

CLUSTER STRATEGY

Zalai Önvezető Jármű Klaszter

Medium-Term Strategy 2027–2029

Cluster management organisation: ZONE Klaszter Nonprofit Kft. (company registration number: Cg. 09-09-036526)

adopted by Resolution No. 11/2026 (X.13.) of the General Assembly of the Cluster

Prepared for the qualification application under the GINOP Plusz-1.1.5-25 “Cluster Qualification” call

Qualification type sought: Industry Qualification

Contents

Contents.....	2
1. Executive summary.....	4
2. Overview of the Zalai Önvezető Jármű Klaszter.....	6
2.1 Purpose of founding the Cluster.....	6
2.2 Organisational structure, governance model and membership structure of the cluster.....	6
2.3 Overview of the cluster management organisation.....	6
2.4 Financial performance and economic potential of the cluster management organisation.....	7
3. Professional background: results of the “Automotive Challenges – Competence Development” pilot project.....	9
3.1 Supplier segmentation.....	9
3.2 Structural transformation of the aftermarket.....	9
3.3 Identified areas of intervention.....	10
3.3.1 Workforce transformation and competence development.....	10
3.3.2 Supporting the adaptation of supplier companies.....	10
3.3.3 Supporting the transformation of the aftermarket and the service network.....	10
4. The Automotive Transformation Cluster initiative.....	11
5. Medium-term strategy (2027–2031).....	12
5.1 Vision.....	12
5.2 Mission and member value proposition.....	12
5.2.1 Challenges facing member companies.....	13
5.2.2 Member value proposition.....	13
5.3 Strategic objectives.....	14
5.3.1 Assessment of the initial situation (SWOT).....	14
5.3.2 Overall and specific objectives.....	15
5.4 Service portfolio for achieving the strategic objectives.....	16
5.4.1 Service pillars.....	18
5.4.2 Member adaptation pathways and their link to the services.....	18
5.4.3 Portfolio structure and pricing.....	19
5.5 Action plan / interventions.....	20
5.5.1 Preparatory steps (2026).....	20
5.5.2 2027 – Launch and foundations.....	21
5.5.3 2028 – Expansion.....	21
5.5.4 2029 – Consolidation and sustainability.....	23
5.6 Resources and funding.....	23
5.6.1 Management organisation and human resources.....	23
5.6.2 Revenue sources.....	24
5.6.3 Own assets and IT systems.....	24
5.6.4 Sustainability after the funding period.....	24
5.7 Partnerships and cooperation.....	25
5.8 Monitoring and evaluation.....	25

5.9 Risk analysis.....	27
6. Business plan (2027–2029).....	29
6.1 Planning assumptions.....	29
6.2 Membership and membership fee system.....	29
6.3 Revenue plan.....	30
6.4 Human resources plan.....	31
6.5 Operating expenses and investments.....	31
6.6 Use of the GINOP Plusz-1.1.6-25 grant.....	32
6.7 Projected profit and loss account.....	32
6.8 Projected balance sheet and liquidity.....	32
6.9 Risks and sensitivity of the business plan.....	33
6.10 Two-layer operating model: market-based core operation and project layer.....	34
7. Summary and commitments.....	35

I. Executive summary

Subject of the strategy. This strategy has been prepared for the Zalai Önvezető Jármű Klaszter, that is, for the community of its member companies and partners, for the period 2027–2029. The cluster was founded in 2018 by six large companies as a joint business platform for companies active in the field of autonomous, connected and software-defined vehicles; it retains its name for the sake of continuity. Its professional focus is the technological and market transition of the Hungarian automotive value chain, in line with the automotive objectives laid down in Government Decision 1073/2024 (III.28.). The cluster management organisation, ZONE Klaszter Nonprofit Kft., is responsible for implementing the strategy.

Challenges facing member companies. Hungarian suppliers, primarily SMEs, are simultaneously confronted with shrinking margins and market pressure, the supplier requirements of new manufacturers localising in the region, the technology shift brought about by electrification and software-defined vehicles, the data-driven requirements of OEMs (carbon footprint data, digital product passport, industry data spaces), and skills shortages.

Member value proposition. The cluster improves the profitability of its member companies in two ways. First, it gives them access to new business opportunities: it builds relationships with OEMs and Tier 1 suppliers, forwards procurement enquiries and requests for quotation, and organises B2B matchmaking and joint market access. Second, it helps them to increase their operational efficiency through digital and AI maturity assessments, efficiency and return-on-investment analyses, risk-free testing opportunities, preparation for data spaces, and support in meeting customers' carbon footprint and ESG requirements. In this, the Data-EDIH 2.0 European Digital Innovation Hub, coordinated by the cluster management organisation, provides in-depth expertise and an operational service infrastructure, free of charge for eligible SMEs. The third element is a skilled workforce: training programmes and workforce transformation plans. Each tier of the three-tier membership fee system comes with specific benefits that will be expanded progressively.

The strategy sets three objectives that create direct value for members and one supporting objective:

- C1 New business opportunities and market access: a quarterly procurement forum with OEM and Tier 1 participation, at least 40 B2B meetings and 20 forwarded procurement enquiries per year, and a defence and space diversification programme;
- C2 Technological, digital and green transition, more efficient operation: at least 20 maturity assessments and efficiency analyses, 10 “test before invest” pilots, preparation of 5 members for industry data spaces, and carbon footprint or ESG assessments for 15 members;
- C3 Workforce and competences: at least 150 participants per year in the training programmes of the ZONE Training & Innovation Academy, and workforce transformation plans;
- C4 Market-based self-sustaining operation and a strong member community: by 2029 own revenue covers the full cost of core operation, membership grows from 30 to 42, at least 3 new projects are won, and the ESCA Bronze and Silver Labels are obtained.

Services and action plan. The services are built on four pillars (business acquisition and market access; technological, digital and green transition; workforce and competences; development funding, international partnership and advocacy) and can be introduced in three rounds. In 2027 the foundations of operation will be established: the membership fee system and the Schedule of Service Fees, a supplier catalogue, the procurement forum and RFQ forwarding, the channelling of Data-EDIH 2.0 services to members, and the expansion of cluster management staff. In 2028 the focus will be on the OEM and Tier 1 relationship programme, data space preparation and workforce transformation plans, and in 2029 on continuing the digital services as the cluster's own fee-based offering and on obtaining the ESCA Silver Label.

Qualification and funding objective. Under the GINOP Plusz-1.1.5-25 call, the cluster is seeking the Industry Qualification (application to be submitted by 13 October 2026), and will subsequently, by 15 January 2027 at the latest, submit a cluster funding application under the GINOP Plusz-1.1.6-25 call for a non-repayable grant of HUF 100 million.

Cluster management and business plan. ZONE Klaszter Nonprofit Kft. is the coordinator of Data-EDIH 2.0, a founding partner of EIT Urban Mobility, a member of several European professional

organisations and a participant in 16 international and Hungarian projects; it holds an adult education licence and organises the CEE Automotive Transition Forum every year. By early 2028 cluster management will operate with nine full-time staff, one part-time controller and one intern; given the prominent role of the training business line, a head of education in the core team is responsible for the ZONE Training & Innovation Academy. Cluster management will break even in 2027 and be profitable from 2028, without taking on any loans. The cluster finances its core operation from its own market revenue: own revenue will cover 36% of the cost of core operation in 2027, 55% in 2028 and the full amount in 2029; grant funding will serve capacity building during the transition period and expansion thereafter.

HUF million	2027	2028	2029
Members at the start of the year (number)	30	36	42
Net sales revenue	65.2	108.9	217.5
of which membership fees	12.7	27.9	35.0
Other income (Data-EDIH 2.0, GINOP Plusz-1.1.6-25, new projects)	119.8	140.4	91.8
Profit after tax	0.0	14.0	33.2
Equity at year-end	18.3	32.3	65.5

Risks. The most significant risks are slower growth in membership, a downturn in automotive demand, delays in grant funding, and a shortfall in the fee-based and project revenue planned for 2029. The cluster mitigates these through demand-driven service development, diversification of funding sources, quarterly monitoring and flexible scheduling of staff expansion.

2. Overview of the Zalai Önvezető Jármű Klaszter

2.1 Purpose of founding the Cluster

In 2018 the six founding members (AVL Autókut Mérnöki Kft., Innogy Hungária Kft., Cisco System Magyarország Kft., Ericsson Magyarország Kft., KNORR-BREMSE Fékrendszerek Kft. and T-Systems Magyarország Zrt.) established the Zalai Önvezető Jármű Klaszter with the aim of creating, for Hungarian and foreign companies using, or potentially able to use, the Zalai Önvezető Jármű Tesztpálya (ZalaZONE Automotive Proving Ground) then being built, a joint business platform which, in the fields of

- autonomous vehicles (autonomous driving)
- software-defined vehicles
- connected vehicles
- transport infrastructure development

offers its members 1) innovation cooperation, 2) knowledge transfer and 3) business development services.

It was the founders' express aim that the establishment of the Cluster should contribute to the economic development of Zala County, creating an opportunity for the region to participate in the implementation of the National Smart Specialisation Strategy, particularly in the priority areas of advanced vehicle and other mechanical engineering technologies and of ICT (information and communication technologies) and services.

2.2 Organisational structure, governance model and membership structure of the cluster

Governance model under the Organisational and Operational Rules of the cluster adopted in 2018:

- Cluster General Assembly — the supreme forum of the cluster, in which every member may participate and vote; it meets at least once a year and approves the report of cluster management.
- Cluster Board — a five-member body elected by the General Assembly; it prepares decisions of strategic importance, liaises with government and represents the interests of members; it does not perform operational tasks.
- Cluster Manager / cluster management organisation (ZONE Klaszter Nonprofit Kft.) — operational running of the cluster, with an obligation to report monthly to the General Assembly and the Board.

A shortcoming of the 2018 model was that it contained no fully developed admission or withdrawal procedure: membership was linked to payment of the registration fee and, in the event of non-payment, terminated after a single reminder. In line with the strategy, the cluster has therefore renewed its governance framework, which is laid down in the amended Deed of Foundation, the new Organisational and Operational Rules, the Code of Ethics and the Fee Regulations. Under this framework, the bodies of the cluster are the General Assembly, the three-member Board (President, Vice-President and the Cluster Manager), and the cluster management organisation together with the Cluster Manager appointed by it. The General Assembly adopts the Cluster Strategy, the annual work plan and budget, the Fee Regulations and the Code of Ethics; the Board decides on admission on the basis of a written declaration of accession and monitors the achievement of the strategy's target values on a quarterly basis; the Cluster Manager reports to the Board quarterly and to the General Assembly annually. The three-tier membership fee system is presented in Section 6.2, and the membership benefits associated with each fee tier in Section 5.2.2.

2.3 Overview of the cluster management organisation

Cluster management organisation: ZONE Klaszter Nonprofit Korlátolt Felelősségű Társaság (short name: ZONE Klaszter Nonprofit Kft.; referred to as "ZONE Cluster Nonprofit Ltd." in international project documents). Company registration number: Cg. 09-09-036526 (Court of Registration of the Debrecen Regional Court); tax number: 26278184-2-09; Central Statistical Office (KSH) number: 26278184-7020-572-09. The company was established on 7 March 2018 (date of the instrument of incorporation: 21 February 2018), with subscribed capital of HUF 3,000,000. Registered office: 4025 Debrecen, Piac utca 77, 2nd floor, door 15; branch office and place of central

administration: 1092 Budapest, Kinizsi utca 21–25, staircase B, 5th floor, door 4. The company's sole member and its managing director with sole power of representation is Erős Veronika Erzsébet (managing director since 20 December 2023; member since 17 February 2025). Its main activity is business and other management consultancy (TEÁOR 7020); its other registered activities include, among others, IT consultancy and other information technology and information service activities, advertising agency activities, market research and public opinion polling, public relations activities, translation and interpretation, administrative and business support services, other education and educational support activities, activities of professional membership organisations, and the organisation of conferences and trade events. (Source: stored company extract reflecting the status of the company register as at 9 August 2026.)

ZONE Klaszter Nonprofit Kft. was designated as the cluster management organisation by Resolution No. 2018/16 of the General Assembly of the Zalai Önvezető Jármű Klaszter.

Since 2024 the company has also held an adult education licence (registration number: E/2024/000047), on the basis of which training courses organised by cluster management may conclude with an official adult education certificate. This provides the legal basis for the education and training organisation business line presented in Chapter 3 and Section 5.4, and is in itself auditable, tangible evidence of the service capacity of the cluster management organisation.

Role as EDIH coordinator. Since 1 January 2026 the cluster management organisation has been the coordinator of the Data-EDIH 2.0 ("Data-Driven Innovation for SMEs and the Public Sector") European Digital Innovation Hub (EDIH) (project number: 101256848; duration: 1 January 2026 – 31 December 2028; total eligible cost: EUR 2,868,064, of which ZONE Klaszter's share is EUR 599,901; financing: 50% Digital Europe Programme, 50% Hungarian national budget). As coordinator, ZONE Klaszter liaises with the European Commission, coordinates the technical and financial reporting of the nine-member consortium (BME – Budapest University of Technology and Economics, Neumann János Nonprofit Kft., HTEnet, the Hungarian Central Statistical Office, ELTE-Soft, Magyar Fejlesztésösztönző Iroda (Hungarian Development Promotion Office) and, as associated partners, the University of Debrecen and the University of Pécs), transfers the grant to the partners, and leads the "test before invest" work package. This role is externally verified evidence of the project and financial management capacity of the cluster management organisation, and also forms the basis of the digital service package presented in Section 5.4.

Staffing capacity. According to the published financial statements, the company's average statistical headcount in the last three closed financial years was 5 in 2023, 4 in 2024 and 2 in 2025 (exclusively non-manual staff). In 2026 the company can demonstrate a significant increase in headcount: in addition to the two full-time employees, current staff comprises 2 employees on maternity leave, 8 part-time employees and 2 interns. Implementation of this strategy can begin with the current part-time staff; achieving full-time employment is to be set as an organisational development objective. According to the human resources plan presented in Section 6.4, by early 2028 cluster management will operate with a team of nine full-time staff, one part-time controller and one intern.

2.4 Financial performance and economic potential of the cluster management organisation

The table below summarises the actual figures from the simplified annual financial statements published in the company register. The company was profitable in all three years under review; net sales revenue in 2025 amounted to HUF 41,055 thousand. The sudden, roughly tenfold increase in the balance sheet total from 2024 to 2025 is primarily due to the fact that, at the end of 2025, the company carried in its books, as short-term liabilities, HUF 395,267 thousand (approx. EUR 1 million) of grant funding related to the Data-EDIH 2.0 project that had not yet been used or passed on. This in itself is factual, quantitative evidence of the sharp increase in 2025 in the volume of international projects managed by the cluster management organisation.

Indicator (HUF thousand, except headcount)	2023	2024	2025
Net sales revenue	16.944	13.401	41.055
Other income (of which grants/EU funding)	97.148	111,739 (of which 111,455 grants received)	15,128 (of which 14,344 grants received)
Profit after tax	-12.857	23.980	1.440
Balance sheet total	133.641	42.618	435.095
Equity	-14.115	9.865	11.305
Average statistical headcount (persons)	5	4	2

Source: simplified annual financial statements of ZONE Klaszter Nonprofit Kft. for 2024 and 2025, published in the company register, and the notes thereto (figures in HUF thousand).

3. Professional background: results of the “Automotive Challenges – Competence Development” pilot project

ZONE Klaszter has carried out foundational research into the industrial transformation that fundamentally determines the competitiveness of the Hungarian automotive industry. The key finding of the pilot project, supported by the Ministry for National Economy, is that the greatest challenge lies in the regulatory changes driving the intensive transformation of the sector and in the pressing need for a rapid transformation of the workforce.

The research mapped the competence matrix of the Hungarian automotive industry and, on this basis, identified the core requirements and toolkit of workforce transformation (labour transition plan). The research clearly showed that one of the main obstacles to developing Hungarian suppliers and nurturing “Hungarian Champions” is the presence of industry skills gaps, which are also the main constraints on the transformation of the sector. The research also compared the challenges regarded as most important by Hungarian and European automotive players.

3.1 Supplier segmentation

Based on the impact of the transformation of powertrain technology solutions, suppliers can be divided into three groups. Support for reskilling and upskilling to safeguard jobs is needed in the RED and YELLOW LIGHT segments, where it is also most effective. This segmentation sets the cluster’s new target directions for member recruitment and service development.

Segment	Vehicle subsystems affected	Impact of the technology shift	Need for intervention
RED LIGHT	Conventional powertrain: fuel storage and supply, air supply, exhaust system, internal combustion engine, clutch, transmission, running gear. Electric powertrain: high-voltage battery, electric machine, power electronics, transmission, running gear.	The technology disappears or changes very significantly — the manufacturer is forced to change its products.	Priority: reskilling and upskilling, preparation for product change and for a change in service profile.
YELLOW LIGHT	Thermal management, electrical system, braking system.	Change occurs and technological solutions become more complex — pressure to innovate and to change infrastructure.	Priority: reskilling and upskilling, support for innovation and infrastructure development.
GREEN LIGHT	Differential, axle drive, wheels, steering, safety systems (ADAS), vehicle body and interior.	No significant technological change.	General competitiveness improvement, digitalisation, new market opportunities related to software-defined and connected vehicles.

Source: ZONE Klaszter, April 2024; own research.

3.2 Structural transformation of the aftermarket

The pilot project also examined points of intervention from the perspective of structural market changes. For vehicles with conventional powertrains, the margin at the point of sale is high, there is continuous trade in complementary products (e.g. oils), a well-developed network of franchised and independent workshops operates, and second and third life cycles exist on the global market. For vehicles with electric powertrains, by contrast, the margin on sale is low, there is no need for continuous complementary products, servicing requirements are minimal, and second and third life cycles do not exist outside the developed world. The consequences are as follows:

- OEMs keep car sales in-house, so for certain brands the dealer segment becomes redundant or plays a smaller role in the market;
- accessories that generate significant margins become redundant, resulting in lost profit on the distribution side;

- demand for servicing declines, putting workshops in a critically difficult position, while servicing electric powertrains entails high infrastructure and technical investment costs.

3.3 Identified areas of intervention

Based on the results of the pilot project, three interlinked areas of intervention have emerged.

3.3.1 Workforce transformation and competence development

- EVH readiness — launching awareness-raising campaigns on electrification and changing public perceptions of electric car use (addressing attitudes, motivations and anxieties);
- preparing workforce transformation plans for industry players affected by electrification;
- identifying industry skills gaps and developing competence training to address them for various target groups (vocational education and training, higher education, adult education, workplace training);
- organising comprehensive training for blue-collar automotive workers on electrification-related topics (digital competences, EVH knowledge, occupational safety challenges);
- improving the image of the industry on the labour market (e.g. emphasising digitalisation, positioning women in the labour market, career guidance support for parents of secondary school-age children);
- involving further industry players, enabling needs and possible responses to be assessed even more broadly.

3.3.2 Supporting the adaptation of supplier companies

- preparing companies for the difficulties arising from product change and for the process of changing their service profile;
- processing international good practices, analysing their applicability, and developing workplace training programmes eligible for state support;
- localising European training solutions that support the transformation in Hungarian higher education, vocational education and training, and corporate training;
- carrying out continuous skills analyses and maintaining a register of the national training portfolio for the industry.

3.3.3 Supporting the transformation of the aftermarket and the service network

- training to prepare workshops and vehicle dealers for a change in service profile;
- prioritising occupational safety, teaching the safety requirements for servicing electric cars, and supporting this training and making it as widely available as possible;
- supporting the transformation of the service network (infrastructure conversions, competence training).

It should be noted that ZONE Klaszter Nonprofit Kft. developed its training business line on the basis of the results of the **“Automotive Challenges – Competence Development” pilot project**; this business line has been significantly strengthened by the adult education licence (E/2024/000047) obtained in 2024. In the period 2024–2026, a number of training courses were developed in response to the main findings of the pilot project:

- EV Protect
- ESG and Corporate Strategy
- Design Thinking in the Automotive Industry
- Autonomous Driving
- Digital Twins
- Innovation Management

These training services are also available on the https://zonecluster.eu/?page_id=1399 website.

4. The Automotive Transformation Cluster initiative

The Government of Hungary, recognising the need for economic actors and policymakers to create by 2030 a business environment that facilitates the establishment and operation of various forms of competitiveness and innovation cooperation between companies, educational and research institutions and other organisations, adopted Government Decision 1483/2023 (XI.7.) on Hungary's Cluster Development Strategy (2023–2030) and on certain measures necessary for its implementation. In light of the challenges of the changing economic environment, it also drew up its competitiveness strategy for 2024–2030, which the Government approved, together with the related industrial and technology action plan, by Government Decision 1073/2024 (III.28.).

Point 2(a) of Government Decision 1073/2024 (III.28.) called upon the Minister for National Economy to “establish the Automotive Transformation Cluster [Járműipari Transzformációs Klaszter], whose task shall be knowledge brokerage ensuring the acquisition of the competences required for the technology shift in the automotive industry, setting the directions of the Hungarian automotive sector, and developing the related education and training system”.

In carrying out this task, the Deputy State Secretary for Domestic Economy invited ZONE Klaszter Nonprofit Kft. to develop, building on the Zalai Önvezető Jármű Klaszter, the implementation of the objectives of the above Government Decision. In the period 2024–2026, ZONE Klaszter Nonprofit Kft. elaborated every detail of the project; however, the Government did not provide targeted funding or a dedicated budget for it. Following the 2026 parliamentary election, the process came to a complete standstill.

ZONE Klaszter Nonprofit Kft. believes that the tasks relating to the automotive transformation laid down in the Government Decision are topics of particular importance, which are also consistent with the objectives set by the Zalai Önvezető Jármű Klaszter in 2018: to find answers to the complex economic and social challenges posed by global technological competition, European climate policy objectives, a fair green and digital transition and the pressing need for workforce transformation. The Cluster's new strategy, set out in detail in this document, has been developed along these lines.

5. Medium-term strategy (2027–2031)

The medium-term strategy has been developed in line with the four intervention pillars of Hungary's Cluster Development Strategy (2023–2030) — (1) Motivation and a culture of cooperation, (2) Business cooperation, (3) Research, development and innovation cooperation, (4) Policy and operating environment. Given that, on the basis of its current membership structure and economic profile, the cluster is seeking the Industry Qualification, the strategy focuses on the Business cooperation pillar, while RDI and international elements are included to the extent required by the call.

Subject and starting point of the strategy. The strategy has been prepared for the Zalai Önvezető Járőr Klub, i.e. the community of its member companies and partners; the cluster management organisation, ZONE Klub Nonprofit Kft., is responsible for its implementation. Its starting point is the business situation of the member companies: Section 5.2 presents the automotive challenges to which the cluster responds and the value proposition it offers its members. The objectives, the services and the action plan are derived from this value proposition.

Operating principle: market-based self-sustainability. The cluster finances its core operation from its own market revenue: membership fees, service fees, events, training and business acquisition services. This is in line with the objective of Hungary's Cluster Development Strategy to ensure the self-sustaining operation of clusters through the broad range of high-quality services they provide. Grant funding (Data-EDIH 2.0, GINOP Plusz-1.1.6-25, international projects) accelerates and extends the achievement of the strategic objectives but is not a precondition for the core operation. During the 2027–2028 transition period, the cluster relies on these sources as a capacity-building investment; by 2029, own revenue will cover the full cost of the core operation.

Twin transition and competitiveness. In the coming years, Hungarian and EU development policy aims to strengthen the competitiveness of companies by supporting the digital and green transitions together. For automotive suppliers, the two transitions are intertwined: customers simultaneously expect digital data exchange, product-level carbon footprint data and more efficient, less resource-intensive production. The cluster therefore complements its technological and digital services with sustainability services, building in both areas on the knowledge and tools accumulated within Data-EDIH 2.0.

5.1 Vision

The cluster's vision is to become, by 2029, the leading business and development community of Hungarian automotive suppliers, whose members are the winners of the automotive transition: they win new orders, operate more efficiently and profitably, and possess the knowledge and workforce needed for the transition. The cluster's operation is based on services with measurable impact that build on members' real business needs, and on genuine professional and business cooperation among members, in line with the system of objectives of Hungary's Cluster Development Strategy (2023–2030).

5.2 Mission and member value proposition

The cluster's mission is to improve the profitability of its member companies, primarily Hungarian SME suppliers, in two ways: by giving them access to new business opportunities and by supporting them in increasing their operational efficiency. To this end, it connects members with OEMs, major system suppliers and international value chains, provides practical support for the technological, digital and green transition, and develops the competences of member companies' employees.

In supporting the digital transition, the cluster builds on in-depth expertise and an operational service infrastructure. The Data-EDIH 2.0 European Digital Innovation Hub, implemented under the coordination of the cluster management organisation, provides digital and AI maturity assessments, “test before invest” experimentation environments, targeted training, and investment and financing advice, free of charge for eligible SMEs. Data-EDIH 2.0 is thus a key element of the member value proposition: its services and the experience accumulated during the project form the basis for the cluster to measurably improve members' efficiency and digital maturity and to carry this know-how forward in its own services from 2029. The cluster complements all this with its existing international network (EIT Urban Mobility, European partner clusters, V4 cooperation, CEE Automotive Transition Forum), which it turns into direct business opportunities for members.

5.2.1 Challenges facing member companies

The cluster responds to the following challenges faced by Hungarian automotive suppliers, identified on the basis of the pilot project presented in Chapter 3 and the operational experience of the cluster management:

- **Market pressure.** European vehicle production volumes and suppliers' margins are declining, OEMs expect continuous cost reductions, and suppliers' development resources are shrinking.
- **New customers, new markets.** New manufacturers localising in the region (for example, BYD's investment in Szeged and CATL's in Debrecen) and their suppliers are looking for local partners, yet Hungarian SMEs find it difficult to enter their procurement processes, as they are unfamiliar with their decision-making logic and qualification requirements.
- **Technology shift.** Electrification and software-defined vehicles put at risk the products and competences of suppliers tied to the conventional powertrain (RED and YELLOW light segments).
- **Data-driven requirements.** OEMs expect their suppliers to provide product-level carbon footprint data, digital product passports and quality data exchange, and to connect to industry data spaces (Catena-X, Factory-X).
- **Efficiency and profitability.** With shrinking margins, the most important means of maintaining profitability is improving the efficiency of production and administrative processes. Most SMEs are unable to assess where, and how much, savings digitalisation, automation and artificial intelligence could bring, and consider pilot implementation expensive and risky.
- **Workforce.** Skills shortages, the outflow of skilled labour, and the need for the reskilling and upskilling required for the transition.

5.2.2 Member value proposition

Membership offers three benefits that directly improve the profitability of member companies:

- **More revenue.** Access to OEM and Tier 1 buyers, targeted forwarding of procurement enquiries and requests for quotation (RFQs), B2B matchmaking, a listing in the foreign-language supplier catalogue, and joint market access at Hungarian and international events.
- **More efficient operation.** Digital and AI maturity assessment based on Data-EDIH 2.0, efficiency and return-on-investment analysis, risk-free testing in a “test before invest” environment, preparation for industry data spaces, and sustainability preparation (carbon footprint calculation, ESG data reporting, energy efficiency); free of charge for eligible SMEs under Data-EDIH 2.0.
- **A skilled workforce.** Training courses leading to an adult education certificate, bespoke corporate programmes and workforce transformation plans, at a membership discount.

These are complemented by access to development funding (monitoring of funding calls, proposal writing, consortium building) and the cluster's international and policy network. The following benefits are associated with each tier of the three-tier membership fee system (Section 6.2):

Membership benefit	Basic membership fee	First upgraded tier	Second upgraded tier
Member profile in the competence and capacity database and the supplier catalogue	yes	yes	yes
Participation in the quarterly procurement forums	yes	yes	yes
Forwarding of procurement enquiries and RFQs	profile-based notification	priority notification	priority notification, personal introduction
Organised B2B meetings per year	–	2	4
Digital maturity assessment and return-on-investment analysis	subject to Data-EDIH 2.0 eligibility	with supplementary efficiency analysis	with a bespoke development roadmap
Monitoring of funding calls	yes	yes	yes
Discount on fee-based services (training, consultancy, events)	10%	20%	30%
Participation in OEM visits and joint international stands	–	yes	with priority
Closed professional club (moderated discussions, Chatham House Rule)	–	yes	yes, with the right to propose topics

The cluster will finalise the content of the benefits on the basis of the results of the market research starting in Q4 2026 and will lay it down in the Fee Regulations.

5.3 Strategic objectives

The strategic objectives are derived from the assessment of the cluster's initial situation, the findings of the pilot project presented in Chapter 3, and the four intervention pillars of Hungary's Cluster Development Strategy (2023–2030). The implementation period of the strategy is the three years from 2027 to 2029, which coincides with the maximum 36-month duration of cluster funding under the GINOP Plusz-I.I.6-25 call. International labelling objectives extending beyond this period, up to 2031, are presented as an outlook in Section 5.5.

5.3.1 Assessment of the initial situation (SWOT)

The situation assessment builds on the operational experience of the cluster management organisation, the cluster's results to date and the conclusions of the automotive pilot project. The identifiers of the individual factors (S, W, O, T) also appear in Sections 5.3.2 and 5.4, where they are linked to the objectives and services.

Strengths (S)	Weaknesses (W)
S1 The cluster management organisation is the coordinator of the Data-EDIH 2.0 European Digital Innovation Hub (2026–2028), with its own “test before invest” and training services. S2 Extensive international embeddedness: founding partner of EIT Urban Mobility; 16 international and Hungarian projects, several of them in a lead partner or coordinator role; membership of European professional organisations (Pôle Véhicule du Futur/EACN, EGVIA, CCAM Association). S3 Operational, revenue-generating services: the CEE Automotive Transition Forum and the ZONE Training & Innovation Academy, which holds an adult education licence. S4 Own research base: the competence matrix and supplier segmentation of the Hungarian automotive industry. S5 Links with Hungarian automotive industry associations and policy forums.	W1 Currently low member engagement. W2 Limited human resource capacity, partly on a part-time basis. W3 A significant share of revenue is project-based; membership fee and service revenue does not yet cover operating costs. W4 Lack of uniform data collection and impact measurement for services provided to members. W5 Assets procured for project purposes (e.g. a CRM system) are not available to the cluster to support its continued operation once the projects have closed.

Opportunities (O)	Threats (T)
O1 OEMs' data-driven supplier requirements (carbon footprint data, digital product passport, connection to the Catena-X and Factory-X data spaces) may create new business lines. O2 Available development funding: GINOP Plusz-1.1.6-25, Digital Europe Programme, EIT Urban Mobility, International Visegrad Fund. O3 The GINOP Plusz calls in their final phase offer further funding opportunities. O4 Growing demand for reskilling and upskilling driven by electrification and software-defined vehicles. O5 New OEM investments and localising manufacturers in the region; opportunities to expand into the defence, rail and energy industries. O6 Regional cooperation with the V4 countries (V4SDV Connect); joint action in EU regulation and standardisation. O7 The priorities of the new EU budgetary period starting in 2028 overlap at many points with the cluster's core activity ("core business").	T1 Decline in automotive demand, financial pressure on suppliers and their decreasing willingness to invest in development. T2 Changes in Hungarian cluster policy. T3 Skills shortages and the outflow of skilled labour. T4 Uncertainty about the timing and amount of grant funding; rapid exhaustion of funding allocations. T5 Increasing competition with other clusters and service providers for SMEs' attention.

5.3.2 Overall and specific objectives

The cluster sets three overall objectives that create direct value for members and a fourth objective that makes the operating principle measurable. The first two objectives serve the two sources of member companies' profitability — new revenue and more efficient operation — the third provides the knowledge and workforce required for this, and the fourth secures the cluster's market-based self-sustainability and the conditions for its community. Each objective builds on one or more strengths or addresses one or more weaknesses or threats, and is aligned with one of the intervention pillars of the national cluster development strategy. The numerical target values of the specific objectives and their measurement methods are set out in Section 5.8.

Overall objective	Specific objectives (2029)	SWOT link	National cluster strategy pillar
C1 New business opportunities and market access	C1.1 Four procurement forums per year with OEM and Tier 1 participation; at least 40 documented B2B negotiations per year. C1.2 Targeted forwarding of at least 20 procurement enquiries and requests for quotation (RFQs) to members per year. C1.3 At least 30 member profiles in the competence and capacity database; a foreign-language supplier catalogue. C1.4 At least one joint international appearance per year; the proportion of exporting SME members is at least 25%. C1.5 Defence and space diversification programme: assessment of the market and technological fit of at least 8 members; participation of at least 2 members in an international defence or space programme by 2029.	S2, S3, O5, T1, T5	(2) Business cooperation
C2 Technological, digital and green transition, more efficient operation	C2.1 Digital or AI maturity assessment, efficiency analysis and development roadmap for at least 20 members. C2.2 At least 10 “test before invest” pilot projects at members. C2.3 Service line based on data-driven supplier requirements: preparation of at least 5 members for connection to industry data spaces. C2.4 Sustainability service line: product-level carbon footprint or ESG assessment for at least 15 members; preparation for customers’ ESG data requests.	S1, O1, O2, O7, T1	(2) Business cooperation; (3) RDI cooperation
C3 Workforce and competences	C3.1 At least 150 participants per year in the courses of the ZONE Training & Innovation Academy. C3.2 At least 3 workforce transformation plans at members in the RED and YELLOW light segments. C3.3 Cooperation agreements with at least 3 vocational training or higher education institutions.	S3, S4, O4, T3	(2) Business cooperation; (3) RDI cooperation
C4 Market-based self-sustaining operation and a strong member community	C4.1 The number of SME members grows at least to the extent required under GINOP Plusz-1.1.6-25. C4.2 The majority of members use at least one service per year; at least 10 professional events per year, including the CEE Automotive Transition Forum. C4.3 Diversified fundraising: at least 3 newly won national or EU projects. C4.4 ESCA Bronze Label (2027/2028) and Silver Label (2029); registration on the European Cluster Collaboration Platform; regular participation in national and V4-level policy consultations. C4.5 Own market revenue covers the cost of the core operation: at least 35% in 2027, at least 55% in 2028 and in full in 2029. C4.6 Own, permanent IT systems and a uniform data collection regime; a core team financed from market revenue (seven full-time employees and one part-time controller), with project positions for the duration of the projects. C4.7 Active member community: member retention rate of at least 90%, share of active members 70% by 2029, member satisfaction of at least 4.0 (on a scale of 1–5); quarterly closed professional club.	W1, W2, W3, W4, W5, S2, O3, O6, O7, T2, T4	(1) Motivation and a culture of cooperation; (4) Policy and operating environment

5.4 Service portfolio for achieving the strategic objectives

The guiding principle in designing the service portfolio is that the cluster does not choose the adaptation path on the member’s behalf but lowers the entry cost of every realistically viable path. The portfolio is built on four pillars, which are directly linked to the objectives set out in Section 5.3.2.

The first two pillars are the two key elements of the member value proposition: business acquisition and market access, and the technological, digital and green transition, in which the services of Data-EDIH 2.0 and the knowledge accumulated during the project form the basis of the services.

5.4.1 Service pillars

Service pillar	Main services	Objective	SWOT	Funding
P1 Business acquisition and market access	OEM and Tier 1 relations programme, including supplier days of new manufacturers localising in the region; targeted forwarding of procurement enquiries and requests for quotation (RFQs); B2B matchmaking; quarterly procurement forum; member competence and capacity database, foreign-language supplier catalogue; joint stands at international conferences and trade fairs; B2B meetings at the CEE Automotive Transition Forum; defence and space diversification programme (assessment of market and technological fit, engineering competences, standards, and regulatory and security requirements; pilot entry via the ESA GSTP De-Risk, NATO DIANA, EUDIS and, later, EDF programmes); entry programme for the rail and energy industries	C1	S2, S3, O5, T1, T5	Membership fees, service fees, sponsorship, ticket revenue; GINOP Plusz-1.1.6-25 (events, international market access)
P2 Technological, digital and green transition (Data-EDIH 2.0)	Digital and AI maturity assessment, development roadmap; efficiency and AI return-on-investment analysis; “test before invest” services (data management sandbox, IoT and sensor lab, Living Lab pilot); preparation for industry data spaces (Catena-X, Factory-X) and organisation of the connection; implementation support; investment and financing support; sustainability services: product-level carbon footprint calculation, preparation for customers’ ESG data requests (value-chain data under the CSRD), energy efficiency and circularity assessment	C2	S1, O1, O2, O7, T1	Data-EDIH 2.0 (free of charge for eligible SMEs until 31 December 2028); fee-based supplementary services; GINOP Plusz-1.1.6-25; from 2029, continuation as the cluster’s own fee-based services
P3 Workforce and competences – ZONE Training & Innovation Academy	Courses leading to an adult education certificate (EV Protect, ESG and Corporate Strategy, Design Thinking in the Automotive Industry, Autonomous Driving, Digital Twins, Innovation Management); AI and digital training; bespoke corporate programmes; workforce transformation plans	C3	S3, S4, O4, T3	Training fees; Data-EDIH 2.0; EIT Urban Mobility projects; GINOP Plusz-1.1.6-25 (training)
P4 Development funding, international partnership and advocacy	Monitoring of funding opportunities and proposal writing; consortium building for international programmes (Eurostars, EIC, EIT Urban Mobility); IP audit and patent search, certification preparation; representation in national and V4-level policy consultations and in European cluster networks; channelling of member feedback; closed professional club; support for business succession (management and ownership succession, knowledge transfer, transition planning with the involvement of partner experts)	C1, C2, C4	S2, S5, O2, O3, O6, O7, T2, T4	Service fees, success fees; membership fees; international projects (e.g. V4SDV Connect); GINOP Plusz-1.1.6-25

5.4.2 Member adaptation pathways and their link to the services

In a turbulent market environment, an automotive supplier has several adaptation pathways open to it, and live European good practice can be identified for each of them. The table below shows which service pillar addresses the main entry barrier of each pathway.

Member adaptation pathway	Main entry barrier	Service provided by the cluster	Pillar
Entering new markets	No contacts; unfamiliar buyer decision-making logic	Targeted procurement forum (including with new OEMs localising in Europe), preparation for local content compliance, foreign-language supplier catalogue	P ₁
Moving beyond the build-to-print model	No development capacity or IP know-how	Niche identification, IP audit and patent search under a framework agreement, mentoring for bringing own products to market	P ₄
International innovation partnership	Unable to find consortium partners	Partner search and consortium building, targeted screening of calls, brokerage within the international cluster network	P ₄
Improving digital maturity	Companies do not know where they stand; pilots are expensive and risky	Digital and AI maturity assessment, “test before invest” pilot projects, preparation for data spaces	P ₂
Improving efficiency and profitability	Companies cannot see where, and how much, savings digitalisation, automation and artificial intelligence could bring; lack of an internal data culture	Efficiency and AI return-on-investment analysis, process and data management assessment, “test before invest” pilot in production, implementation support	P ₂
Green transition and ESG compliance	Customers request carbon footprint and ESG data, but the company has no measurement methodology	Product-level carbon footprint calculation, preparation for ESG data reporting, energy efficiency and circularity assessment	P ₂
Expanding into new industries	Gaps in certification, documentation and customer relations	Defence and space diversification programme with low-cost pilot entry; entry guide (rail and energy industries), certification preparation, links to national sector programmes	P ₁ , P ₄
Human and organisational capacity building	Companies cannot find a training system offering effective solutions tailored to their needs	Extension of the activities of the ZONE Training & Innovation Academy, workforce transformation plans	P ₃
Business continuity, business succession (generational change)	No succession plan; critical knowledge rests with the owner and a few key employees	Business succession programme with partner experts: management and ownership succession, knowledge transfer, transition planning	P ₄

5.4.3 Portfolio structure and pricing

Services are introduced in three successive stages, each building on the previous one:

- **Core stage (from 2027):** member competence and capacity database, supplier catalogue; quarterly procurement forum; forwarding of procurement enquiries and RFQs; channelling the services of Data-EDIH 2.0 (maturity assessment, efficiency and return-on-investment analysis, “test before invest”, training) to members; funding-opportunity monitoring and grant-writing support as a named, invoiceable service; ZONE Training & Innovation Academy courses at a membership discount; quarterly closed professional club; rapid sustainability assessment (carbon footprint, energy efficiency).
- **Advanced stage (from 2028):** OEM and Tier 1 relations programme and B2B matchmaking; readiness programme for joining industrial data spaces; IP audit framework contract; workforce transformation plans; joint appearances at international events; defence and space diversification programme with pilot market-entry projects; business succession programme; market-entry programme for the railway sector.
- **Continuity stage (from 2029):** following the closure of Data-EDIH 2.0 (31 December 2028), continuation of the proven digital services as the Cluster’s own fee-based services; organisational development programmes; preparation of the concept for a physical and digital competence centre, from separate funding.

Over the 36 months of the Data-EDIH 2.0 project, ZONE Klaszter Nonprofit Kft. will acquire all the knowledge and experience required to develop companies’ digital skills. Building on this foundation, the portfolio of the ZONE Training & Innovation Academy will gradually include services that no longer target only the employees of member companies but focus on developing the organisation as a

whole: guidance on implementing digital and AI maturity roadmaps, leadership and change management programmes, and support for the implementation of workforce transformation plans.

Data spaces. The Cluster plays an organising role in members joining industrial data spaces. Each participating company takes part in a data space with its own identifier and its own connector; the Cluster therefore does not provide shared access but informs and prepares members, coordinates the onboarding process and negotiates more favourable group terms with specialised providers (“Connector-as-a-Service”).

Two-tier pricing. Some services are available exclusively to members, while others are also open to companies outside the Cluster, although members can use them at a discounted price. Two-tier pricing both encourages membership and generates service revenue for the cluster management.

Excluded elements. The portfolio deliberately excludes the development of a proprietary sectoral data standard (aligning with international standards is more efficient) and the operation of a stand-alone physical laboratory without a partner (its running costs cannot be covered from the planned revenue structure).

Membership fees and the planned annual revenues per service are set out in Sections 6.2 and 6.3. The fee rates for individual services will be laid down by the cluster management in the two-tier Fee Regulations, based on the results of the market research.

5.5 Action plan / interventions

The action plan translates the strategic objectives into measures broken down by year for the period 2027–2029. Many of the measures also form the professional content of the GINOP Plusz-1.1.6-25 cluster funding application. The managing director of the cluster management organisation is responsible for implementation; regulatory decisions affecting membership are prepared by the Board and adopted by the General Assembly.

5.5.1 Preparatory steps (2026)

Measure	Objective	Responsible	Timing	Output
Adoption of the Cluster Strategy, the Organisational and Operational Rules, the Code of Ethics and the Fee Regulations	C4	Board, General Assembly	2026.10.13.	General Assembly resolution
Submission of the qualification application (GINOP Plusz-1.1.5-25)	C4	Cluster management	By 13 October 2026	Application submitted
Self-funded market research on the needs of members and the target group (quantitative, qualitative, desk research)	C1–C4	Cluster management	Q4 2026 – Q1 2027	Preliminary results (December 2026), final report (Q1 2027), finalised service portfolio
Preparation and submission of proposals for new projects starting in 2027 (EIT Urban Mobility, Interreg, Horizon Europe, International Visegrad Fund)	C4	Cluster management	Q4 2026	Proposals submitted
Submission of the cluster funding application (GINOP Plusz-1.1.6-25)	C4	Cluster management	By 15 January 2027 at the latest	Application submitted

The stages of the action plan for 2027–2029, presented in Sections 5.5.2–5.5.4, are based on the Cluster’s current knowledge: the operational experience of the cluster management, the findings of the “Járműipari kihívások – kompetenciafejlesztés” (Automotive Challenges – Competence Development) pilot project, the results of the Data-EDIH 2.0 project to date and preliminary desk research. The self-funded market research starting in Q4 2026 aims to identify the real needs of members and of businesses in the target group using quantitative and qualitative methods and the analysis of secondary sources.

The results of the market research may modify the subsequent steps of the action plan. If the research identifies new market needs or new service opportunities, the cluster management will propose corresponding adjustments to the measures, the timing and the service portfolio. The proposal will be reviewed by the Board, and the amended action plan will be approved by the General Assembly. In

this way, the Cluster ensures that the implementation of the strategy reflects members' actual needs, that the professional content of the application to be submitted under the GINOP Plusz-1.1.6-25 call already builds on the preliminary results of the research, and that the final results are incorporated during implementation.

5.5.2 2027 – Launch and foundations

Measure	Objective	Responsible	Timing	Output
Introduction of the three-tier membership fee system: membership tier declarations (by 15 June 2027), review of membership benefits based on the market research (by 30 June 2027)	C4	Board	Q1	Membership tier declarations, membership fees payable from 1 July 2027
Preparation of the two-tier Schedule of Service Fees and its approval by the Board in accordance with the Fee Regulations	C4	Board	Q1	Approved and published Schedule of Service Fees
Introduction of an in-house CRM and membership register system and a data collection procedure	C4	Cluster management	Q1–Q2	Operational system, designated persons responsible
Expansion of the cluster management team: head of education, junior administrator and part-time controller (January), junior cluster manager (April), senior IT officer (July), senior grants project manager (September)	C4	Managing director	Q1–Q3	8 full-time staff, part-time controller, 1 intern
Targeted membership recruitment campaign (suppliers, vocational training, higher education)	C4	Cluster management	Ongoing	Growth in membership
Member competence and capacity database, foreign-language supplier catalogue	C1	Cluster management	Q1–Q2	At least 20 member profiles
Channelling Data-EDIH 2.0 services: maturity assessments and efficiency analyses at member companies	C2	Cluster management	From Q1	At least 8 members assessed
Launch of a sustainability service line: rapid carbon footprint and ESG assessment building on Data-EDIH 2.0 tools	C2	Cluster management	From Q2	At least 3 members assessed
Launch of a quarterly procurement forum	C1	Cluster management	From Q2	4 forums/year, documented B2B meetings
Launch of a closed professional club: moderated discussions on pre-set topics under the Chatham House Rule, with invited experts and decision-makers	C4	Cluster management	From Q2	At least 3 sessions
Forwarding of procurement enquiries and RFQs, launch of a B2B matchmaking service	C1	Cluster management	From Q2	At least 10 business opportunities forwarded
Defence and space diversification: survey of member needs, information day on international programmes (ESA, NATO DIANA, EUDIS, EDF)	C1	Cluster management	Q3–Q4	Needs survey, at least 1 information day
Launch of grant-writing and project management services for members; winning new projects	C2, C4	Cluster management	From Q3	At least 1 new project won
ZONE Training & Innovation Academy courses at a membership discount	C3	Cluster management	Q1	Member discount available
Cooperation agreement with vocational and higher education institutions	C3	Cluster management	Q2–Q3	At least 1 agreement
CEE Automotive Transition Forum 2027	C1, C4	Cluster management	Q4	Event held, B2B meetings
Registration on the European Cluster Collaboration Platform (ECCP), documentation of compliance with ESCA entry requirements	C4	Cluster management	Q2–Q3	Registration, documented compliance
ESCA Bronze assessment	C4	Board, cluster management	Q4 – Q1 2028	ESCA Bronze Label

5.5.3 2028 – Expansion

Measure	Objective	Responsible	Timing	Output
Launch of a readiness programme for joining industrial data spaces	C2	Cluster management	From Q1	At least 3 members prepared
Expansion of the cluster management team: junior business development officer	C4	Managing director	Q1	9 full-time staff, part-time controller, 1 intern
“Test before invest” pilot projects at member companies	C2	Cluster management	Ongoing	At least 6 pilots (cumulative)
IP audit framework contract and market-entry programme for the railway sector	C1	Cluster management	Q1–Q2	Framework contract, programme description
Defence and space diversification programme: assessment of members’ market and technological fit and of their compliance with standards and security requirements, pilot market-entry projects	C1	Cluster management	Q1–Q4	At least 5 members assessed
Launch of a business succession programme: management and ownership succession, knowledge transfer, transition planning with partner experts	C1, C4	Cluster management	Q2	Framework agreement with experts, at least 2 member companies
Workforce transformation plans at members in the RED and YELLOW light segments	C3	Cluster management	Q2–Q4	At least 2 plans
Fee-based complementary digital services, corporate training programmes and a paid procurement forum	C1, C2, C3	Cluster management	Ongoing	Revenue targets as per Section 6.3
Joint member presence at an international trade fair or conference	C1	Cluster management	Annually	At least 1 joint stand
OEM and Tier 1 relations programme: company visits, supplier days with manufacturers localising in the region	C1	Cluster management	Q1–Q4	At least 2 OEM or Tier 1 events
Joint R&D&I initiative between member companies and university partners	C2	Cluster management	Q2–Q4	At least 1 initiative
CEE Automotive Transition Forum 2028	C1, C4	Cluster management	Q4	Event held
Development of a sustainability plan for the period after the closure of Data-EDIH 2.0	C4	Cluster management, Board	Q3–Q4	Adopted sustainability plan
Preparation for the ESCA Silver assessment (designation of 3 improvement areas)	C4	Cluster management	Q2	Improvement plan

5.5.4 2029 – Consolidation and sustainability

Measure	Objective	Responsible	Timing	Output
Continuation of the proven digital services as the Cluster's own fee-based services	C2, C4	Cluster management	From Q1	Fee-based service line, HUF 66.0 million in revenue
Introduction of organisational development programmes in the ZONE Training & Innovation Academy offering	C3	Cluster management	Q1–Q2	New programmes
Defence and space diversification: member participation in international programmes and calls (ESA GSTP De-Risk, NATO DIANA, EUDIS, EDF)	C1	Cluster management	Q1–Q4	Participation of at least 2 members
Fee-based sustainability services (carbon footprint, ESG data reporting, energy efficiency)	C2	Cluster management	From Q1	At least 15 members assessed (cumulative)
Verification of fulfilment of the membership growth commitment	C4	Cluster management	Q4	Verified membership list
ESCA Silver assessment	C4	Board, cluster management	2029	ESCA Silver Label
CEE Automotive Transition Forum 2029	C1, C4	Cluster management	Q4	Event held
Comprehensive evaluation of the strategy, preparation for the next strategic period	C4	Board, General Assembly	Q4	Evaluation report, draft new strategy

Outlook to 2031. In 2030–2031 the Cluster aims to obtain the ESCA Gold Label. To this end, the cluster management must achieve a performance of at least 80% across the 31 international quality indicators. ESCA does not require the Silver Label as a prerequisite for Gold; the step-by-step approach is justified by the introduction of the new service model.

5.6 Resources and funding

5.6.1 Management organisation and human resources

The cluster management organisation, ZONE Klaszter Nonprofit Kft., is responsible for implementing the strategy. In 2026 the company employs two full-time employees, eight part-time staff and two interns; a further two employees are on maternity leave. Implementation of the strategy can begin with the current staff. According to the human resources plan presented in Section 6.4, the cluster management will start in January 2027 with a managing director, an operations manager, a senior communications officer, a head of education, a junior administrator, a part-time controller and one intern, and by January 2028 it will operate with a team of nine full-time staff, one part-time controller and one intern. Given the prominent role of training, the head of education is a member of the core team. Staff work remotely, with two in-person meetings a month in a rented coworking office. Staffing is divided into two layers: the core team financed from market revenues (managing director, operations manager, senior communications officer, head of education, senior grants project manager, senior IT officer, junior administrator and part-time controller), and staff employed for the duration of projects (junior cluster manager, junior business development officer, intern).

Tasks are allocated according to the following areas of responsibility:

- executive and cluster management, strategic and policy relations;
- business development: OEM and Tier 1 relations, procurement enquiries, B2B matchmaking, member relations and recruitment;
- technological, digital and green transition: Data-EDIH 2.0 services and its “test before invest” work package;
- training and education (ZONE Training & Innovation Academy) under the direction of the head of education;
- event management and communications;
- project and financial management, controlling, administration, data collection and monitoring.

Under the GINOP Plusz-1.1.6-25 call, the personnel costs of the cluster management are eligible subject to limits linked to the number of members (one manager and two staff members for up to 60 members). Additional capacity is provided by service revenues, Data-EDIH 2.0 and new projects.

5.6.2 Revenue sources

Source	Content	Period	Role in operations (2027 / 2028 / 2029, HUF million)
Membership fee	Three-tier membership fee (basic fee: HUF 275,000 / 560,000 / 1,725,000 per year for micro and small, medium-sized and large enterprises respectively, with two higher tiers); fees payable from 1 July 2027	From 2027	Covers core operation and advocacy; 12.7 / 27.9 / 35.0
Service fees	Events (sponsorship, ticket sales), procurement forum, training, consultancy, grant writing (success fee), fee-based digital services	Ongoing	The most important own revenue; 52.5 / 81.0 / 182.5
Data-EDIH 2.0	Digital Europe Programme and national co-funding; eligible costs attributable to ZONE Klaszter: EUR 599,901	2026–2028	Funds digital services, free of charge for SMEs; 80.0 / 80.0 / 0.0
GINOP Plusz-1.1.6-25	Cluster funding: HUF 100 million non-repayable grant with a 15% own contribution (total eligible cost HUF 117.6 million)	2027–2029	Member services, own IT systems, training, events, consultancy, international market access; 24.6 / 35.4 / 35.4
EIT Urban Mobility	Training, event and innovation projects (e.g. SHIFT+, MOBINAUT, support for the CEE Automotive Transition Forum)	Ongoing	International service development, training capacity
New international and national projects	At least 3 new projects: EIT Urban Mobility, Interreg, Horizon Europe, International Visegrad Fund (e.g. follow-up to V4SDV Connect)	2027–2029	Inter-cluster and policy cooperation, staff capacity; 15.2 / 25.0 / 56.4

5.6.3 Own assets and IT systems

Software procured for project purposes, such as the customer relationship management system used under Data-EDIH 2.0, is not owned by the cluster management: access ends when the project closes. The Cluster is therefore building its own permanent CRM and membership register system and a member competence database, which fits within the IT development activity of the GINOP Plusz-1.1.6-25 call. In-house and project-based systems are kept separate by purpose, licence, contract and invoice, which rules out double funding. The company records the “t3Étel” software as its own intangible asset (property right).

5.6.4 Sustainability after the funding period

In line with the guiding operating principle, the Cluster’s operation is built on two layers. Core operation, i.e. the core team and operating costs, is covered by revenues from membership fees, service fees, events, training and business acquisition services. The project layer is funded from Data-EDIH 2.0, GINOP Plusz-1.1.6-25 and new international and national projects. Own revenues will cover at least 35% of core operation costs in 2027, at least 55% in 2028 and the full amount in 2029 (Section 6.10). The closure of Data-EDIH 2.0 at the end of 2028 will therefore not jeopardise the Cluster’s core operation.

Project rules. The Cluster applies the following rules to projects:

- the Cluster participates only in projects that serve one of the objectives set out in Section 5.3.2;
- each project covers its own direct costs and the staff assigned to it, and contributes to the overhead costs of the cluster management;
- the Cluster does not finance core functions from project funds on a permanent basis; staff employed under projects are engaged for the duration of the project;
- the Cluster carries forward project results (knowledge, methodology, service content) in its own fee-based services.

The detailed financial plan broken down by year (revenue plan, cost plan, investment plan, income statement, balance sheet, liquidity plan and the source of own contribution) is set out in Chapter 6.

5.7 Partnerships and cooperation

The Cluster's services are largely based on existing partnerships. In 2025 the range of written cooperation agreements was extended by an inter-cluster agreement with NOHAC, an events agreement with the National Innovation Agency (Nemzeti Innovációs Ügynökség) and a professional and media partnership agreement with Hasznáلتautó.hu. During the strategic period, the aim is for further relationships to become institutionalised, written cooperation agreements that create direct benefits for members.

Partner type	Partners	Content of cooperation	Objective
Hungarian universities and research organisations	BME (Budapest University of Technology and Economics), University of Debrecen, University of Pécs, ELTE-Soft, Hungarian Central Statistical Office, Neumann János Nonprofit Kft. (members of the Data-EDIH 2.0 consortium)	Digital services, "test before invest", training, joint research	C2, C3
International universities and research institutes	Universitat Politècnica de Catalunya (ES), CERTH/HIT (GR), Aalto University (FI), TU Eindhoven (NL), TU München (DE), Technion (IL)	Joint training programmes (Digital Twins for Smart Mobility, MOBINAUT), international projects	C3, C4
Hungarian clusters and professional associations	Dél-dunántúli Gépipari Klaszter (South Transdanubian Machinery Cluster), Magyar Metál Fémipari Klaszter (Hungarian Metal Industry Cluster), NOHAC, MAGE, MAGEOSZ, ANK, HH2, MAJOSZ, HTA, Hungarian Battery Association (HUBA)	Professional partnership at the CEE Automotive Transition Forum, joint events, member recruitment	C1, C4
International clusters and networks	SEVA (SK), PSNM (PL), Polish Automotive Group, Automotive Cluster Serbia, Pôle Véhicule du Futur (FR), EACN; partner clusters of the REMOBILISE EU project	V4SDV Connect, inter-cluster exchange programmes, joint funding applications, joint international presence	C1, C4
European research and innovation partnerships	EGVIA (2Zero Partnership), CCAM Association	Participation in the programming of European partnerships, building funding consortia with the involvement of members	C2, C4
EIT Urban Mobility	ZONE Klaszter is a founding partner of EIT Urban Mobility; its managing director holds a position on the leadership of the EIT Urban Mobility Association	Training and innovation projects, support for the CEE Automotive Transition Forum, European partner search	C3, C4
Chambers and enterprise development organisations	Győr-Moson-Sopron County, Tolna County and Székesfehérvár Chambers of Commerce and Industry, Magyar Fejlesztésösztönző Iroda (Hungarian Development Promotion Office), Hungexpo	Data-EDIH information sessions and workshops, joint professional programmes (e.g. "Women in Industry")	C2, C4
Policy partners	Ministry for National Economy (Automotive Sectoral Consultation Forum), national co-funder of Data-EDIH 2.0	Consultation, channelling members' needs, policy proposals	C4

V4 cooperation is a priority area: within the V4SDV Connect project, ZONE Klaszter, together with the Slovak SEVA and the Polish PSNM, is comparing the regulatory and technological frameworks for software-defined and autonomous vehicles and developing a joint regional position. The Cluster intends to continue this relationship as permanent inter-cluster cooperation after the project ends.

5.8 Monitoring and evaluation

Implementation of the strategy is overseen by the managing director of the cluster management organisation. The cluster management reviews the indicators quarterly, reports on them to the Board in a quarterly monitoring report and presents them to the General Assembly annually. The data sources are the in-house CRM and membership register system, attendance sheets and invitations, invoices and contracts, press monitoring and the Data-EDIH 2.0 monitoring system. The indicators are aligned with the assessment criteria of the GINOP Plusz-1.1.5-25 call, so the data required to renew the qualification are continuously available.

Indicator	Objective	Baseline value (2026)	2027	2028	2029	Measurement method
Number of members (at start of year, headcount)	C4.1	30	30	36	42	Membership list
Member retention rate (share of the previous year's members retaining their membership)	C4.7	–	≥ 90%	≥ 90%	≥ 92%	Membership list
Share of active members (members using at least one service)	C4.7	–	50%	60%	70%	CRM records
Deals resulting from B2B meetings (per year)	C1, C4.7	–	3	6	10	Follow-up, member feedback
Joint projects and bids among members (per year)	C4.7	–	2	4	6	CRM records
Member satisfaction (annual survey, 1–5 scale)	C4.7	–	≥ 4.0	≥ 4.0	≥ 4.0	Annual member questionnaire
Closed professional club sessions (per year)	C4.7	–	3	4	4	Attendance sheet
Number of professional events organised (per year)	C4.2	TO BE COMPLETED	8	10	10	Invitation, attendance sheet
Press and media coverage (12 months)	C4	TO BE COMPLETED	10	10	12	Press monitoring, links
CEE Automotive Transition Forum participants	C1, C4	278 (2025)	300	320	350	Registration, attendance sheet
Members having completed a maturity assessment (cumulative)	C2.1	0	8	15	20	Data-EDIH monitoring
“Test before invest” pilots at member companies (cumulative)	C2.2	0	2	6	10	Data-EDIH monitoring
Members prepared for data spaces (cumulative)	C2.3	0	0	3	5	Programme documentation
Members having completed a carbon footprint or ESG assessment (cumulative)	C2.4	0	3	8	15	Service records
Documented B2B meetings (per year)	C1.1	TO BE COMPLETED	20	40	40	Forum minutes
Procurement enquiries and RFQs forwarded (per year)	C1.2	0	10	15	20	CRM records
Member profiles in the competence database	C1.3	0	20	25	30	Database
Share of exporting SME members	C1.4	TO BE COMPLETED	–	–	25%	Member data reporting
Members having completed a defence and space fit assessment (cumulative)	C1.5	0	2	5	8	Programme documentation
Participants in Academy training courses (per year)	C3.1	TO BE COMPLETED	100	130	150	Adult education records
Workforce transformation plans (cumulative)	C3.2	0	0	2	3	Completed plans
Cooperation agreements with educational institutions (cumulative)	C3.3	TO BE COMPLETED	1	2	3	Signed agreements
Number of revenue-generating services	C4.5	6 (2025–2026)	6	7	8	Contracts, invoices
Net sales revenue (HUF million)	C4.5	41.1 (2025)	65.2	108.9	217.5	Annual report
Self-financing ratio (own market-based coverage as a share of core operation costs)	C4.5	–	35%	55%	100%	Accounting records, annual financial statements
Documented inter-cluster collaborations	C4	1 (2025)	3	4	5	Agreements, joint funding applications
New Hungarian and EU projects won (cumulative)	C4.3	–	1	2	3	Grant agreements
Number of full-time staff at year end (of which core team)	C4.6	2 (2026)	8 (7)	9 (7)	9 (7)	HR records

Indicator	Objective	Baseline value (2026)	2027	2028	2029	Measurement method
International label and network membership	C4.4	–	ECCP registration	ESCA Bronze	ESCA Silver	Certificates

Review. The General Assembly reviews the strategy annually. The review covers the achievement of the indicators, the updating of the action plan, progress along the international labelling pathway and whether the documentation required to maintain the qualification is up to date. If an indicator falls significantly short of plan in two consecutive half-years, the cluster management submits a corrective proposal to the Board.

5.9 Risk analysis

The risk analysis builds on the weaknesses and threats identified in the situation assessment presented in Section 5.3.1 and on the operational experience of the cluster management. The likelihood and impact of each risk were rated on a three-level scale (low, medium, high), and a preventive or mitigating measure was assigned to each risk.

Risk (SWOT)	Likelihood	Impact	Mitigation	Responsible
R1 Member activity and membership grow more slowly than planned, jeopardising fulfilment of the commitment under GINOP Plusz-1.1.6-25 (W1, T5)	medium	high	Demand-driven service portfolio based on market research; membership discounts within the two-tier pricing; targeted recruitment through the CEE Automotive Transition Forum, the Data-EDIH 2.0 client base and chamber partners; quarterly monitoring of membership numbers, with a corrective recruitment plan in the event of a shortfall.	Managing director, Board
R2 Declining demand in the automotive industry reduces members' willingness to invest in development and their ability to pay (T1)	medium	high	Prioritising services available free of charge under Data-EDIH 2.0; funding monitoring and grant writing to help members raise funds; entry programme for new industries (defence, rail, energy).	Managing director
R3 Grant funding is delayed, reduced or unavailable; the GINOP Plusz-1.1.6-25 budget is exhausted (T4, W3)	medium	high	Submission of the cluster funding application as early as possible, by 15 January 2027 at the latest; diversification of funding sources (C4.3); increasing the share of paid service revenue; phased roll-out of services; building a liquidity reserve and an overdraft facility for the temporary liquidity need described in Section 6.8.	Managing director
R4 Changes in national cluster policy adversely affect the cluster's operating conditions (T2)	medium	medium	Regular participation in policy consultations; maintaining the qualified status; drawing on EU, EIT Urban Mobility and V4 funding to reduce dependence on national sources.	Managing director, Board
R5 Limited management capacity or the loss of key staff delays the roll-out of services (W2, T3)	medium	high	Documenting processes and responsibilities, deputising arrangements; gradual transition of part-time staff to full-time employment (C4.6); involving external experts and partner organisations.	Managing director
R6 After the closure of Data-EDIH 2.0 (31 December 2028), funding for digital services ceases; assets procured under the project do not remain at the cluster's disposal (W5)	medium	medium	Preparing a sustainability plan in 2028; building the cluster's own durable IT systems (C4.6); continuing proven services on a fee-paying basis; securing new project funding from EU programmes starting from 2028.	Managing director
R7 The costs of parallel projects are not clearly separated, which may give rise to suspicion of double funding	low	high	Separate cost records, contracts and invoices for each project; clear separation of own and project-based assets; internal control before payment claims.	Managing director, finance
R8 Members' data reporting is incomplete, so the documentation required for the indicators and for renewal of the qualification is not complete (W4)	medium	medium	Uniform data collection procedure built into the CRM; laying down data reporting as a membership obligation; one short, consolidated member data request per year.	Managing director
R9 The membership and partners do not fully accept the cluster's new service model and membership fee system	low	medium	General Assembly decision on the strategy, the governance model and the membership fee system; information and communication plan; involving members in the market research and in finalising the services.	Board, managing director
R10 The revenue targets of the business plan (new projects, fee-based digital services, corporate training programmes) are achieved late or at lower amounts (W3, T1)	medium	high	Quarterly revenue monitoring against the plan in Chapter 6; continuous preparation of project applications; reducing revenue-linked direct costs; in the event of a significant shortfall, rescheduling staff expansion and non-mandatory costs (see 6.9).	Managing director

Risk management procedure. The cluster management reviews the risks quarterly, together with the monitoring, and updates the assessment where necessary. Should a high-impact risk materialise or its likelihood increase, the managing director will inform the Board without delay and propose the necessary measures.

6. Business plan (2027–2029)

The business plan sets out the financial framework for implementing the strategy presented in Chapter 5 for the period from 1 January 2027 to 31 December 2029. The plan covers the entire financial management of the cluster management organisation, ZONE Klaszter Nonprofit Kft.: it includes membership fee and service revenue, the Data-EDIH 2.0 and GINOP Plusz-1.1.6-25 grants, the planned new projects, and the personnel and material expenses of operations. The first 24 months are presented on a monthly basis and the third year as an annual total. The formula-linked financial model (revenue plan, cost plan, investment plan, grant accounting, profit and loss account, balance sheet and cash flow) forms an annex to the strategy.

6.1 Planning assumptions

- **Starting position.** As opening cash, the plan takes into account equity of HUF 11.3 million according to the 2025 financial statements and an own liquidity reserve of HUF 7.0 million built up by the end of 2026 (HUF 18.3 million in total); the subscribed capital is HUF 3.0 million. Pass-through items of Data-EDIH 2.0 to be transferred to consortium partners are not part of the plan.
- **Inflation and wage growth.** Material costs and wages increase by 6% per year. The plan assumes a 6% annual increase in membership fees from 2029, decided by the General Assembly as part of its annual review.
- **Taxation.** The company is subject to the small business tax (KIVA). The tax rate is 10% on personnel-related payments, plus a further 10% on positive profit before tax; the company pays neither social contribution tax nor corporate income tax.
- **Operating model.** Staff work from home, with two in-person meetings per month in a rented coworking office. Full-time staff receive work equipment and a home office allowance of HUF 30,000 per month; no per-capita operating cost arises for the part-time (20 hours per month) controller. Senior staff – with the exception of the senior IT officer – take part in two three-night professional trips within the European Union each year.
- **Grant funding.** The non-repayable grant requested under the GINOP Plusz-1.1.6-25 call amounts to HUF 100 million (85% aid intensity, 36 months). The EUR 599,901 attributable to ZONE Klaszter in the Data-EDIH 2.0 project is accounted for evenly over the 2026–2028 period (HUF 80.0 million per year at an exchange rate of HUF 400/EUR).
- **Direct costs.** The direct costs of services are planned in proportion to revenue: events 65%, training 45%, fee-based digital services 35%, procurement forum 30%, grant writing and project management 15%; the non-personnel direct costs of new projects amount to 35% of project revenue.
- **Operating layers.** The plan divides operations into two layers. Core operation, i.e. the core team (seven full-time staff and one part-time controller) and operating costs, is covered by market revenue, without grant funding by 2029. The project layer is funded from grant and project sources; the positions financed from it are limited to the duration of the projects (Section 6.10).

6.2 Membership and membership fee system

The cluster starts the strategic period with 30 members. Membership grows in line with the mandatory membership growth prescribed by the GINOP Plusz-1.1.6-25 call: 20% per year for 15–30 members and 15% per year for 31–60 members. Accordingly, membership will be 36 at the beginning of 2028 and 42 at the beginning of 2029. The plan assumes no withdrawals. Breakdown of members by company size: micro and small enterprises 60%, medium-sized enterprises 25%, large enterprises 15%.

Members pay no membership fee until 30 June 2027. From 1 July 2027, a three-tier membership fee system enters into force (named the “Member”, “Partner” and “Strategic Partner” tiers in accordance with the Fee Regulations). In addition to the membership fee, the higher tiers provide discounted access to the cluster’s fee-based services; the benefits associated with each tier are presented in Section 5.2.2. According to the plan, 20% of members choose the first and 15% the second higher tier, giving an average annual membership fee of HUF 845,625. In accordance with the Fee Regulations, new members joining after 1 July 2027 pay no membership fee for six months from accession (accession discount) and thereafter pay the pro rata portion of the annual membership fee; the plan assumes that new members join on 1 January.

Membership fee tier (HUF/year)	Micro and small enterprise	Medium-sized enterprise	Large enterprise
Basic membership fee	275,000	560,000	1,725,000
First upgraded tier	550,000	1,120,000	3,450,000
Second upgraded tier	825,000	1,680,000	5,175,000

	2027	2028	2029
Members at the start of the year (number)	30	36	42
New members (number)	–	6	6
Membership fee revenue (HUF million)	12.7	27.9	35.0

6.3 Revenue plan

Revenue falls into two main groups: net sales revenue from the cluster management's own activities and other income recognised from grant funding. The key feature of the plan is the transformation of the revenue structure: by 2029, the HUF 80 million annual grant lost with the closure of Data-EDIH 2.0 at the end of 2028 will be replaced by revenue from fee-based services and new projects.

HUF million	2027	2028	2029
Net sales revenue			
Membership fee	12.7	27.9	35.0
CEE Automotive Transition Forum	23.8	26.2	28.8
Procurement forum	0.0	2.9	5.6
Training (ZONE Training & Innovation Academy)	15.4	25.8	49.6
Consulting, other services	11.4	12.5	13.7
Grant writing with success fee, project management	0.8	8.7	18.8
Fee-based digital services	1.2	5.0	66.0
Total net sales revenue	65.2	108.9	217.5
Other income (grant funding)			
Data-EDIH 2.0	80.0	80.0	0.0
GINOP Plusz-1.1.6-25	24.6	35.4	35.4
New international and national projects	15.2	25.0	56.4
Total other income	119.8	140.4	91.8
Total revenue	185.0	249.3	309.2

- **Events.** Revenue from the CEE Automotive Transition Forum starts from the actual 2025 figure of HUF 19.7 million and grows by 10% per year; with expanded sponsorship packages, the event's direct cost ratio falls from 74% to 65%. From 2028, the quarterly procurement forum operates in a paid, sponsored format.
- **Training.** Revenue of the ZONE Training & Innovation Academy grows by 10% per year from the 2025 base and is supplemented by tailored corporate programmes, workforce transformation plans and artificial intelligence training based on Data-EDIH 2.0 training materials. From January 2027 the training business line is led by a head of education, so corporate programmes will already be launched in the first year. Training revenue rises to HUF 15.4 million in 2027 and to HUF 49.6 million by 2029.
- **Grant writing and project management.** From autumn 2027, the cluster provides grant writing to members as a named, invoiceable service for a fixed fee plus a 3–5% success fee, and also undertakes the management of successful projects.
- **Fee-based digital services.** In 2027–2028, a fee-based range complementing the free-of-charge services of Data-EDIH 2.0 is launched (large enterprises and non-eligible clients, implementation projects following “test before invest”). From 2029, the cluster's own fee-based continuation of proven services (data space connection readiness, AI return-on-investment analysis and pilot, maturity assessment update) generates net sales revenue of HUF 66.0 million; this revenue ensures that own revenue covers the full cost of core operation in 2029.
- **New projects.** During the strategic period, the cluster implements at least three new international or national projects (EIT Urban Mobility, Interreg, Horizon Europe, International Visegrad

Fund), which provide revenue of HUF 15.2 million, HUF 25.0 million and HUF 56.4 million respectively from the share attributable to ZONE Klaszter and partly cover the personnel expenses of the cluster management staff.

Paid service revenue (net sales revenue excluding membership fees) relative to operating expenses is 31% in 2027, 38% in 2028 and 72% in 2029; the share of net sales revenue in total revenue rises from 35% to 70%. Self-financing of core operation (C4.5) is presented in Section 6.10.

6.4 Human resources plan

In January 2027, the cluster management starts with a managing director, an operations manager, a senior communications officer, a head of education, a junior administrator, a part-time controller and an intern, and by January 2028 it operates with a team of nine full-time staff, one part-time controller and one intern. Given the prominent role of training, a head of education within the core team is responsible for the operation and expansion of the ZONE Training & Innovation Academy. The controller works 20 hours per month under a part-time employment contract; all other positions are full-time. Staff are divided into two layers: the core team (C), sustained from market revenue, consists of seven full-time positions and the controller, while project positions (P) are limited to the duration of the projects and financed from project funding. Salaries were set on the basis of national market benchmarks and increase by 6% per year.

Position	Start	Gross monthly salary at 2027 level (HUF)	Layer
Managing director (Cluster Manager)	January 2027	1,500,000	C
Operations manager	January 2027	1,200,000	C
Senior communications officer	January 2027	1,000,000	C
Head of training	January 2027	1,200,000	C
Senior grants and project manager	September 2027	1,000,000	C
Senior IT officer (in-house systems, digital services)	July 2027	1,000,000	C
Controller (part-time, 20 hours per month)	January 2027	140,000	C
Junior administrator	January 2027	600,000	C
Junior Cluster Manager	April 2027	650,000	P
Junior business development officer	January 2028	650,000	P
Intern (1 person)	January 2027	360,000	P

HUF million	2027	2028	2029
Wage costs	87.8	118.3	125.4
Home office allowance	2.7	3.8	4.0
Total personnel expenses	90.6	122.1	129.4
of which core team (C)	79.8	99.9	105.8
of which project positions (P)	10.8	22.3	23.6
Small business tax on personnel-related payments	8.8	11.8	12.5
Number of full-time staff at year-end (persons, excluding the intern and the part-time controller; core team in brackets)	8 (7)	9 (7)	9 (7)

Under the GINOP Plusz-1.1.6-25 call, the personnel costs of cluster management are eligible for one manager and two staff members for up to 60 members. During the transition period, the costs of the core team are partly covered by the contribution of the project layer, and from 2029 entirely by market revenue; project positions are financed by Data-EDIH 2.0 and the new projects; costs are recorded separately for each project.

6.5 Operating expenses and investments

Material expenses consist of the basic costs of operation, the revenue-linked direct costs of services and projects, and one-off items required to launch the strategy. Basic costs include the coworking office and in-person meetings, software licences, accounting and auditing, legal services, marketing, travel, the membership fees of national and international organisations (in 2026: EIT Urban Mobility, Pôle Véhicule du Futur and the Hungarian Battery Association (Magyar Akkumulátor Szövetség)) and the ESCA labelling fee.

HUF million	2027	2028	2029
Basic operating costs	26.2	29.1	32.5
Direct costs of services (events, training, digital services, forum, grant writing)	22.9	32.5	68.6
Data-EDIH 2.0 direct costs	20.0	20.0	0.0
Non-personnel direct costs of new projects	5.3	8.8	19.7
External expert advice and market research	6.8	3.3	3.3
Total material expenses	81.3	93.7	124.2
Investments	18.5	0.7	0.0
Depreciation	3.4	4.8	4.8

Investments fall into two groups. The development of the cluster's own CRM, membership register and competence database system, costing HUF 12.0 million, takes place in the first half of 2027 within the IT development activity of GINOP Plusz-1.1.6-25, with a five-year depreciation period. The work equipment package for new staff (laptop, monitor, telephone) costs HUF 650,000 per person, with a three-year depreciation period.

6.6 Use of the GINOP Plusz-1.1.6-25 grant

The cluster is applying for a non-repayable grant of HUF 100 million. With an aid intensity of 85%, the total eligible cost of the project is HUF 117.6 million; the own contribution of HUF 17.6 million is provided from the cluster management's own revenue. Eligible costs are incurred evenly over the 36-month implementation period, at HUF 39.2 million per year: in addition to operating costs, they include the development of the cluster's own IT system.

The plan assumes disbursement of an advance of HUF 25.0 million, corresponding to 25% of the grant, in March 2027, with further instalments paid on the basis of quarterly payment claims with a two-month processing time. The grant is recognised as other income in proportion to the costs incurred, and the part relating to assets in proportion to depreciation (HUF 24.6 million, HUF 35.4 million and HUF 35.4 million respectively). Amounts disbursed but not yet recognised appear in the balance sheet as deferred income.

6.7 Projected profit and loss account

HUF million	2027	2028	2029
Net sales revenue	65.2	108.9	217.5
Other income	119.8	140.4	91.8
Material expenses	81.3	93.7	124.2
Personnel expenses	90.6	122.1	129.4
Depreciation and amortisation	3.4	4.8	4.8
Operating profit	9.8	28.7	50.8
Profit before tax	9.8	28.7	50.8
Small business tax (personnel and profit components)	9.8	14.7	17.6
Profit after tax	0.0	14.0	33.2
EBITDA	13.1	33.5	55.6

The cluster management breaks even in 2027 (profit after tax of HUF 0.0 million) and achieves profit after tax of HUF 14.0 million in 2028 and HUF 33.2 million in 2029. In the first year, the costs of establishing the full core team, IT development and market research are balanced by revenue. In the first two years of the strategy, the result relies primarily on Data-EDIH 2.0 and GINOP Plusz-1.1.6-25 funding, while in 2029 it is based predominantly on own service revenue and new projects.

6.8 Projected balance sheet and liquidity

HUF million, 31 December	2027	2028	2029
Fixed assets	15.1	11.0	6.2
Cash	22.4	30.1	64.0
Total assets	37.5	41.1	70.2
Equity	18.3	32.3	65.5
of which subscribed capital	3.0	3.0	3.0
Deferred income (grant)	19.2	8.8	4.7
Total equity and liabilities	37.5	41.1	70.2

Equity grows from the opening HUF 18.3 million to HUF 65.5 million by the end of 2029; the plan assumes no borrowing. Year-end cash balances are HUF 22.4 million, HUF 30.1 million and HUF 64.0 million respectively. IT development, the purchase of work equipment and market research start before the GINOP Plusz-1.1.6-25 advance is received in March, giving rise to a temporary financing need in the first two months of 2027. The cluster management covers this from its own reserve, which it builds up to HUF 7.0 million by the end of 2026. As a result, according to the monthly cash flow plan, the cash balance remains positive throughout the plan period; the lowest balance, HUF 0.5 million, occurs in February 2027.

6.9 Risks and sensitivity of the business plan

The result of the business plan depends primarily on three revenue items: new projects, digital services that are fee-based from 2029, and corporate training programmes. Owing to direct costs, a revenue shortfall does not affect the result in its full amount:

- a HUF 10 million shortfall in new project revenue reduces profit after tax by approx. HUF 5.9 million;
- a HUF 10 million shortfall in fee-based digital services reduces profit after tax by approx. HUF 5.9 million;
- a HUF 10 million shortfall in training revenue reduces profit after tax by approx. HUF 5.0 million.

As 2027 is a break-even year, the cluster management will address any revenue shortfall in that year by rescheduling non-mandatory costs and staff expansion and by drawing on its own reserve. In 2028 the planned result absorbs a revenue loss of approx. HUF 23 million, and in 2029 approx. HUF 55 million, without the cluster management becoming loss-making. The management of revenue risks is set out under risks R3, R6 and R10 in Section 5.9; core operation and the project layer are presented separately in Section 6.10.

6.10 Two-layer operating model: market-based core operation and project layer

The plan presents the financial fulfilment of the guiding operating principle broken down into two layers. Market-based core operation means operation calculated without grant funding: net sales revenue less the direct costs of services, basic operating costs and core team expenses. The project layer comprises grant and project revenue together with the costs and staff financed from it. The combined result of the two layers equals the result presented in Section 6.7.

HUF million	2027	2028	2029
A) Market-based core operation			
Net sales revenue	65.2	108.9	217.5
Direct costs of services	22.9	32.5	68.6
Basic operating costs	29.7	29.1	32.5
Core team personnel expenses and small business tax	87.5	109.6	116.1
Result of core operation	-75.0	-62.2	0.2
Self-financing ratio	36%	55%	100%
B) Project layer			
Grant and project revenue	119.8	140.4	91.8
Project costs and project staff	43.9	61.2	53.7
Project layer contribution	75.9	79.1	38.1

In the 2027–2028 transition period, core operation is not yet self-sustaining: own revenue covers 36% and 55% of the cost of core operation respectively, with the difference provided by the contribution of the project layer. By 2029, thanks to fee-based digital services, the expanding training offer and growing membership fee revenue, own revenue covers the full cost of core operation (100%), so from then on grant funding no longer sustains operations but expands them. Self-sustainability in 2029 depends on achieving the fee-based digital and training revenue; should these fall short, the cluster will align the number of project positions and the timing of expansion steps with its own revenue.

7. Summary and commitments

Mission. The mission of the Zalai Öncezető Jármiú Klaszter is to improve the profitability of its member companies, primarily Hungarian SME suppliers: it gives them access to new business opportunities, supports the efficiency of their operations and their digital and green transition, and develops the competences of their employees. The cluster achieves all this through market-based self-sustainability: by 2029, own revenue will cover the full cost of core operation.

Main objectives. The strategy sets four objectives: C1 new business opportunities and market access; C2 technological, digital and green transition, more efficient operation; C3 workforce and competences; C4 market-based self-sustaining operation and a strong member community. The cluster measures the achievement of the objectives through the commitments below; the full indicator system is set out in Section 5.8.

Commitment	Objective	2027	2028	2029
Business opportunities and market access				
Documented B2B meetings (per year)	C1	20	40	40
Procurement enquiries and RFQs forwarded (per year)	C1	10	15	20
Defence and aerospace fit assessments (cumulative)	C1	2	5	8
Digital and green transition				
Maturity assessments and development roadmaps (cumulative)	C2	8	15	20
“Test before invest” pilot projects (cumulative)	C2	2	6	10
Carbon footprint or ESG assessments (cumulative)	C2	3	8	15
Workforce and competences				
Participants in Academy training courses (per year)	C3	100	130	150
Workforce transformation plans (cumulative)	C3	0	2	3
Member community and self-sustainability				
Members at the start of the year (number)	C4	30	36	42
Member retention rate	C4	≥ 90%	≥ 90%	≥ 92%
Share of active members	C4	50%	60%	70%
Net sales revenue (HUF million)	C4	65.2	108.9	217.5
Self-financing ratio	C4	36%	55%	100%
International label	C4	ECCP registration	ESCA Bronze	ESCA Silver

Fulfilment of the commitments is monitored quarterly by the cluster management, assessed quarterly by the Board and reviewed annually by the General Assembly. In this way, the cluster measures its own success by the actual business results and activity of its members.