

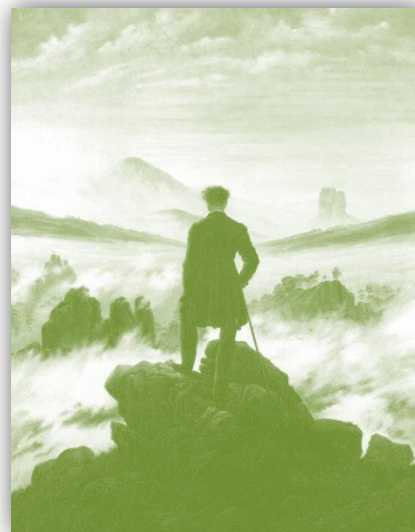


**Three T**  
Interreg Europe



# Report on Territorial context analysis

**Partner n. 8**  
**Self-Government Office of Vas County**



... a trail brought me here

**Doc. 6A-TCA-P8**

Szombathely, 14.12.2018. Version1  
Szombathely, 10.01.2019. Final version



*[The present template is meant to help partners in carrying out the Territorial context analysis (TCA) in their region, the analysis being the initial one of the 5 macro-activities planned in ThreeT Phase 1. Each section of the template is set up for you to insert textual information, maps, tables, diagrams and images that meet your desired description.*

*A suggested size for your report is between 30 and 50 pages.*

*The results of the analysis will not only guide you in selecting Good Practices of your interest but also in drawing your Action Plan in the year 2020. Territorial context assessment is aimed, in fact, also at helping decision makers to select and interpret indicators relevant to spatial policy priorities and agendas. Please note that indicators will not provide you and your decision makers with answers but with information that can help informed decisions to be taken. Indicators will represent your baseline indicators to compare with the future ones in the Action Plan.*

*Each section of the template highlights a certain set of indicators made available in the project web platform or to be collected by each partner. Kindly complete the list by adding other selected indicators relevant to your region, your chosen/planned trail, your Action Plan and your addressed Policy. Other information will be available as data in the project webGIS platform to be commissioned shortly (see Appendix 1 to this template).*

*Prompts and example text is in **blue italicized text** and can be removed from this document when drafting the Report.*

*Pls also refer to the following Presentation: ThreeT\_Mod4C-3T-10 made on 26<sup>th</sup> September 2018 in Livorno, at Workshop n.1]*



## Table of contents

The template includes 8 suggested steps for executing the TCA.

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## [ WHY STARTING FROM A TERRITORIAL FOCUSED APPROACH?]

*ThreeT proposal gives strong emphasis to a “place-based” approach to development policies suiting local conditions.*

*“The design of integrated interventions [is] tailored to places, since it largely depends on the **knowledge** and **preferences** of people living there” (Barca Report, 2009) with focus on territorial, natural and institutional resources.*

*Indeed, ThreeT intends to contribute making sectoral actions more space-aware. Trail development, conservation and valorization are a way of providing such contribution.*

*Let us try a sort of reverse-engineering approach where we start from the process of how to identify and structure actions in order to combine them eventually in the Action Plan. A possible structure for each specific action could be the following:*

- A. Action (title)
- B. Location
- C. Time-frame
- D. Description of the action and the **status quo of the activities**
- E. Objectives, **background**
- F. Action leader and **stakeholders involved**
- G. **Problem/s to be solved and motivation**
- H. **Means of transport used**
- I. **Target group**
- J. Benefits
- K. **Challenges**
- L. Costs/financing
- M. Awareness raising

*Considering the expression in bold, you can appreciate how TCA information collected at the project initial stage may greatly facilitate such a process.*

*You may also appreciate how the above Action structure can influence the lay-out of the Good Practice template to be adopted shortly.*



## 1. General Description of your Region and its Demography

Vas County is one of the most diverse counties of Hungary, its surface is defined by the presence of mountains in the West, hilly areas in the South, plain areas in the middle parts and in the North and gravel flood plains and volcanic cones in the East.

Also the highest peak of Transdanubia region, the 882 m high Írótkő, can be found here. The Kőszeg Mountains and the hill ridges of the Órség region are characterized by extensive woodlands, the feet of the Kőszeg mountains by vineyards and fruit plantations and the lowland areas by cropland management. 30 % of its area is covered by woodlands.

The population of Vas county has been declining constantly over last two decades. The negative demographic indicators are valid practically across the whole county but the natural demographic decline is still not entirely homogeneous, since there are territorial disparities in this respect among county regions. More than 60 % of the county population live in towns, this value is approx. by 7 percentage point lower than national average. Six from seven county districts are classified as rural.



Source: Self-Government Office of Vas County



Tab. 1 - Indicators

n.	Title	Unit of measure	Quantity	Source	To be provided by
1.1	land area by type: mountain a. forest (forest cover) b. hilly (no data available) c. plain (no exact data available) d. water-covered (by type: lake, river, ...) d1 still waters d2 streams, rivers d3 water areas total	a.) % b.) - c.) % d.) hectare	a.) 29,6 b.) - c.) approx. 50 d.) d1 255,1 d2 97,0 d3 352,1	a.) Statistical Yearbook of Vas county, 2016. b.) - c.) Handbook of Vas county d.) Regional Development and Spatial Planning Information System (TEIR)	PP
1.2	topographic diversity (geographic form and elevation variation) /elevation	meter	125 - 882	<a href="http://www.vas.katasztrofavedelem.hu">www.vas.katasztrofavedelem.hu</a>	PP
1.3	Population on 1 January by age group, sex and NUTS 3 region	n.		Eurostat	Lead Partner
1.4	Population: Structure indicators by NUTS 3 region	n.		Eurostat	Lead Partner
1.5	Demographic balance and crude rates at regional level	n.		Eurostat	Lead Partner
1.6	Conventional dwellings by occupancy status, type of building and NUTS 3	n.		Eurostat	Lead Partner
1.7	Population density	n./sq. km			Lead Partner
1.8	Municipalities	n.	216	Gazetteer of Hungary 1st January, 2017 Hungarian Central Statistical Office (KSH)	PP
1.9	Population in urban areas/total	%	61,7	Statistical Yearbook of Vas county, 2016.	PP
1.10	Rural centers – centers of rural districts)	n.	6		PP



## 2. Economy and Labour Market

The county's economy is on a growth path, the per capita level and growth rate of GDP is above national average. A key element in economy is the export-oriented machine industry dominated by foreign direct investment, and therefore county counts as one of the most industrialized areas of the country in both respects, production volume and employment.

The county's labour market is vibrant, 62 % of people aged between 15 and 74 are part of the labour market as employees or unemployed, and the employment rate of 61,3 % is above national average. The unemployment rate is low (1,9 %), or moreover, there is an increasing labour shortage of different degrees in all segments of economy.

*Table 2 - Indicators*

n.	Title	Unit of measure	Quantity	Source	To be provided by
2.1	Gross domestic product (GDP) at current market prices by NUTS 3 regions	National currency		Eurostat	Lead Partner
2.2	Gross value added at basic prices by NUTS 3 regions	National currency		Eurostat	Lead Partner
2.3	Employment (thousand persons) by NUTS 3 regions	n.		Eurostat	Lead Partner
2.4	Dispersion of regional employment rates of age group 15-64 by NUTS 3 regions	n. or %		Eurostat	Lead Partner
2.5	Dispersion of regional unemployment rates by NUTS 3 regions	n. or %		Eurostat	Lead Partner
2.6	Business demography and high growth enterprise by NACE Rev. 2 and NUTS 3 regions	n.		Eurostat	Lead Partner
2.7	Business demography by size class and NUTS 3 regions	n.		Eurostat	Lead Partner
2.8	Employer business demography by NACE Rev. 2 and NUTS 3 regions	n.		Eurostat	Lead Partner
2.9	Employer business demography by size class and NUTS 3 regions	n.		Eurostat	Lead Partner
2.10	Employer business demography by size class and NUTS 3 regions	n.		Eurostat	Lead Partner



### 3. Environment and Climate Change

The state of the elements of the environment in Vas county is overall good, and another contributing factor besides congenial conditions is that the region has never been affected by industrial pollution because it never had any heavy industry and also light industry has been always concentrated in or around towns.

The county's flora and fauna is rich and diverse with a coexistence of elements of Alpine and Pannonian flora and fauna.

The county has several protected areas, such as national parks, landscape conservation areas, nature reserves, forest reserves, with a much higher ratio than national average.

The county has the most balanced climate in the country.

The western part of the county with a continental climate is the area with the highest rainfall in Hungary.

While other parts of the country are often affected by precipitation deficits, in Vas county excessive water causes occasional problems.

Experts indicate that one of the negative effects of climate change, namely the damages caused by water, affect the region to the greatest possible extent.

There is no public energy producing unit with a capacity above 50 MW in the county.

In the case of renewable energy sources, based on the forest cover above national average, biomass could provide significant utilization possibilities.

Another renewable energy source of the county in significant quantities is geothermal energy, but theoretically also the ratio of the use of hydropower could be increased and also initiatives for the use of wind energy were launched.





Table 3 – Indicators

n.	Title	Unit of measure	Quantity	Source	To be provided by	
3.1	Land and marine protected areas (by category)	sq. km	System of Environmentally Sensitive Areas (hectares)	15751,5	Regional Development and Spatial Planning Information System (TEIR) T-MER 2007	PP
			Location of Natura 2000 areas: extent of special bird protection areas in municipality territories (hectares)	45810,1		
			Location of Natura 2000 areas: extent of Special areas of conservation in municipality territories (hectares)	69576,8		
			National park (hectares)	42561,4		
			National park areas in relation to municipality areas (%)	2946,6		
			Extent of total area of Protected Areas of National Importance (hectares)	47523		
			Total protected areas (hectares)	47354,3		
			Extent of total protected areas in relation to municipality areas (percentage)	3221,3		
			Location of Ramsar sites (hectares)	9473,3		
			Landscape parks (hectares)	4569,8		
			Extent of landscape park areas in relation to municipality areas (%)	255,5		
			Protected area (hectares)	223,1		
			Extent of protected areas in relation to municipality areas (%)	19,2		
			Ex lege protected: Cave	32		
			Ex lege protected: well	50		
			Ex lege protected: earth fort	31		
			Ex lege protected: Kunhalom/„kun” hillock	2		
Ex lege protected: Settlements affected by moorlands	62					
assessed caves	32					
3.2	Wildlife (biodiversity)		NA		PP	
3.3	Flora (biodiversity)		NA		PP	



3.4	Maximum, minimum and mean temperature (by month)  - Data of Szombathely city	C.	Hőmérséklet [°C]			Hungarian Meteorological Service, average 1971-2000 years	PP	
			Hónapok	Közép	Maximum			Minimum
			január	-0,9	2,6			-4,0
			február	1,0	5,7			-2,8
			március	5,2	10,7			0,6
			április	9,6	15,4			4,3
			május	14,8	20,6			9,0
			június	17,8	23,6			12,1
			július	19,7	26,1			13,8
			augusztus	19,4	26,0			13,6
			szeptember	15,2	21,2			9,9
			október	9,8	15,3			4,98
			november	3,9	7,9			0,6
december	0,4	3,7	-2,4					
3.4	Variation of exceptional climatic adverse events against previous year	%(or n.)	NA			PP		
3.4	Incidence of renewable energy on total energy production	%	14,2% (2016)			Eurostat  PP		



## 4. Infrastructure and Mobility

The most important transport corridors of the county are the main road Nr.8 as part of the European road network and the main road Nr.86 which has been upgraded into a motorway some years ago.

The former runs west to east and provides connectivity to Székesfehérvár and Graz, the latter leads along the route of Amber Road, a former trading route from the Roman times, connecting the Baltic and the Adriatic Sea.

The town Szombathely is an important railway node, from where trains depart to the biggest towns of Transdanubia and also via Sopron to Vienna and via Szentgotthárd to Graz.

The border to Austria can be crossed by car at 10 crossing points and to Slovenia at 4 crossing points, and by train the border to Austria can be crossed at Szentgotthárd and to Slovenia at Bajánsenye.

Initiatives to interconnect different transport modes have been also launched; the new bus station at Körmend is the first intermodal node in the county, and the development of another nod at Szombathely is under way.

There are 12 P+R (Park and Ride) and 22 B+R (Bike and Ride) facilities next to train stations allowing a change of the transport mode.

The geographical conditions of cycling tourism are good, the route network is expanding dynamically, but there are still many shortcomings in the field of serving infrastructure and tourist information. The cooperation between transport and tourism is not yet intensive, but there are already initiatives on this subject.



*Source: Self-Government Office of Vas County*



Table 4 - Indicators

n.	Title	Unit of measure	Quantity	Source	To be provided by																
4.1	Transport infrastructure (by type and length)	km		OpenStreetMap	Lead Partner																
4.2	Modal split of passenger transport (national level value) car bus railway	%	69 % 21,7 % 9,3 %	Eurostat, 2016.	PP																
4.3	Existing trails (type, length, conditions, ...) [each partner to insert] a) national road b) from this: motorways, motorroads c) municipal cycle path, or foot & cycle path	km	a) 1581 b) 38 c) 85,1	Statistical Yearbook of Vas county, 2016.	PP																
4.4	Transport-related accidents (by mode of transport, other characteristics) - road traffic accidents caused by various modes of transport	n. (per year)	<table border="1"> <tr> <td>all cases</td> <td>531</td> </tr> <tr> <td>car</td> <td>340</td> </tr> <tr> <td>motorcycle</td> <td>14</td> </tr> <tr> <td>lorry</td> <td>57</td> </tr> <tr> <td>bus</td> <td>6</td> </tr> <tr> <td>bike</td> <td>68</td> </tr> <tr> <td>scooter</td> <td>27</td> </tr> <tr> <td>pedestrian, passenger, other person</td> <td>11</td> </tr> </table>	all cases	531	car	340	motorcycle	14	lorry	57	bus	6	bike	68	scooter	27	pedestrian, passenger, other person	11	Statistical Yearbook of Vas county, 2016.	PP
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bus	6																				
bike	68																				
scooter	27																				
pedestrian, passenger, other person	11																				
4.5	Percentage of population riding a bike (national level value, 2013)	% (contrary to 35% that never cycle)	65		PP																



## 5. Tourism and Leisure

Due to its varied and attractive conditions, tourism is the most perspective segment of economy in Vas county.

At the present time, tourism is particularly concentrated, above all medical tourism stands out, but natural attractions, monumental heritage and renowned cultural/art events could be exploited in a better way than today, and also rural tourism has strong potentials.

In 2017 410 thousand guests have generated 1.6 million overnight stays at Vas county's accommodations; the number of visitors and overnight stays increased by a quarter in the last decade.

Alongside a high number of domestic visitors, most tourists arrive from the Czech Republic, Austria and Germany.

The most important settlements from a touristic point of view are Bük and Sárvár (two-thirds of all overnight stays are generated in these two towns), and Szombathely and Szentgotthárd, followed by Celldömölk, Kőszeg, Körmend and Mesteri.

Besides dominant medical tourism, there is a wide variety of attractions for diversification at one's disposal, the main lines of development could be an extended concept of medical tourism (medicinal mineral water, active tourism, ecotourism, local products, medicinal plants, etc.) and cultural tourism (including in particular religious tourism).

The implementation of developments could base on the experiences and capacity of tourism destination management (beside of Tourism Association of Vas county there are four registered TDM organizations in the county, with headquarters in Bük, Celldömölk, Szombathely and Körmend, but also other touristic organizations play an active role in a given micro region).



*Source: Self-Government Office of Vas County*



Table 5 - Indicators

n.	Title	Unit of measure	Quantity	Source	To be provided by				
5.1	Number of establishments, bedrooms and bed-places by NUTS 3 regions	n.		Eurostat	Lead Partner				
5.2	Nights spent in tourist accommodation	n.	1 656 835	www.ksh.hu (STADAT) 2017	PP				
5.3	Endowment of cultural and natural heritage of tourist interest (pls list and specify by category)	n.	<table border="1"> <tr> <td>Assessed unique landscape values</td> <td>560</td> </tr> <tr> <td>Historical heritage monuments</td> <td>722</td> </tr> </table>	Assessed unique landscape values	560	Historical heritage monuments	722	Regional Development and Spatial Planning Information System (TEIR) T-MER 2007	PP
Assessed unique landscape values	560								
Historical heritage monuments	722								
5.4	Area of regenerated open spaces and regenerated public buildings	sq. m.	NA		PP				
5.5	Tourist visits (year) and other information of tourist value  a) Bed-places in public accommodation establishments b) Number of tourist arrivals at accommodation establishments c) Number of tourism nights at accommodation establishments d) of which: international e) Average length of stay f) Spending/day/capita (HUF) f1) Multi-day	n.	a) 15 324 b) 520 551 c) 1 656 835 d) 892 020 e) 3,2 f1) 5 678 f2) 16 012	www.ksh.hu (STADAT) 2017	PP				



	domestic tourism trips f2) Trips by foreigners to Hungary				
5.6	Duration of the period favorable to green mobility	n. of months / year	8 months	(according to experience)	PP
5.7	Tourist who go hiking	n/year	not available at local, regional or national level		PP
5.8	Other activities tourists carry out while staying in the region (by type and %)	%	not available at local, regional or national level		PP
5.9	Availability of a visitor card (if yes, number of cards issued per year)	n.	<ul style="list-style-type: none"> <li>• Bükfürdő Card</li> <li>• Sárvár fürdő Card</li> <li>• Kőszegi kistérség, Írottkö/Geschriebenstein kártya</li> </ul> <p>The number of cards issued is not known.</p>		PP



## 6. Existing policies related to Threet project features. Projects

The Integrated Territorial Programme of Vas County identifies the socially and environmentally sustainable tourism development, in particular projects of networked priority tourism products', as measures to be implemented.

The direct objective of the measure is to achieve a higher spending value and a longer duration of tourist visits in local tourism, while serving the sustainable use of natural resources as a strategic goal of the county as well.

This measure foresees interventions in two fields; the development of county-level thematic offer (water tourism along the River Rába, angling tourism, equine tourism, cycling tourism) and active tourism developments in the area of Nature Park communities.

In relation to the first mentioned field, the adequate service and infrastructure offer of networked priority tourism products comes up as an emphatic element, with particular attention paid to sustainable traffic development, and above all to infrastructure investments of cycling tourism.

The geographical planning horizon is wider than the county itself and it takes the common product development of tourism destination areas next to county or state border, such as cycle route networks, hiking paths or pilgrim routes, also into consideration.

In previous years, numerous projects have been implemented in the county relevant to the goals of ThreeT, such as a Garden Route (international touristic package offers in the field of "gardens" for the age group over 55); Common values of our past – our living heritage (actions aimed at facilitating heritage conservation and by that cultural tourism), alpannonia® - Borderless hiking (preparation and completion of a premium cross-border hiking trail from Kőszeg till Semmering, and further to the region Joglland Waldheimat) or Natur-Kulinarium (development and completion of tourism- and training-focused new experience possibilities provided by the gardens and cultural landscapes of the region).

Thematic international trails Iron Curtain Trail (EuroVelo13 -

<http://www.eurovelo13.com/stages/austria-hungary>),

Via Sancti Martini (<http://www.viasanctimartini.eu/thematic-routes>)

and the Maria Route pilgrim route (dedicated to Holy Mary - <http://mariaut.hu/>; Hungarian only)

cross the county, these have been developed through a series of territorial cooperation projects in the past and provide good practices and lessons to learn on different aspects of route development and management.





Table 6 – Indicators

n.	Title	Unit of measure	Quantity	Source	To be provided by
6.1	Policy 7 - Thematic packages/trails developed	Number	3	Threet Application Form	PP

	Policies	Self-defined performance Indicators	Target
1. IT	Policy 1	Increased number of visits to natural and cultural areas and other areas of attraction receiving SF support (n.)	4,200
2. FI	Policy 2	Visits/year (n.)	10,000
3. MT	Policy 3	Rehabilitated / Preserved Land (% of Total target amount in OPI)	3
4. PL	Policy 4	Visitors using the new created/renovated trails (n.)	2,400
5. ES	Policy 5	Increased tourist visitors linked to hiking (%)	10
6. RO	Policy 6	Area of intervention (sq.km)	5,363
7. HU	Policy 7	Thematic packages/trails developed (n.)	3
8. DE	Policy 8	Enterprises in the sustainable tourism sector receiving financial supports (n.)	17



## 7. Stakeholders

### **Ministry of Finance (former Ministry of National Economy) as Managing Authority of TOP (the policy addressed)**

The Ministry is directly responsible for the policy targeted.

They are involved as strategic partners and ultimate owners of the policy development proposals.

They participate to the meetings of the stakeholder group in order improve the TOP and to support coordination of improving regional projects. Participation to the local and interregional activities allows them to directly learn from the interregional experience and draw solutions to address local needs.

The Ministry participates as key stakeholder and will contribute with good examples of cycling projects (IronCurtainTrail, TransDanube, MoveOnGreen) from previous regional programmes that were implemented in the region.

### **Municipalities of Vas County**

Vas County municipalities are key actors on the beneficiary side of the policy instrument TOP, they work on improving projects to be funded and improve regional coordination among thematic trails based on the interregional learning process of the project.

### **Tourism Federation of Vas County (regional destination management)**

As an association founded by all kind of tourism stakeholders in the county, this organization seeks to develop and manage the NUTSIII region as destination.

### **Local destination management organisations**

Destination Management Organisations operate as NGOs or non-profit companies in 7 cities:

- Szombathely,
- Bük,
- Sárvár,
- Kőszeg,
- Celldömölk,
- Szentgotthárd,
- Körmend

and have local municipalities and service providers among their members/owners.



They have a good coverage also in the surrounding rural areas and are potential project holders and operators for thematic trail projects in the region.

#### **Hungarian Cycling Alliance and Cycling Alliance of Vas County**

The Cycling Alliances are NGOs acting as key cycling coordinator at national and regional level and is in an ideal position to disseminate project outcomes for potential beneficiaries of the TOP in other Hungarian regions.

They also represent a strategic local partner for a more sustainable use of feeder roads by cycling (a privileged human-transport mean which is already popular in the region).

Hungarian Cycling Alliance and Cycling Alliance of Vas County contributes with best practices from other Hungarian regions and will disseminate project results in other Hungarian regions to improve their capacities and practices with higher emphasis on ThreeT approach to a sustainable use of environmental assets and related light infrastructure.



## 8. S.W.O.T. Analysis

The SWOT analysis has been compiled based on the desk research and data collection as well as on the II. Stakeholder workshop held on the 30th of November 2018, in Szombathely.





## **S** Strengths

- Favourable physical and cultural geographic conditions
- Varied touristic offer / diverse touristic potential
- Positive assessment of the region within the country (“developed”, “western”)
- Prominent presence of tourism, high number of overnight stays and guests
- Destinations, brands renowned on national and European level  
(eg. Sárvár, Bükfürdő, Órség)
- Strong and geographically well distributed health tourism (wellness) offer as a related service for thematic packages
- Significant (although concentrated) accommodation capacity
- Available management capacity  
(the region is mostly covered by local TDM organisations; Órségi National Park)
- Broad spectrum of nationally and locally important events
- Living traditions in many settlements
- Presence of cultural, historic and ethnographic expertise
- Long distance routes crossing the region, possibility to access (Kéktúra - National Blue Trail, Via Mariae Pilgrim Route, Via Sancti Martini Pilgrim Route, Eurovelo13)
- Existing intellectual antecedents of some thematic developments
- Presence of active civil society organisations
- High number of local producers and local products



## **W** Weaknesses

- Unfavorable traffic-geographic conditions  
(peripheral position within the country, far from the capital and airports)
- Excessive geographical concentration of tourism (in spa cities of Bük and Sárvár), and by attraction factors (medical tourism)
- Low number of locally owned, capitalized companies in the sector, tourism profit leaking from the region
- Incomplete local networking (thematic, infrastructure-related), weakness/lacking of regional level touristic products
- Deficiency of cycling infrastructure in the country
- Majority of countryside events and attractions represent mostly local values than real touristic attractions
- There is no implementer, potential management (interested in operation) of conceptually outlined products
- The region has no elaborated touristic packages containing county attractions
- The tourism of the region has no strong and active owner, the organizational initiatives, case-by-case resources and different interests won't be channeled by a consensual concept
- Cooperation difficulties, weak partnership base
- Regional level marketing communication is weak and occasional
- Dependence on funding sources – sustainability problems of projects implemented or to be implemented
- Marginalized demand orientation in developments



## **O** Opportunities

- Availability of (national and international) funds
- Scope provided by existing, unused capacities (attractions, actor)
- National level networking initiatives (eg. cycling routes, hiking trails)
- Opportunities provided by the vicinity of borders: cultural links and international markets
- Forming, expected creation of higher educational background of tourism
- Increasing interests towards the local culture and the unique local resources worldwide
- Opportunities provided by national level promotion of 'Hungarikums'
- Increased possibility provided by IT technologies
- Growing demand for individual, creative, new attractions instead of ever attractions and events growing ever larger
- Positive effects of increasing incomes on tourism demand
- Possibilities to participate in international cooperation/projects and get acquainted with foreign good practices
- Possible linking of wellness and active tourism products



## **T** Threats

- Unpredictability of financing system, with rising tendency
- Increasing price competition – return problems, missing developments/investments
- Eventual changes in consumer behavior might have a negative effect on tourism in the region
- Lack of planned national level developments (eg. roads, built heritage) might have a negative effect on the plans' framework conditions
- Further strengthening of centralization tendencies (shrinking scope of local initiatives)
- Not sufficiently positive and worsened country image abroad (in potential markets)
- Frequent changes in economy policy might discourage development actors
- Adverse changes can happen in the field of permeability of borders
- Increasing outward migration trend  
(in particular with regard to skilled, proactive and active actors)
- Realisation of negative scenarios in relation to disbursement of EU funds due to administrative burden and institutional bottlenecks in EU funded programmes, especially the TOP
- Future of tourism organizations – financing of Tourism Destination Management is neither secured by legislation, nor consistent support from public funds
- Decrease in the number of service providers
- Intensifying structural labour shortages in the future





Strengths	Weaknesses
<p>Favourable physical and cultural geographic conditions</p> <p>Varied touristic offer / diverse touristic potential</p> <p>Positive assessment of the region within the country (“developed”, “western”)</p> <p>Prominent presence of tourism, high number of overnight stays and guests</p> <p>Destinations, brands renowned on national and European level (eg. Sárvár, Bükfürdő, Órség)</p> <p>Strong and geographically well distributed health tourism (wellness) offer as a related service for thematic packages</p> <p>Significant (although concentrated) accommodation capacity</p> <p>Available management capacity (the region is mostly covered by local TDM organisations; Órségi Nemzeti Park)</p> <p>Broad spectrum of nationally and locally important events</p> <p>Living traditions in many settlements</p> <p>Presence of cultural, historic and ethnographic expertise</p> <p>Long distance routes crossing the region, possibility to access (Kéktúra - National Blue Trail, Via Mariae Pilgrim Route, Via Sancti Martini Pilgrim Route, Eurovelo13)</p> <p>Existing intellectual antecedents of some thematic developments</p> <p>Presence of some active civil society organisations</p> <p>High number of local producers and local products</p>	<p>Unfavorable traffic-geographic conditions (peripheral position within the country, far from the capital and airports)</p> <p>Excessive geographical concentration of tourism (Bük, Sárvár), by attractions (medical tourism)</p> <p>Low number of locally owned, capitalized companies in the sector, tourism profit leaking from the region</p> <p>Incomplete local networking (thematic, infrastructure-related), weakness/lacking of regional level touristic products</p> <p>Majority of countryside events and attractions represent mostly local values than real touristic attractions</p> <p>There is no implementer, potential management (interested in operation) of conceptually outlined products</p> <p>Deficiencies of cycling infrastructure in the country</p> <p>The region has no elaborated touristic packages containing county attractions</p> <p>The tourism of the region has no strong and active owner, the organizational initiatives, case-by-case resources and different interests won't be channelized by a consensual concept</p> <p>Cooperation difficulties, weak partnership base</p> <p>Regional level marketing communication is weak and occasional</p> <p>Dependence on funding sources – sustainability problems of projects implemented or to be implemented</p> <p>Marginalized demand orientation in developments</p>



Opportunities	Threats
<p>Availability of (national and international) funds</p> <p>Scope provided by existing, unused capacities (attractions, actor)</p> <p>National level networking initiatives (eg. cycling routes, hiking trails)</p> <p>Opportunities provided by the vicinity of borders: cultural links and international markets</p> <p>Forming, expected creation of higher educational background of tourism</p> <p>Increasing interests towards the local culture and the unique local resources worldwide</p> <p>Opportunities provided by national level promotion of 'Hungarikums'</p> <p>Increased possibility provided by IT technologies</p> <p>Growing demand for individual, creative, new attractions instead of ever attractions and events growing ever larger</p> <p>Positive effects of increasing incomes on tourism demand</p> <p>Possibilities to participate in international cooperations/projects and get acquainted with foreign good practices</p> <p>Possible linking of wellness and active tourism products</p>	<p>Unpredictability of financing system, with rising tendency</p> <p>Increasing price competition – return problems, missing developments/investments</p> <p>Eventual changes in consumer behaviour might have a negative effect on tourism in the region</p> <p>Missing of planned national level developments (eg. roads, built heritage) might have a negative effect on the plans' framework conditions</p> <p>Further strengthening of centralisation tendencies (shrinking scope of local initiatives)</p> <p>Not sufficiently positive and worsened country image abroad (in potential sending markets)</p> <p>Frequent changes in economy policy might discourage development actors</p> <p>Adverse changes can happen in the field of permeability of borders</p> <p>Increasing outward migration trend (in particular with regard to skilled, proactive and active actors)</p> <p>Realisation of negative scenarios in relation to disbursement of EU funds due to administrative burden and institutional bottlenecks in EU funded programmes, especially the TOP.</p> <p>Future of tourism organizations – financing of Tourism Destination Management is not secured by legislation, nor there is a consistent support from public funds.</p> <p>Decrease in the number of service providers</p> <p>Intensifying structural labour shortages in the future</p>