



**Sustainable Transport and Tourism
along the Danube**
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**STATUS QUO ANALYSIS / STATE OF THE ART
EXECUTIVE SUMMARY
GYŐR-MOSON-SOPRON COUNTY**



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Nyugat-Pannon Terület- és Településfejlesztési Közhasznú
Nonprofit Kft.



Jointly for our common future

Executive Summary

0. Introduction

County Győr-Moson-Sopron is situated in the north-west of Hungary being integral part of the West Trans-Danubian Region. The county has borders to two European Union countries: Austria on the west and Slovakia on the north. Győr-Moson-Sopron is accepted as one of the most developed counties in Hungary regarding the economy.

Regarding County Győr-Moson-Sopron the most important touristic hotspot is the whole area (27 settlements) of the Fertő-Hanság National Park being one of the world heritage areas as core area and the neighbouring areas¹ that have intensive relationship with the given area are regarded as a Puffer zone.

1. Status Quo Analysis

Transportation

The evaluated area is situated in a frequented zone regarding both the traffic and transportation as well as the international transportation centres. Regarding public transport the highway No. M1 is very important serving as part of the pan-European transport channel No. IV, which connects the western part of Europe with the Balkan area. There is another Helsinki channel in the area marking the water transportation way of the Danube with the number VII. Regarding the railways the most important is the railway line No. I (Budapest-Hegyeshalom- Rajka), both its cargo and public transportation values are high. The touristic hotspot is situated in the neighbourhood of three airports in three different capital cities, thus by this way of transport it is easily accessible. (Vienna-Schwechat, Pozsony/Bratislava- Letisko, Budapest- Ferihegy). All these facts determine County Győr-Moson-Sopron's role as a gate between Western and Eastern Europe, and the transportation channels listed above have not only national but also international importance. These are the „A” transport centres.

The transport centres „B” are also important, but mainly on regional level. The road No. 84 (regarding the accessibility of the core area from the direction of Austria it plays an important role), the main roads No. 85 and 86 (their load has almost doubled for the past 10 years), and the motor way No. M15 going to Rajka can be mentioned. Regarding the railway lines, the Sopron-Győr, and the Sopron-Szombathely lines are important on regional level, and which are managed by the GySEV Plc. The airport in Pér has a regional importance, and due to the developments (wider and longer run paths, the developments of the buildings) financed by Audi, the airport can accept even Airbus 320 and Boeing 737 flights.² This airport has high development potentials.

Naturally these roads are important not only for the economy of the area, but also for its tourism.

Regarding the railway lines Győr plays the central role, which has a connection to Austria, mainly to Vienna and Budapest (Budapest- Hegyeshalom- Vienna main railway line No. I.). Csorna and Sopron are also important interchanges; the headquarters of the Győr- Sopron- Ebenfurth railway company is located in the latter. There is also a quite important logistic centre in Sopron. The Sopron-Győr, and the Sopron-Szombathely railway lines are also important. These lines are situated parallel with the main roads No. 84 and 85. A major niche is the missing railway connection between Győr and Pozsony / Bratislava.

¹ Sopron-Fertődi Micro-region, Kapuvár-Beledi Micro-region, Csornai Micro-region, Mosonmagyaróvári Micro-region, Győri Micro-region. Due to the great distances the other two micro-regions of the county, the Téti and the Pannonhalmi Micro-region have not become the parts of the puffer zone.

²<http://gyor.hir24.hu/gyor/2012/10/26/boeing-737-es-repulogep-is-erkezhet-a-peri-repuloterre/>

The coach service in the county is supplied by Kisalföld Volán Plc., thus every settlement is connected, available. The availability of the settlements close to the cities is good; however the availability of the small settlements on the peripheral areas should be developed. As part of the multimodality the Kisalföld Volán and the railway companies of the county try to harmonise the timetables of the coaches and the trains, which is encouraged by the fusion of the regional Volán companies.

The bicycle tourism shows increasing tendencies in the county. County Győr-Moson-Sopron has a favourable situation regarding the bicycle lines as the Eurovelo 6 bicycle road is situated on the northern part of the county, thus according to the estimations about 1.5 million bikers enter the border at the county.

The most popular bicycle road is located along the coastline of Lake Fertő, where there are several facilities for bikers, resting places, and other additional services, and developments are expected in the future as well³. The length of the already existing lines around the lake (excluding the part between Balf and Fertőrákos) is 130 km, but with the different side roads it can be even 350 km. There are information boards besides the bicycle roads as well as services for the bikers. In the framework of the Fertő-Hanság Mobil project the city of Kapuvár was connected to the bicycle road system around the Lake Fertő, and even a bridge was constructed for the bikers close to the Austrian border.

Public transport on water in the studied area, in County Győr-Moson-Sopron is only available on the Lake Fertő, and the Danube. The latter is the Helsinki corridor No. VII., which is part of the water transport line on Danube, Main and Rheine crossing Europe. Boating on the Danube is mainly touristic attraction; however the boat shuttle between Vienna and Pozsony / Bratislava (Twin City) has proved to be needed as a means of the everyday public transport.

There are no sites that would cover the information regarding all the traffic possibilities; however there are web-sites that supply the passengers with information on a sufficient way. The Mobility Centre Sopron⁴ created within the framework of the GreMo project may supply with the most complex information, „not only the sale of the international tickets is their service but also they give competent answers about all the questions regarding mobility, both in Hungarian and in German.” Moreover there are leaflets and brochures introducing the touristic sites around and in Sopron. Also within the framework of the GreMo project a mutual Austrian Hungarian information system has been created under the flag of the mobility, which is available in three languages.

Bicycle route planners are available in Hungary as well, but in several cases they are not updated, they should be maintained. Although the information is not complex for the bikers (e.g. accommodation, bicycle services, etc.) information for the bikers is available on other sites. <http://www.utvonalterv.hu/>

Tourism

County Győr-Moson-Sopron and the focus area that is currently being introduced do not have any special touristic brand. Their products are offered on regional level (NUTS II), and West Trans-Danubia is introduced as the ‘region supplying forests’⁵, where there is an increased attention paid to the offers and destinations of the county researched in our study. (see later the chapter about Touristic offers).

The main touristic statistic data of County Győr-Moson-Sopron and the focus area i. e. the Fertő-Hanság National Park and the related settlements are introduced. The data of the years 2007 and 2011 are compared,

³http://www.kisalfold.hu/soproni_hirek/450_millio_forintbol_fejlesztenek_a_ferto_menti_kerekparutat/2307857/

http://www.kisalfold.hu/soproni_hirek/allami_forrasbol_fejlesztik_a_ferto-to_koruli_kerekparutat/2314409/

⁴<http://www.b-mobil.info/hu//sopron-gysev>

⁵<http://www.itthon.hu/nyugatdunantul>

thus we have evaluated the recent processes. The number of the spent nights in the hotels has increased in both the county and the focus area despite the economic crises. In the years between 2007 and 2011 the number of the spent nights in the hotels increased more in the county, however we have to add, that more than the half of the spent nights (58%) are spent in the 27 settlements of the focus area in County Győr-Moson-Sopron (183 settlements).

Area	The number of the spent nights in the hotels 2007	The number of the spent nights in the hotels 2011	The rate of the changes in the number of the spent nights in the hotels
County Győr-Moson-Sopron	915 827	1 071 722	+17%
Focus area (27 Settlement)	541 280	618 444	+14%

In the focus area Sopron has the highest number of spent nights as the biggest city of the area, (467 197), which is followed by Hegykő (96 956) and Csorna (15 994). The dominance of Sopron and Hegykő can also be seen in the number of the available accommodation as well as in the number of the visitors.

If we compare it to the Austrian area of the coastline of Lake Fertő, the differences are significant as well. In the NeusiedlSee Region the number of the spent nights in the hotels (1 439 403) is more than the double of the Hungarian data. There are huge differences in the distribution of the number of the spent nights in the hotels, since while in Hungary only 5 settlements has 10 000 of the number of spent nights in the hotels on the Austrian side this number is 19 settlements. In both the Austrian and the Hungarian areas of the focus area the number of the spent nights in the hotels in Sopron has got the highest value (61 390 people, 467 197 nights spent in the hotels), the second in the row is Podersdorf am See with the population of only 2000 people (378 877 nights spent in the hotels). Comparing the rate of the internal customers we can see, that on the Austrian focus area their rate is higher (72%), than in County Győr-Moson-Sopron (60%).

The chosen focus area is a considerable touristic destination in the country, which is introduced as highly important by all touristic information systems.

The main touristic offers of the focus area:

- The Fertő/Neusiedlersee area, world heritage, which was listed as a world heritage by the UNESCO in 2001.
- The Fertő-Hanság National Park, which offers interesting programmes for the tourists throughout the whole year (canoeing on the canals, bird watching).
- The stone mine in Fertőrákos: it is both a natural and cultural value as it is the venue of concerts and theatre performances in the summer.
- Sopron: its fabulous city centre appeal thousands of tourists from all over the world. Sopron is known as the 'City of Loyalty' as well as the capital of 'kékfrankosok'.
- Wine, bicycle and water tourism. (Sopron, Fertőrákos).
- Health, spa and adventure bath tourism (Balf, Hegykő).
- Common cross-border festival tourism (Haydn and Liszt festivals).
- Conference tourism, its main destination is the city of Sopron.
- International music festival in the city of Sopron (VOLT festival).

SWOT-analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Good situational energies, 'gate' between eastern and western Europe. • The continuous communication between the different players of the public transport and the harmonisation of the different transport means have started. • The development of the bicycle infrastructure elements and services along the coastline of Lake Fertő. • The foundation of the Mobility Center Sopron, which supplies touristic transport information • Variable touristic features: thermal and spa water springs, natural values, cultural heritage, events, lakes, rivers and creeks, bicycle roads, vineyards • There are world heritage venues in the county (Fertőtáj, the abbey in Pannonhalma), and a new one is formulated (the Roman limes) • The central role of the focus area in the tourism of the county. • The increasing number of visitors in the county and the focus area. • The importance of the ETE projects in County Győr-Moson-Sopron regarding tourism and mobility. • Unique solutions to the unique, area specific issues. 	<ul style="list-style-type: none"> • The bad condition of the old roads crossing the border. The dividing role of the Danube (the lack of the bridges, ferries). • Overloaded main roads in bad condition (e.g. road No. 86), and lower level roads badly constructed and maintained. The planned developments of the motor ways, the railway system, the water traffic (ports, water lines) have been delayed. • The settlements at the border are badly connected to the main roads. • The bad condition and the small amount of the existing bicycle infrastructure elements and at some areas the total missing of the system • The background infrastructure of the bicycle tourism is just roughly constructed, it lacks the networking organisation. • The harmonisation of the touristic products and the targeted marketing activities are still missing. • There are huge differences in the number of the visitors at Lake Fertő and the Fertő-Hanság/Neusiedl See National Park Hungarian and Austrian sides (there are more visitors on the Austrian side) • The missing common touristic brand of the area. • There are too many development documents and studies, between which there is no cohesion • The operation of the Hungarian participants of the ETE programmes is uncertain due to the several structural changes, there are financial problems in several cases, and they cannot become the owners of the project. • Quite often the transport projects aim at the development of the soft elements, while the development of the hard elements would be necessary. • TDM organisations cannot be found everywhere in the country. • There are no individual development sources; the investments are only possible by the usage of the European Union sources.
Opportunities	Threats
<ul style="list-style-type: none"> • The foundation of the CETC ROUTE No. 65 road • The demand of the individuals and the communities 	<ul style="list-style-type: none"> • The deteriorating conditions of the public roads, the lack of the maintenance

for public transport is increasing.

- Start of regular bus shuttles between the settlements and the settlement groups (e.g. Sopron and its surroundings)
- The creation of intermodal interchanges
- In case of a possible transport association the harmonisation of the timetables would be encouraged and it could play a coordinating role in the public transport.
- The construction of the Iron Curtain Trail (road EuroVelo No. 13) with sections in the county.
- The construction of the bicycle roads linking the Fertő-Hanság National Park and the Szigetköz.
- The increasing national and international demand for the cultural and eco-touristic products and services produced upon unique, local values
- With the increasing health consciousness the demand for the preventive, active touristic products is increasing as well.
- The development of the bicycle tourism due to the increased number of available services.
- The development of a development strategy in line with the national goals, and the local features of the county.
- By the foundation of Transport Associations the organisation of the transport could be more efficient.
- The realisation of a common fare system in the public transport, the availability of the e-ticket network.

- The necessary bicycle road and infrastructure constructions have not been completed, the existing elements deteriorate quickly.
- Due to the missing infrastructural elements the area loses its competitiveness in the bicycle tourism segment.
- The global decrease in the tourism (The number of the visitors) decreases the international demands on the area of tourism, moreover it increases the competitiveness in the international markets.
- Postponing the renovation of the existing, but deteriorating bicycle and water infrastructure
- The development plans of the counties are not in line with the real demands.
- De to the great differences in the infrastructure (mainly in the direction of Austria) the number of the cooperation in the cross-border programmes is decreasing.
- In the years of 2014-2020 the European Union resources will not subsidy the renovation of the lower level roads.
- Tourism will not be present among the thematic development areas of the 2014 and 2020 time period.