impact on passenger traffic must be avoided** 2. **Unforeseen traffic disruptions** 3. …	1. Demonstrating pro-active approach to improvements towards customers and stakeholders 2. Raising awareness among decision-makers for support to improvement measures 3. …

2. ANALYSIS OF FREIGHT TRENDS (TIME RANGE 2030 / 2050)

The toughest challenge in road transport in the territory of the European Union lies in recruiting lorry drivers. The increase in heavy vehicles' use of roads, on the other hand, results in growing environmental pressures accompanying road use and increasing demand for road refurbishments, putting a strain on the budget of each country. The Association of Hungarian Logistics Service Centres (AHLSC) argues that up to 50 thousand lorries could be kept off Hungary's roads by improved cooperation among the road, rail and water transport segments. This could provide rail and water transport operators with new business and enable road transport operators to cut their costs. Moreover, the actions so taken would provide an answer to the expected tightening of requirements in the EU Mobility Package. Another important requirement is that logistics operators should remain independent in terms of their business activities and organise more efficient and more economical carriage processes on the basis of a new approach, with lower environmental pressures.

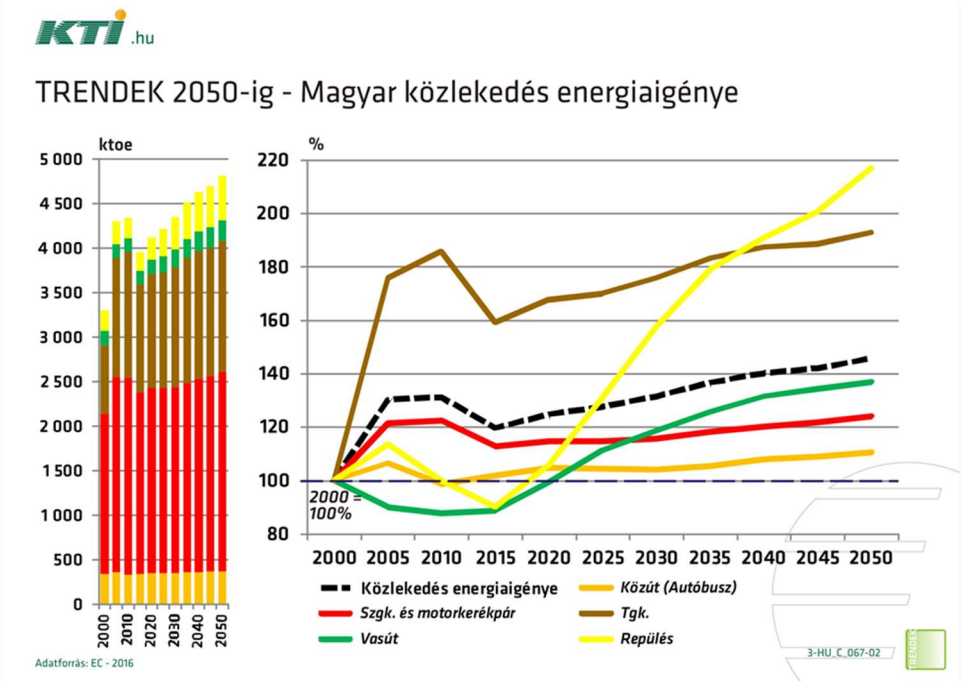
The following figures represent Hungarian and EU trends of population, size of households, outcomes of households and the GDP (Figure 62), the energy needs (Figures 63), and CO2 production (Figure 64).



62. Figure Hungarian household and GDP data

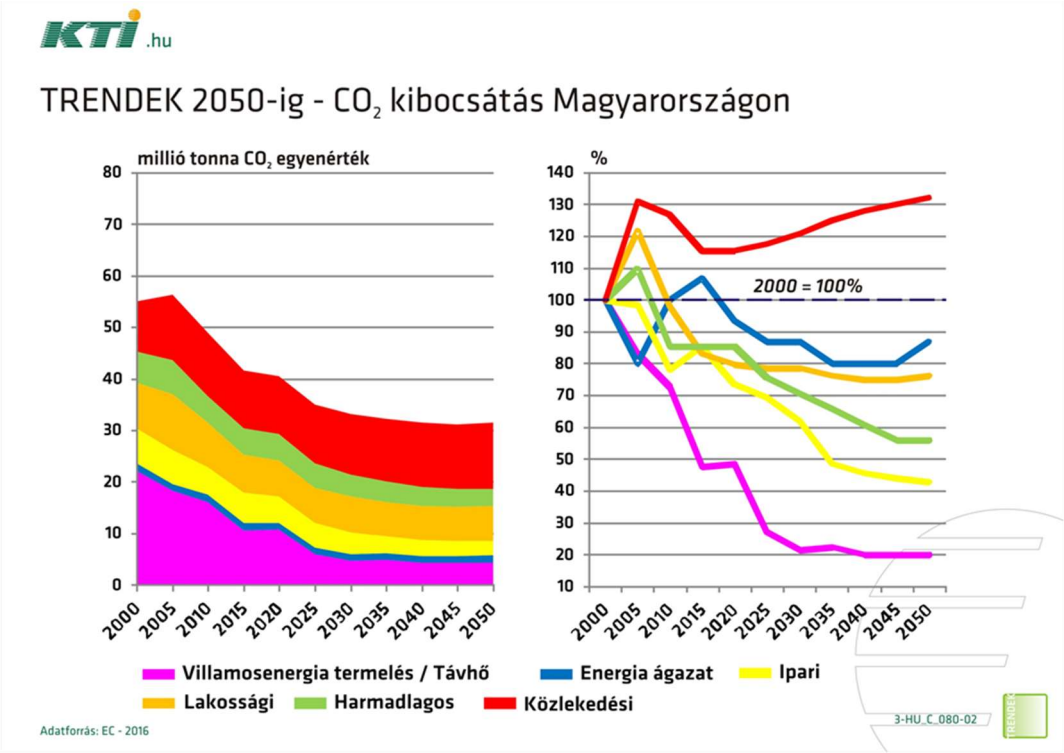
source: KTI

This trend shows that the energy need of the transport sector will increase most (red). That is why it is important to strengthen environmentally friendly transport modes, in particular rail.



63. Figure Energy need of transport sector

source: KTI

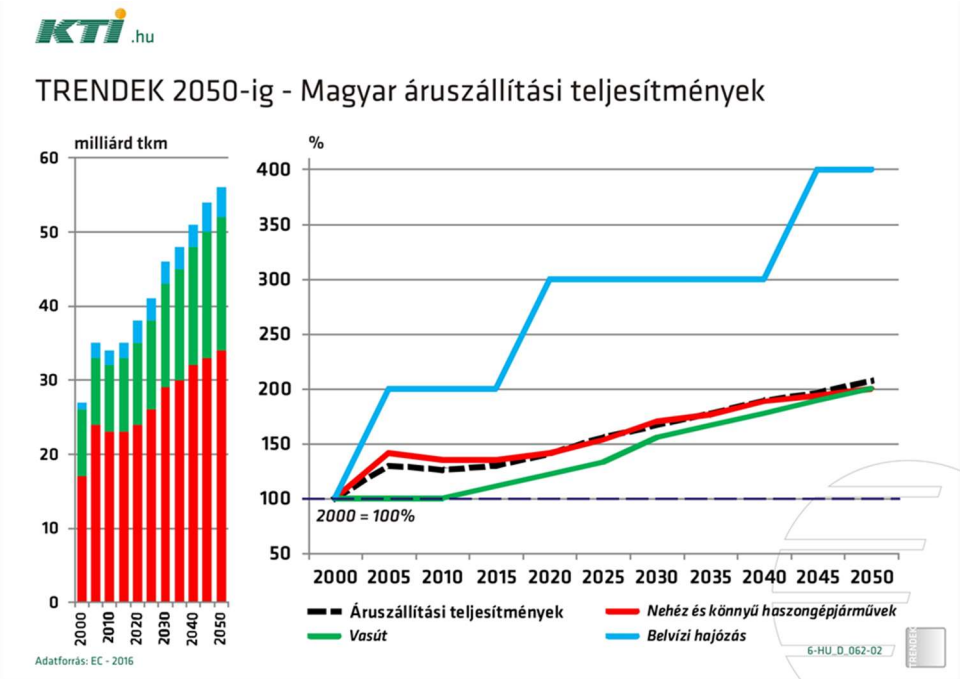


64. Figure CO2 outcome

source: KTI

The CO2 outcome will increase most in the transport sector (red). In the other sectors (energy (blue), industry (yellow), private (orange), lightning, heating (rose), tertiary (green)) the CO2 outcome will decrease.

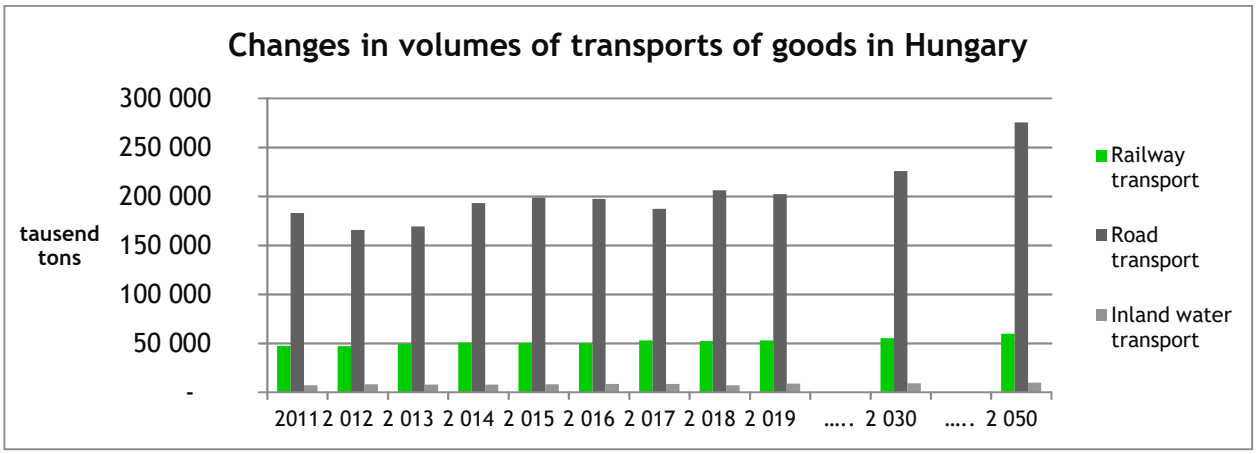
According to the trends (www.kti.hu/trendek/aruszallitas-logisztika) published by Institute for Transport Sciences, the domestic public road and railroad transportation sector will double its performance measured at millennium by 2050. Significant growth is also forecasted in the field of inland waterway transportation (Figure 65).



65. Figure The volumetrend of fraight transport

source: KTI

The Association of Hungarian Logistics Service Centres (AHLSC) analysed the current situation and the prevailing trends regarding intermodal transport in Hungary on the basis of data published by the Central Statistical Office (CSO) and data collected on its own in 2018. After analysing and evaluating the data the Association worked out elements and criteria for improvements in the efficiency and effectiveness of the intermodal transport system. The volume-changes are presented in Figure 66.



66. Figure The expected trends of Hungarian freight transport (source: CSO and MLSZKSZ)

Transport of goods by road – restructuring

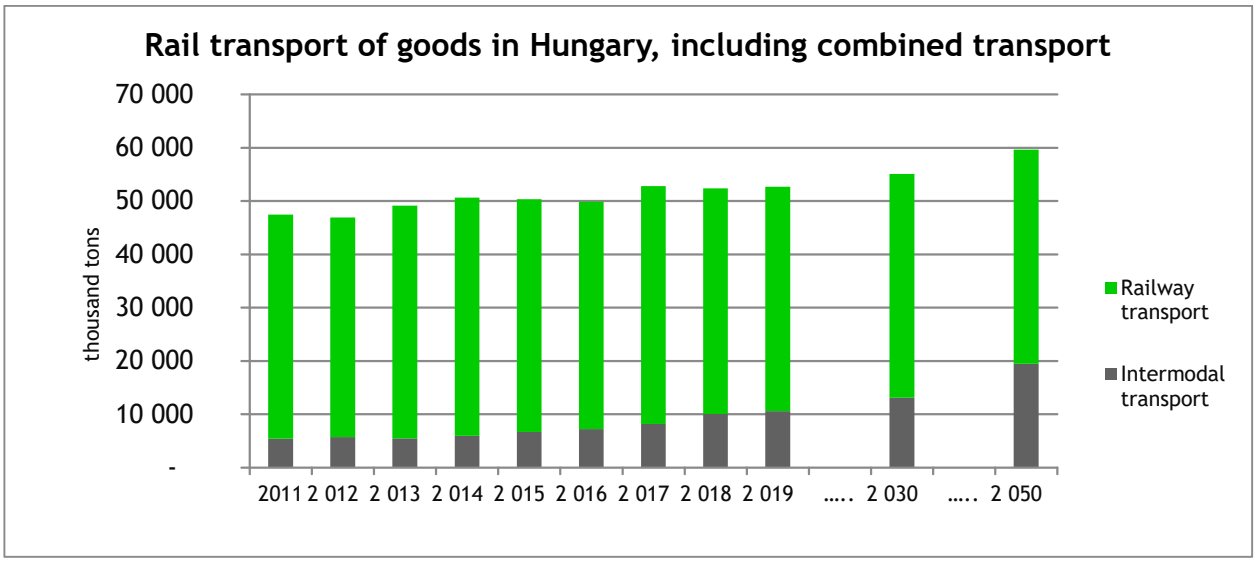
According to data published by the Central Statistical Office (CSO) the volume of goods transported by road started to grow again in 2018, after a period of decline in 2016 and 2017. A 1,45% decrease in 2015/2016 and another drop of 6,41% in 2016/2017 was followed by an increase of 10% in 2017/2018. An analysis of the transport directions reveals change in the dominant trend: the amount of goods transported to international destinations decreased by 10,6%, while domestic transport increased by a substantial 15.8%. Since the Hungarian economy has been on a growth path for years now, the massive increase in the domestic road transport of goods is partly a result of the outstanding growth rates recorded in the construction industry (motorways, railways, homes). The decrease in international freight transport is somewhat more interesting, because it is not accompanied by an increase in transport by rail or inland waterways – that is, this traffic has disappeared for some reason from roads or become invisible to the statistical system. The reasons may only be guessed – the EKÁER effect or an increase in the share of third country carriers.

The CSO's 2018 data show that a total of 78% of the goods carried by transport operators registered in Hungary were transported by road (see Figure 29). This equals goods of a total of some 169.3 million tons carried by road, involving the use of roads by a total of over 10,5 million freight transport vehicles, up 15% year-on-year.

The total volume of goods carried by road national across borders was 36,7 million tonnes in 2018. Most of the goods were transported by heavy articulated vehicles exceeding 40 tonnes in total weight, that is, some 2,29 million lorries on the roads.

Transport of goods by rail – stagnation

A look at the CSO's figures for the past 5 years shows that rail transport remained in 2018 at the previous year's level. Rail transport dropped by 0,9% between 2017 and 2018, which is regarded as stagnation in comparison with the modest growth rates recorded in earlier years. Some 20% of the total amount of goods were carried by rail in 2018. The stagnation in rail transport resulted definitely from the track closures necessitated by refurbishment projects, delays caused by detours, capacity restrictions and an outdated system of regulations. The expected proportion of Hungarian intermodal transport is shown in the Figure 67.

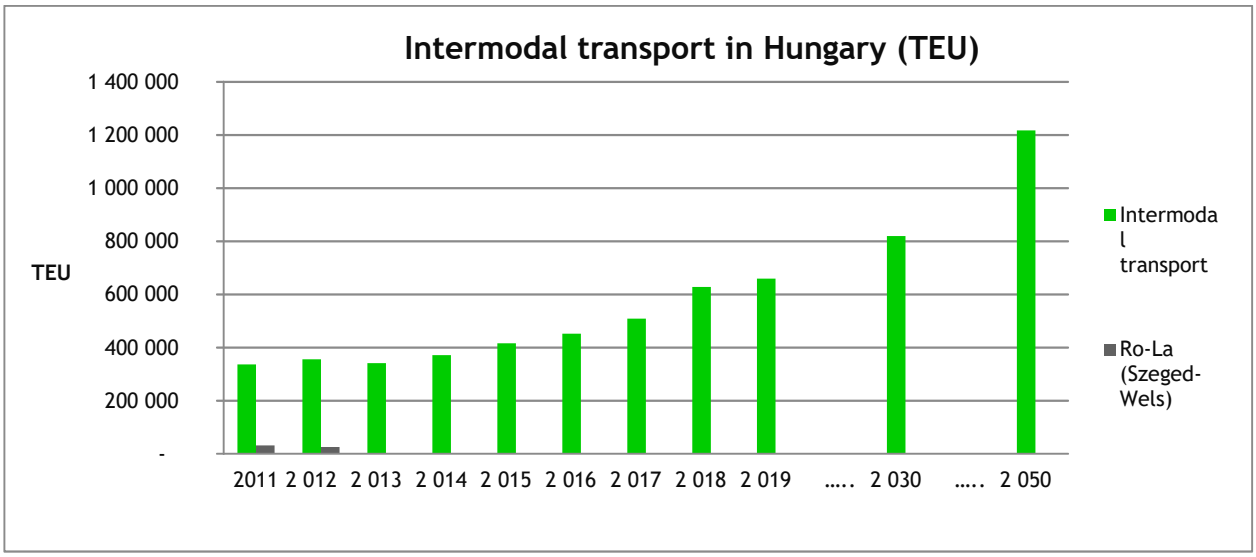


67. Figure The expected proportion of Hungarian intermodal transport (source: CSO and MLSZKSZ)

According to data gathered by AHLSC domestic intermodal transport (including Ro-La up to end-2012) increased within the rail transport segment between 2017 and 2018 by 10%, which is quite a substantial rate in comparison to earlier years. The share of domestic intermodal transport in rail transport increased in 2018 to over 20%, which is regarded as a favourably high level, as we have reached the lower end of the 20-25% range that is characteristic of West European countries. The increase, of a ratio exceeding the ratios recorded in earlier years, was a result of the attraction of the new METRANS terminal in Csepel: 2018 was the first full business year of the combi-terminal delivered in 2017.

Intermodal transport of goods – marked growth

Intermodal transport in Hungary has been growing steadily in the last 6 years, with a 10% increase between 2017 and 2018. The expected growth of Hungarian intermodal traffic is illustrated in the Figure 68.



68. Figure The expected growth of Hungarian intermodal traffic (TEU) (source: MLSZKSZ)

The increase resulted in part from an upswing in the overall economic output (with a 4,9 growth in GDP in 2018) and partly from an increase in the transport of goods suitable for containerisation and the increase in the quantity of goods transported through the METRANS combi-terminal in Csepel.

AHLSC data show that the combi-terminals of the logistics service providing centres in Central Hungary manage practically the entire intermodal transport taking place in Hungary. This is where international through goods trains arrive and depart from. Some 92,5% of the total domestic intermodal traffic arrived in Hungary through the three combi-terminals in Central Hungary (BILK Kombiterminál, Mahart Container Center, METRANS) in 2018. Törökbálint Kombiterminál was closed down in 2019, its traffic has been redirected to Mahart Container Center. Of the terminals in rural Hungary the traffic through one in Sopron decreased by 14% while container traffic through Záhony plummeted by 27%. The traffic through Záhony and Sopron typically involves reloading, with a small proportion of the goods being carried on locally by road.

As to the future, the ratio of intermodal transport in the total quantity of transport will increase (and this process is already under way) for the following reasons: Up to 1200 km in 24 hours (by rail, the time to delivery is somewhat longer by water), it can be well-organised, competitive rail transport costs, favourable total costs, substantially lower environmental pressures, reduced risk of migration, reduced stationery time/exhaust emission on congested roads, direct cost reduction on the part of road fleet operators: 1 locomotive driver instead of as many as 30 car drivers: fewer drivers, fewer tractors, reduced tire wear, reduced repair and maintenance, longer trailer replacement cycles.

There is a shortage of drivers in European countries and they cannot attract enough drivers even from East European countries. Therefore, operators are thinking in terms of new solutions. Particular attention is paid in designing new combi-terminals to enabling the carrying of road trailers by rail (focusing primarily on non-craneable trailers). One of the solutions for carrying non-craneable trailers is the so-called LOHR technology. The most characteristic feature of this solution is the use of rail carriages that can be turned out in the middle and a special terminal where there is no need for vertical loader machinery or high load bearing capacity outdoor pavement. Non-craneable trailers are moved onto and off rail carriages with the terminal's tractors. The total cost of constructing a terminal with horizontal loading capability is only 40-50% of that of a horizontally loaded terminal. The cost of an articulated rail carriage is 160-170% of the cost of a normal pocket wagon. Thus, on the one hand, the

terminal is cheaper to construct but on the other hand, the railway wagons are more expensive. The costs can be optimised by way of the sizing and good location of the terminal and the resulting adequate – road/rail – traffic volume.

2.1. Possible new connections

Possible directions for **road** and **rail**:
– East: Turkey, Bosnia, North-Macedonia
– South: Greek ports

- There is also an important growth potential for rail in port-hinterland traffic between the Adriatic Seaports and the northern part of Central-Eastern Europe (Hungary, Slovakia, Poland) on a flat north-south route east of the Alps. This route is served by the Amber Rail Freight Corridor, which connects and in its central section overlaps with the Orient/East-Med Rail Freight Corridor.

The development of different routes may be influenced by a possible extension of the EU in the Western Balkan region.Further, the southern direction depends also on the development of entry routes for Euro-Asian trade via Mediterranean seaports and Chinese engagement in these trade routes.

2.2. Terminating links (if any)

There are no plans to end or terminating any connection.

3. PRESENTATION OF PLANNED DEVELOPMENTS (SCREENING OF DOCUMENTS)

3.1. Identification and presentation of strategies and documents with relevance for spatial planning and infrastructure planning

In this sub-chapter we identified and examined the strategic materials which are related to the Region of Central Hungarian Region and therefore can have an influence on the CORCAP project as well, they cover transport/logistic areas, or review/analyse some area of development.
Based on the above aspects the following documents have been selected:
1. Logistics Sector Policy Strategy
2. Analysis of the Hungarian Transport, Forwarding and Logistics Market, and Mapping the Competition Situation and Competitiveness of the Transport Sector and its Subsectors, with Special Concern for Vertically Integrated Companies with International Outlook.
3. Situation Analysis of the National Transport Strategy
4. Integrated Transport Development Strategy 2007-2020 – White Book
5. National Port Development Master Plan Strategy
6. DRS 2019 Implementation - Implementation of EU macro-regional strategies
7. Current issues in transport development

3.2. Analysis of contents of identified strategies and documents

Summary: 1. Logistics Sector Policy Strategy

Author of the document	Iparfejlesztési Közalapítvány
Title of the document	Logistics Sector Policy Strategy
Date and place of publication/creation	Budapest, August 16th 2013
Language of the document	Hungarian

Category		
	Output of international projects	x
	EU publications and strategies	
	Strategies and plans of EU countries	
	Scientific articles and publications	
	Legislation	

Topic / Subject / Keyword						
watery artefacts		state aid		ocean shipping		
watery regulation		port services		bulk goods		
inland waterway transport	x	water corridor /TEN-T		container terminal		
logistics		financing		container		
intermodal transport	x	Danube	x	oversize goods		
sustainable transport	x	Rhine		RO-RO		
port infrastructure		Main		SKV		
port security		employment	x	multimodal transportation system		x
loading technology		inland navigation	x	legislation		
warehouse technology		transport cost		exceptional weather		
IT		climate change		passenger transport		

Online availability	http://www.logsped.hu/logstrat_2013.pdf

Summary:

The aim of the preparation the Logistics Sector Policy Strategy 2014-20 is to establish a strategic plan accepted by the Government and the industry, in line with the related strategies and international expectations, to manage logistics according to its economic weight. Strategic pillars aim to achieve specific goals; promotion of networking and cooperation in the sector; development of logistically relevant administrative services; modernization of education; support for logistics R & D & I, support for logistics infrastructure development and ensure sustainability of operations.

Professional and business federation organizations were also involved in the strategy-making process, as well the National Tax and Customs Board plays an important role in the implementation of the strategy in the field of simplification of customs regulations, and IFKA Industrial Development Non-profit Ltd with professional background materials, monitoring and research activities such as professional training programs for the sector. It is crucial to improve services and background activities, such as infrastructure transport networks, as a significant quantity of logistics traffic crosses borders therefore to improve competitiveness IT developments can make a significant contribution, but human resources and specialist training are essential, too. Cooperation and joint lobbying at EU level with neighbouring countries are emphasized to promote cross-border development and complementary competencies and to reap the benefits of joint development. Despite its central geographical position in terms of quality, Hungary is lagging far behind the EU average; however, the implementation of the strategic plan could significantly improve Hungary's competitiveness.

Relevance of this document to CORCAP project:

- documents including the all logistics sector development in Hungary
- development of logistics capacities, elimination of bottlenecks

Summary: 2. Analysis of the Hungarian Transport, Forwarding and Logistics Market, and Mapping the Competition Situation and Competitiveness of the Transport Sector and its Subsectors, with Special Concern for Vertically Integrated Companies with International Outlook

Author of the document	Bank Dénes, Bíró Péter, Kopik Tamás, Dr Losoncz Miklós, Dr Molnár László, Munkácsy Anna, Szenczy Dániel, Udvardi Attila
Title of the document	Analysis of the Hungarian Transport, Forwarding and Logistics Market, and Mapping the Competition Situation and Competitiveness of the Transport Sector and its Subsectors, with Special Concern for Vertically Integrated Companies with International Outlook
Date and place of publication/creation	2010
Language of the document	Hungarian

Category		
	Output of international projects	
	EU publications and strategies	
	Strategies and plans of EU countries	
	Scientific articles and publications	x
	Legislation	

Topic / Subject / Keyword					
watery artefacts		state aid		ocean shipping	
watery regulation		port services		bulk goods	
inland waterway transport		water corridor /TEN-T		container terminal	
logistics	x	financing		container	
intermodal transport		Danube		oversize goods	
sustainable transport		Rhine		RO-RO	
port infrastructure		Main		SKV	
port security		employment		multimodal transportation system	
loading technology		inland navigation		legislation	
warehouse technology		transport cost		exceptional weather	

	IT		climate change		passenger transport	
Online availability	http://gvh.hu/data/cms1000660/22_GKI_Tanulm%C3%A1ny.pdf					

Summary:

Personal interviews were conducted with 23 major carriers, freight forwarders, logistic service providers and business federation's representatives during a study commissioned by the Hungarian Competition Authority. As part of the empirical research, 300 carriers, freight forwarders and logistics service providers were searched. As the results of the qualitative and quantitative surveys and based on the international outlook it can be stated that customers are increasingly expecting a joint, integrated service from larger companies, which leads to growing of freight-forwarding-logistics services closer, regarding traffic. However, this does not necessarily mean that a single company will carry out all three activities, but rather that the three activities will be carried out by two or three more and more closely linked parties, even in a specific area. Vertically integrated services can bring many benefits to customers and to service companies, too. However, mostly larger companies are capable to provide vertically integrated services, so their competitive advantage over smaller ones can be further strengthened. On the other hand, the ability to provide this complex service is becoming less and less a competitive advantage for larger companies, as more and more of them are able doing so (if not all of them).

Relevance of this document to CORCAP project:

- documents including the logistics sector development in Hungary
- development of logistics capacities, elimination of bottlenecks

Summary: 3 Situation Analysis of the National Transport Strategy

Author of the document	TRANSPORT DEVELOPMENT COORDINATION CENTER
Title of the document	Situation Analysis of the National Transport Strategy
Date and place of publication/creation	2014
Language of the document	Hungarian

Category

Output of international projects	
EU publications and strategies	
Strategies and plans of EU countries	x
Scientific articles and publications	
Legislation	

Topic / Subject / Keyword

watery artefacts		state aid		ocean shipping	
watery regulation		port services		bulk goods	
inland waterway transport		water corridor /TEN-T		container terminal	
logistics		financing		container	
intermodal transport		Danube		oversize goods	
sustainable transport	x	Rhine		RO-RO	
port infrastructure		Main		SKV	
port security		employment		multimodal transportation system	
loading technology		inland navigation		legislation	
warehouse technology		transport cost		exceptional weather	
IT		climate change		passenger transport	

Online availability	http://www.kormany.hu/download/6/3f/51000/01_NKS_Helyzetelemzes.pdf

Summary:

The purpose of this document is to provide a thorough overview of the entire Hungarian transport sector by processing the available and transmitted data.

After presenting general issues - such as the presentation of the global economic and social situation; transport policy of the EU; important characteristics of the transport environment; climate, energy, environmental and sustainability policies of the EU; energy use of the transport sector - the document examines passenger transport and freight transport by subsectors of transport means and presents the infrastructure characteristics (networks). At examining horizontal qualities, it also enters into details of traffic safety, sustainability, intelligent technologies, electronic charging systems, aspects of transport education and research development, and further the competitiveness of domestic transport in comparison to international situation.

It introduces the factors that determine and influence the long-term and social expectations of transport. It covers also financing issues of the transport system.

In conclusion, it formulates conclusions and a vision.

Relevance of this document to CORCAP project:

- documents including the transport sector development in Hungary
- transport infrastructure development

Summary: 4. Integrated Transport Development Strategy 2007-2020

Author of the document	Ministry of Economy and Transport					
Title of the document	Integrated Transport Development Strategy 2007-2020 – White Book					
Date and place of publication/creation	2006					
Language of the document	Hungarian					
Category	Output of international projects					
	EU publications and strategies					
	Strategies and plans of EU countries	x				
	Scientific articles and publications					
	Legislation					
Topic / Subject / Keyword	waterway transport		state aid		combined transport	
	road transport		transport cost		bulk goods	
	rail transport		TEN-T		legislation	
	logistics		financing		container	
	intermodal transport		High-Speed Rail		employment	
	multimodal transportation system		railway infrastructure		IT	
	sustainable transport	x	loading technology		Strategic Environmental Assessment (SEA)	
	transportation trends		warehouse technology		climate change	
	passenger transport		goods transport			
Online availability	http://www.pestmegye.hu/images/2014/agazati_strategiak/Egyseges_Kozlekedesfejlesztesi_Strategia_2007_2020__Feher_konyv.pdf					

Summary:

The Integrated Transport Development Strategy (EKFS) is a review of the country's transport policy. Hungarian transport policy documents have already formulated long ago as a highlighted objective – particularly since the EU accession - the promotion and development of environmental-friendly modes of transport (freight and passenger transport).

The Strategy states that Hungary will encourage the creation of combined waterway traffic in inland freight transport, complemented by comprehensive logistics services and information systems. The EKFS is likely to confirm that on the VII. Trans-European main network generated by the DMR waterway system the volume of inland waterway freight transport is increasing significantly due to EU expansion. Further traffic increase can be expected by the growth in the East-West trade traffic, as well as Adriatic and Black Sea port developments generated by trade between the EU and China.

The Sustainability Assessment of the EKFS rightly states that maintaining the favourable division of work targets, initiating such processes requires complex transport policy interventions. The prevention of modal split – deterioration between modes of transport - (further strengthening of road transport) can be prevented by preserving the share of environmentally friendly modes of transport, but to ensure this share needs as well important technical, economic, organizational and legislative tasks. Only when these are realized together can the social and environmental negative impacts of transport be mitigated. Increasing the share of rail, water and combined transport is considered environmentally and socially favourable, but the expected impact is low.

Relevance of this document to CORCAP project:

- documents including the transport infrastructure and services development in Hungary
- transport infrastructure development,

Summary: 5. National Port Development Master Plan Strategy

Author of the document	Consortium of EX ANTE Consulting Ltd. and MAHART PassNave Ltd.
Title of the document	National Port Development Master Plan Strategy
Date and place of publication/creation	Budapest, 2019
Language of the document	Hungarian

Category		
	Output of international projects	
	EU publications and strategies	
	Strategies and plans of EU countries	x
	Scientific articles and publications	
	Legislation	

Topic / Subject / Keyword					
watery artefacts		state aid		ocean shipping	
watery regulation		port services	x	bulk goods	
inland waterway transport	x	water corridor /TEN-T	x	container terminal	
logistics		financing		container	
intermodal transport		Danube	x	oversize goods	
sustainable transport		Rhine		RO-RO	
port infrastructure	x	Main		SKV	
port security		employment		multimodal transportation system	
loading technology		inland navigation	x	legislation	
warehouse technology		transport cost		exceptional weather	x
IT		climate change	x	passenger transport	

Online availability	http://www.huport.eu/hu/fooldal/

Summary:

The document is a draft strategy of the National Port Development Master Plan to strengthen Danube freight transport by developing TEN-T port infrastructure. Its objective is to encourage modal shift by increasing the share of inland waterway freight and integrating it in a combined intermodal transport system, generating additional demand by developing a financing system and a sustainable regulatory environment, and developing human resources. The port development master plan comprehensively sets out directions for the development of the Danube port infrastructure and port services, as well as for the entire sector by 2030. Following a comprehensive analysis of the situation, strategic planning fits in with existing facilities and capabilities, contributes to transport development and economic policy goals, and ensures feasibility, effectiveness and economy. I order to increase and handle growing quantities in port traffic an adequate road and rail accessibility is needed, but it is necessary to ensure the navigability of the waterway. Growth can also be boosted by working closely with industries and developing industrial space within the port area. The basic technical and technological modernization of the craft and the digitalisation of information systems is essential for an efficient service. To enable port terminals to be able to connect to a cross-border freight transport system, it is necessary to set up an extensive connection to international port information systems. Sustainable ports can be evolved if the development plan considers the effects of climate change and extreme weather, and not only physical hazards but also economic risks, develops a skilled workforce, and creates effective and long-term waste management regulations. As the entire Hungarian section of the Danube River is part of the TEN-T core network, its priority development is not only in the interest of Hungary but also of the European Community.

Relevance of this document to CORCAP project:

- documents including the water transport infrastructure and services development in Hungary
- case studies and plans have also been made for the Freeport of Budapest
- promotion of multimodality is also an objective

Summary: 6. DRS 2019 Implementation - Implementation of EU macro-regional strategies

Author of the document	EUSDR NCs
Title of the document	DRS 2019 Implementation - Implementation of EU macro-regional strategies
Date and place of publication/creation	Brussels 29.01.2019
Language of the document	English
Category	Output of international projects: EU publications and strategies: x Strategies and plans of EU countries: Scientific articles and publications: Legislation:

Topic / Subject / Keyword					
watery artefacts		state aid		ocean shipping	
watery regulation		port services		bulk goods	
inland waterway transport		water corridor /TEN-T		container terminal	
logistics		financing		container	
intermodal transport		Danube		oversize goods	
sustainable transport	x	Rhine		RO-RO	
port infrastructure	x	Main		SKV	
port security		employment		multimodal transportation system	
loading technology		inland navigation		legislation	x
warehouse technology		transport cost		exceptional weather	
IT		climate change		passenger transport	

Online availability	https://danube-region.eu/wp-content/uploads/2019/09/EUSDR_Consolidated-Input-Document_AP-Revision_2019_DSP_v1.pdf

	https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=SWD:2019:006:FIN https://eur-lex.europa.eu/legal-content/HU/TXT/PDF/?uri=CELEX:52013DC0295&from=EN

Summary:

The report on the implementation of previously adopted macro-regional strategies, covering 19 EU Member States and 8 non-EU countries, provides an integrated framework for the implementation of common tasks and is an important tool for optimizing the use of existing financial resources.

However, there is a need for further refinement of the strategies contained in the report, which would enhance the coherence between EU and national policies and funding programs. The four main areas of the macro-regional strategy are the Alps, the Baltic Sea region, the Adriatic and Ionian region and the Danube region. All regions work on programs that meet their capabilities and expectations, but preserving environmental resources, public goods is a common priority of all four macro-regional strategies, and its main objective is to improve economic well-being.

Non-EU countries participate on an equal condition level with EU Member States in the elaboration of tasks, the EU Strategy, which greatly facilitates their integration into the EU. Several calls for proposals have been published in the implementation reports of the European Structural and Investment Funds.

Discussions on the future financial and regulatory framework and programs in support of it could strengthen the joint commitment to commonly agreed priorities for macro-regional strategies, optimizing its added value and enabling them to fully exploit their potential. However, to overcome the gap between macro-regional strategies and funding opportunities will indicate further challenges.

The general objective is to improve the connections of infrastructure, systems and people within the Danube region and with the rest of Europe. Its main points are the development of mobility and multimodality, particularly in road, rail and air links, as well as in inland navigation; encouraging the use of sustainable energy – in fields of energy infrastructure, markets and clean energy - and fostering interconnection through culture and tourism.

In financing the focus is on transport, which is essential for other development objectives and is supported by other EU programs such as TEN-T and ERDF. It is important to improve transport based on coordinated and integrated development concepts, coupled with the development and use of appropriate, ecologically sustainable technical solutions, which can enhance the integration of the Danube River as a cost-effective corridor that effectively ensures sustainable regional development and mobility.

The EU is committed to promoting less energy intensive, cleaner and safer modes of transport. Inland waterway transport can play a key role in achieving this objective. Specific programs are needed to fully exploit and increase the market potential for inland navigation.

Improvements in accessibility and connectivity can be achieved by implementing prioritised rail and road projects, by implementing rail freight corridors as part of European rail freight transport, and in particular by building two new bridges on the Danube.

Policies to support the use of renewable energy already exist in the region but need to be further encouraged to reach the target of 20% by 2020 and to improve security of supply.

Relevance of this document to CORCAP project:

- documents including the water transport infrastructure and services development in Danube.

Summary: 7. Current issues in transport development

Author of the document	Dr. László Mosóczi, State Secretary for Transport					
Title of the document	Current issues in transport development					
Date and place of publication/creation	Siófok, 14th May 2019					
Language of the document	Hungarian					
Category	Output of international projects					
	EU publications and strategies					
	Strategies and plans of EU countries					
	Scientific articles and publications			x		
	Legislation					
Topic / Subject / Keyword	watery artefacts		state aid		ocean shipping	
	watery regulation		port services		bulk goods	
	inland waterway transport	x	water corridor /TEN-T		container terminal	
	logistics		financing		container	
	intermodal transport		Danube		oversize goods	
	sustainable transport		Rhine		RO-RO	
	port infrastructure		Main		SKV	
	port security		employment		multimodal transportation system	
	loading technology		inland navigation		legislation	
	warehouse technology		transport cost		exceptional weather	
	IT		climate change		passenger transport	
Online availability	http://www.fomterv.hu/mmk/sites/default/files/Siofok-2019/01_mosoczi_laszlo_mmk_kozlfejlkonf_20190514_A.pdf					

Summary:

The presentation summarizes completed, ongoing and planned transport development works until 2023.

Main topics are the development of road and railway infrastructure in order to increase the competitiveness of the railway, the establishment of intermodal hubs, the development of water transport and navigability, the construction of airport infrastructure.

Modernization of the railway line is one of the most important issues, in order to ensure the high quality of passenger and freight transport, the construction of modern railway interlocking equipment providing interoperability with the European Union, the construction of additional lines and the preparation of high-speed railways.

The development of waterway transport will be a priority for the realization of projects, such as the development and modernization of port capacity-growing infrastructure and the creation of barrier-free and predictable water transport facilities.

In the framework of the Complex Road Reconstruction Program and the Hungarian Village Program, the reconstruction of side roads and local roads are mentioned, such as bicycle-way developments, which are important factors for the tourism as well.

The material mentions the education and examination system and its vision, innovative solutions for the creation of a railway test track - railway technical inspection centres and a school bus network.

Relevance of this document to CORCAP project:

- increasing transport capacity - rail, road

3.3. Presentation of completed and ongoing projects and actions

THE EXTENSION OF THE PREPARATION FOR THE DEVELOPMENT OF THE HUNGARIAN TEN-T INLAND WATERWAY

The development of the inland waterway on the Hungarian section of the Danube between Sap (SK)-Szob (HU) incl. the Győr-Sopron County side of the river, in the places of intervention identified during the planning process. The project involves the preparation for the development of the inner waterways along the full Hungarian section of the Danube. In its present condition the Danube is unable to provide long-term and reliable transport conditions; in several places' restrictions of depth and/or width have to be considered, which impede the utilisation of the waterway. Beyond fulfilling the obligations deriving from international agreements, another strategic aim is to improve the conditions for navigability in order to increase the role of water transport within the transport sector (to eliminate bottleneck situations).

The Danube-Shipping Consortium (members: UTIBER Public Road Investment Company, Viziterv Consult Kft, Budapest University of Technology and Economics) signed a Planning Contract on 15th December 2017 for carrying out the complex planning tasks.

The grant contract for financing the project was signed on 10th April 2018 by NFM (Ministry of National Development), NIF Zrt. (National Infrastructure Development Company) and OVF (General Directorate of Water Management).

The investment will be financed by EU and domestic sources, with the support of CEF (Connecting Europe Facility).

THE EXTENSION OF THE RAJKA - HUNGARIAN BORDER SECTION OF M15 – M1 MOTORWAY

The development of the 2x1-lane M15 road into a 2x2-lane (dual carriageway) motorway on the section between motorway M1-Rajka-Hungarian border in Győr-Moson-Sopron County. During the implementation of the project the accessibility of the existing border crossing point has to be carried out as well.

The investment will be financed by EU and domestic sources, with the support of CEF (Connecting Europe Facility).

MODERNISATION OF THE RAILWAY SECTION HEGYESHALOM – RAJKA

This railway line belongs to GySEV and operates as a corridor between the Hungarian and Slovakian rail network. This line is a barrier on the CORCAP corridor because of the single track and low speed (80 km/h).

The GYSEV plans to modernise the line, with the maximum speed up to 120 km/h. Because of this the capacity of the section will be almost doubled.

At present it is in the preparatory phase – planning.

4. SPATIAL ASPECTS OF NODES IN TRANSNATIONAL TRANSPORT

4.1. Needs and requirements for improvement of node functions

Based on the present survey and the earlier documents the following node functions have to be developed:

Road transport

- a level playing field between transport modes and/or government incentives are vital for the change of transport modes,
- the existing combined transport connections do not fully cover the market needs,
- door to door services that are value for money,
- there are not enough parking places, road construction works slow down traffic
- the extension of the road network,
- lack of labour force, the clients have no need for combined transport as using merely road transport is faster and more convenient, combined transport does not involve enough price advantage to counterbalance its negative aspects
- mobility package, different rules of law by each country,
- the expectations of road haulage companies against railway transportation • flexibility, punctuality, as car companies do not tolerate insecurity and delay,
- long-term reliable services with shorter delivery times,

Rail transport

- lack of interoperability on the borders and the infrastructure between the railway lines,
- the regulations are not harmonized (protection carriage, change of braking modes, etc.),
- lack of labour force,
- railway infrastructure related problems (slow signals, insufficient axle load, capacity limitations, low speed on the tracks, etc.)

Combi terminals

- utilisation – over 85%,
- limited extension possibilities,
- adaptation of terminals to new infrastructure standards (e.g. train lengths) needed
- serious problems in road and rail transport as a result of concentrated traffic in Budapest

Water transport

- correspondent water level
- encourage change of mode
- additional demand generates
- financing system design
- human resources development
- Creating a sustainable regulatory environment
- environmental impact reduction

4.2. Process of node development (analysis of the processual dimension)

At present a dialogue and cooperation is going on between the Hungarian logistic profession and the Hungarian government in order to eliminate the above mentioned (and other) problems.
In the first phase the problems, which the profession/sector finds to be the most burning, will be identified, which is then followed by ranking the issues -

1. priority will be given to those issues which can be solved within a short time and produce attractive results (in the majority of the cases this means the modernisation of different outdated regulation systems)
2. the issues needing lengthy planning and preparations and proceeding slowly will go further down on the list,
3. to improve the efficiency of the authorities and control systems of rail and road traffic.

At present we are in the phase of ranking the issues.

Expected final outcome: end of January 2020.

4.3. Networking activities

1. National Logistic Alliance initiative was started in 2017 at the initiative of the Association of Hungarian Logistic Service Centres, which is a formation including 11 professional organisations aiming at cooperation, but offers no legal representation. (Magyarországi Logisztikai Szolgáltató Központok Szövetsége – MLSZKSZ, Fuvarozó Vállalkozók Országos Szövetsége – FUVOSZ, Közúti Közlekedési Vállalkozások Szövetsége – KKVSZ, Magyar Hajózási Országos Szövetség – MAHOSZ, Magyarországi Dunai Kikötők Szövetsége – MDKSZ, Magyar Szállítmányozók Szövetsége – MSZSZ , Nagyvállalatok Logisztikai Vezetőinek Klubja – NLVK , Magánvállalkozók Nemzeti Fuvarozó Ipartestülete – NiT Hungary, Magyar Vámügyi Szövetség – MVSZ, Magyar Közúti Fuvarozók Egyesülete – MKFE, Magyar Vasúti Egyesület – HUNGRAIL) The purpose of this cooperation is to identify the problematic areas of the logistic sector in Hungary and to offer good solutions, which can significantly increase the logistic competitiveness of the country. The Hungarian Government also addresses their documents which are updated every year.

2. Logistic Round Table – the cooperation of logistic professional organisations on a voluntary basis, with the goal to find solutions for professional issues. Mamber of the cooperation: Magyarországi Logisztikai Szolgáltató Központok Szövetsége – MLSZKSZ, Magyar Hajózási Országos Szövetség – MAHOSZ, Magyar Szállítmányozók Szövetsége – MSZSZ , Nagyvállalatok Logisztikai Vezetőinek Klubja – NLVK , Magyar Vámügyi Szövetség – MVSZ, Magyar Logisztikai Egyesület – MLE, Magyar Logisztikai Beszerzési és Készletezési Társaság - MLBKT).

3. Hungarian Federation of Danube Ports (HFIP): It was founded on May 25, 2012 with the aim of providing independent representation of Hungarian ports, collecting and providing professional information for its members, organizing professional days and conferences, implementing co-ordinated training for the employees of the member organisations and developing general service conditions.

4. The establishment of EU Rail Freight Corridors (RFCs) set up since 2013 created permanent platforms for railway infrastructure managers and customers to address challenges in international rail freight. Working Groups for different topics have been set up and each RFC includes Advisory Groups for Railway Undertakings and Terminal Managers (RAG-TAG). The further development of the RFCs will contribute to make cross-border rail freight smoother, more efficient and more competitive. The Győr-Moson-Sopron and Burgenland region is concerned by four RFCs: the Orient/East-Med RFC, the Amber RFC, the Rhine-Danube RFC and (in its periphery) the Baltic-Adriatic RFC. GYSEV is leader of the Amber RFC and active Member of other RFCs.

5. Forum of European Road Safety Research Institutes (FERSI): It was set up in 1991 with the aim of promoting cooperation between European road safety research institutes. The main purpose of such cooperation is to continue existing joint research work and to start new international ones. Its mission is to identify road safety problems across Europe and to find the most effective solutions to these problems at national and international level.

5. PRESENTATION OF NECESSARY ADDITIONAL DEVELOPMENTS

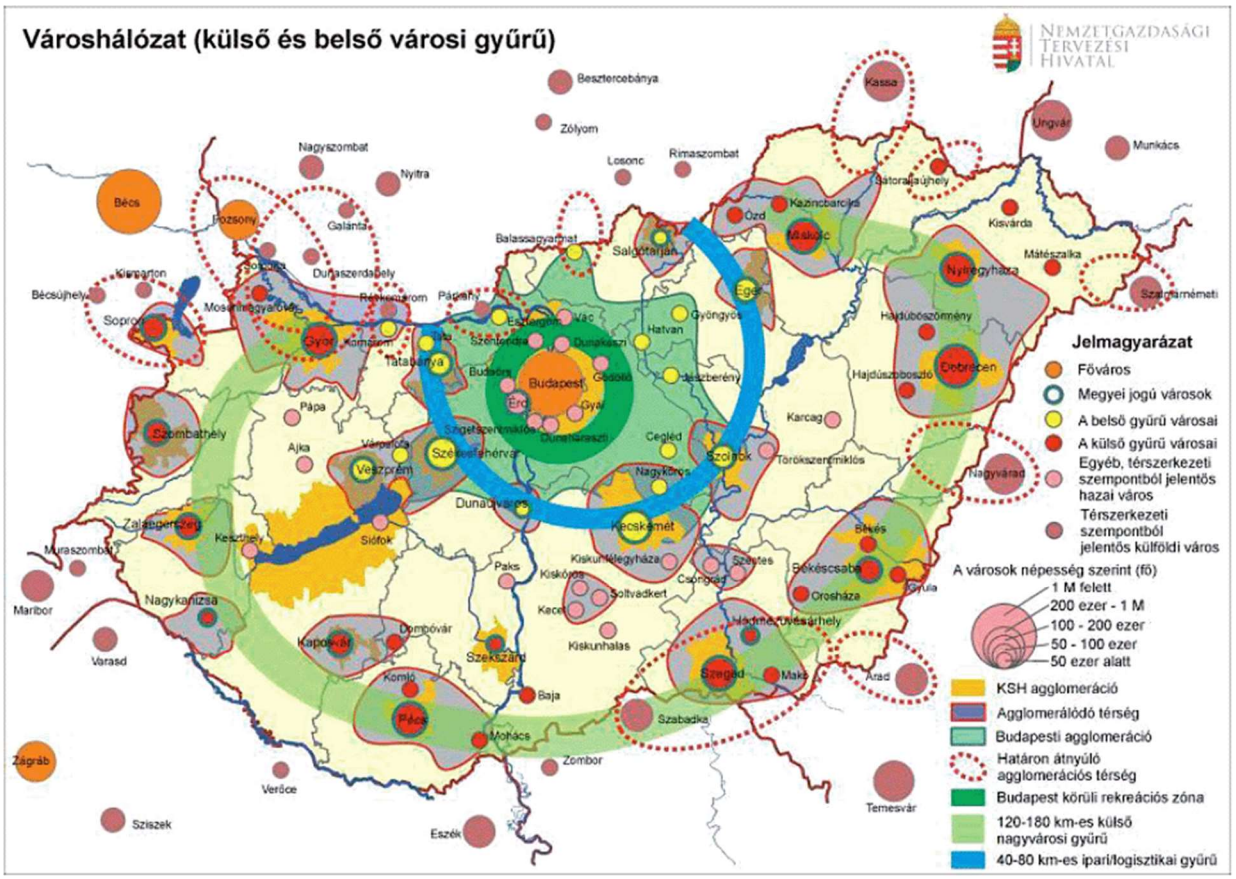
5.1. Identification of regional challenges and regional needs

Regional complementary developments are investments that are not closely related to the subject of the project, but when completed may have an impact on the project itself.
Such challenges include:

- Increasing the throughput of Sopron as a railway node: the investment primarily concerns passenger transport, but as a result there is also an opportunity to increase capacity in freight transport
- Speeding up rail freight transport: a general demand, as increasing rail competitiveness is a necessary complement to the developments in CORCAP
- Ensuring the navigability of the Danube for most of the year
- Digitalization in the logistic centres (and ports).

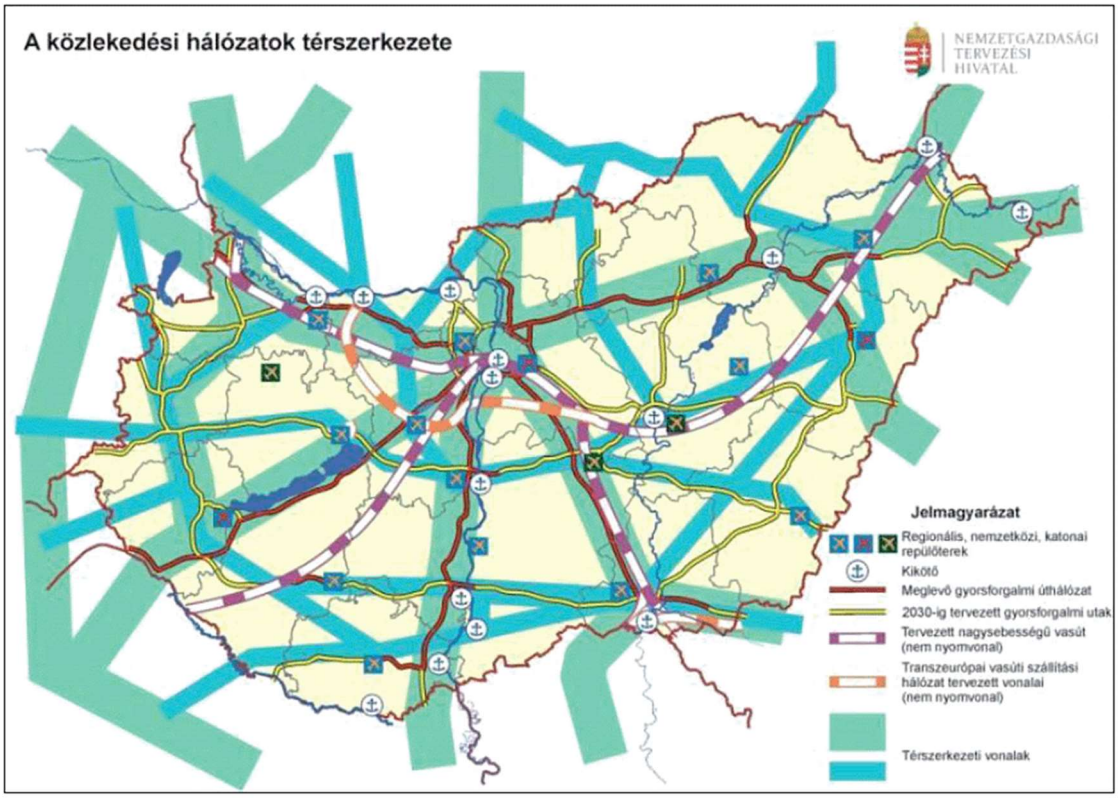
5.2. Maps with possible improvements

The following maps show the possible improvements in Hungary (Figure 69), per settlement and the possible transport improvements (Figure 70). The maps are taken from the strategic document: National Development 2030.



69. Figure Possible improvements in Hungary

Source: https://net.jogtar.hu/jogszabaly?docid=a14h0001.ogy&txtreferer=a1600007.nfm



70. Figure Planned transport improvements

Source: https://net.jogtar.hu/jogszabaly?docid=a14h0001.ogy&txtreferer=a1600007.nfm

5.3. High speed lines for freight trains

Rail freight corridors are already dedicated to facilitating freight trains, currently prioritizing freight trains in the order of trains. In the future, it may be necessary to develop railway lines using only freight trains, which could significantly increase the speed and thus the competitiveness of freight transport. Currently in Hungary, only the Budapest - Hegyeshalom line can be operated at 160 km / h, but there are plans to increase the speed on other lines as well. Such lines:

- Budapest – Kelebia
- Budapest – Szolnok – Békéscsaba – Lőkösháza
- Budapest – Debrecen – Nyíregyháza – Záhony

These railway lines lead to the most significant transport directions towards Serbia, Romania and Ukraine. While for the majority of the rail freight market higher maximum speeds are likely not crucial, there might be certain market segments for time-sensitive goods, which could benefit from such higher speeds.

The introduction of increased speed is facilitated by ETCS level II. Freight trains can achieve this speed if both wagons and engines are capable of traveling at this speed and the engines are able to communicate with ETCS.

5.4. Presentation of future capacity utilization and modal shift

Combined freight traffic is currently experiencing a 3-6% annual increase in turnover. However, the available capacities also allow a 10% annual increase in traffic. Following the introduction of the state incentive scheme for combined transport in 2022, the share of combined transport in the freight market cake is expected to reach 20%. This target could be reached by 2030, which is also a governmental expectation.

5.5. Business model of new lines / developments

The cost of investing in rail networks and combi terminals is high, the rate of return is very low, and there are even cases where a return on investment is not possible. Possibilities to raise private capital for such investments are very limited. Therefore, such investments will to a high degree rely on public funding.

5.6. Improvement of regional and cross-border accessibility (opportunities provided by the rail sector)

The inclusion of traffic is a transport policy decision, and the rebuilding of tracks is already a financial issue.

From the point of view of CORCAP, i.a. the Ebenfurth – Sopron – Győr line and the Komárom - Komárno railway crossing should be developed. Although the link already exists, the level of the track is very low, it is necessary to renovate it in the joint investment of the Hungarian and Slovakian states.

5.7. Possible chronology of developments

Among the most important railway investments in the region would be

- the reconstruction of the Hegyeshalom – Rajka line section
- the upgrading of the Sopron node, including its terminal
- the triangle tracks in Ebenfurth and Zalaszentiván
- the implementation of 740m train length and 22,5 t axle-load on the entire Ebenfurth – Sopron – Győr line and on the Zalaszentiván – Szombathely – Csorna – Hegyeshalom – Bratislava line
- the double-tracking of the Sopron – Győr line
- the upgrading of the Komárom - Komárno line, incl possible triangle tracks

5.8. Possible pilot projects

Possible pilot projects will be identified in the framework of the CORCAP-Deliverable D.T2.3.8 (Application of a system approach for improvements for rail freight on the Brno – Budapest section of the OEM corridor).

6. STAKEHOLDER ANALYSIS AND STAKEHOLDER INVOLVEMENT

6.1. Identification of relevant stakeholders

6.1.1. For the implementation of pilot actions

Level of influence and power	Keep satisfied	Key players
+	1. Ministry for Innovation and Technology 2. GySEV Infra 3. Railway Undertakings using the lines concerned	1. GySEV/GySEV Cargo 2. …
	Monitoring	Keep informed
-	1. International logistic centres 2. … 3. …	1. MÁV 2. VPE Kft 3. RFC OEM, RFC AMBER

- + Level of interest and commitment

6.1.2. For the elaboration of Corridor Capitalisation Plans

Level of influence and power	Level of interest and commitment: -	Level of interest and commitment: +
+	**Keep satisfied** 1. Ministry for Innovation and Technology 2. GySEV Infra 3. MÁV 4. ÖBB Infra 5. Region Burgenlnad 6. Győr-Moson-Sopron Megye Közgyűlése	**Key players** 4. GySEV Cargo 5. Ralicargo Austria
-	**Monitoring** 1. International logistic centres 2. … 3. …	**Keep informed** 1. MÁV 2. VPE Kft 3. City of Sopron 4. KTI 5. RFC OEM, RFC AMBER

6.2. Description of the approach towards stakeholder involvement during the elaboration of the regional analyse of challenges and needs

The Hungarian Logistics Service Centres Association (MLSZKSZ) plays a key role in the Hungarian logistics sector, establishing and sharing best practices and representing major stakeholders. Members include companies that transport freight by road, rail and water. Most of them operate in the central region of the country, but many are headquartered in Western Hungary. The association regularly prepares and publishes market analyses, surveys, and reports about logistics, transport, freight forwarding and intermodal transport.

Therefore, MLSZKSZ was selected to carry out CORCAP project surveys for road, rail and intermodal transport, among its members and business partners, using the questionnaire prepared by KTI.

Willingness to participate in questionnaire surveys is very low, as companies they lack extra HR resources, and only a few have structured data collection schemes. Therefore, the CORCAP survey uses a multiple-choice online questionnaire with only a few questions, and respondents hardly have to write anything. Participation is encouraged by giving survey rewards for completed and returned questionnaires.

The questionnaire prepared by KTI was sent to 36 road transport companies with headquarters and sites in central Hungary (Budapest region) and Western Hungary (Győr-Moson-Sopron-Burgenland region). From the

36 road transport companies, 19 returned properly completed questionnaires, which is a 53 percent response rate.

The questionnaire prepared by KTI was sent to 15 rail transport companies with headquarters and sites in central Hungary (Budapest region) and Western Hungary (Győr-Moson-Sopron-Burgenland region).

7. ANNEXES

7.1. Maps

Maps are included as a figure in the text field.

7.2. Tables