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*Eva Kiss**

MAJOR CHANGES IN HUNGARIAN INDUSTRY DURING THE PERIOD OF TRANSITION

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The change in the social system in 1989 was an important landmark in the history of Hungarian industry. Since then radical changes have taken place in industry. The main purpose of the present study is to demonstrate them with particular regard to their spatial consequences and to the role of industrial estates. During the last decade relevant organizational, structural, proprietarial and other alterations have occurred in Hungarian industry, which have considerably affected its spatial pattern both on the national and local levels. Industrial estates have appeared in Hungary in the second half of the 1990s and it seems that they play a more and more important role in Hungarian industry and in shaping industrial space.

Key words: industrial restructuring, industrial estates, Hungary

INTRODUCTION

Since the late 1970s significant changes have taken place in the industry of the developed Western countries and its spatial pattern due to the shifts in the world economy. Industrial transformation, however, began much later in the East European countries and accelerated only after 1989, when the change in the political and social system opened the way to it. Compared to Western countries, where only some industrial enterprises or some branches had to be restructured, in the East industry as a whole and each individual firm needed to be reorganized simultaneously, because almost the whole of industry was in cri-

* Geographical Research Institute, Hungarian Academy of Sciences, Budaörsi út 45, 1112 Budapest, Hungary

sis. This is one of the most essential differences between Eastern and Western European countries. In addition, Eastern European countries have to cope with the challenge of globalization, too. That is the probable reason why changes proceed much slower in Eastern Europe and will take longer. It is also true that their social influences will be more deep-reaching, particularly in certain parts of the region (Hillman 1992). The rate of transformation is rather different in each Eastern European country owing to different factors (historical past, structure of industry etc.). But, the capital cities of the Eastern European countries have generally reacted to the changes faster than other parts of these countries (Gritsai 1997).

Among the Eastern European countries, Hungary, where about 10 million people live, is one of the most dynamically developing one. During the last decade significant organizational, structural, proprietarial, spatial structural and other changes have affected Hungarian industry. In fact, this was the third radical transformation during its almost 150 year history. The main aim of this study is to show new trends and major changes in Hungarian industry with particular regard to their spatial consequences and to the role of industrial estates.

The study consists of three main sections. The first, using basically different statistical data, will analyse the post-socialist industrial transformation, while the second, based partly on a survey carried out in the industrial areas of Budapest in 1998, will point out the spatial consequences on the local and regional levels. The major features of industrial estates deriving from questionnaires in 2001 and their role in the regional development will be introduced in the third section. The Hungarian experiences are good examples for the processes taking place in the industry of other Eastern European countries as they have to cope with similar difficulties coming from their partly similar socialist heritage. The difference lies primarily in the intensity of their transformation. Probably, in Eastern Europe changes in industry have advanced most rapidly in Hungary after 1989, just like in the 19th century, when Hungary was also at the front of industrial development (Berend and Ránky 1979).

NEW TRENDS AND PHENOMENA AFTER 1989

1989 was a major landmark in the history of Hungarian industry and since then radical changes have taken place in Hungarian industry, however, these have not significantly affected the position of industry in the Hungarian economy (Tabs. 1 and 2).

One of the most relevant changes after 1989 is that anyone can establish an industrial enterprise. Thus, the number of industrial firms has increased rapidly in the 1990s and nowadays there are almost 23 thousand of them. Their majority are brand new, only a small part of them have any precedents. They were generally the part of former large state companies split into several units in the 1990s. Some of them were closed down because they were less effective and equipped with old, outdated machines. But the other part began to operate as independent firms. These are also the reasons why the number of industrial plants has decreased spectacularly, from almost 13 thousand to 7 thousand between 1990 and 1998 (Fig. 1).

Tab. 1. The significance of Budapest's industry in Hungarian industry, 1990-1998

Denomination	1990	1998
Number of the economic corporations with legal entity	14 105*	22 823**
<i>of which:</i> limited liability company	11 329	21 151
<i>of which:</i> joint stock company	578	953
Number of industrial plants	12 934	7052
Number of enterprises with foreign direct investment in industry	4066***	4120
Share (%) of foreign direct investment in industry of all FDI	47.9	54.5
All investments in industry (in million USD)	1048	3291
Share (%) of industrial investments of all investments	28.7	33.1
Number of firms with less than 50 employees in industry	11240	20 272
Number of firms with more than 300 employees in industry	872	552
Number of all employees in industry	1 282 185	750 900
<i>of which:</i> in machinery industry	421 554	187 458
<i>of which:</i> in light industry	283 246	162 558
<i>of which:</i> in food industry	198 890	119 523

* Data from 1992

** Data refers only to the active economic corporations

*** Data from 1994

Source: Hungarian Statistical Yearbook 1990, 1992, 1994 and 1998

Regional Statistical Yearbook 1990 and 1998

Tab. 2. Importance of industry in the economy of Hungary, 1990-1998

Share (%) of industry	1990	1998
of the number of the corporations with legal entity	21**	6.2*
of the number of employed persons	30.7	31.4
of the number of enterprises with foreign direct investment	17.2****	16.3
of all investments	37.4	39.8
of the gross domestic product	32.3	30.6
of the export	83.2	72.9
of the value of fixed assets	48.1	52.5***
of the value of real assets	56.1	44.5
of all use of energy	41.5	34.5

* Data refers only to the active corporations

** Data from 1992

*** Data from 1991

**** Data from 1994

Parallel with this process organizational reforms have also been introduced as a spectacular and fast process. The approval of the Act on Economic Associations in 1989 made it possible for industrial firms to choose from different kinds of organizational forms (Csanádi and Fényes 1990). As a consequence, the organizational structure of Hungarian industry has diversified. Traditional

forms (like state companies) have already almost completely disappeared and the new forms came to prevail. Among them limited liability companies are the most popular form, more than 90 % of firms belong to this group.

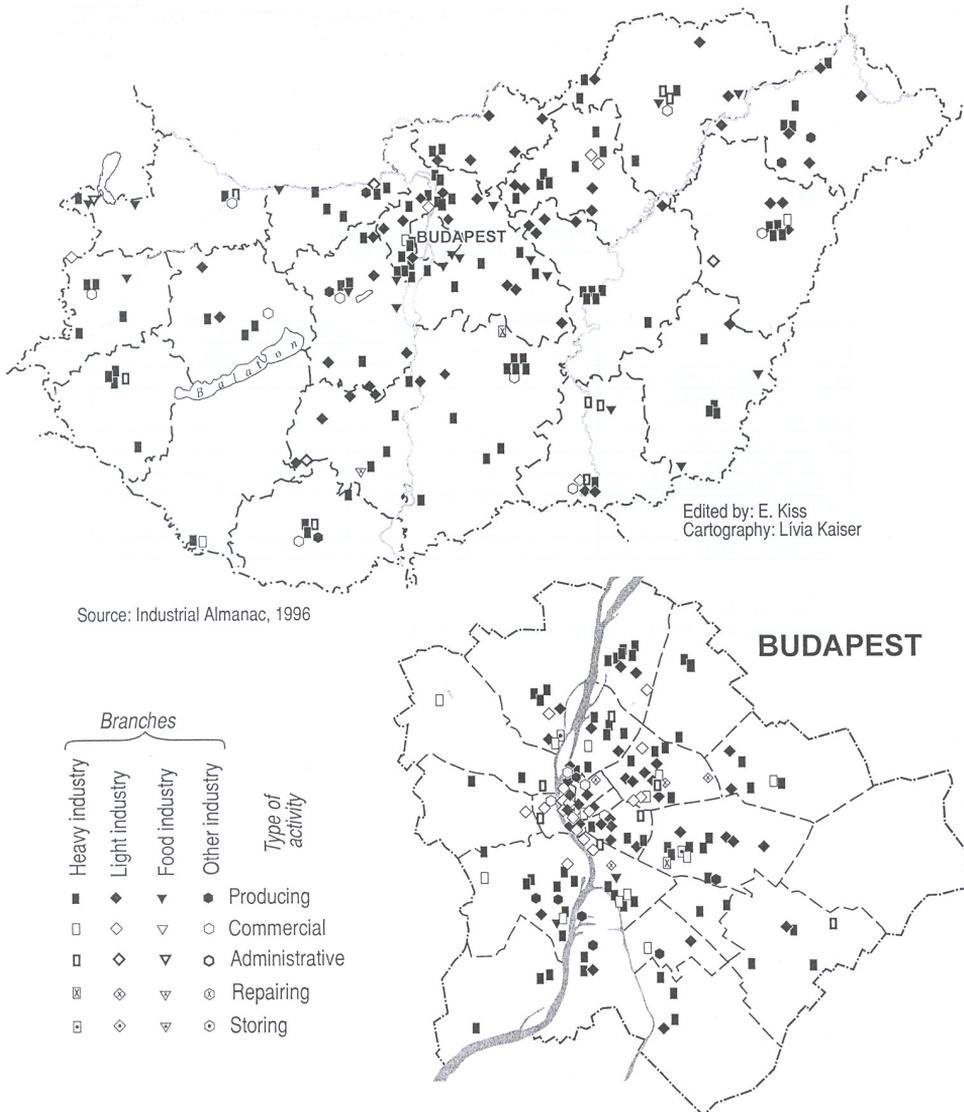


Fig. 1. Industrial plants by branches and type of activity in Hungarian industry, 1996

With the proceeding organizational decentralization a spectacular shift has taken place in favour of the small- and medium-sized firms, representing the majority of the newly founded firms, because those firms, which came from the decentralization of former giant state companies have also been reduced to

small- and medium-sized firms. Owing to these processes, the size-structure of industrial firms has become more proportionate. The number of firms with less than 50 employees has increased at the most rapid rate. In 1998 their share has exceeded 80 %, while the proportion of firms with more than 300 employees accounted for only a few percent. This size structure is very favourable and it is very similar to developed countries, although Hungarian companies are still lagging behind in terms of skills, technical equipment and competitiveness.

The reorganization of ownership can be considered the most important consequence of the change in the political system. Compared to the other Eastern European countries privatization started in Hungary earlier and proceeded much faster. The initial “spontaneous” privatization was soon replaced by a state controlled procedure (Voszka 1998). In the beginning emphasis was laid on privatization of enterprises, small in number but with large fixed assets; later smaller and more numerous firms came to the fore. As a result the Hungarian economy has become based on private property by now, and some subsectors of the economy are fully or to an overwhelming extent controlled by private capital: for example, the chemical industry (e.g. pharmaceuticals) and the food processing (e.g. tobacco industry, brewing), printing and publishing, paper and packing industries (Iván 1998).

Besides Hungarians, foreigners have also taken part very actively in this process. Mostly foreign investors are the owners of larger industrial establishments while Hungarians are in possession of smaller enterprises. Privatization, which has now ended, was also a differentiated process both spatially and temporally and the present owners are of mixed origin. In the mid-1990's Hungarian ownership was typical in South Transdanubia, the Great Plain and North Hungary, while foreigners prevailed in Budapest, Pest County and North Transdanubia (Cséfalvay 1996). Such a spatial distribution was a consequence of different levels of social and economic development, geographical setting, transport geographical conditions, provision of infrastructure, standard of industry, its structure and assets in a given area, composition of local society, conditions of the built environment and image of the region. In this way privatization, to a certain extent, had led to the preservation of earlier regional contrasts, even in enhanced form. A general experience is that modernization, technical renewal and renovation of old industrial establishments are carried out more rapidly in firms which are in foreign ownership.

It has been possible to establish joint-ventures in Hungary since 1972, but during the period of socialism their number was moderately large. In 1987 139, in 1990 2044 and nowadays already more than 4000 joint-ventures operate in industry. They make up 16 % of all enterprises with foreign interest indicating that foreigners established or purchased firms primarily outside the industrial sector. On the other hand 52 % of all foreign investment were attracted by industry in 1998. It clearly shows the attractiveness of Hungarian industry. Foreign investment has been typical in engineering (computer technology, telecommunications, car manufacturing). The chemical and food industries (brewing, tobacco processing, confectionery) and printing and publishing have also attracted many foreigners who either launched new ventures or were eager to buy the best firms within these subsectors. Most of the industrial enterprises with foreign interest can be found in the north-western part of the country, in the

northern part of Transdanubia. This can be explained by several factors (geographical setting, proximity of the western border, developed infrastructure, skilled labour force etc.). The larger part of these firms are “brownfield” investments, that is foreigners have bought old, already existing and well-operating factories. Most of the foreign investors in industry are Germans and Austrians who typically established small and medium enterprises. Americans are less in number but they have invested in large projects. English, Dutch, Japanese, French, Italian and Belgian capital has also played an important role in privatization and investment (Fig. 2).

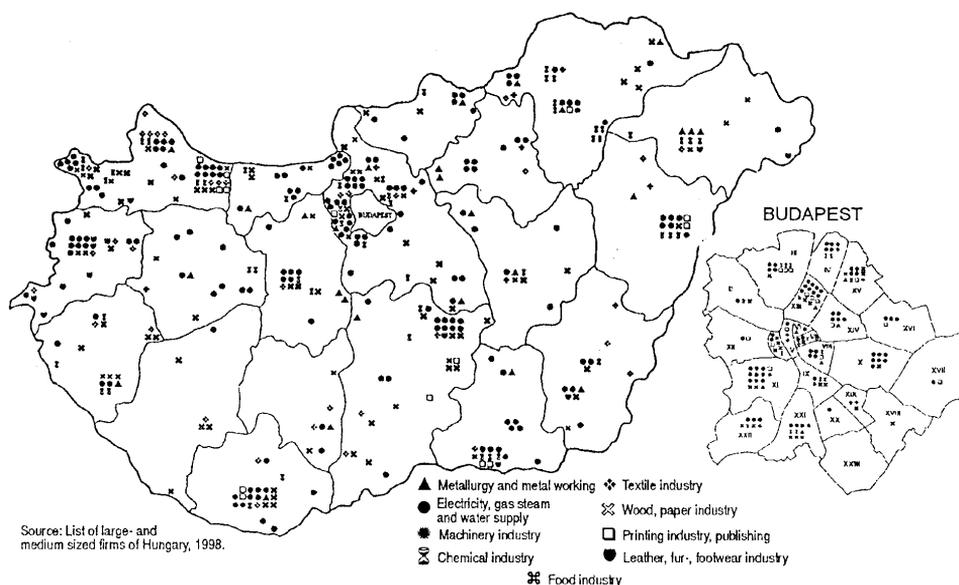


Fig. 2. The most significant firms with foreign interest in Hungarian industry by branches, 1998

During the last decade the structure of Hungarian industry has also altered. Foreign investors have also contributed significantly to this process, as they have invested only in those branches which were considered profitable in the long run. A significant shift has taken place in favour of high-tech or knowledge-based industries while the significance of extractive industries and production of basic materials is continuously decreasing. Nowadays engineering (computer technology, telecommunications, electronics, manufacturing of vehicles and their components) are developing at the most rapid pace, concentrated in the northern part of Transdanubia. Within the chemical industry manufacturing of plastics, rubber and pharmaceuticals enjoy good prospects with plants in the capital, in the northeastern part of the country and in Veszprém County. Food processing develops moderately and, relying on its traditions and resources it plays an outstanding role in the industry of the Great Plain.

On local levels the structure of industry has only changed in those settlements where traditional and declining branches dominated before 1989. Owing

to their crisis the whole of industrial production declined severely in the 1990s. Some of these settlements acted quickly and successfully overcame difficulties (e.g. Tatabánya) where mining and metallurgical activities have been replaced by flourishing firms of electronic and computer technology. In contrast, in the northern part of the country (e.g. in Miskolc) economic restructuring is proceeding at a considerably slower rate, motivated by different socio-economic factors.

In spite of the increasing number of industrial firms (their number including companies with legal and without legal status exceeds 40 thousand) industrial employment figures have considerably decreased. In 1990 there were about 1.3 million industrial employees but now there are only about 830 thousand. The drop was especially high:

- in the first half of the 1990s, when the old companies had collapsed and the newly established had not appeared yet,
- in certain branches, such as mining, machinery industry, light and food industries. Mining has lost 88 % of its manpower, but the machinery industry (56 %), light industry (43 %), food processing (40 %) and chemicals (30 %) were also losers,
- in the north eastern part of the country, where the centres of socialist industry were located (Fig. 3).

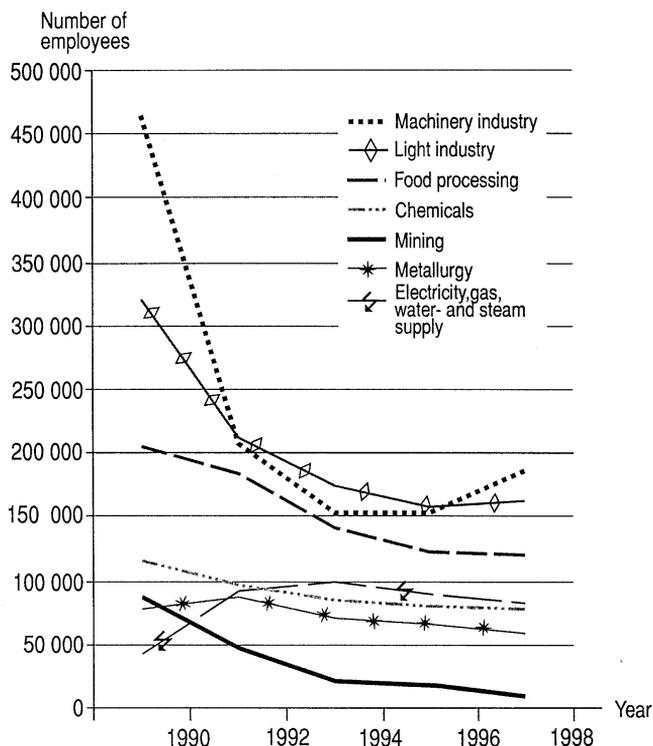


Fig. 3. Changes in the number of industrial employees by branches, 1990-1998

SPATIAL STRUCTURAL CONSEQUENCES

The above mentioned changes that have affected the industry of Hungary after 1989 have directly or indirectly influenced the location and the size of the industrial areas to varying extents. The degree of change is quite variable and it can be traced back to numerous factors, such as the size and location of industrial areas or industrial establishments, the branch structure and size of firms which are in the same industrial district.

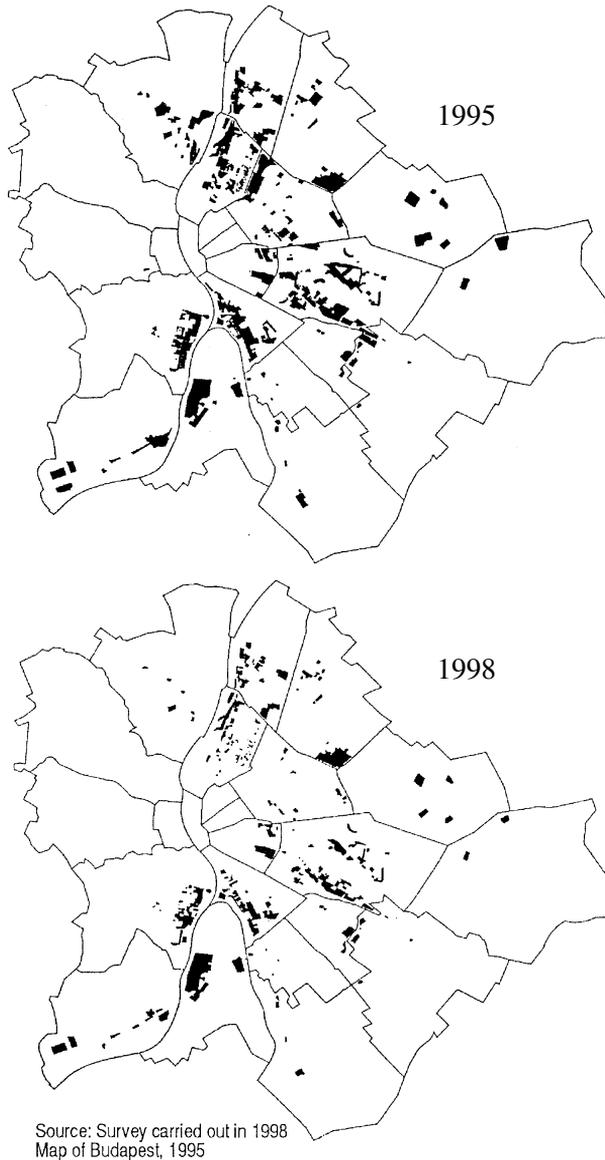


Fig. 4. Industrial areas of Budapest

The case of Budapest is the best example to show how industrial transformation has affected industrial space on a local level, since Budapest is still the largest industrial centre of the country with large industrial areas, which have undergone significant changes in the 1990s (Kiss 1997). According to Chapman and Walker (1988) these changes are, in part, the natural consequences of the evolution of industrial firms and areas. It is also true that the changes in Budapest are not unique, even if they proceeded faster than in developed cities, because similar changes have already occurred in Western cities, too (Takeuchi 1985, Cohen 1998).

During the past decade the industrial areas of Budapest have been considerably reduced in extent. Originally, they developed at the beginning of the 20th century and they formed a crescent around the city centre. At the end of the 1980s they occupied 8.6 % (4538 ha) of the city's area, but now they account for ca. 4.5 % of the total area of the city. The decrease in industrial areas was especially fast in the north-northeastern part of the city, where deindustrialization was the most advanced. The expansion of the city centre into this industrial district has also contributed to this process. Thus, the centre of Budapest is developing in a way similar to that of Western cities (Kluczka 1996) (Fig. 4).

The change in function and the expansion of the city centre can also be observed in the southern-southeastern part of the capital, especially along the River Danube, although, in this region these processes are progressing much more slowly than in the Northern region. Basically, here the main tendency is the rehabilitation of old industrial areas. This means that industry will remain in the long run, but in a much smaller area which can be considered a "relic" of the city's industrial past.

The survey carried out in the second half of the 1990s has shown that, derelict and/or redundant industrial areas and/or buildings are utilized in different ways depending on their size, situation, quality of surroundings etc. (Kiss 1999). Most frequently, however, commercial and service establishments have appeared in the former industrial areas or in the former industrial buildings. But there have already also been attempts to establish parks, flats and sports establishments in their place. Due to the functional transformation of the industrial areas of the city a new urban structure and a new functional division began to take shape. As a consequence the outlook, the image and the whole urban landscape of Budapest will be transformed.

On the national level there is also a relevant change in the spatial pattern of industry. During the socialist era the spatial pattern of Hungarian industry was relatively balanced, in spite of a northeast-southwestern axis following the location of mountains and natural resources and concentrating the larger part of the industrial production. After 1989, however, the regional differences were attenuated for various reasons such as an increasing number of industrial companies, the influx of foreign capital, an increasing role of local autonomy in decisions concerning the economy, structural and organizational reforms within industry. This change is also closely linked with the appreciation of place (geographical setting) as "the era of globalization" is favourable for certain regions and detrimental or less advantageous for other ones (Amin 1994). Thus, the inherited, relatively balanced spatial structure of Hungarian industry became very unbalanced and the former industrial axis was replaced by a northwest-

southeastern axis. However, its southern part has not been developed yet because of the Balkan crisis and the lack of a motorway to this part of the country, just to mention the most important factors, and it is not at all sure that it will be completed in the near future.

Formation of the new post-fordist industrial space is under way even today, but two dynamically developing regions can be clearly identified. One of them is the capital and its agglomeration. In spite of its decreasing role, Budapest continues to be the most important industrial centre in the country with a considerable portion of industrial employees, firms and foreign investment. Budapest has a good chance of becoming a centre of the regional economy (industry) in East-Central Europe (Tab. 3).

Tab. 3. The significance of Budapest's industry in Hungarian industry, 1990-1998

Share (%) of Budapest	1990	1998
of all employees in industry	21.7	12.6
of all enterprises with legal entity in industry	37.1	37.8
of all industrial plants	30.5	20.7*
of all industrial estates	-	2.2
of all investments in industry	19.1	12.5
of all industrial enterprises with foreign interest	33.4	31.8
of all FDI in industry	25.3**	26.6

* Data from 1997

** Data from 1995

Source: Statistical Yearbooks of Budapest 1990, 1995, 1997 and 1998

The other most intensively developing region is the northwestern part of the new industrial axis, the northern half of Transdanubia. This region can be considered as a "winner" of the industrial transformation, because it did not belong to the traditional districts of heavy industry, and thus reacted to the new challenges promptly and adapted to the changed circumstances making use of its good geographical setting and infrastructural equipment on the one hand and a higher level of qualification, innovativeness, flexibility and wealth of the population on the other. The better position of this region is manifested in the large number of enterprises with foreign interest and in the higher rate of industrial employees.

At the same time the northeastern part of the former industrial axis is the big "loser" of the industrial transformation because of the deepening crisis of its branches, which already had serious difficulties earlier, partly because they were unable to adapt themselves to the new conditions in the modified domestic and global impacts on the economy and became even more backward. Lately, this region with mainly declining branches has begun to develop slowly. In other parts of the country there are only a few relevant industrial centres. They are mostly large towns scattered around the country from where dynamism is spreading out.

INDUSTRIAL ESTATES

The regional spatial pattern of industry described above is likely to be changed by industrial estates which are also new phenomena in Hungarian industry. About two years ago a research project began on industrial estates to reveal their role in the economy and regional development. The first results of this research, the major characteristics of industrial estates will be summarized in this part of the study.

In the Eastern European countries, industrial estates emerged first in Hungary (Rakusz 2000). The first industrial estates were established in the northern half of Transdanubia. Then more and more estates were created in the other parts of the country too. As a consequence, their spatial pattern has become more balanced, but they are still relatively insignificant in the moderation of regional differences, because most of them are in the stage of emergence (Fig. 5).

Between 1997 and 2000 their number increased from 28 to 133. In fact, this “fever” to create industrial estates can be considered the third industrialization wave in the history of Hungarian industry. According to a survey carried out in 2001, the industrial estates were usually established for the following reasons: establishing working places, ensuring living, renewal or restructuring of local industrial structure, improvement of local economy, reutilization of old existing but redundant industrial and other establishments, relocation of polluting and/or disturbing firms within a settlement.

A considerable part (45 %) of industrial estates are greenfield investments, mainly in the capital region, in the central part of Great Plain and in the southwestern part of Transdanubia. The brownfield industrial estates are usually connected to the former northeastern-southwestern industrial axis, as the old industrial establishments have been converted into industrial estates. Part of them can be enlarged by a green field and these are the industrial estates with mixed investment. The average size of industrial estates is 61.4 ha, however, most of them are much smaller than this.

The largest proportion of industrial estate are partly or fully owned by local authorities. Besides Hungarian owners, there is also foreign interest in the case of several estates (e.g. Győri, Székesfehérvári Sóstói and Marcali industrial estates). Generally, the most important task of industrial estates is to deal with industrial activity. Because of this it seems that industry will probably play a major part in the Hungarian economy in the future too. The other two most popular functions of parks are logistical functions and innovation centres. About 102 thousand people work for all the industrial estates, but only a few hundreds in most of them. The estates with the largest number of employees are usually greenfield industrial estates with quite high shares in invested capital and exports. This is closely connected with the fact that several multinational companies have settled down and operate in these estates. For example the share of exports is 63 % in the case of Esztergom industrial estate, 72 % in Tatabánya and 92 % in Rétság.

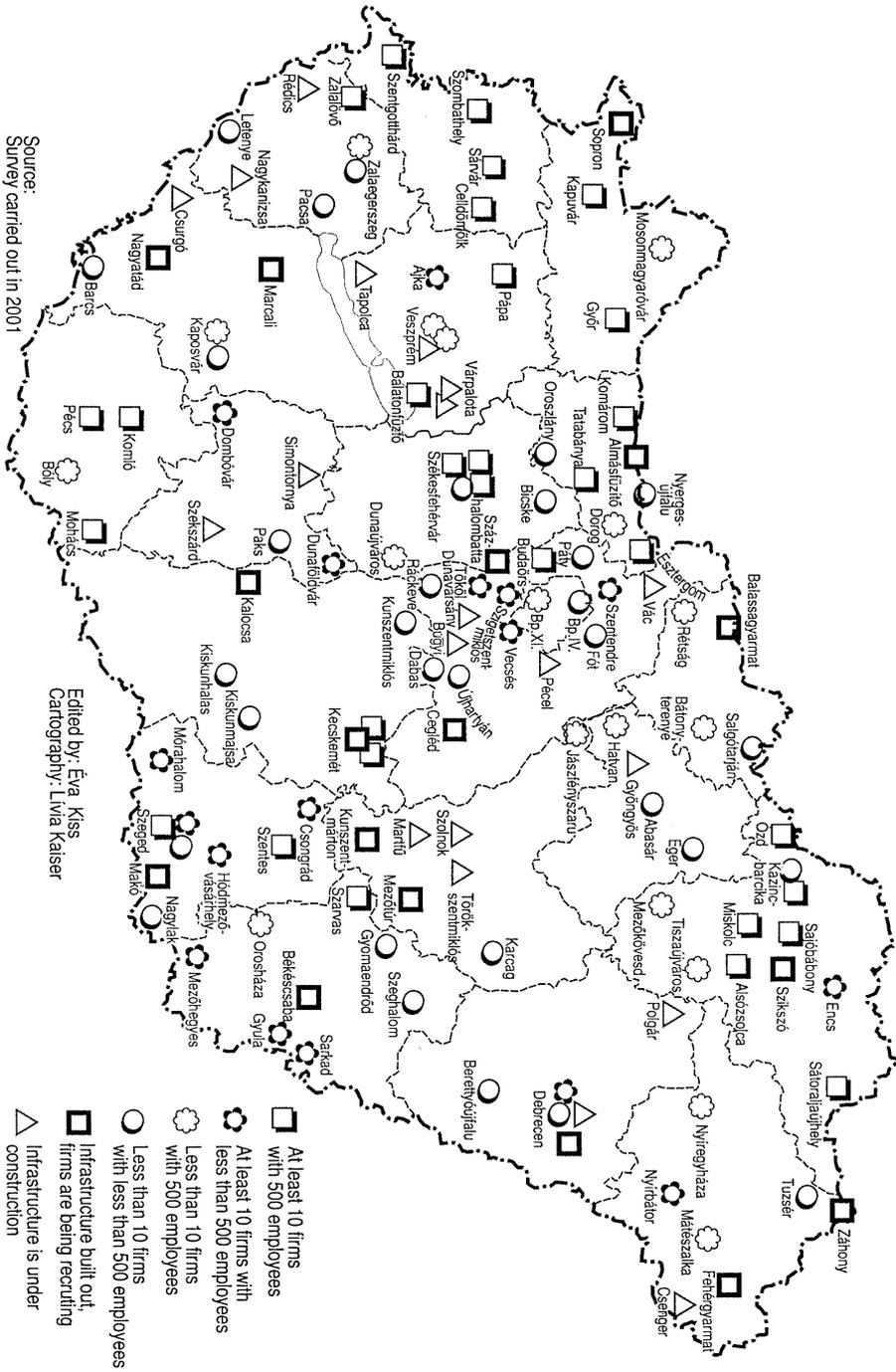


Fig. 5. Industrial estates in Hungary 2001

To operate as a true industrial estate, it has to possess at least 10 enterprises and 500 employees. In 2001 only 30 estates met these criteria. In about 40 % of all industrial estates, the size of building up has not reached 50 % yet, though they have a few years to complete their development, as the full accomplishment has to be reached within five years. It is already obvious that some industrial estates will disappear. The reasons are rather diverse and they are independent of geographical location. But the main reason is that none intends to settle down in these estates. This can be related to the fact that there may be too many industrial estates in Hungary. As a consequence, the firms which intend to settle down can have a wide choice. This also means that the competition among estates for investors will intensify in the following years.

Industrial estates are major components of industrial space on macro level. At the same time on local level mainly the effect of brownfield industrial estates is significant, since these are mostly within settlements, close to residential areas. Thus, the changes taking place in the industrial estates can more directly affect the structure of a settlement, its infrastructural division and the physical landscape too. The local effect of greenfield estates is relatively small because they are usually situated on the periphery of settlements.

CONCLUSIONS

During the last decade Hungarian industry has undergone significant changes. This transition period was very important in laying the foundations for further development and in the beginning of the 21st century a new era started for Hungarian industry. Its future depends on many factors and, there is a range of open issues, but it is already obvious that industry will contribute to the national economy more significantly in the future in Hungary than in Western countries. This is partly due to industrial estates which are of great importance in employment, in local economies and in the shaping of the spatial pattern of industry.

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Eva K i s s

NAJVÝZNAMNEJŠIE ZMENY MAĎARSKÉHO PRIEMYSLU V TRANSFORMAČNOM OBDOBÍ

Cieľom tohto príspevku je ukázať nové trendy a hlavné zmeny v maďarskom priemysle so zvláštnym zreteľom na ich priestorové dôsledky a úlohu priemyselných parkov. Príspevok pozostáva z troch hlavných častí. Prvá analyzuje na základe zásadne odlišných štatistických údajov postsocialistickú transformáciu priemyslu. Druhá je založená sčasti na prieskume realizovanom v priemyselných areáloch Budapešti v roku 1998 a poukazuje na priestorové dôsledky na miestnej a regionálnej úrovni. Tretia časť príspevku sa venuje hlavným črtám priemyselných parkov a ich úlohe v regionálnom rozvoji na základe dotazníkov z roku 2001.

Po roku 1989 došlo v maďarskom priemysle k radikálnym organizačným, štruktúrnym, vlastníckym a iným zmenám. Počet priemyselných podnikov vzrástol a došlo aj k nápadnému rastu malých a stredných podnikov. Maďarská ekonomika sa teraz opiera o súkromné vlastníctvo a niektoré sektory ekonomiky sú úplne alebo prevažne riadené súkromným kapitálom. Zahraničný kapitál sa spravidla objavuje v technických sektoroch (počítačová technika, telekomunikácie, výroba automobilov). V priebehu minulého desaťročia došlo aj k nárastu odvetví zakladajúcich sa na poznatkoch a vysokej technológii, pričom poklesol význam ťažobných odvetví a výroby základných materiálov. Výrazne poklesol aj počet osôb zamestnaných v priemysle (z 1,3 milióna na 830 tisíc).

Prípad Budapešti je najlepším príkladom transformácie priemyslu a jeho vplyvu na priemyselný priestor na miestnej úrovni, pretože Budapešť je najväčším priemyselným strediskom krajiny s najrozsiahlejšími priemyselnými areálmi. Ich zmenšovanie bolo obzvlášť rýchle v severnej a severovýchodnej časti mesta, kde došlo k najpokročilejšej dezindustrializácii. Opustené alebo nadbytočné areály a budovy sa teraz využívajú inak.

Priestorová skladba priemyslu sa zmenila aj na národnej úrovni. Zdedená, relatívne vyvážená priestorová štruktúra maďarského priemyslu je veľmi rozkolísaná a bývalú severovýchodno-juhozápadnú os nahradila severozápadno-juhovýchodná. Toto priestorové rozloženie sa pravdepodobne zmení vplyvom priemyselných parkov, ktoré sú v Maďarsku tiež novým javom. Významný efekt na miestnej úrovni majú priemyselné

areály vybudované na plochách, kde priemysel existoval aj predtým, pretože sa nachádzajú v sídlach blízko obytných areálov.

Budúcnosť maďarského priemyslu závisí od mnohých faktorov, ktoré prinášajú aj množstvo otvorených otázok. Už teraz je však zrejmé, že priemysel prispeje k rozvoju národnej ekonomiky Maďarska viac ako v západných krajinách.

Preložila H. Contrerasová