



# KONFERENCIAKÖTET

## Conference Proceedings

**Nemzetközi tudományos konferencia  
a Magyar Tudomány Ünnepe alkalmából**  
International Scientific Conference  
on the Occasion of the Hungarian Science Festival

**Sopron, 2022. november 3.**  
3 November 2022, Sopron

**TÁRSADALOM – GAZDASÁG – TERMÉSZET:  
SZINERGIÁK A FENNTARTHATÓ FEJLŐDÉSBN**

SOCIETY – ECONOMY – NATURE: SYNERGIES IN SUSTAINABLE DEVELOPMENT

Szerkesztők / Editors:

OBÁDOVICS Csilla, RESPERGER Richárd, SZÉLES Zsuzsanna, TÓTH Balázs István

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## TARTALOMJEGYZÉK / CONTENTS

### **1. szekció (személyes): Fenntartható gazdálkodás és menedzsment, körforgásos gazdaság** Session 1 (personal): Sustainable Economy and Management, Circular Economy

#### **Az ökológiai termelés és termékek piacának változásai a COVID-19 okozta megszorítások alatt**

*Dr. GYARMATI Gábor* ..... 11

#### **Fenntartható fejlődés és körforgásos gazdaság a vállalkozások mindennapi életében**

*Dr. FEKETE-BERZSENYI Hajnalka – Dr. KOZMA Dorottya Edina –*

*Dr. MOLNÁRNÉ dr. BARNA Katalin – Prof. Dr. MOLNÁR Tamás* ..... 26

#### **Fenntarthatóság a divatiparban (?) – Négy divatipari szervezet CSR jelentésének rövid áttekintése, valamint a fenntarthatóságra törekvés fogyasztók általi észlelésének vizsgálata**

*VIZI Noémi* ..... 39

#### **Épített örökségeink fenntarthatósága a volt szovjet laktanyák újrahasznosításának példáján keresztül**

*TEVELY Titanilla Virág* ..... 52

### **2a. szekció (személyes): A fenntartható fejlődés globális és regionális vetületei**

Session 2a (personal): Global and Regional Aspects of Sustainable Development

#### **A migráció mérésének módszertani nehézségei**

*RUFF Tamás* ..... 65

### **2b. szekció (személyes): A fenntartható fejlődés globális és regionális vetületei**

Session 2b (personal): Global and Regional Aspects of Sustainable Development

#### **Munkaérték preferenciák vizsgálata a szállítási ágazatban**

*Dr. BALÁZS László – Dr. KŐKUTI Tamás* ..... 73

### **3. szekció (személyes): Turizmus és marketing, fenntartható turizmus**

Session 3 (personal): Tourism and Marketing, Sustainable Tourism

#### **Studentifikáció Lágymányoson, avagy az újbudai egyetemek hatása a fenntartható turizmusra**

*KISS Bence Álmos – PORHAJAS Gábor László* ..... 85

#### **Book Consumption Literature – Literature Review on the Subject of the Behavior of Book Consumers**

*Miklós LÉGRÁDI – Dr. habil. Zoltán SZABÓ* ..... 96

#### **Szállodaüzemi intézkedések irányvonalai a fenntarthatóság jegyében**

*MARTOS János András* ..... 114

<b>Sportfogyasztási szempontú elemzés a Sopronban rendezett 2021-es Női Vízilabda Magyar Kupáról</b> <i>CSISZÁR Szabolcs János – Dr. habil. PAÁR Dávid</i> .....	126
---	-----

**4a. szekció (személyes): Pénzügyek, számvitel, fenntartható pénzügyek**  
Session 4a (personal): Finance, Accounting, Sustainable Finance

<b>A könyvviteli szolgáltatási szakma megítélése. Összehasonlító elemzés a 2020. és 2022. évek felmérése alapján</b> <i>Dr. VERESS Attila – Dr. SIKLÓSI Ágnes – Dr. SISA Krisztina A.</i> .....	136
--	-----

<b>A KKV-szektor hitelezési tendenciának értékelése MNB adatok alapján</b> <i>MÁRKUS Mónika</i> .....	147
--	-----

<b>Az ellátási láncok fenntartható pénzügyi adaptációja – rövidtávú fizetési kötelezettségek finanszírozása</b> <i>Dr. CZIRÁKI Gábor – HACKL János</i> .....	158
---	-----

<b>ESG közzététel vizsgálata nemzetközi háttérű kereskedelmi bankok esetében Magyarországon</b> <i>SIKLÓSI Veronika</i> .....	172
--	-----

**4b. szekció (személyes): Pénzügyek, számvitel, fenntartható pénzügyek**  
Session 4b (personal): Finance, Accounting, Sustainable Finance

<b>A fenntarthatóság és az osztalékpolitika kapcsolata</b> <i>Dr. KUCSÉBER László Zoltán – Dr. CSOMA Róbert</i> .....	180
--	-----

<b>Pénzügyi és öngondoskodási ismeretek a magyar középiskolák végzős osztályaiban 2021-ben</b> <i>KOVÁCS Zoltán – TÖRÖNÉ Prof. Dr. DUNAY Anna</i> .....	188
--	-----

<b>A cégértékelés módszertani kihívásai</b> <i>FÁBIÁNNÉ JÁTÉKOS Judit Ilona</i> .....	203
--	-----

**5. szekció (személyes): Sustainable Economy, Management and Development**  
Session 5 (personal): Sustainable Economy, Management and Development  
(session in English)

<b>The Qualitative Characteristics of Accounting Information: A Literature Review</b> <i>Asma MECHTA – Prof. Dr. Zsuzsanna SZÉLES – Dr. Ágnes SIKLÓSI</i> .....	219
--	-----

<b>Tourism Development in Indonesia - Surakarta City Role Supporting National Tourism Planning</b> <i>Dr. Rizky Arif NUGROHO – Laura BAZSÓNÉ BERTALAN PhD – Judit PAPPNÉ VANCSÓ PhD</i> .....	228
--	-----

<b>Green Manufacturing Practices Towards Sustainable Development in the Ready-Made Garments (RMG) Industry of Bangladesh</b> <i>Dr. Md. Sadrul Islam SARKER – K. M. Faridul HASAN – Dr. István BARTÓK</i> .....	241
--	-----

<b>Drivers and Barriers of GSCM Practices Implementation: Literature Review</b> <i>Khouloud CHALLOUF – Dr. Nikoletta NÉMETH</i> .....	252
--	-----

**6. szekció (személyes): Tourism and Marketing, Sustainable Tourism**  
Session 6 (personal): Tourism and Marketing, Sustainable Tourism  
(session in English)

<b>Impact of COVID-19 Pandemic on Tourism Sector in Vietnam</b> <i>Thi Thuy Sinh TRAN – Dr. Nikoletta NÉMETH – Dr. Thai Thuy PHAM – Nhat Anh NGUYEN</i> .....	259
--	-----

<b>Tourism in Troubled Times: the Economic and Social Effects of Short- and Expected Long-Term Changes</b> <i>Dr. habil. Tamás SZEMLÉR</i> .....	276
---	-----

<b>Application Areas of Drones: Exploratory Research from Residential and Corporate Perspectives</b> <i>Bendegúz Richárd NYIKOS – Astrid IONESCU</i> .....	286
---	-----

**7. szekció (online): A fenntartható fejlődés globális és regionális vetületei**  
Session 7 (online): Global and Regional Aspects of Sustainable Development

<b>Németország elektromos személygépjármű exportja az Európai Unió tagállamaival</b> <i>Dr. KONKA Boglárka</i> .....	295
---	-----

<b>Fenntartható design - új megközelítések a terméktervezésben</b> <i>NÁDAS Gergely – Dr. habil. MOLNÁR László</i> .....	307
---	-----

<b>Challenges of the Adaptation Planning – Evolution of the Vulnerability Assessment Methodologies</b> <i>Pál SELMECZI</i> .....	322
---	-----

<b>Szisztematikus irodalmi áttekintés a személygépjárművekbe épülő elektromos hajtáslánc gyártásáról a fenntarthatóság szempontjából</b> <i>Dr. TÓTH Árpád – BEGE András</i> .....	329
---	-----

<b>Németország az európai labdarúgás térképén – jogi és sportföldrajzi megközelítés</b> <i>Dr. ENGELBERTH István – Dr. VIRÁGH Árpád</i> .....	344
--	-----

<b>A körforgásosság mérési lehetőségeinek vizsgálata a szállodaüzemeltetésben</b> <i>KARAKASNÉ Dr. MORVAY Klára</i> .....	360
--	-----

<b>Az állami nyugdíjrendszerek fenntarthatóságának kihívásai</b> <i>SZABÓ Zsolt Mihály</i> .....	377
---	-----

<b>Competencies for Sustainable Development</b> <i>Zsuzsanna NAGYNÉ HALÁSZ</i> .....	391
---	-----



**8. szekció (online): Turizmus és marketing, fenntartható turizmus**  
Session 8 (online): Tourism and Marketing, Sustainable Tourism

**Gyógynövényturizmus és az abban rejlő lehetőségek**  
– Az Észak-Magyarországi kínálati oldal primer vizsgálata  
*PÁSZK Norbert* .....400

**Fiatal külföldi turisták pozitív és negatív tapasztalatai Budapesten**  
*Dr. habil. GROTTÉ Judit – MAGYAR Tímea* .....408

**Mit ígér Bükfürdő? A városmárka-kommunikáció lehetséges eszközei és csoportosításuk a POE-modell alapján**  
*HORVÁTH Kornélia Zsanett* .....417

**9. szekció (online): Fenntartható gazdálkodás, körforgásos gazdaság**  
Session 9 (online): Sustainable Economy, Circular Economy

**Erdei biomassza lehetőségei és korlátai Magyarország energiabiztonságában**  
*VARGOVICS Máté – Dr. NAGY Dániel* .....433

**A körforgásos gazdaság és a soproni hulladékfeldolgozó stratégiája**  
*KASZA Lajos – Dr. NÉMETH Patrícia* .....444

**10. szekció (online): Sustainable Economy, Management and Development**  
Session 10 (online): Sustainable Economy, Management and Development  
(session in English)

**Comparison of the Density of Physicians and General Practitioners in the Hungarian Csongrád-Csanád Country and in the Territorial Units of Vojvodina for the Period 2002-2020**  
*Dr. Ivana KOCSICSKA* .....453

**The Re-Consideration of Business Diplomacy and Corporate Social Responsibility for International Business in the Post-Covid-19 World**  
*Anh Tuan TRAN* .....463

**Examining the Process of Project Preparation**  
*Attila LEGOZA* .....474

**The Relativity between Sustainable Management and Turnaround Management: Evidences and Suggestions for the Hungarian Agricultural Sector**  
*Zsuzsanna VARGA – Dr. habil. Etelka KATITS – Dr. Éva SZALKA – Dr. Ildikó PALÁNYI – Katinka MAGYARI* .....484

**Developing countries and Sustainability**  
*Arjana KADIU – Dr. habil. Zoltán SZABÓ* .....504

**The Effect of Supply Chain Management in Achieving Sustainability in Supply Chain in Four Seasons Hotel in Syria**  
*Wael ALASFAR* .....519

**The Role of EGTCs and Euroregions in Economic Cooperation Across  
the Hungarian-Romanian Border Between the Period 2007-2020**

*Melinda BENCZI* ..... 531

**11. szekció (online): Poszter szekció**

Session 11 (online): Poster Session

**Procrastination and its Influencet on Retirement Saving Plann**

*Khaliunaa DASHDONDOG* .....540

**Színházi kommunikáció 2.0**

**Hazai kőszínházak jelenléte Facebookon és Instagramon a pandémia első évében**

*Dr. DÉR Cs. Dezső – Dr. habil. PAPP-VÁRY Árpád Ferenc – ZRINYI Ivett* .....554

**A felnőttképzésben résztvevő álláskeresők elhelyezkedési esélyei**

**Szabolcs-Szatmár-Bereg megyében**

*LE-DAI Barbara* .....575

**Cost Analysis of Sustainable Concrete Production Using Waste Nanoparticles**

*Omar ZINAD – Dr. habil. Csilla CSIHA – Prof. Dr. Alya'a Abas AL-ATTAR* .....585

## Examining the Process of Project Preparation

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### Abstract

My research focuses on medium-sized enterprises in Hungarian private hands, examines their operation during the implementation of projects, highlighting the reasons for the unsuccessful project implementation. I investigate deadlines and budget overruns. Investments and developments are implemented in the form of projects. One of the most important stages of project implementation is project preparation. Proper preparation affects all subsequent stages of project implementation. The preparation process starts already in the application stage and continues throughout all the subsequent stages of the project. During my empirical research, I examine the process of project preparation, as appropriate preparation has an impact on the successful implementation of the project. The present study presents the results obtained from the analysis of the responses to the questionnaires and the responses to the in-depth interviews.

*Keywords:* project, project preparation, project implementation, schedule, project failure

*JEL Codes:* O15, D2

### 1. Introduction

The successful implementation of projects is in the interest of both investors and contractors. The investor wants to achieve his goal, and the contractor wants to fulfill his obligations under the contract. However, in order for the project to be successful, all influencing factors must be taken into account. The phases and stages of the project have been defined in the literature, but it must be taken into account that every project is different. The difference can be caused, for example, by the technical content of the project, the schedule of the project, the value of the investment. Since the projects are different, the success factors are also different. It is important that the success factors are defined, we can only measure success after they are available. According to statistics, the majority of investment projects are implemented unsuccessfully. One of the reasons for failure is inadequate project preparation. The study also deals with the examination of the preparation process and discusses the possible steps of the process.

### 2. Literature review

#### 2.1. Project, project management

According to Görög (2003, p. 26.): "A project is any activity that is a one-time and complex task for an organization, the duration of its completion (start and end) and the costs of its completion (resources) are determined, and (similar to strategic objectives) is aimed at achieving a defined goal (result)."

According to Lockyer and Gordon (2020): "A unique process system that is a set of coordinated and controlled activities undertaken to achieve an objective that meets specific requirements, including time, cost, and resource constraints, with start and finish dates."

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In his analysis of literature, Packendorff (1994, p. 22.) mentions the criterion of uniqueness with special emphasis with the phrase "occurring once in a lifetime". As he writes, "in most of the project management literature, a project is usually defined as:

- a unique, once-in-a-lifetime task,
- with a predetermined closing date,
- determination with one or more activity goals (resource use and quality),
- many complex and interrelated activities".

The indicators "unique" and "once in a lifetime" are intended to exclude continuous operation and routine application from the defined field of phenomena. According to this, a project is a problem solution that requires creativity, as a result of which novelties can be repeated continuously, routinely and "reliably" (Jensen et al., 2016), but those repetitions can no longer be considered a project.

Papp (2002, p. 20.) completes the definition with a preliminary demonstration and analysis of the risks. In his opinion, the project:

- "for specific goals and results,
- within given time, cost and resource constraints,
- with specified quality and performance requirements,
- preferably using minimal »assets« (or resources),
- at an acceptable level of risk,
- activity aimed at creating some clearly defined »product« (facility, service) (or interrelated series of activities)".

Considering the risk level indicates that the project manager knows about these risks and is prepared to deal with them. This is a relatively new expectation for the project, which shows that the project is usually prepared for some external "customer" where the preliminary plans are available.

Projects play a key role in the development of the economy, as illustrated by a World Bank survey which estimates that the amount spent on projects is about 22% of GDP generated in the world economy, meaning every fifth dollar generated from project-like activities in the world. In developing countries e.g. 43% in China and 39% in India (World Bank, 2008).

Projects have some basic features, namely that they are limited in time, cost and resources (human and technical). The project must therefore be completed within a given timeframe and within a given budget. In fact, this is the essence of project management. Project management is the management, control, organization of the project process itself, which focuses on the resources on the one hand and the methodological and technical tools on the other hand to achieve the goal (Görög, 2001).

It can also be defined that the implementation of project management at the appropriate level means that we set goals for ourselves and achieve them. However, for this we have to take the necessary steps, plan, ensure the implementation and manage the team, we have to work together. It is necessary to constantly check the project processes, the completed tasks, whether everything is progressing according to our schedule and schedule, and if not, it is necessary to decide what changes and modifications are necessary in order to return to the original schedule. In the meantime, we must constantly use project management tools, such as daily schedule tracking, monthly controlling, resource tracking, etc. "We achieve goals with the project, subject to time, financial, personal and other restrictions" (Vörös, 2004).

According to the Project Management Institute (PMI): A project is a series of reasonably chosen activities involving the use of resources (time, money, people, materials, energy and space) to achieve predefined goals (PMI website: [www.pmi.hu](http://www.pmi.hu)).

Project management is a specialized field dealing with the organization and management of resources, the goal of which is to ensure that the project's goals are met within a given time

and budget, in accordance with quality parameters, as a result of the work performed by the resources (Görög, 2003).

Project management is a process of conscious efforts – carried out by one or more people – which consists of the planning, management and control of resources (knowledge, skills, tools, techniques, money) in order to ensure that the project meets the partner's requirements, the set goals, and time and cost constraints (Henczi & Murvai, 2012).

One of the most important and oldest issues in the science of project management has been project success itself. Despite being a very important factor, defining it has proven to be a very difficult task to date. Many researchers have already examined the correlation between project managers professional competencies and project performance and organizational performance (Kendra & Talpin, 2004; Koong & Liu, 2006).

## ***2.2. Project lifecycle***

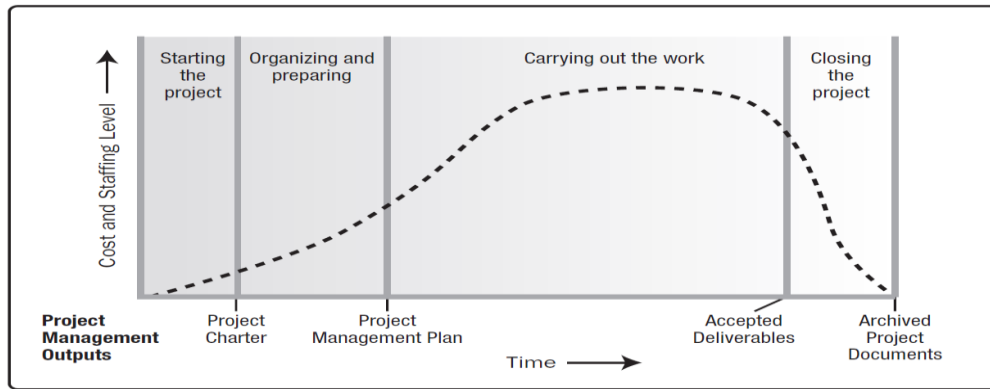
The project life cycle is the series of phases that the project goes through from its initiation to its closure. Phases are usually sequential and their name and number are determined by the management and control needs of the organization or organizations involved in the project, the nature of the project and its scope.

Application: Stages can be broken down by functional or partial goals, intermediate results or deliverables, specific milestones within the overall scope of work, or financial availability. Phases are usually limited in time, with a start and end or checkpoint. The life cycle can be documented within a methodology. The project life cycle can be defined or shaped by the unique aspects of the organization, the industry or the technology used. While every project has a defined beginning and a defined end, the specific deliverables and activities in between can vary widely from project to project.

Characteristics of project life cycles: Projects vary in size and complexity. All projects can be assigned to the following general life cycle structure (see Figure 1):

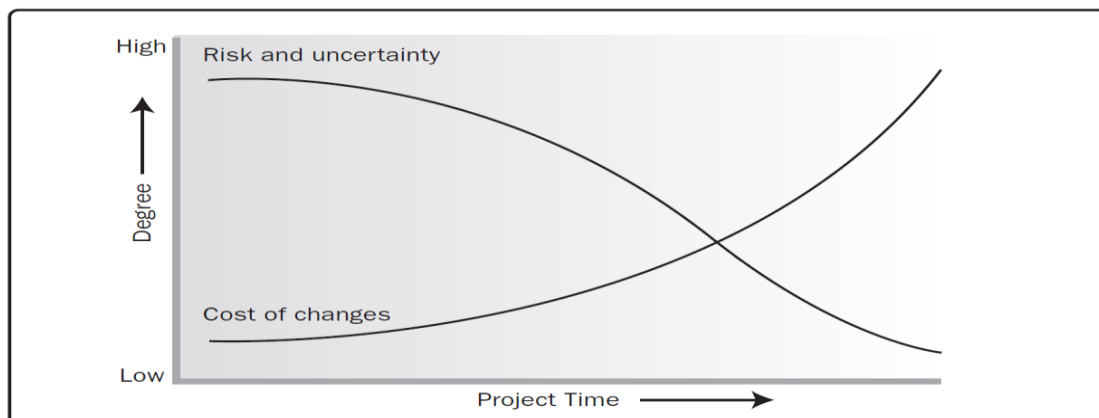
- starting the project,
- organization and preparation,
- carrying out the project work, and
- closing the project.

This general life cycle structure model is often referred to by those responsible for the project when communicating with senior management or other organizations less familiar with the details of the project. Not to be confused with project management process groups, as process group processes consist of activities that can be performed and repeated at individual stages of the project and throughout the project as a whole. The life cycle of the project is independent of the life cycle of the product produced or modified by the project. However, the project must take into account the current life cycle stage of the product (PMI, 2013).



**Figure 1: Typical cost and resource level in the life cycle structure of the general project**  
 Source: PMI (2013, p. 38.)

- A typical project lifecycle structure typically has the following characteristics:
- Cost and staffing levels are low at project initiation, rise slowly, peak when project work is completed, and decline rapidly when project is completed. Figure 1 illustrates this typical pattern.
  - The typical cost and staffing curve above is not typical for all projects. A project can require significant costs, even in the early stages of its life cycle, if, for example, the full number of employees must be secured at the start of the project.
  - Risk and uncertainty (shown in Figure 2) are greatest at the beginning of the project. These risk factors are reduced during the life of the project when the project participants make the right decisions and accept the deliverables.
  - Figure 2 illustrates the idea that the costs of making changes and correcting errors tend to increase significantly as the project nears completion.



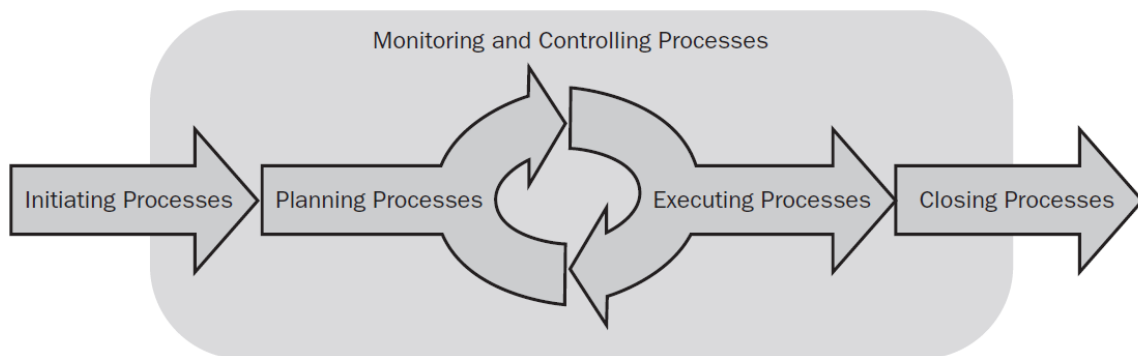
**Figure 2: The impact of costs and risks during the life cycles of the project**  
 Source: PMI (2013, p. 39.)

In the context of the overall life cycle structure, the project manager can determine whether more effective control is needed during the execution of certain activities, or whether certain subtasks must be completed before they affect meeting the project's deadline. Large and complex projects in particular may require this additional level of control. In such cases, it may be beneficial to divide the project into phases in order to achieve the project goal (PMI, 2013).

### 2.3. Project phases

Projects can be divided into any number of stages. A project stage is a collection of logically related project activities. Project stages are defined when the nature of the work to be performed is characteristic of a part of the project and is usually related to the achievement of a specific objective. Project phases are usually completed sequentially, but some projects overlap. Different stages usually have different durations or resource requirements.

The staged structure enables the project to be divided into logical subgroups, thereby facilitating project planning, management, and control. The number of stages, the need for stages, and the level of control applied will depend on the size, complexity, and potential impact of the project. There is no single ideal structure that applies to all projects. Although industry practice often leads to the use of a preferred structure, projects within the same industry – or even within the same organization – can vary widely. Some will have only one section, as shown in Figure 3. Other projects may have two or more phases (PMI, 2013).



**3. Figure: Example of the One-Stage project**

Source: PMI (2013, p. 41.)

### 3. Materials and methods

#### 3.1, Basic assumptions

The preparation process is based on the documents prepared during the bidding period, as well as the delivery limits and conditions of the concluded contract. Among the documents of the offer period, the following are required to start work:

- contract,
- technical description (equipment parameters, delivery limits, special technical conditions),
- preliminary calculation,
- preliminary construction schedule,
- preliminary project organization,
- design documentation (design documentation received as data provision for starting work).

#### 3.2. Basic documents for project preparation

Based on the documents of the bidding period, the Project Manager prepares the following basic documents, which, with the approval of the manager responsible for the project, the project members of the project organization must be introduced to:

- *Project summary*: to be prepared by the project manager, it contains a brief description of the project task, a description of the data provision, the guaranteed parameters agreed in the contract, the main milestones, and possible main suppliers.
- *Project organization*: prepared by the project manager, approved by the manager responsible for the project.
- *Responsibilities*: based on the documentation compiled by the project manager, which is defined in the organizational chart and the "Purchasing plan", in the case of larger projects in the

responsibility matrix, for the project manager, system manager and procurement package manager includes relevant tasks and responsibilities.

- *Project schedule*: based on the preliminary construction schedule, the project manager prepares and maintains it. It includes the main processes of preparation and procurement, as well as the implementation activities broken down by specialty and area, together with the definition of the critical path. This forms the basis of the later, fully detailed schedule before the start of construction.

- *Procurement plan*: prepared by the project manager based on the construction schedule. It includes the preparation and procurement packages broken down by specialty, along with the names of those responsible and the procurement deadlines.

- *List of possible suppliers and subcontractors*: includes the list of possible subcontractors and suppliers considered during the bidding period and intended to compete during the preparation, together with their contact information, which the project manager supplements with additional potential contractors.

Creation of a project-specific model contract (designer, supplier, enterprise contract draft): a model contract that can be used during the procurement process and contains the conditions accepted for the project, drawn up by the project manager.

The basic documents must be uploaded to the company's central server in the folder containing the name of the project.

### ***3.3. Project meetings and communication during preparation***

The following meetings must be held during the preparation and full implementation of the project in order to prepare and control information flow and processes:

- *Steering Committee*: called by the manager responsible for the project within 8 days after signing the contract together, from the beginning of the project to the end of the project, on a weekly basis. The manager responsible for the project, the controlling manager and the project manager take part in the meeting. Its purpose is to control the execution of project processes, to monitor deadlines and project management processes, as well as to determine necessary measures and to make decisions in accordance with the company's rules of procedure. Agreements must be recorded in minutes and monitored.

- *Project Coordination Kick-off Meeting*: the project manager convenes the first Steering Committee within 8 days. Members of the approved project organization will participate in the meeting. Its purpose is to familiarize the project participants with the project task and requirement system, as well as the organization, responsibilities and schedule. At this meeting, the project manager announces the date of the regular weekly project coordination meeting.

- *Regular weekly Project Coordination Meeting*: a weekly meeting convened by the project manager at the time announced at the Project launch meeting. Members of the project organization take part in the meeting. Its purpose is to monitor the execution of tasks and determine the necessary measures in order to comply with the project schedule. Agreements must be recorded in a task list and monitored.

### ***3.4. Project preparation activities***

The preparation process must be carried out according to the schedule according to the company system. It covers the following activities:

- *Processing of incoming plans*: according to the division defined in the responsibility matrix, it is carried out by the system managers together with their project engineers and installation managers.

- *Compilation of a procurement material list based on plan collection*: compilation is the responsibility of the system manager, a list of coded material types and quantities collected during the processing of the plan, which further provides information on the required quantities to the



procurement package managers and to the installation managers on the required work quantities. Uploading the material list is the task of the project engineer appointed by the system manager.

- *Compilation of the procurement package and requests for proposals:* based on the list of materials, technical specifications and commercial conditions, the project engineer responsible for the package uses the contract sample for the project.

- *Competition:* competition for procurement packages among potential suppliers and subcontractors. The competition is the responsibility of the project engineer responsible for the procurement package, the sent offers must be registered in a separate file. Before the closing, a negotiation must be held with the selected competitors, and the agreements must be recorded in the negotiation minutes. The generated documents must be stored and maintained in an orderly manner on the server.

*Making a procurement proposal:* at the end of the bidding process, the person in charge of the package must make a proposal on the procurement sheet, indicating the possible supplier or subcontractor. During the competition, the offers must be brought to the same level both from a technical and commercial point of view. There can be no open contractual issues.

*Approval of the procurement proposal:* the project manager submits it to the manager responsible for the project for approval. The procurement proposal must be approved according to the valid signature procedures.

*Contract conclusion based on the approval of the purchase sheet.* The order and contract signed by both parties must be stored in scanned form together with their attachments in the libraries of the subfolder of the project library on the server.

After the conclusion of the contract, one original copy of the contract to the controller, one copy

the project manager must hand over a copy to the procurement package manager. At the project manager contracts, orders and their amendments must also be stored in an orderly manner in accordance with quality assurance regulations.

### **3.5. Track changes**

The basic documents of the preparation process must be continuously maintained during the project, after evaluating the effects of the Customer's or designer's changes, the changes must be passed through the system.

*Processing of modified plans:*

- after receiving the modified plan, the project manager is responsible for processing the change,  
- for the parts of the amended plan affected by the plan amendment, the additional requirements or surpluses must be determined,

*Examination of the effects of the amendment:*

- What does the amendment affect?  
- Does it have an effect on the schedule, procurement, budget?  
- Is it necessary to initiate a contract amendment with the customer?

*Tasks:*

- project manager's decision on the necessary measures,  
- transferring changes to the material list,  
- assignment of tasks, recording of tasks,  
- modification of the project schedule (if necessary), recording of the schedule on the central server after approval of the modified schedule by the project manager, presentation of the new schedule to the project members  
- procurement to cover additional requirements, contractual monitoring of changes  
- approval of contracts and contract amendments with the project manager  
- contract, order or contract amendment

## 4. Results

The topic of my research is basically focused on the failure of projects, and examines their causes during investment projects. Accordingly, I conducted in-depth interviews with professionals who have implemented multi-billion forint investments. With technical director, investment director, project director and investment director. During the interview, we discussed the questions formulated in the questionnaire and went through the factors causing the failure of the projects in detail, point by point.

I sent the questionnaire to hundreds of professionals involved in project implementation, project directors, project managers, project engineers, construction managers, project purchasers, and project preparers. The conclusions drawn from the given answers are included in this study, touching on two issues.

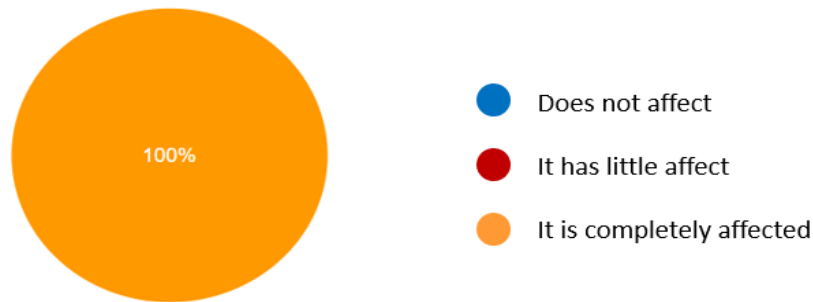
I formulated 18 questions in the questionnaire. The following two questions deal with the importance of the project preparation process. The first question may seem too simple, since it is clear that the project is affected by the project preparation, but the question concerns the successful implementation of the project, and I wanted to know from the answers to what extent the respondents think that the project preparation is important. 100% of respondents believed that project preparation has an impact on the successful implementation of the project. I also received this answer during the interviews, so I can say that project preparation is one of the most important processes in the life of the project. The failure of the project can be caused by inadequate preparation, and during my research it has been proven that it is the cause in many cases. All respondents consider proper project preparation important, yet one of the main reasons for unsuccessful project implementation is inadequate project preparation. The answers to the second question also confirm this statement.

The three main factors of the project are the deadline, the cost and the quality of the content. If any of the three factors cannot be met, the project can be considered unsuccessful. Project preparation affects all three factors! Part of the preparation is the preparation of the project schedule. A detailed schedule is drawn up for the implementation tasks, and resources are assigned to comply with it. Inadequate project preparation can cause deadlines to slip and cause costs to rise. Deadline slippage can be reduced by involving more resources, but this involves exceeding the budget.

In the course of my research, I asked the following questions in my questionnaire and during the interviews conducted:

*First question:* „One of the most important phases of project implementation is project preparation. To what extent do you think the proper preparation influences the successful implementation of the project?“

Questionnaire response evaluation: I got the following result. According to 100% of the respondents, the preparation of the project has a full impact on the successful implementation of the project (Figure 4).

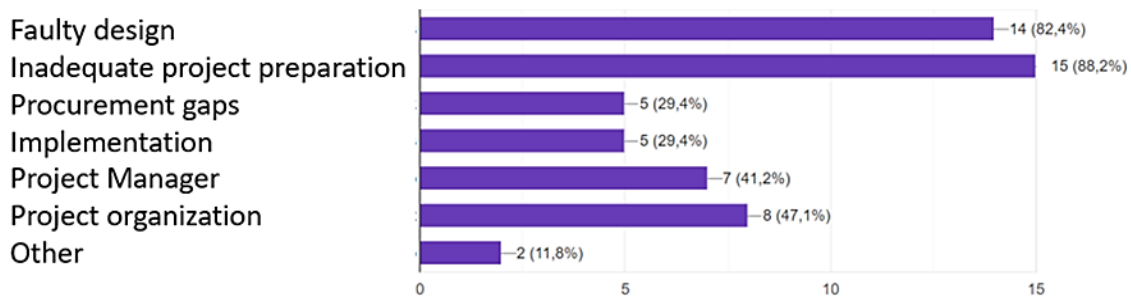


**Figure 4: Questionnaire statement (first question)**

Source: edited by myself

*Second question:* “Statistics show that more than 30% of investment projects are delayed, not in line with the original technical content and not within the planned cost. What do you think is the reason for this? Please choose from the following, you can choose more.”

Questionnaire response evaluation: Respondents had more choices and could identify more as a cause, inadequate project preparation was selected in 88.2%, which shows that inadequate preparation is the number one cause of unsuccessful project implementation (Figure 5).



**Figure 5: Questionnaire statement (second question)**

Source: edited by myself

#### 4. Recommendations and Discussion

The proper design of the project preparation process and its integration into the company's operational process can facilitate the successful implementation of projects. The preparation process described in the study is an example, but companies dealing with project implementation must develop the appropriate process description for their own profile. Adequate preparation of the project facilitates the successful implementation of the project, but inadequate preparation can lead to the unsuccessful implementation of the project. The projects have different technical content and different investment values, so the project managers had to face different challenges. A separate organization must be created for the preparation of the projects, thus promoting the proper preparation of the projects. The purpose of the study was to demonstrate the importance of project preparation, which was confirmed by the obtained results. Based on the results of my research, it has been proven that there is a significant effect between inadequate preparation and a failed project. Appropriate preparation must be applied to the project to be implemented, either with the help of an existing organization or a separate organization.

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