DELIVERABLE D.T1.2.2-11

Territorial needs assessment for the Region of BURGENLAND	**Version 1.0** **102017**

1. Overview of the selected region

1.1. Delimitation and basic geographical description of the pilot area (max 2 page with maps)

- **Delimitation of the area NUTS3 or NUTS2 and local administrative units in accordance with pilot actions.**

Burgenland is situated in the very east of Austria, is one of nine provinces of Austria (= NUTS2) and consist of the three NUTS3 regions AT111 (Middle Burgenland), AT112 (Northern Burgenland), AT113 (Southern Burgenland). It is governed by the Regional Government of Burgenland and - so the national affairs – by the Federal Government of Austria in Vienna. The capital of Burgenland is Eisenstadt, which is located in the northern part of the province.

Figure 1 and 2: Maps of Europe and Austria

- **Description of main geographical features with focus to project activities:**

For many years the iron curtain limited the cooperation between the region of Burgenland and the Western Hungarian regions – regions that for a very long time were closely linked to each other - linkages that have been renewed after the fall of the iron curtain more than 25 years ago.

The functional region covers the Austrian region of Burgenland, smaller parts of the Austrian Regions Lower Austria and Styria as well as the largest parts of the three Western Hungarian regions Györ-Moson-Sopron, Vas and Zala. While the Hungarian regions add up to one million inhabitants 2011, the region of Burgenland in total has a population of about 290.000 inhabitants. The low number of inhabitants in Burgenland is a result of the separation process in the formerly

joint region in 1921, which left the bigger cities in Hungary. The largest cities in the region are Szombathely, Sopron and Mosonmagyaróvár in Western Hungary and Wiener Neustadt in Lower Austria. Eisenstadt (the capital and largest city in Burgenland) has a population of about 14.500 inhabitants. The whole functional region is dominated by the attractiveness of Vienna with more than 1,7 million inhabitants and almost 800.000 work places.
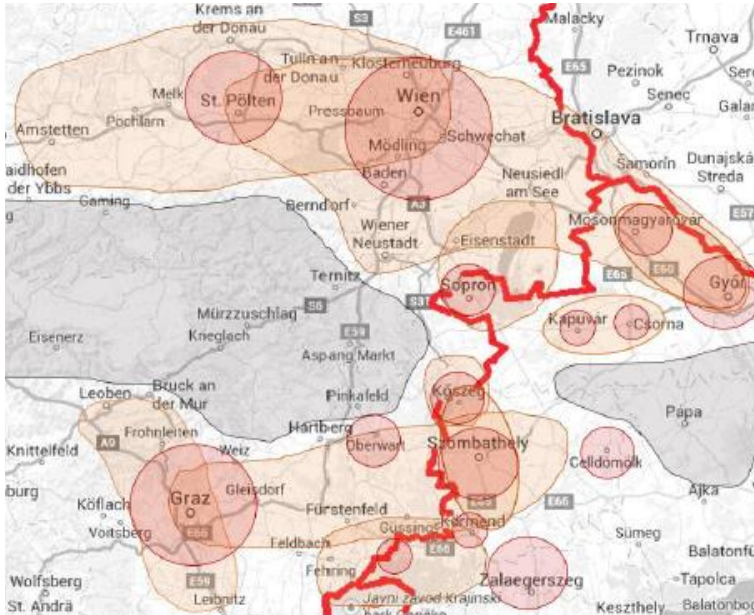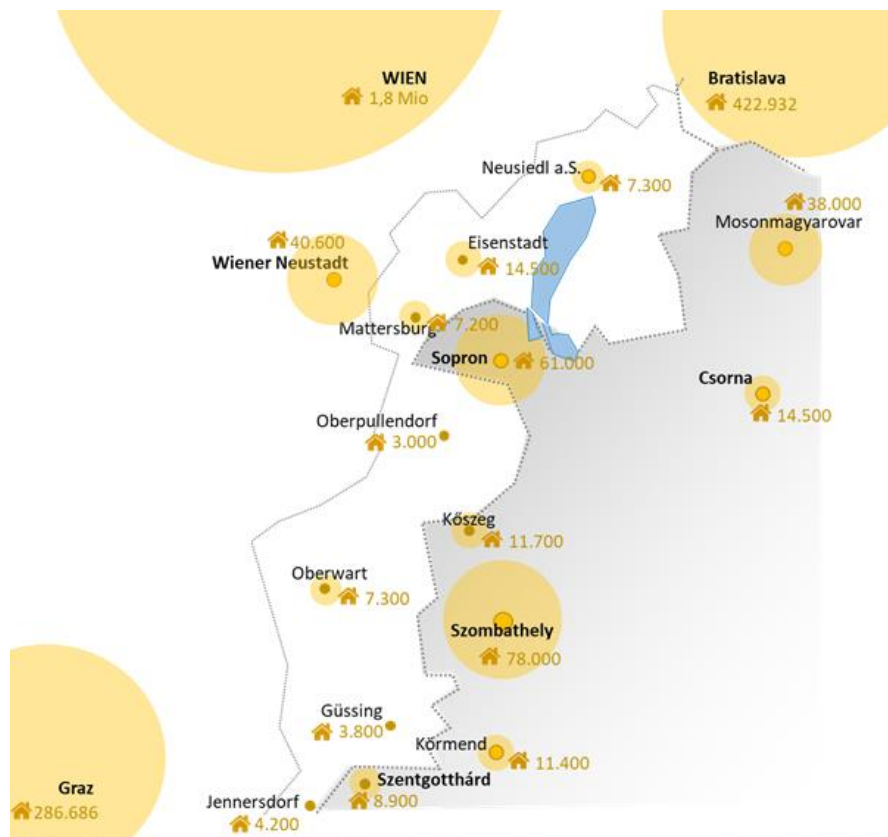

Figure 3: functional Area Burgenland-Hungary- Styria

Figure 4: Agglomerations in the Austrian-Hungarian border region

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European Regional
Development Fund
CONNECT2CE

- Description of main touristic points and other relevant points of interest

The easternmost province of Austria attracts with 300 days of sunshine and a diverse range of destinations and offers for the entire family. Unique experiences in different subject areas are waiting to be discovered in Burgenland. Six nature parks and the National Park Neusiedler See-Seewinkel are waiting with impressive natural landscapes. The lake Neusiedl (Neusiedler See) and its surroundings are awarded as an UNESCO World Heritage cultural landscape (Fertő-Neusiedler See).

Special cultural experiences offer castles, palaces and museums - the landmarks of Burgenland.

Whether cycling, horseback riding, hiking, sailing, golfing - Burgenland offers plenty of possibilities for those hungry for exercise. In the mild Pannonian climate many sports can be practiced almost year round.

As one of the most child-friendly regions, Burgenland is ideal for your family holiday. The choice ranges from the Pannonian family thermal baths, excellent family hotels to cycling and canoeing. Especially in the flat, varied landscape of northern Burgenland, there are attractive and well-developed tourist cycle routes.

1.2. Recent population and demographic trends (max 1 page)

Describe recent population trends in the pilot area with the focus on:

- Population density and population trends (decrease or increase),

- migration balance (positive or negative),

- age structure.

In 2016 Burgenland had 291.023 inhabitants. The increase in population compared to 1991, however, was not the result of natural population growth, but rather the result of a positive migration balance, which more than compensated for the negative birth rate. In addition, Burgenland's population has developed very differently in different parts of the country: in particular, municipalities in the northern political districts, which are favorably located in terms of transport infrastructure, have benefited.
While more than 5,000 births were registered each year in Burgenland in the early 1960s, only 2,200 births are currently counted annually.
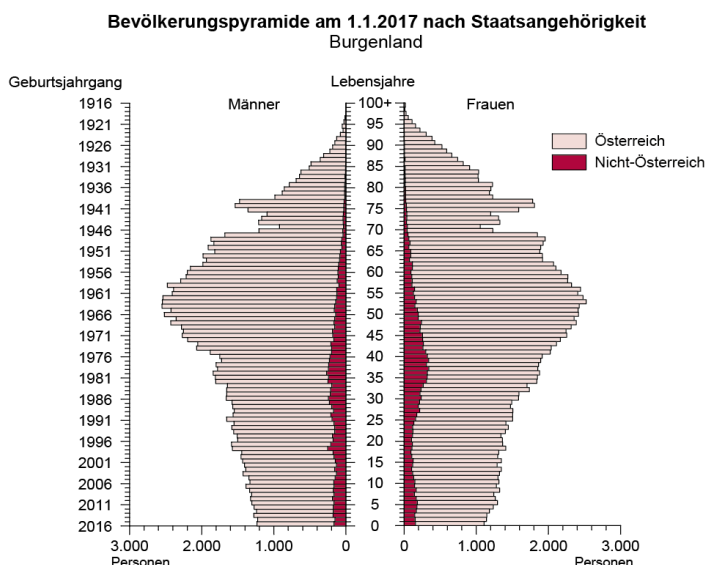

Figure 5: Age pyramide (23.05.2017), Source Statistik Austria

1.3. Transport network and accessibility conditions

Please shortly describe main (if possible include maps) of road and railway transport network in the pilot region with focus on:

- Interurban and regional transport road and railway transport network with possible connections to transnational networks;

- Main passenger intermodal points and cross border sections

Describe other characteristics from collected and available data (e.g. level of motorisation, average speed, modal split, commuting distances, main bottlenecks)
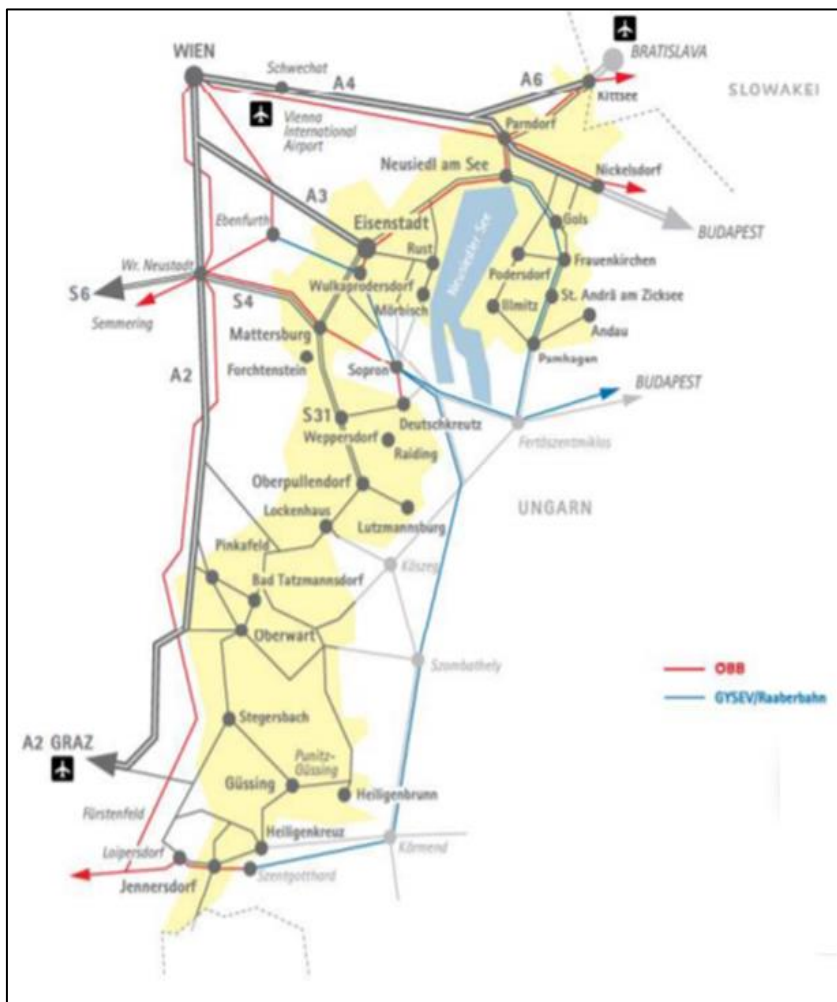
Road and rail network in Burgenland

Figure 6: Road and rail network of Burgenland

Regarding the road and the rail network, it is very characteristic for Burgenland that the northern part is very well connected to motorways and rail infrastructure, but the southern part isn´t. In the northern part of Burgenland we have a very good bus network additional to the rail network, while in the southern part there is the bus network the main available public transport system.

Cross-border mobility

Cross-border cooperation results in cross-border traffic. A regional survey carried out during the general study[1] came up with the result that 20% of the long distance trips from Hungary have Austria as a destination. The largest part of long distance trips to Austria have work as the main purpose (60%), while the share of work trips of all the long distance trips within Hungary is only 40%. The other travel purposes do not exceed 5%. For 92% of all trips to Austria people use the private car, while the share of the train is only 2%. 17% of the students mentioned that they would look for a job in Austria after finishing their studies (in Kapuvár and Körmend the share is 40%!).

Out of the 19% of long distance trips having a destination in Hungary, 32% have the purpose leisure and tourism, 26% shopping, 21% visits. The modal split of private cars is even higher than the one from Hungarians: 96%, busses and trains together sum up to not even 3%. Not even 1% of the trips is on working purpose, compared to the 60% of trips from Hungary! As long as average wages in Hungary are only one third of the Austrian and employment options are way better in Austria many employees living in Western Hungary will look for a job in Austria/Burgenland.

At the moment 20% of the employees in Burgenland are coming from abroad – the largest part from Hungary. Up to 12.000 Hungarian commuters[2] daily cross the borders to Burgenland for work. The closer the municipality is located to the border the higher the share of commuters working or studying in Austria – values for smaller municipalities range up to 30%. The share of people commuting to Austria of all commuters in a municipality differs widely. Whereas 70% of commuters in Sopron commute to Austria, the share in the other municipalities is between 20 to 25%. The share of public transport is rather low. Only Sopron has a significant share of commuters using the train on their way to work/school in Austria.

Adequate cross-border transport infrastructure and services are a major precondition for the exploitation of existing cooperation potentials. At the moment the core network corridors are crossing the very North and South of the functional region.

Figure 7: TEN-T network in the functional region

level of motorisation (2016):649 cars per 1000 inhabitants (= highest level in Austria)

average speed: no data available

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[1] Hungary 7.100, Austria 6.800 people returned the questionnaire containing questions about the travel behavior of people living near the border
[2] FÖMTERV 2015: AT-HU General Study page 325

modal split:

Walking 14,7%
Cycling 5,9%
Car 54,8+17,3%
Public Transport 6,8%

commuting distances:
Average daily trip distance (all days): **41,8 km/person**
Average daily trip distance (all days): **53,4 km/mobile person**

Future Railway system in the functional area

The activities in Connect2CE are part of a big picture of the future railway system in our region. Burgenland is working closely together with the Gysev (=Raaberbahn, PP4 in Connect2CE, railway-company and a cross-border operating rail service and infrastructure provider), the Hungarian Ministries of National Development and Foreign Affairs in Budapest on the upgrading of the regional cross boarder railway system. There are some infrastructural bottle necks where high investments of both countries are needed to establish a powerful railway system. The backbone of the West Hungarian – East Austrian system is the connection Vienna-Szombathely-Zagreb which is part of the SETA corridor. Since the beginning of this year several high level meeting have taken place – including a meeting in Brussels with the leading persons of the DG Move and DG Regio.
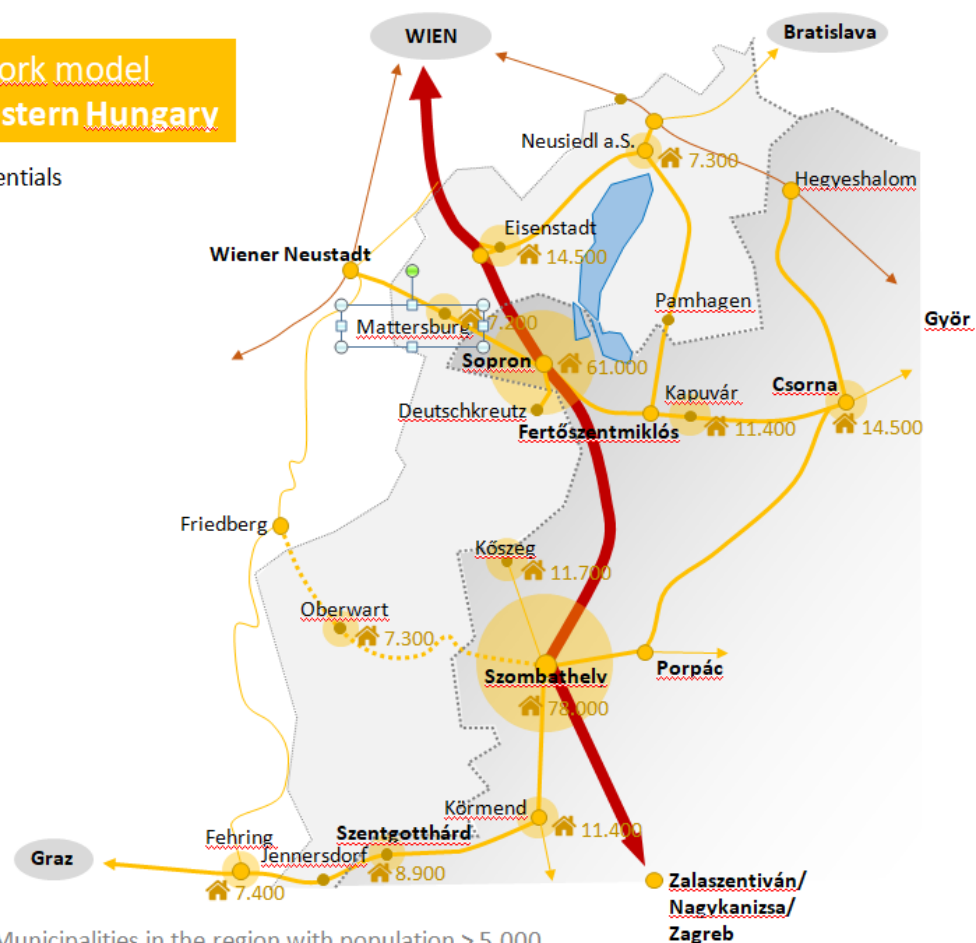

Figure 8: Designed future rail network

1.4. Organisation of transport sector and key stakeholders (max 1 page)

Describe organisation (e.g. regional/national ministries, bodies, transport operators) that are main decision makers to be addressed in the pilot implementation actions.

Additional data from the previously collected tables. More details in T1.2.12 and 17.

Regionalmanagement Burgenland Ltd. (RMB) is a province-owned service agency. One of the departments is the Mobility Centre Burgenland. The team of the Mobility Centre Burgenland is closely working together with the Regional Government Burgenland, which is one of our ASP 21 in this project. Especially the unit transport coordination and spatial planning of the Regional Government Burgenland is a strong partner and stakeholder in all of our projects. The team of the Mobility Centre Burgenland was responsible the project-management of all cross-border and transnational EU-funded Mobility projects of the Regional Government Burgenland. It was also involved in the development of the "Gesamtverkehrsstrategie Burgenland" (= Mobility and transportation strategy for the region of Burgenland) in 2014. This very close relations guarantee sustainability of the project results.

The second Austrian partner and important stakeholder in this project is the Public Transport Association Vienna Region VOR (ASP 22). The VOR is the biggest Public Transport Association in Austria and works in the Regions of Vienna, Lower Austria and Burgenland. Their task is the planning, coordination and financing-coordination of the entirely public transport system in the eastern region of Austria. The VOR is owned and financed by the three provinces Vienna, Lower Austria and Burgenland. As Burgenland is the smallest region among the three partners, it owns 12% of the VOR. In the whole region the VOR offers a ticket system including online tickets and a general public transport information platform (www.anachb.at). Different public transport modes are very well harmonized. Regional and temporary special events as beginning of school after summer holiday, village fairs or music festivals find inclusion in planning process. The team of the Mobility Centre and the responsible team of the Regional Government are regularly in contact with the VOR, every two to three week there is a jour fixe and additional there are planning and strategic meeting between this three partners. The planning processes also include regular meetings and close cooperation within the three Regions of Vienna, Lower Austria and Burgenland.

Besides these two ASP the ÖBB Austrian Federal Railways, the Federal Ministry of Infrastructure and Transport, as mentioned the Regions of Lower Austria and the City of Vienna, the Austrian neighbour region Styria and because of our very strong cross boarder services the **Gysev (PP4)** are important stakeholder for the Connect2ce project. There are regularly meetings with these stakeholders to coordinate and plan the activities in and beyond the region.

Additional to the public transport system of railway and busses, several well establishs Micro Public Transport-systems complete the transport services. Micro Public Transport is not organised by VOR but in general by regional associations of municipalities. That's why we will get in contact with the relevant municipalities as soon as needed and according to the AF cross border with Hungarian Partners. In the future, the micro public transport systems should be included in the general public information system of VOR.

2. Territorial needs assessment

2.1. Connectivity

In this section the territorial needs assessment (TNA) should explore the main characters of the harmonisation of the multimodal timetable and selected features of the PSO/PSC.

- Summarize shortly (1/2-1 page) the existing cross-border timetable coordination process and form according to the incoming answers. If it is insufficient please do additional research.

Cross-border public transport services between Burgenland and Hungary is currently only available in the railway sector. The planning and coordination takes place within the framework of regular meetings (at least twice a year) of the participating partners (Burgenland, VOR, ÖBB and Gysev). In addition, there are other meetings and interviews, sometimes on a short and informal level.

The concrete coordination of the timetables of cross-border traffic is carried out on a regular basis by representatives of ÖBB, Gysev and VOR.

To further enhance cooperation, the Interreg VA AT-HU SMART Pannonia project has launched a high-level institutionalized transport platform (strategic level), which meets at least once a year, and a cross-border expert platform (meetings at least twice a year). The implementation is in progress, first meetings already took place. The relevant federal ministries in Vienna and Budapest are also involved.

At the level of the federal ministries in Vienna and Budapest, there are also meetings at irregular intervals in order to address cross-border traffic issues. All partners mentioned above are also involved.

- Describe (2 pages) the selected themes of the PSO/PSC:
  - cross-border transport flows (modal split, split by the purpose of the trip);

    A regional survey carried out during a general study[3] came up with the result that 20% of the long distance trips have Austria as a destination. The largest part of long distance trips to Austria have work as the main purpose (60%), while the share of work trips of all the long distance trips within Hungary is only 40%. The other travel purposes do not exceed 5%. For 92% of all trips to Austria people use the private car, while the share of the train is only 2%.

    At the moment 20% of the employees in Burgenland are coming from abroad – the largest part from Hungary. Up to 12.000 Hungarian commuters daily cross the borders to Burgenland for work. The closer the municipality is located to the border the higher the share of commuters working or studying in Austria – values for smaller municipalities range up to 30%. The share of people commuting to Austria of all commuters in a municipality differs widely. Whereas 70% of commuters in Sopron commute to Austria, the share in the other municipalities is between 20 and 25%.

  - commuters flows (numbers, average trip distance & time, profession, gender);
    Share of trips by purpose (regional)
    - To workplace 21,8
    - Business: 3,6
    - To school: 5,3
    - Pick up trips: 6,1
    - Shopping: 11,1
    - "Erledigung": 12,9
    - Leisure: 19,2
    - Visits: 13,7
    - Others: 0,3
  - transport operators performance (cost per km, passengers km, vehicle km);

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[3] Hungary 7.100, Austria 6.800 people returned the questionnaire containing questions about the travel behavior of people living near the border

Contracted cost per km for bus¤	cost (€/km), (2,3)¤	2,5-4€/km¤
Contracted cost per km for rail ¤	cost (€/km), (3,2)¤	12-18€/km¤
Operating cost per vehicle km ¤	(€) (2)¤	7-9€ (without staff costs, depreciation)¤

- o Economy of scale of the cross-borders public passenger transport (fare revenue, subsidy).

  No data available

2.2. Infomobility systems

The aim is to collect comprehensive information about the ICT solutions currently adopted in selected CE regions, the data regarding both the transport supply (connections, timetables, costs, number of changes, waiting times) and the different types of tickets available for users.

- Describe shortly (1 – 1 ½ pages) the themes of the travel information system (TIS) below, providing a broad picture:
  - o general characters: financing form, technical-interoperability features, geographical and transport modes coverage, interfaces;
  - o pre-trip specifications: utility, menu, information content;
  - o on-trip specifications: information content, process and technical features of the real time data transfer.

The Verkehrsauskunft Österreich (VAO) (www.verkehrsauskunft.at) is a common transport information hub for all of Austria, covering all traffic (Passenger Car Routing, Public Routing, Bicycle Routing, Bike & Ride, Park & Ride, Bicycles, Car Sharing, etc.) Based on this data many platforms from public transport associations, rail operators or automotive clubs offer TIS in different quality and with different main focuses.

The two TIS that are mainly used in the eastern Austria are AnachB (AtoB, www.anachb.at) from VOR (Public transport Association for Vienna, Lower Austria and Burgenland) and Scotty from the national railway company ÖBB (www.fahrplan.oebb.at). AnachB and Scotty are available in English language too. https://anachb.vor.at/bin/query.exe/en?L=vs_voranachb&.

http://fahrplan.oebb.at/bin/query.exe/en?

Both offer pre-trip and on-trip specifications as map of line (or routes), timetables, travel times and additional services, trip planning based on origin and destination, information on traffic disruption and delays and both offer an online ticket shop. AnachB offers besides this also a routing for cars.

Both TIS offer apps for mobil phones and widgets which can be included at e.g. a hotel website, so that customers can directly get traffic information on how to get there.

Figure 9: Widget on the website of the Mobility Center Burgenland.

- Summarize (1/2-1 page) the main traits of the ticketing system connected to the TIS: form, share of the sale, benefits.

After choosing the best connection the customer can get to the ticket shop. Before using the ticket shop for the first time, a registration is needed. At Scotty is only a mouse click to get to the ticket shop, the name of the traveller has to be entered and finally the payment via credit card or online banking can be completed by one mouse click. After this the customer gets his ticket sent to his email address.

As AnachB has no ticket shop app for mobile phones and at the website it is not so easy to get to the ticket shop as Scotty. The customer needs to go to the dropdown menu to the ticket shop, fill in the start and the destination one more time and then the ticket sale is done the same procedure like Scotty. AnachB sells only tickets within the regions Vienna, Lower Austria and Burgenland. It is planned to improve the online ticket shop within the next month.

Actually there is a new ITS in Austria started. It is called "Wegfinder", www.wegfinder.at and has just won a mobility award in the category "Digitalisation". This system offers information from all transport associations in Austria. Wegfinder is a product from iMobility Gmbh, which is owned by the federal railway company ÖBB.

VCÖ-Mobilitätspreis 2017 Österreich - Kategorie Digitalisierung und webbasierte Mobilitätslösungen

wegfinder – wie wohin
Der intermodale Routenplaner
für öffentlichen und individuellen
Verkehr

iMobility GmbH

wegfinder ist eine App, die unterschiedliche Mobilitätsangebote in ganz Österreich vereint. Nutzerinnen und Nutzer haben dadurch die Möglichkeit, individuelle und öffentliche

Figure 10: VCÖ Award 2017

2.3. Integrated ticketing and tariff schemes

This section focuses on 'state of the art' analysis of Multimodal integrated tariff and ticketing schemes (ITTS) that are currently in operation in CE countries. The main aim is to collect data on current situation and on gaps forming a status report.

- o Organisational and financial framework and the public passenger transport of the selected region

  The system is in change from public company operation to public tendering (PSO) planned and organized by the VOR. The VOR is the biggest Public Transport Association in Austria and works in the Region of Vienna, Lower Austria and Burgenland. There task is the planning, coordination and financing of the entirely public transport system in the eastern region of Austria. The VOR is owned and financed by the three provinces Vienna, Lower Austria and Burgenland. In the whole region the VOR offers a ticket system including online tickets and a general public transport information platform. Different public transport modes are very well harmonized. Regional and temporary special events as beginning of school after summer holiday, village fairs or music festivals find inclusion in planning process.

1 → GENERAL QUESTIONS: Organisation of public passenger transport in the area.

Our System is in change from Public Company operation to public tendering (PSO)

Description of organisation of public transport services per each mode of transport in the area:	Number of operators (write number)	Type of transport service procurement for each transport mode (indicate YES if true)				Organisation of the PT	
		Concession	Public companies operation	PSO	Other	Organizer of transport *	Ticket issuer **
BUS	national	x	x	x		PTA	PTA
	inter-urban	x	x	x		PTA	PTA
	urban	x	x	x		PTA	PTA
RAIL	national	x	x			PTA	PTA, TO
	inter-urban	x	x			PTA	
	urban	---	---	---	---	---	
TRAM	urban	---	---	---	---	---	---

*Organizer of transport: ministry, local community, Public transport authority (PTA), …

**Ticket issuer: ministry, local community, Public transport authority (PTA), transport operator …

2 → FINANCING MODEL OF PUBLIC PASSENGER TRANSPORT

Indicate the financing model of public passenger transport, adopted in the area (per transport mode and type) – in the table indicate YES if true. If OTHER, please describe.

Financing model / Type of PT		GROSS (transport operator is fully paid for service per kilometre)	NET (transport operator is fully responsible for economic sustainability on exclusive area of service; also elaborates timetables),	OTHER
BUS	national	x	x	
	inter-urban	x	x	
	urban	x	x	
RAIL	national		x	Until 2020, high Cross
	inter-urban		x	
	urban	---	---	

- o categorization of the ticketing mediums and ticketing products per transport mode – or per transport operators if needed;

3 → TICKET RECORDING

Please declare types of ticketing mediums or ticket recording per transport mode and type. Indicate YES if true. Please explain if OTHER medium or ticket recording can be used.

Ticket recording / Type of PT	Paper media (official or print at home)	Magnetic stripe	Barcode (paper, smart phone)	NFC	SMS/MMS (mobile or smart phone)	Bank card	Other (please indicate)
BUS national	x		x				
BUS inter-urban	x		x				
BUS urban	x		x				
RAIL national	x		x				
RAIL inter-urban	x		x				
RAIL urban	---	---	---	---	---	---	---
TRAM urban	---	---	---	---	---	---	---

- o description of the tariff system;

4.1. Tariff system

Indicate (YES) to select the applied tariff system use for transport mode and type. If a special system is used, please describe it.

Type of PT	Zonal system of PT operation	Distance based system of PT operation	Other system. Please describe.
BUS national		x	
BUS inter-urban		x	
BUS urban		x	
RAIL national		x	
RAIL inter-urban		x	
RAIL urban	---	---	
TRAM urban	---	---	---

- o technical features, marketing (sales channels) of the ticketing system;

  The tickets are sold online, via apps, at the bus drivers and in the customer service offices.

- o short analysis of the integrated tariff and ticket system of the selected region – if it is available (main traits, level of integration, financial-technical implementation).

  As mentioned before the VOR (Public Transport organization) is Austria's largest transport network and since 1984 has been providing nationwide mobility and comprehensive service to all passengers in Vienna, Lower Austria and Burgenland with more than 40 rail and bus transport partners. It is owned and financed by these three provinces. As a state-of-the-art Public Transport Association and mobility agency, VOR handles cross-border planning, financing and coordination of all public transport in an area of 23,563 km^2.

- Summarize (1/2-1 page) status of integration of the public transport in the local or/and cross-border area:

  - o 1.) IF CASE OF EXISTING ITTS: Describe the key elements of the system and faced problems and development needs OR

For the region of Burgenland: All public transport modes are integrated in the tariff and ticketing system of regional transport Association. Addition the National Railway Company ÖBB offers a ticketing system for national and international tickets.

- o 2.) IN CASE ITTS DOES NOT EXIST: In case there is no system integration describe the main barriers and drivers to implement one. Describe the main features you would like to integrate (development needs).

3. SWOT analysis

Analyze and categorize (according to the SWOT) the findings of the Overview and the TNA chapters, than fill in the strength, weaknesses, opportunities, threats table with the main outcomes.

According to the literature please use in the table below the following internationally agreed categorization:

- Strengths: characteristics of the business or project that give it an advantage over others
- Weaknesses: characteristics of the business that place the business or project at a disadvantage relative to others
- Opportunities: elements in the environment that the business or project could exploit to its advantage
- Threats: elements in the environment that could cause trouble for the business or project

Strenghts	Weaknesses
- Existing ITTS - VOR Public Transport Association 3 regions - Good and lively cooperation with the Hungarian partners, especially with the Gysev (Raaberbahn) as a cross-border operation service provider - Town of Sopron already as part of the Austrian PT Authority (VOR) – tariff, ITTS	- Rural structure, small towns - Low density of inhabitants, especially in the south of Burgenland - Some missing infrastructural links in the railway system - No cross-border bus system - Nearly no cross border PT system in the middle and southern part of Burgenland
Opportunities	Threats
- Optimisation of the rail system - Implementing a future cross-border bus system - PSO, integrated planning and common branding for all busses in Burgenland	Future budgets for optimisation of infrastructure and for the services not fixed

4. Overall conclusion

Overall conclusions would summarize and merge the findings and the outcomes of the study as well of the SWOT analysis.

There is a very well developed and organised public transport system in Burgenland with integrated planning and ticketing. In some years all bus lines and the rail services are contracted as PSO. VOR as the Public Transport Association is very strong and high professional partner for the Regional Government of Burgenland. Thanks to EU-funded projects we have the opportunity to go on with the development of the public transport system.

The geographical and the political situation with our neighbouring countries gives us the opportunist to see the whole region as a functional area which has a lot of opportunities for all participating regions. Digitalisation, globalisation, high mobility of the inhabitants and the strong need of a sustainable mobility in the field of and beyond cross border transport is one of the big challenges for the future of Austria and the all European countries.