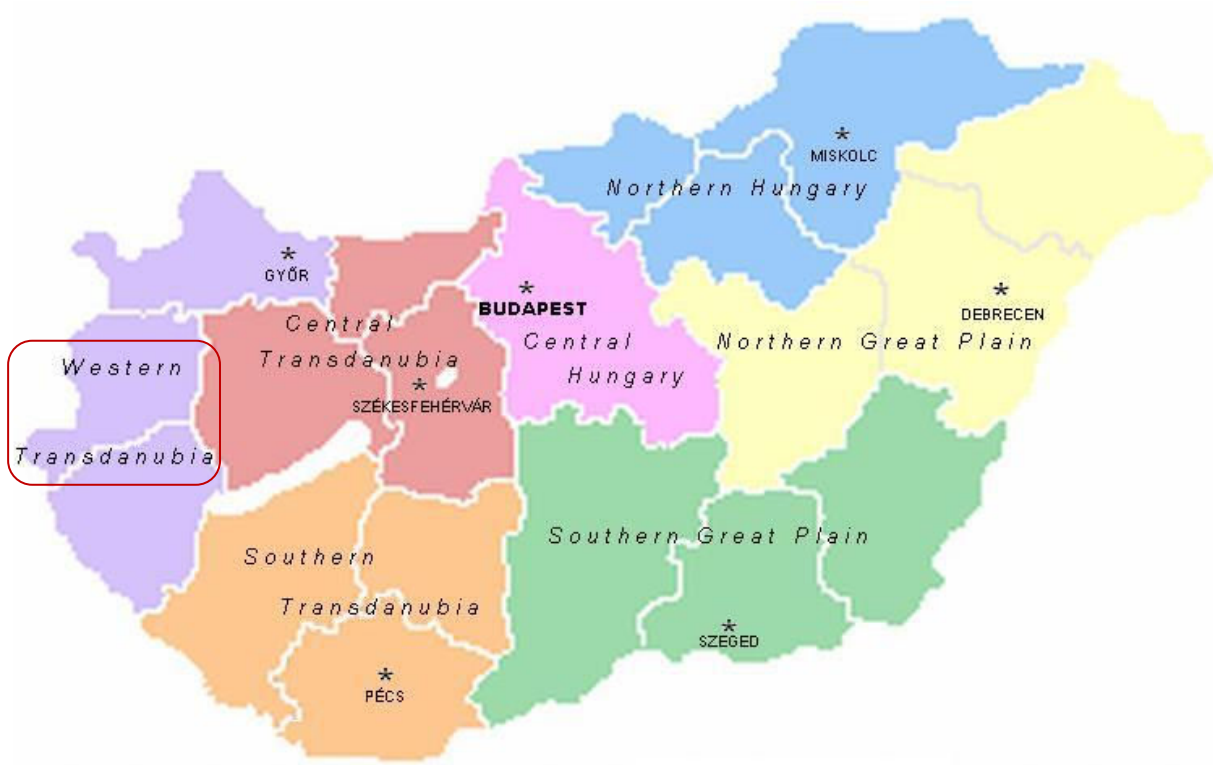


## Western Transdanubia



**Budapest, November 2008**

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## **1. Western Transdanubia – “The region of initiatives”**

The West-Transdanubian Region was set up from three counties: Győr-Moson-Sopron, Vas and Zala counties. The region with its 11,329 km<sup>2</sup> occupies the 12 % of the country’s territory. The territory of the region is occupied in 36 % by Győr-Moson-Sopron county, in 30 % by Vas county and in 34 % by Zala county. Western Transdanubia is situated where four larger areas meet: the western lowlands, the Lower Alps, the Transdanubian Hills and the Transdanubian Mountains. The varied landscape features watercourses and lakes. There are several national parks in the region (Fertő-Hanság National Park, Órség National Park), and it is particularly rich in spa and medicinal waters. Although there are several large industrial centres in the region, there are no serious environmental hazards, and natural treasures remain an important consideration.

## 2. Regional Characteristics

### 2.1 General indicators and figures

In economic terms Western Transdanubia is one of the most developed parts of the country, thanks to its complex economic structure. Industry, the service sector and agriculture appear to be developing at more or less the same rate. The standard of living is also above the national average. The same applies to the proportion of industrial investments within inward investments and the export orientation of the industry. Furthermore, this region has the highest proportion of businesses founded with foreign capital after Central Hungary. The geographical and cultural proximity of Austria has boosted relationships in many areas (e.g. between the Western Pannon Euregion with Burgenland).

Western Transdanubia is the most industrialised area of the country in terms of the proportion of the population employed in industry. The region is also a very attractive tourism destination, mainly because of its spa and medicinal waters, its protected natural treasures, its wine and gastronomy, its listed buildings and folk traditions. Several multinational automotive and electronic companies have established operations here, and this has provided an opportunity for local SME-s to become suppliers, after adequate preparation. In some sectors this encourages the formation of product clusters, and the synergies thus created may also have a beneficial effect on the development of the region.

The main industries in the region according to the shares in total employment are machine industry, textile industry and food industry. 70% of the employment is employed in these sectors.

The economic development of the West-Transdanubian Region is above the national average and the GDP per capita is the second highest in the country. The region's economic structure is complex; it stands on a number of pillars and ranks above other regions in terms of attracting foreign capital, the ratio of industrial investments and industrial export orientation.

			Western Transdanubia
General indicators and figures	Area*, km <sup>2</sup>		<b>11,209</b>
	Population, thousand persons*	thousand persons	<b>998</b>
	<i>Thereof:</i> age of 0-14 years, %	%	<b>14.1</b>
	age of 15-64 years, %	%	<b>69.7</b>
	age of 65-x years, %	%	<b>16.2</b>
	GDP**	million EUR	<b>9,521</b>
	<i>Thereof:</i> Agriculture, %	%	<b>4.8</b>
	Industry and construction, %	%	<b>44.4</b>
	Services, %	%	<b>50.8</b>
	GDP per capita**	thousand EUR	<b>9.5</b>

\*2008    \*\*2006

## 2.2 Industry, construction

			Western Transdanubia
Industry, construction	Industrial production, volume index*	%	<b>103.0</b>
	Industrial sales*	%	<b>99.5</b>
	<i>Thereof:</i>		
	Domestic sales, volume index	%	<b>76.8</b>
	Export sales, volume index	%	<b>106.3</b>
	Production of construction, volume index**	%	<b>90.3</b>

\*2008 Q1-3

\*\*2008 Q1

## 2.3 Enterprises

			Western Transdanubia
Enterprises	Number of registered enterprises*		<b>118,535</b>
	<i>Thereof:</i>		
	in manufacturing		<b>7,483</b>
	in construction		<b>9,711</b>
	in trade		<b>18,174</b>
	providing real estate/business services		<b>39,927</b>
	others (%)		<b>43,240</b>
	Number of enterprises per 1 000 inhabitants*		<b>147</b>
	Number of foreign-owned enterprises**		<b>2,511</b>
	Number of 100% foreign owned companies**		<b>1,736</b>

\*2007

\*\*2006

## 2.4 Investment\*

			Western Transdanubia
Investmen †	Foreign direct investment stock	million EUR	<b>6,322</b>
	Share in total FDI stock in Hungary	%	<b>11.6</b>

\*2006

## 2.5 Main foreign companies present in the region

County	Company	Activity
Győr-Moson-Sopron	AUDI Hungária Motor Ltd.	Automotive company
	Győri Likőrgyár Inc.	Liqueur maker
	Gardénia Csipkefüggönygyár Inc.	Curtain manufacture
	Pannon-Flax Győri Lenzővő Inc.	Textile industry
	Kisalföld Volán Inc.	Passenger transport, supplier
	Integrál-Hexa Inc.	Building industry
	Globál Építőipari Ltd.	Building industry
	Pannon-Team Ltd.	Building industry
	Mischek Hungária Ltd.	Building industry
	Kenvéd Ltd.	Surface finishing
	Győr-Gönyű Kikötő Inc.	Logistics
	IB Andresen Industri Magyarország Ltd.	Steel industry
	SCA Packaging Ltd.	Paper manufacturing
	Carant Antenna Ltd.	Manufacture of telecommunication and electronic components
	Leier Ltd.	Building industry
	Schoeller Plast-Eder Ltd.	Plastic processing
	ProMinent Magyarország Ltd.	Reparation of devices and machines
	Somogyi Elektronik Ltd.	Trade of electronic items
	R.Quehenberger Ltd.	Logistics
	Skiny Gyártó Ltd.	Textile industry
	Nemak Győr Ltd.	Aluminium industry
	West Hungária Bau Építő Ltd.	Building industry
	Amoco Fabrics Magyarország Termelő Ltd.	Textile industry
	Jankovits Hidraulika Ltd.	Hydraulics
	Lite On IT	Electronics
	INNONET Innovációs és Technológiai Központ Ltd.	Innovation and Technology Centre
	PolyOne Magyarország Ltd.	Plastic industry
	ThyssenKrupp Ferroglobus Inc.	Metal trade
	Maltech Hungaria Építőipari, Szolgáltató és Kereskedelmi Ltd.	Renting mobile platforms for the building industry
	DUTRADE CENTER DURÁB Ltd.	Storage and distribution of steel products
	Erbslöh Hungaria Ltd.	Manufacture of aluminium parts for the automotive industry
	MAN Kamion és Busz Kereskedelmi Ltd.	Trading of trucks and buses
	Gépkontakt Mérnöki Iroda Ltd.	Engineering and manufacture of machine parts
	Lambda Systeme Kereskedelmi Ltd.	Wholesaler for insulating material (heat, noise, water)
	KME Holding Inc.	Trusteeship
	Tipa Vezérléstechnikai Ltd.	Industrial automating
	Borsodi Műhely Ltd.	Metal working
	HNS Műszaki Fejlesztő Ltd.	Software developing
	DUOVERZIO Vagyonkezelő Ltd.	wholesaler
	Robust Plastik Assembling Ltd.	Manufacturing of fax devices
	DAKOVIT Kereskedelmi és Szolgáltató Ltd.	Distribution of feed and veterinary products
	IGM Robotrendszerek Ltd.	Manufacturing special machines
Büchl Hungaria Környezetvédelmi Szolgáltató Ltd.	Recycling of waste	
E.ON Északdunántúli Áramszolgáltató Inc.	Electricity supply	
Észak-Dunántúli Gázszolgáltató Inc.	Gas supply	
DATACON Hungary Termelő Ltd.	Microchip manufacturing	
Mile Ltd.	Automating of industrial production processes	

Viola-Hús Ltd.	Food industry
HAT-AGRO Ltd.	Chemical industry
JADESTAR Hungary Ltd.	Plans to manufacture microelectronic, metal and plastic spare parts for printed circuits
Rozmaring Hungária Ltd.	Wholesale of buffer materials
Visimpex Hungary Ltd.	Wholesale of ironware
Hagleitner Hungary Ltd.	Distribution of industrial hygienic products
LIEBHERR-ÉPÍTŐIPARI GÉPEK MAGYARORSZÁG Ltd.	Borrowing of special machines for the building industry
LOSBERGER Délkelet-Európa Ltd.	Distribution and hiring mobile halls and stalls
RAAB-SZIG Ltd.	Building industry, insulation
VIVAKER Kereskedelmi és Szolgáltató Dc.	Wholesaler
FIT-TEXT Ltd.	Manufacturing wool products
GIMEX-HIDRAULIKA Kereskedelmi és Szolgáltató Dc.	Manufacturing roll & power supply
Rondó Elektronikai Kereskedelmi és Szolgáltató Dc.	Wholesaler
Renault – Hungarian Alliance Logistics Ltd.	Logistic supplier of spare parts
Szintézis Informatikai Inc.	Computer technique
Vill-Korr Dc.	Electricity supply
Rába-Lux Ltd.	Manufacturing lighting
Aquacomet Ltd.	Manufacturing covering for swimming pools
Hungarotinbox Ltd.	Manufacturing tin boxes
Pannon Tools Szerszámgyártó Ltd.	Manufacture of tools
Shin-Etsu Polymer Hungary Ltd.	Electronics
Text Print Nyomdaipari Ltd.	Printing
EMK Vagyonkezelő és Tanácsadó Ltd.	Property management
Europe Investors Inc.	Investment
Rába Járműipari Holding Inc.	Vehicle manufacturing
Pannon Baromfifeldolgozó Ltd.	Food industry
Alcufer Ltd.	Recycling of waste
Graboplast Inc.	Textile and plastic industry
Glovita Kesztyű Inc.	Manufacturing gloves
Győri Szeszgyár és Finomító Inc.	Distillation
Győri Plast Műanyagipari Ltd.	Plastic manufacturer
Federal Mogul Sealin System Hungária Dc.	Machine industry
SICK Kft.	Electronics
KACO Hungary Ipari és Kereskedelmi Ltd.	Manufacturing car spare parts
Kravtex Kereskedelmi Ltd.	Machine industry
Fliegl Abda Gépgyártó Ltd.	Machine industry and trading
BRAU UNION Hungaria Sörgyárak Inc.	Beer-marking
CIKLAMEN Ipari Kereskedelmi és Vállalkozó Inc.	Light industry
DEKORSY Ipari és Kereskedelmi Ltd.	Car industry
EURO-ELZETT Zárgyártó és Kereskedelmi Ltd.	Lock industry
FALCO Sopron Irodabútor Ltd.	Office furniture industry
GALA Kerzen Hungaria Kft	Candle industry
Hirschler Üvegipari Vállalkozás	Glass industry
SOFÉS Soproni Fésűsfonalgyár Ltd.	Light industry
Soproni Szőnyeggyár Inc.	Carpet manufacturing
SWESWOOD SOPRON BÚTOR Ltd.	Furniture industry
Győr-Sopron-Ebenfurti Vasút Inc. ( GYSEV Inc.)	Railway directory
TERCIA Kereskedelmi és Vendéglátó Ltd.	Service industry
Fertő-tavi Nádgazdasági Inc.	Reed processing
Wienerberger Téglaiipari Inc. Soproni Téglagyára	Building industry
Velux Magyarország Fertődi Építőkomponens	Building industry
Wolf Plastics Ltd.	Plastic industry

	Instantia Hungaria Élelmiszergyártó és Kereskedelmi Ltd.	Manufacture of instant drinking powder and packaging
	Magyar Cukor Inc. Petőházi Cukorgyára	Sugar manufacturing
	Sefra-Hungária Festékgyártó és Forgalmazó Ltd.	Paint manufacturing
	ROTO Elzett Sopron Zár-és Vasalatgyártó Ltd.	Lock and ironwork manufacturing
	Kapuvári Ruhaipari Inc.	Textile cutting and sewing
	Lővér Sütő Inc.	Baker production
	Áfész Húsfeldolgozó Ltd.	Meat products-production
	Kapuvári Építőipari Szövetkezet	Building industry
	DIADAL Ruhaipari Inc.	Undergarment production for men and women
	Kapuvári Vízitársulat	Civil engineering
	Gépfarm, Szétumezker	Agricultural machine trade
	Kisalföld Volán Inc. Kapuvári Üzem	Person transport, vehicle reparation
	Econorm Ltd	Plastic industry
	Provertha Inc.	electronic
	Kapuvári Közlekedési Ltd	Local public transport
	Nolato Protec Ipari és Kereskedelmi Ltd	Plastic industry
	MOFÉM Inc.	Fitting production
	MOTIM Inc.	Chemist industry
	Lajta Haas Műanyagfeldolgozó Ltd	Plastic industry broom and brush production
	Lajta Hansági Inc.	Agricultural production and service
	Kühne Mezőgazdasági Gépgyár Inc.	Agricultural mashine industry
	Óvártej Inc.	Milk production
	BBB Mosoncink Horganyzó Ltd	galvanizing
	In Time Direkt Kuriere Hungária Logisztikai Szolgáltató Ltd	Transport, logistics
	Arlington Magyarország Ltd	Stockings production
	SAPU Ipari és Kereskedelmi Dc.	Vehicle components production
	BOS Magyarország Dc.	Implement production
	Göncz Csapágy Ltd	Machine industry
	REKULTIV Környezetvédelmi és Hulladékhasznosító Ltd	Environment
	Ziegelwerke Gleinstätten Csorna Beled Cserépgyártó Inc.	Tile manufacturing
	Hantech Ltd	Machine industry
	Pannon Gabona Feldolgozó és Kereskedelmi Inc.	Food industry
	Seeburger-Rábaközi Konzervipari Ltd	Food industry
	Baranyatej Inc. Csonai Tejüzeme	Food industry
	Győri Sütőipari Ltd Csonai Üzeme	Food industry
	Németh Szerelvénygyártó Ltd.	Machine industry
	Autovision Ltd.	Runnung gear manufacture
<b>Vas</b>		
	Agro-Alfa Ltd.	Machine & Parts-sale
	AKE Hungária Ltd.	Mashine manufacture
	Baumgartner Gumiszervíz Ltd.	Tires – recapping, repair & installation
	Delphi Packard Hungary Ltd. (Packard Divízió)	járművillamossági termék gyártása
	(Delco Divízió)	járművillamossági termék gyártása
	Dutrade Center Duvas Ltd.	Steel wholesale
	EPCOS Ltd.	Electronics
	FALCO Forgácslapgyártó Ltd.	Chipboard manufacture
	Falcotrans Fuvarozási Ltd.	Transport, logistics
	Frikus-Immobilien Ltd.	Transport,
	JABIL Circuit Magyarország Ltd. -JGS Divízió	alaplapp (PCB) gyártás, szervíz
	JABIL Circuit Magyarország Ltd.	alaplapp (PCB) gyártás
	Lasselsberger Hungária Ltd.	Concrete manufacture
	LuK Savaria Ltd.	Automobile parts manufacture
	Milos Spedició Ltd.	transport
	PALCO Építőanyagkereskedelmi Ltd.	Building materials sale
	Pannunion Csomagolóanyag Ltd.	Plastic Packaging

	Sabina Ipari és Kereskedelmi Inc.	Furniture
	STYL Ruhagyár Inc.	Textiles
	TESCO - Globál Áruházak Rt.	hipermarket
	VÁMCÓ Vámügynökség Ltd.	Customs services
	Velekey Szerelvénygyártó Ltd.	Fittings manufacture
	EGIS Gyógyszergyár Inc.	gyógyszeripar
	ADA Hungária Ltd.	Furniture
	Eybl Hungária Ltd.	Automobile upholstery manufacture
	EDS Elektronikus Adatrendszer Magyarország Ltd.	Data processing
	KROMBERG & SCHUBERT Ltd.	járművillamossági készülékek gyártása
	Csiba Ltd.	Wood Industry
	CELLCOMP Ltd.	Elektronikai alkatrészek gyártása
	CELLMODUL Ltd.	fém szerkezetek gyártása
	Bakó Trex Ipari és Kereskedelmi Ltd.	Underclothes manufacture
	Antók Nyomdaipari Ltd.	Printing services
	Radisson SAS Birdland Resort & Spa-ban	Tourism services
	Danubius Thermal & Sport Hotel Bük	Tourism services
	Rába Alkatrészgyártó Ltd. Sárvári Üzeme	Metal processing
	Sága Foods Inc.	Food industry
	SCA Packaging	Paper manufacture
	Amtek Hungary Precíziós Mérnöki Inc.	Metal Processing
	Opel Hungary Powertrain Ltd	Engine manufacture
	EDS Ltd.	Computer technology
	Sariana Ltd.	Textile industry
<b>Zala</b>		
	Flextronics International Ltd.	Electronic
	Zalabaromfi Inc.	Food industry
	Zala Bútor Inc.	Furniture manufacture
	Kanizsa Trend Ltd.	Furniture manufacture
	Zalakerámia Inc.	Construction industry
	Wienerberger Téglaiipari Inc.	Construction industry
	Royal Sped Inc.	Transportation
	Kanizsa Trans Inc.	Transportation
	Zalaerdő Inc.	Sylviculture
	Zala Volán Inc.	Transportation
	Anton Szerszámgyártó Ltd.	Machines manufacture
	Siroma-Plast	Plastic Industry
	Rotary Ltd.	Oil industry
	Elander Skogs Grafiska AB	Printing services
	FIBROLUX Ltd.	Plastic industry
	General Electric	

## 2.5 Labour market

			Western Transdanubia
Labour market	Number of employed people*	thousand persons	<b>423.2</b>
	Economically actives*	thousand persons	<b>444.4</b>
	Economically inactives*	thousand persons	<b>329.2</b>
	Participation rate**	%	<b>58.8</b>
	Employment rate**	%	<b>55.8</b>
	Unemployment rate***	%	<b>5.6</b>
	Number of unemployed***	thousand persons	<b>21.2</b>
	<i>Thereof:</i>		
	Man	thousand persons	<b>8.6</b>
	Woman	thousand persons	<b>12.6</b>
	Number of registered jobseekers***		
	<i>Thereof:</i>		
	younger than 19	thousand persons	<b>0.75</b>
	20-24	thousand persons	<b>3.66</b>
	25-34	thousand persons	<b>6.94</b>
	35-44	thousand persons	<b>5.87</b>
	45-54	thousand persons	<b>6.45</b>
55-	thousand persons	<b>3.35</b>	
<i>Thereof:</i>			
with high level education	%	<b>7.12</b>	
with secondary education	%	<b>57.58</b>	
with primary school or less than 8 grades	%	<b>35.3</b>	
Gross average monthly wages***	EUR	<b>668.67</b>	
Blue-collar***	EUR	<b>527.24</b>	
White-collar***	EUR	<b>899.91</b>	

\*2008 Q2

\*\*2007

\*\*\*2008 Q3

## 2.6 Education\*

		Western Transdanubia
Education	Number of secondary schools	<b>154</b>
	<i>Thereof:</i>	
	grammar schools	<b>60</b>
	specialized secondary schools	<b>94</b>
	Graduates / year	<b>4,200</b>
	Number of vocational schools	<b>54</b>
	Graduates / year	<b>5,980</b>
	Number of bilingual schools	<b>9</b>
	Number of universities or colleges	<b>4</b>
	Number of university - college graduates / year	<b>5,217</b>
<i>Thereof:</i>		
Engineer	<b>550</b>	
Business	<b>1,475</b>	
IT	<b>124</b>	
Others	<b>3,068</b>	

\*2007/2008

### **Győr-Moson-Sopron county**

Győr has a university, called Széchenyi István University, where more than 7,000 students are educated. The University provides Bsc and Msc degrees in various fields. It offers post-graduate courses and carries out research, consultancy and other professional activities, the following courses are available:

#### **Faculty of Engineering Sciences**

Mechanical Engineering Training	Engineer-Teacher Training
Transportation Engineering Training	Technical Management Training
Electrical/Electronic Engineering Training	Environmental Engineering Training
Information Technology Engineering Training	

#### **INSTITUTE OF TRANSPORTATION AND MECHANICAL ENGINEERING**

The aim of the Institute is to train innovative and practice-oriented engineers. The Institute supports quality-based engineer- and teacher training to the BSc level, furthermore it provides post-graduate (production-engineering) and post-secondary (higher education vocational training) education both within the framework of full-time and distance education. By ensuring the conditions of a supplementary education the Institute is also keen to create possibilities for access to further education at a university-level. Since 2001 the Institute offers Transport Engineering course at the MSc level, as well. The Institute of Transportation and Mechanical Engineering is the largest one of the University, more than 41% of the students are enrolled in this Institute.

#### **INSTITUTE OF INFORMATICS AND ELECTRICAL ENGINEERING**

The Institute offers a wide range of courses providing students not only with the technical competence but also with the interpersonal skills they need to pursue

worthwhile and satisfying careers. The six departments in the Institute run accredited degree and diploma courses which make extensive use of continuous assessment, group projects, individual projects and self-learning packages to develop personal skills such as creativity, confidence, problem solving, decision making, co-operation and communication. Education makes students capable of applying their theoretical and practical experience in the real world in a flexible way as well as to follow up to date technology in a wide range of fields.

### **Faculty of Law and Economics**

The Faculty of Economics has become the dominant faculty of the university: 400 candidates in each year (1200 students in total) plus 2500 students opting for distance learning.

Institute of Economics and Social Sciences

Subjects and Modules Offered by the Department of Finance and Accountancy

Accountancy	Controlling
Public Finances	Taxation
Theory of Corporate Finances	Economic Analysis
Case Studies for Accountancy	Economic Controlling
Stock Exchange Studies	Corporate Accountancy
Banking	International Accountancy System
Real Estate Management	Financial Policy
Budgeting	Accountancy and Finances
Managerial Accountancy	

Thanks to the industrial traditions the school system is developed. In the city there are 14 secondary schools, educating in various fields: mechanical engineering, technical training of cutting skilled workers, and electronics/electrotechnics, (LUKÁCS SÁNDOR Technical Training School), information technology (JEDLIK ÁNYOS Engineering and Information Technology Secondary School) economic, trading, (BAROSS GÁBOR Technical Secondary School of Economics) agricultural, and vehicular, plus a wide range of other professions.

University of West Hungary – forestry, wood sciences, designing, economics, geoinformatics, information technology, environmental-, rural sciences, health-, tourism marketing, pedagogy, agriculture engineering, food producing, – Sopron, Győr, Mosonmagyaróvár.

The Faculty of Agricultural and Food Sciences, is the part of the University of West Hungary which is also located in Mosonmagyaróvár. There are 9 majors at the university, including agricultural engineer, food-products engineer, and economic agricultural engineer. The number of students on regular training courses is approximately 1200 – 1300 persons.

The Institute of Agricultural Economics and Management maintains a significant relation with international universities, like Alabama Farmers Federation (Montgomery USA), Auburn University, Auburn (Alabama USA), Centro Ricerche Produzioni Animali, Reggio Emilia (Italy), The Greenery International Den Haag (Netherlands). The University also does outstanding research on numerous fields, such as biotechnology, biology or economy.

The middle- and higher educational institutions and the University of West Hungary in Sopron are training experts with a wide spectrum of the technical fields. The university education is going on faculties of forestry, wood industry, information science and economics. In 2005 the number of students was 7,379.

4 grammar schools, 7 vocational and technical schools are located in Sopron. Beyond the grammar school trainings, the vocational schools train medical, catering, gardening, wine-growing, economical, mechanical working and informational science experts.

### **Vas county**

Berzsenyi Dániel College - arts department, natural science, physical education and art in Szombathely.

16 secondary and vocational schools train high-qualified experts in all fields of industry, administration, electronics, IT and tourism in Vas County.

In approximately 30 general and vocational secondary schools of the county 2400-2500 pupils finished their studies each year in the last few years, 1100-1200 from them appeared on the labour market, the others chose the institutions of higher education. A few thousands of pupils study foreign languages – mainly German and English - in secondary schools. More than thousand students finish their studies at university or college each year in the county.

There are 7 Secondary Technical Schools in Szombathely.

### **Zala county**

The higher education is confined to the following towns: Zalaegerszeg, Keszthely, Nagykanizsa.

- The most significant institution is the institute Zalaegerszeg of Financial and Accountancy Faculty of Budapest Business School. (Branches: Finance, Accountancy, and Informatics.)
- From September, 2002 the Budapest Business School in Zalaegerszeg ensure location for the mechanical engineer training of Budapest Technological University.
- Higher education operates on the Medical College Faculty of Pécs University in Zalaegerszeg. (Branches: Physiotherapist, Professional Hospital Nurse)
- One of the 50 consultancy institutes of Dénes Gábor College of Technology is found in Zalaegerszeg.
- One of the consultancy institutes of Veszprém University operates in Nagykanizsa.
- Agricultural Faculty of Veszprém University is found in Keszthely. The legal predecessor of the institute was the oldest agricultural higher education institute in Europe.
- 17 secondary and vocational schools train high-qualified experts in all fields of industry, administration, electronics, and IT in Zala County.

## **2.7 Research and development**

As a task of Regional Innovation Agency project Hungarian Academy of Sciences – Centre for Regional Studies started to undertake a benchmarking exercise in the region. A methodology and indicator system is being carried out, which will be suitable to measure the innovation potential of the region and compare the region with other Hungarian or foreign regions.

This task is still in progress; and analysis has already been evaluated based on an innovation questionnaire filled out by innovative companies.

The implementation of regional innovation strategic programme and the specific programme effects can be measured by the defined priority impact indicators.

According to this, the monitoring and the programme evaluation – done in every two years - should include the following activities:

- Analysis of research and development, innovation and higher education statistic data, and national and international comparative studies.

- Interviews and questionnaires about enterprises, different higher education and research institutes.

The regional innovation strategy programme's analytical background studies provide good basis for the future monitoring activity, which is proposed to be complemented by a „benchmarking“ activity. This means that the registration of the region's innovation system monitoring, changes, and development results in comparison to other regions' data, should be in line with the OECD norms, and the EU innovation research practice. In our days the RTD activity is partly (about 60%) going on State owned Universities and Research Institutions, and around 40% of research money spent at private companies (mostly owned by multinational companies, mostly at automotive-, electric-, computer-, telecommunication-, pharmacological companies).

There are several big multinational companies, who have their research centres in Hungary, like Audi, Knorr-Bremse, LuK, Zenua Starker, Deutsche Telekom, etc. and there are also Hungarian owned big companies, like Rába, Ikarus, Bakony Rt, who have significant RTD centres in Hungary, mostly in Budapest area.

Nevertheless the economical performance of the region is quite good, (the second best performing region after Central Hungary) the RTD activity is very low only 0,38% of GDP. There is strong commitment from the stakeholders to improve the R&D and innovation performance of West-Transdanubian Region.

The main policy-making institutions are the following:

- Hungarian Academy of Sciences – Centre for Regional Studies, as the Regional Innovation Strategy was carried out by this organisation.
- West-Pannon Regional Innovation Council, the regional decision-maker body in the field of innovation
- West-Pannon Regional Innovation Agency, which is the administrative body of the Regional Innovation Council

There are three innovation centres in the region:

- INNOSOP - Innovation Centre of Sopron
- INNONET Innovation and Technology Centre Győr
- Claudius Industrial and Innovation Park, Szombathely

The region has five clusters:

- Pannon Automotive Cluster, Győr
- Pannon Electronic Cluster, Szombathely
- Pannon Wood and Furniture Cluster, Sopron-Zalaegerszeg
- Pannon Fruit Cluster, Óriszentpéter
- Pannon Thermal Cluster, Szombathely-Bükk

The financial subsidy for innovation and technological development is the Pannon Novum West-Pannon Regional Innovation Agency. With handling the national and regional innovation and technological subsidies and with providing services to SME-s, this is the main institute in the region supporting the innovative activities of enterprises. The Innovation agency is supporting knowledge transfer between research organisations and companies.

### **Main innovation programs:**

#### *REGINS:*

The West-Pannon Regional Development Agency's project, REGINS' main approach is a combination of regional and thematic elements of cluster management. The intensity of the REGINS co-operation is the joint development of new approaches.

The REGINS consortium decided to increase interregional co-operation

- For a sustainable regional development
- For transfer of instruments
- To a joint development of new approaches.

*INNOREG:*

INNOREG is a regional subsidy supporting programs for innovation.

Aim of the subsidy:

- Improve the innovation environment, spread knowledge and technology
- Product and service innovation
- Create innovation clusters, clusters' network
- Foster co-operation within the region and interregional co-operation, network of innovation centres and research centres, network of innovation experts and consultants
- Improve innovation infrastructure; support purchasing of R&D tools
- Provide services related to innovation financing

*INNO-CHECK:*

INNO-CHECK is also a regional subsidy program supporting innovation services, to help SME-s increase their competitiveness. Aim of the subsidy: supporting innovation initiatives of micro- and small enterprises and encouraging the innovation service supply and demand in the region.

University-Based Regional Knowledge Center for Vehicle Industry  
Széchenyi István University

The University-Based Regional Knowledge Center for Vehicle Industry (UBRKC for Vehicle Industry) is being implemented in the scope of the Pázmány Péter Program with the support of the National Office for Research and Technology in the time period of 2006-2008. In accordance with the industrial traditions and development perspectives of the Győr region, the business challenges the consortial partners are facing as well as the main training fields of the Széchenyi István University, the Knowledge Center focuses on vehicle industry. Within this field the Knowledge Center specializes in the research of vehicle production technology, component design and development. The Knowledge Center operates as a scientific and technology innovation center, which coordinates a regional R&D network in cooperation with the private sector, thus enhancing the competitiveness of the country as well as the technological and economical development of the region.

**Research fields of the Knowledge Centre**

- I. R&D program: Complex research of manufacturing processes and tools of highly complicated, high-quality vehicle parts and components
- II. R&D program: Development of complex modules and systems of vehicles and research of their related diagnostic procedures
  - technologies and reliability
- III. R&D program: Technology and Knowledge Transfer

At present the Széchenyi István University and INNONET Innovation and Technology Centre in Győr are the main institutions boosting human resource supply for innovation. Since 2004 students in the region can attend the innovation process manager course at the Széchenyi István University. INNONET Innovation and Technology centre delivers innovation broker trainings continuously.

Regional University Knowledge Centres in Sopron and Győr were established in year 2005 to promote the knowledge transfer between universities and companies, to establish a better innovation environment. In 2004 there was established an Environmental Knowledge and Competence Centre in Sopron to promote environmental innovation projects, to transform environmental research results into implementation.

### **Innovation development program of „AUTOPOLIS”**

The International Knowledge Park program - A complex development project focusing on the advancement of the innovation capacity of the Széchenyi István University.

In the specialized and network based innovation development program of „AUTOPOLIS” - The West-Hungarian Development Pole one main ambitious strategic objective was defined: to grow the West-Pannon Region from a production site to a development center. As part of the program Széchenyi István University aims at carrying out development projects that can highly support the creation of a knowledge-based economy. Main subprojects of the program are:

#### *Technology elements*

- Hardware elements – Concentrated automotive knowledge environment
  - Knowledge Base & Knowledge management: INNO-SHARE Center at University Knowledge Center
  - Concentrated public-private research and development infrastructure
    - Basic and applied research: INNO-RAAB Center at University Knowledge Park
    - Product development: Automotive Living Lab at TechnoNet at the Industrial Park
  - Technology transfer and technology marketing infrastructure: MOVE-SMART Center at University Knowledge Park
  
- Software elements – Linked and shared knowledge base, and service capacities coordinated by the Pole Management
  - Technology and research services
  - Market, innovations and network services
  - Regional, network based automotive vocational training

#### *Incubation*

- Public-private joint research projects (projects in preparation with Audi, GM Powertrain, Schefenacker, Knorr-Bremse & Thyssen Krupp, Integris, Györi Likörgyár (bioethanol)
- Incubation of university spin-offs: INNO-RAAB Center
- Incubation of SME's : TechnoNET Center

(High-tech Production Environment

- Automotive Supplier Park)

		<b>Western Transdanubia</b>	
<b>R&amp;D</b>	Number of R&D units*		<b>216</b>
	Number of R&D personnel*		<b>1,246</b>
	R&D expenditure*	million EUR	<b>59.6</b>

\*2007

## 2.8 Infrastructure

Western Transdanubia is in a unique situation even in European terms as it borders four countries (Austria, Croatia, Slovenia and Slovakia) and thus has substantial international transit traffic. Three of the Helsinki corridors pass through the region, so with time it may fulfil a serious transit role between Western and South-East Europe. The border crossings situated here handle 60% of Hungary's cross-border traffic. Its infrastructure is more developed than the national average.

### *Rail transport*

The Hegyeshalom-Budapest line complies with the European standard for tracks allowing a speed of 160 km/h. The county seat, the busiest transport hub of the county, is readily accessible by rail from Budapest-Veszprém, Győr and Graz-Szentgotthárd.

### *Public road transport*

The geographical position of the region is advantageous from the point of view of transport as east/west and north/south roads meet on its territory. Northern Italy, Gdansk, Vienna and the Adriatic Sea are directly accessible from Western Transdanubia on the European main roads. The public roads of the region are in a special position for a variety of reasons:

- several European transport axes passing through Hungary lead through here, because of the motorways
- several international routes meet here
- this is where the Eastern European motorway system connects to the Western European motorway system
- Helsinki corridors no. IV,V and VII (Danube) pass through the region, and
- the former Amber Route connecting the Baltic Sea and the Adriatic Sea and enabling trade traffic to bypass the Alps now forms an additional element to the Helsinki corridors and passes through here.

According to the flow directions in this area, the heavy lorries going on the "Baltics-Adria" axis, use the number 86 main road – which goes through 3 Hungarian counties (Győr-Moson-Sopron, Vas, Zala) to avoid the high mountains of the Alps. Only this 200-kilometre section of the North-South transport axis of the continent is not part of the Helsinki corridors network. This means that only the Mosonmagyaróvár-Nagykanizsa route, which would link corridors IV and V, is missing from the route system between the Northern and Southern ports of Europe.

This missing element connects to the Helsinki corridors in the direction of Bratislava in the North, and towards Ljubljana and Zagreb in the South. On the basis of the counting on the North-South transport axis, the amount of the current traffic also justifies the development of this connection.

### *Water transport*

The region's most important water route is the Danube, which is one of Europe's most important water transport routes. The river is unique from several aspects:

- it forms Helsinki corridor no. VII;
- its entire Hungarian section is navigable;
- it is equally suitable for passenger and freight services;
- it runs through many countries of Europe, thus it is considered a direct corridor.

### *Air traffic*

Balaton, the largest lake of Central Europe, is one of the most popular tourism destinations of the region and the country. Most visitors fly in to Sármellék Airport, the busiest international airport in the country after Ferihegy. The airport at Győr-Pér, certified as "public and commercial", and may receive occasional international traffic, complies with European standards and can receive small aircraft accommodating 70-80

passengers. Fertőszentmiklós Airport is in Austrian ownership, and it can also receive small aircraft and handle international traffic.

			<b>Western Transdanubia</b>
<b>Infrastructure</b>	Public road network*	km	<b>4,933</b>
	<i>Thereof:</i>		
	motorway	km	<b>71</b>
	Public road per 100 km <sup>2</sup>	km	<b>44.0</b>
	Main telephone lines per 1 000 inhabitants**		<b>332</b>

\*2006

\*\*2007

## 2.9 Tourism

There isn't a region in Hungary which has this many tastes, colours, scents, that is as varied as Dunántúl, west Hungary. That is, Pannónia.

Lake Balaton, central Europe's largest fresh water lake lies within this region, and so we deal with separately. Here we also find the region's largest castle, the gardening world's legendary hársfásor, the country's largest baroque palace, one of the world libraries, one of Europe's oldest continually inhabited settlements, the nation's very first Christian church, the country's most beautiful forest and the only intact castle from the Middle Ages. Three sites are listed in the UNESCO World Heritage list, the convent at Pannonhalma, and lake Fertő. In Pannónia, everything is possible, from fine dining, touring, swimming in clear waters, healing in thermal springs, to fishing, hunting, castle climbing, strolling in gardens, enjoying the wine trail and marveling at palaces.

## Industrial Parks

In the West Transdanubian Region 23 major industrial parks are operating. The land they are operating on involve 12,000,000 sqm. From which 40% of the total are is free for rent or ready to buy in 2006. In the industrial parks there are nearly 400 companies situated, 90% of them are SME-s. These firms have already invested more than 2,000 million euro, since 1997, their total revenue in 2005 was 2,800 million euro. The number of employees was 37,000 in 2005. It is remarkable to see number of SME-s coming settled in the industrial park area. From 1997 (3,7%), till 2004 (20,2%) of all employees in the region are working at firms being situated in one of the industrial parks.

### 2.10 List of industrial parks

Name of industrial parks
Celldömölk Industrial Logistics Park, Celldömölk
Claudius Industrial and Innovation Park, Szombathely
Csorna Industrial and Logistics Park, Csorna
Flextronics International Sárvár Industrial Park, Sárvár
Ganz Industrial Park, Zalaegerszeg
Győr International Industrial Park, Győr
Industrial Park of RABA, Győr
Kapuvár Industrial Park, Kapuvár
Letenye Industrial Park, Letenye
Mosonmagyaróvár Industrial, Logistics and Business Park, Mosonmagyaróvár
Nagykanizsa Industrial Park, Nagykanizsa
Kőszeg Industrial and Innovation Park, Kőszeg
Rédics Industrial Park, Rédics
Répcelak Industrial Park, Répcelak
Sopron Industrial and Innovation Park, Sopron
Sopron Dél-Keleti Industrial Park, Sopron
Szentgotthárd Industrial Park, Szentgotthárd
Vicinity Industrial Park, Pácsa
Türje Industrial Park, Türje
Zalaegerszeg Industrial Park, Zalaegerszeg
Ganz Industrial Park, Zalaegerszeg
Zalalövő Industrial Park, Zalalövő
Lenti Industrial Park, Lenti