

Federal Institute for Research on Building, Urban Affairs and Spatial Development

within the Federal Office for Building and Regional Planning



## RESEARCH NEWS

No 2 / 2020



### Dear Readers,

Under the German Council Presidency two documents were adopted which play a pioneering role for the future policies of cities and regions. The New Leipzig Charter develops the principles of an integrated and sustainable urban development policy along the terms "just", "green" and "productive" further. It emphasises the outstanding role of digitalisation for urban transformation and highlights guidelines for urban development geared to the common good. The Charter mentions the strengthening of the local authority to act as the goal of a policy for the cities. The reason is that only strong municipalities can find local solutions to global challenges.

In recent years there has been a growing awareness of regional and transnational disparities in the EU. The new Territorial Agenda 2030 (TA 2030) takes this into account. The TA 2030 as well addresses a green and just Europe. It is supplemented by pilot actions in European regions. In order to visualise the priorities of the TA 2030 and to work out spatial structures and developments, the BBSR and the European research network ESPON have developed an atlas for the German Federal Ministry of the Interior. Its thematic maps and figures illustrate how the regions in Europe differ – and what unites them. An interactive version can be found on the website of the German Council Presidency at www.AtlasTA2030.de.

In addition to the results of the Council Presidency, the current Research News issue focuses on the housing and real estate markets in Germany and Europe. I hope you enjoy reading it.

Dr. Markus Eltges Director of the Federal Institute for Research on Building, Urban Affairs and Spatial Development (BBSR)

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## **EU COUNCIL PRESIDENCY**

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## **New Leipzig Charter for urban development**



Saxony, Leipzig, View to New Townhall, St. Trinitatis and Federal Administrative Court at sunset

Source: Getty Images / Westend 61

As part of Germany's Presidency of the Council of the European Union, the New Leipzig Charter was adopted on 29th November at the informal meeting of ministers responsible for urban development. The Charter reflects the principles of a modern urban development policy and was developed in a two-year participatory process at the national and European levels.

The New Leipzig Charter emphasises the through the European Structural Funds.

ΑII ministers responsible for development in the EU member states and

partner countries took part in the meeting in the context of the German Council Presidency as did the European Commissioner for Cohesion and Reforms, the President of the European Committee of the Regions and high-level representatives of the European Parliament and of European associations.

In addition to the New Leipzig Charter, the meeting of ministers also adopted a second document titled "Implementing the New Leipzig Charter through Multi-Level Governance: Next steps for the Urban Agenda for the EU". The document provides a basis for further cooperation at local, regional, national and European level to deal better with issues facing cities and municipalities in Europe. Both documents underscore the need for close cooperation among all partners in the EU.

### Study "Local Governments' Capacity to Act: A European Comparison"

How much capacity do local authorities have to shape the urban development policy for the common good in the various member states? These are the questions addressed in the Europe-wide comparative study "Local Governments' Capacity to Act: A European Comparison. Autonomy, Responsibilities and Reforms", which the University of Potsdam prepared for the BBSR. The research team has examined the position of local authorities in the EU member states, the degree of their autonomy, their tasks and their fiscal and financial capacity to act within the structures of their states. Although the study identifies a "local government-friendly" trend in Europe, there are significant disparities in many cases with regard to the capacity of local governments to manage and shape their own affairs. According to the study, a minimum degree of local financial autonomy and ownsource revenue helps local governments to effectively provide public services. Moreover, local governments should be able to decide on a wide range of tasks and, accordingly, have the necessary robust organisational structures for control and coordination.

### Further information:

www.bbsr.bund.de/BBSR/DE/ veroeffentlichungen/sonderveroeffentlichungen/ 2020/handlungsfaehigkeit-dl-en.pdf

## The Federal Institute for Research on Building, Urban Affairs and Spatial Development has prepared the New Leipzig Charter based on its own research work and provided technical advice.

orientation of European cities to the common good. This includes to provide vital public services reliably as well as to reduce social, economic and environmental disadvantages. The Charter aims to support an integrated urban development for the common good in order to preserve and improve the quality of life in all cities and municipalities of Europe. The principles of the New Leipzig Charter are to be incorporated into national, regional and local urban development strategies. The Charter also calls for municipal authorities to make greater use of the opportunities available

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## **EU COUNCIL PRESIDENCY**

## **European Territorial Agenda 2030**

The Territorial Agenda 2030 promotes the reduction of regional disparities and works sustainably to strengthen social cohesion between people, communities and places in Europe. To this end, it defines two overarching objectives for future development: a "just Europe" and a "green Europe". At their informal meeting on 1 December 2020, the representatives of the EU, Norway and Switzerland responsible for spatial planning, territorial development and territorial cohesion adopted the agenda for a sustainable future for all places.

Especially in times of the coronavirus pandemic, the goals of the Territorial Agenda 2030 are particularly important and up to date than ever before. The pandemic threatens to further intensify spatial and social inequalities in Europe and to neglect important measures for sustainable spatial development. The Territorial Agenda 2030 can provide important impulse for a fresh start for the future.

Together with other participating EU member states and institutions, the ministers of Germany, Luxembourg, Poland, Portugal, Norway and Switzerland launched six concrete pilot measures to implement the Territorial Agenda 2030: For Germany, the Federal Ministry of the Interior announced to carry

out a pilot action on structurally weak regions until 2023. In addition to German regions, at least three other regions from three different EU member states will be involved. As part of the pilot measures, the involved stakeholders develop and test innovative approaches and exchange related ideas across Europe.

## Interreg programmes may contribute to implementing the TA 2030

With its goals of a "just Europe" and a "green Europe", the Territorial Agenda 2030 is also an important reference document for the programming of the future transnational cooperation programmes. If the Interreg programmes do not focus too much on specific sectors, but also create opportunities for projects that pursue an interdisciplinary but spatial approach — for example with regard to urban-rural partnerships or the various services of general interest in disadvantaged regions — the Interreg programmes can make an important contribution to strengthening spatial cohesion in the EU and contribute to the implementation of the Territorial Agenda.

### **Further information:**

www.territorialagenda.eu www.interreg.de

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To strengthen local transport an urban und rural areas is an objective of Interreg projects. Bus with zero emissions in motion with nature in the background.

Source: Oleksandr Filon / iStock by Getty Images

## **EU COUNCIL PRESIDENCY**

## **Atlas for the Territorial Agenda 2030**

A new atlas of the Federal Ministry of the Interior, Building and Community illustrates the development of the regions in Europe. Maps, figures and short texts show how the regions differ, where they are similar and what challenges they are facing – for example in the areas of economy, demography, labour market, education, research and the environment. The Federal Institute for Research on Building, Urban Affairs and Spatial Development (BBSR) and the European regional research network ESPON have developed the map collection for the German Federal Ministry of the Interior.

The atlas was created during the German EU Council Presidency. It refers to the TA 2030. The 49 thematic maps and 32 illustrations of the atlas take up the focuses – a green and just Europe.

The atlas addresses actors who want to deal with regional development issues in Europe. The BBSR and ESPON have evaluated official data from national statistical offices and other data sources for the atlas. Depending on the topic, the figures refer to different territorial units such as municipalities and regions.

The publication "Atlas for the Territorial Agenda 2030. Maps on European territorial development" is available in German, English and French and will later be translated into all the official languages of the EU.

### Online version: www.AtlasTA2030.de

## Population development in local authorities Average annual population development from 2001 to 2017\* in local authorities (LAU)\*\* to under -2.0 -2.0 to under -1.0 -1.0 to under 0.0 0.0 to under 0.5 0.5 to under 1.0 1.0 to under 2.0 2.0 and more no data \* Population data: 2001, 2017: AT, HR, IT, MT: 2002, 2017; BA: 2001, 2013; FR: 1999, 2016; IE, LT, LV, RO: 2001, 2016; PL: 2002, 2011; KS: 2012, 2017; MK: 2005, 2017; TR: 2009, 2017; EL, CY: 2001, 2011 Local Administrative Units (LAU): local territorial units Equivalent territorial units: AL, BA, KS, RS DK: sogne; EE: vallad/linnad; PT: cocelhos; UK: wards Regions: LAU (2017) Data source: Spatial Monitoring System for Europe; Data origin: national statistical offices opulation estimates: GfK GeoMarketing for the administrative boundaries © BBSR, 2020

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## **HOUSING**

# Socially mixed, newly built neighbourhoods: social diversity is possible!



Source: Getty Images / fotografixx

The BBSR supported a study on how to achieve a high level of housing satisfaction and neighbourliness in socially mixed, newly built neighbourhoods. The study deals with sociological and spatial aspects as well as property management and housing aids. 16 case studies throughout Germany were analysed.

Attaining social diversity within residential districts is a vital objective of urban development and housing policies today. Therefore, planning residential complexes must respond to the increasing difficulty of living together within a society becoming more heterogenous. This research activity deepens the knowledge about neighbourhoods aimed at more socially mixed housing, where lowcost flats, varied living arrangements and the inclusion of households with difficulties in gaining access to the housing market are desirable.

High rates of satisfaction with residential conditions and a good neighbourhood are indicators of success for socially diverse new districts. Further expected benefits for the districts are documented in multiple ways and will not be elaborated in present research activities. Instead, the influencing factors, conditions and instruments for a successful social mix in new districts will be examined. 14 housing associations of different types - mostly municipal associations, but also cooperative and private ones - participated in the research project with a total of 16 examples. The focus of this research on the associations' and residents' perspective was put on these case studies which were analysed with the help of workshops with representatives from housing associations, by conversations with key actors on site,

by an evaluation of documents as well as a survey among residents (with a total of 484 interviews). The aim was to generate findings which encompass the individual case studies and are transferable to housing associations and planners on similar projects. All phases of socially mixed new districts were analysed – from project development to property management.

Nowadays, the discussion about social diversity and segregation in the context of housing is no longer an "either/or approach" but one that is openly tackled. The housing associations involved in the research explicitly aim for a social mix within their districts. Housing associations as well as residents have no particular difficulties with diversity in their new buildings. However, it would be too shortsighted to make social diversity dependent on occupancy rates alone. Essentially, the social mix relies on diverse housing typologies and forms featuring a wide variety of floor plans for households with different living situations and needs. These are then combined with a range of financing options including subsidised and privately financed rental accommodation as well as privately owned flats. Social mix has to be planned and established within architectural diversity.

The study was created by "Institut WEEBER+PARTNER", based in Stuttgart and Berlin und was funded by the Federal Ministry of the Interior, Building and Community by resolution of the German Bundestag.

### **Further information:**

www.zukunftbau.de/publikationen or contact zb@bbr.bund.de

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## HOUSING

## Change in the importance of municipal housing stocks

The BBSR is setting up a housing information system that focuses on the various groups of rental housing providers and their housing stocks. The BBSR carries out its own surveys for the information system with the aim of systematically and regularly collecting information on the housing industry in order to identify trends at an early stage, to analyse them and derive the need for action on the housing policy. It thus represents an important basis for the political advice given to the German Federal Government.

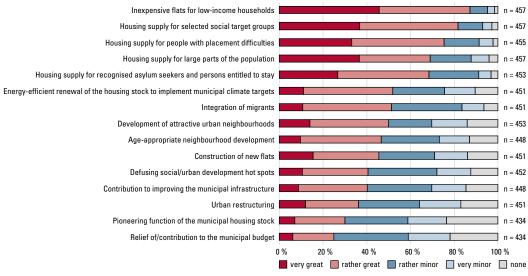
In Germany there are around 2.3 million flats in municipal hands. This corresponds to around 10 % of the total rented housing stock in Germany. Due to their particular importance in terms of housing policy, the focus of the BBSR's own surveys was initially put on the municipalities and their housing stock. Since 2009, the BBSR has been collecting information on the owner group of the municipalities and their housing stocks at regular intervals of three years. All cities and municipalities nationwide with more than 5,000 and, since 2018, more than 10,000 inhabitants and all districts (Kreise, NUTS 3) are surveyed. As a result of the last survey in 2018, about three quarters of the total municipal housing stock in Germany could be recorded with a response rate of 49 %.

From the point of view of the municipalities, supplying the population with inexpensive

housing and bottlenecks in the availability of building plots are currently the greatest housing policy challenges. The municipalities attach increasing importance to their housing stock, especially when it comes to providing lower-income population groups and special target groups such as large families, the elderly, people with placement difficulties as well as recognised asylum seekers and persons entitled to stay with inexpensive housing, as an instrument for solving current housing problems. In addition, municipal flats are becoming increasingly important in areas that go beyond the mere provision of housing such as the defusing of urban development and social hot spots, the pioneering function of the municipal housing stock or their contribution to the development of attractive urban neighbourhoods.

Due to the former non-profit status of municipal housing companies, the housing stock of cities, municipalities and districts still has a rather high proportion of social housing with rent control agreements and/or occupancy rights. However, more and more of these agreements are expiring. At the end of 2017, just under one quarter of the municipal flats were subject to rent control – around two thirds of them on a legal basis (housing assistance act or subsequent laws) and one third via contract-based rent control agreements. From the end of 2014 to the end of 2017, there was a very significant decrease

### Significance of municipal housing stocks or companies for the fulfilment of municipal tasks



Data source: BBSR municipal survey 2018

© BBSR Bonn 2020

## **HOUSING**

by a total of 86,400 rent-controlled flats. In the period 2018 to 2020, rent control agreements will expire for a further 15 % of the flats.

In addition to rent-controlled flats, municipal flats are often said to have a rent-lowering effect. The rent price excluding heating and other additional costs for this group of providers at the end of 2017 amounted to a median of €5.04/m<sup>2</sup> for market-priced flats and €5.00/m<sup>2</sup> for rent-controlled flats with the price range for market-priced living space being significantly greater than for rent-controlled living space. In comparison, according to the 2018 results of the additional microcensus survey of housing, the rent price excluding heating and other additional costs was a nationwide median of €6.30/m². The comparison over time between 2015 and 2018 shows rather moderate rental price increases of 5.9 % for market-priced living space and 3.6 % for rent-controlled flats in three years.

Numerous cities and municipalities are expanding their municipal housing stock. The stock can be enlarged in a variety of ways (redensification in the existing stock, purchase of existing properties and flats, purchase of fully developed new construction projects, construction of new flats on self-initiative), but building new municipal flats on self-initiative is by far the most important form of stock expansion. Occasionally, municipal housing companies are newly founded with the task of building flats in the next few years.

The results of the 2018 municipal survey confirm the great importance of new constructions: in the three-year period from the beginning of 2015 to the end of 2017, every third municipal housing provider has expanded its housing stock by new buildings. Municipal housing companies are much more active than the municipalities themselves. Almost half of the housing companies have built new homes. In the case of municipalities, however, this was only the case for 16 %. A total of 885 new construction projects with almost 22,900 flats were recorded. West German construction projects dominate the construction of new municipal flats. 82 % of the new construction projects and 69 % of the flats were realised in West Germany. By far the largest number of new construction projects can be found in large cities. Differentiated according to the direction of development of the local authorities, the new construction will concentrate in particular on growing cities and municipalities, both in western and eastern Germany. On a nationwide average, the new residential units are freely financed and rent-controlled in an almost balanced ratio. The main motivation of the municipal housing providers to construct new buildings is the motivation to support the housing supply on the local market by expanding their own housing stock.

BBSR municipal surveys provide nationwide information on the owner group of the municipalities and their housing stocks. These quantitative surveys represent a valuable information basis for the Federal Government's housing policy; the individual topics can only be outlined in this context. Accompanying research projects are required for more in-depth knowledge. Against the background of the Federal Government's interest to strengthen the construction of new rented flats, the research project "Expanding the municipal housing stock as a housing policy strategy" provides additional insight into this topic, which is currently very important in terms of housing policy, beyond the nationwide overview given by the BBSR surveys.

Since the concrete situation on site plays a central role when planning to expand municipal housing stocks, the in-depth study was carried out in 20 case cities based on different housing market situations, problems and strategies. A methodical set of quantitative evaluations, onsite surveys and qualitative empirical social research was used for the investigation.

The key questions of the research project were, on the one hand, directed towards the overall conditions, under which municipal housing stocks are expanded, and their conceptual context. Against this background, the characteristics and overall conditions of the municipalities with stock expansions and the goals, motivations and strategies of the municipal housing companies should be worked out. On the other hand, the specific expansion process was examined. The focus was on the dimension and implementation practice when expanding the stock.

The results of the BBSR's 2018 municipal survey and the project "Expanding the municipal housing stock as a housing policy strategy" will soon be published.

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## HOUSING

## Housing policies in the European Union: comparative research project illustrates Europe's diversity

The Federal Institute for Research on Building, Urban Affairs and Spatial Development (BBSR) and the Federal Ministry of the Interior, Building and Community (BMI) are conducting a research project on the different types of housing policies in the member states of the European Union. The study intends to provide a comprehensive and profound overview of the individual characteristics and current challenges of national housing policies. The project incorporates the perspectives of numerous national scientific experts as well as the policymakers of the EU countries with the aim to initiate an international dialogue and discursive exchange of the prevailing market conditions, national legal regulations and housing policy instruments.

The project aims at providing a systematic overview of crucial actors, housing policy goals and steering approaches, including the present status as well as recent developments in challenges and political responses. The results are based on a qualitative survey addressed to country-specific experts enriched by secondary statistical data and an evaluation and comments of national policymakers. The research process is supported by an international scientific advisory board, assisting with the conceptual approach and helping to approve and condense the project's findings.

## Diverse governance structures and housing provision systems

The situation regarding governance structures in housing policy is very diverse in the EU member states. The field is differently structured in terms of the horizontal distribution of competencies between different national units as well as the vertical distribution across the administrative levels.

One of the central results against the background of the respective national development is the broad diversity of the different housing provision systems across the European Union in terms of the structure of the housing stock, forms of use and the social care function of the different tenure forms. The systems range from diversified systems with balanced quantities between rental tenures and owner-occupation and a

heterogeneous composition of non-profit/cooperative and market-based rental housing to less diversified systems with a dominance of owner-occupation and only a marginal, both market-based and social supply of rental housing.

## **Housing policy instruments**

Regarding housing policy instruments, it can be seen that most member countries use the four main identified housing policy instruments at least to some extent: "housing subsidies", "instruments for homeowners and homebuyers", "subsidised housing" and "rent regulation". Almost all participating countries apply different kinds of subject-oriented subsidies, while object-oriented instruments are established to a lesser extent.

Housing allowances exist in all but one member states; in many countries several systems even coexist and aim at different target groups. Additionally, supporting homeowners and -buyers, especially in the form of a tax benefit, is also a well-established instrument. These benefits are often paralleled by low-interest loans or grants. A common object-oriented housing instrument in most EU member states is subsidised housing. However, the programmes vary in their funding modalities and objectives in the different countries mainly aiming at supporting low and middle income groups. While most are designed for rental tenure, some also include owneroccupied tenures. Regarding rent regulation, around one third of the EU member states do not have any significant regulation of the initial rent as well as the rent increase. While twelve countries regularise only the increase, only a handful have placed measures for both.

### **Contemporary challenges for housing policy**

Despite the heterogeneous housing markets and devised policy instruments in the different countries, there are also commonalities regarding the main factors influencing housing policy decisions over the last decade. Primarily, energy efficiency issues and the continuing trend towards urbanisation play a prominent role for most countries in the European Union. Other common drivers include demographic changes, immigration and, on the housing

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supply side, price and rent increases in urban areas associated with financing problems and lack of social or subsidised housing.

The results of the projects were presented at the European Housing Policy Conference (after the editorial deadline) on 6 November 2020. The Conference was hosted by the Federal Ministry of the Interior as the main event for the German Council Presidency in the field of housing.

More information on the research project can be found on the BBSR homepage.

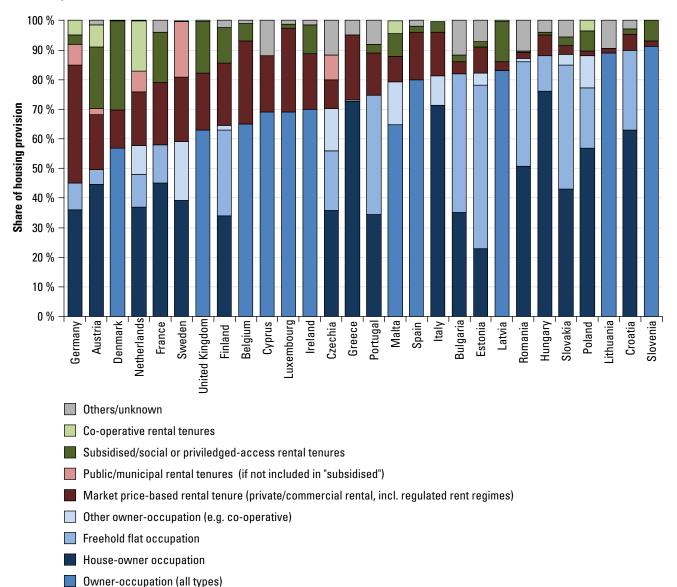
### **Further information:**

www.bbsr.bund.de/BBSR/DE/forschung/ programme/exwost/Studien/2018/ wohnungspolitiken-eu/01-start.html

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### Tenure composition in the EU member states



Source: Institute for Housing and Environment (IWU)

## HOUSING

## Housing markets in Germany and its neighbouring countries

Due to its central location in Europe, Germany has very close relationships with its neighbouring countries. The housing markets and their developments remain mainly determined by national conditions though. In border areas, differences in flat prices and rents may influence the choice of location.

Both in Germany and in most of the neighbouring countries, the population has increased in the last five years. Cities and their surrounding areas in particular have grown. Austria (+4.1%), Switzerland (+5%) and Luxembourg (+11.7%) showed a particularly strong growth compared to the neighbouring countries. For comparison: In Germany the population grew by 2.8%.

Despite a relatively low population growth (+1.3%), the Czech Republic shows the

strongest price increase: the prices of all residential property purchased by private households, according to Eurostat, have risen by almost 50 % since 2015. In Luxembourg, the price of residential property rose significantly (+ 35 %). In France, however, the development was comparatively moderate: There, the prices for residential property rose by 12 % with prices in Paris increasing significantly more than in the rest of the country. With a plus of 30 %, Germany is well above the EU average.

### Different rent levels also in border regions

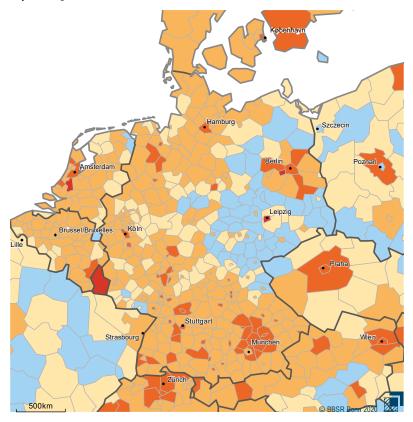
A look at the border regions shows whether the interrelationships there influence the local housing market. The available data on flatrents on the border to Luxembourg and France serve as an example. While the average advertised rents for a flat in the city of Luxembourg reach €27 per m², rents per square metre on the German side remain below €8. Only in the city of Trier, the market rents (rent prices of advertised flats) are at just under €9 per m², in the county of Trier-Saarburg at almost €7.20 per m².

Almost 40,000 cross-border commuters, who work in Luxembourg according to the Luxembourg statistical office, can benefit from significantly lower housing costs in Germany. Commuter movements are just the opposite between Germany and France: over 45,000 in-commuters come from France to work in Germany (according to statistical information of the Federal Employment Agency), although the rents are higher on the French side than in Germany. In these three countries, the numerous interdependencies in the immediate border area do not seem to have any direct influence on the rent level but rather the proximity of a city. However, the different prices may influence the choice of location and thus also the commuter movements across borders.

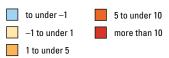
### Different living and ownership conditions in European countries

One of the main differences between Germany and its neighbours is the ownership rate. According to Eurostat, 42 % and 51 % of the population in Switzerland and Germany live in owner-occupied households, in Eastern

### Population growth 2014 to 2019



### Population development 2014–2019 in per cent



Data source: Spatial Monitoring System for Europe Geometric basis: 6fK GeoMarketing, NUTS 3 regions Author: C. Duvernet

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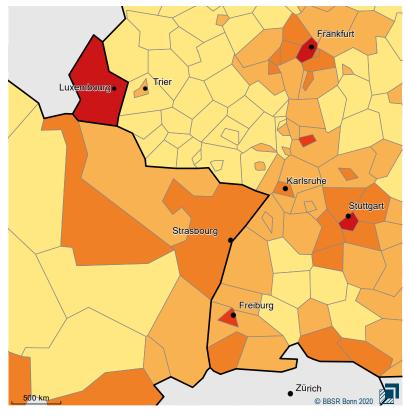
European countries such as the Czech Republic and Poland, the rate is around 80 %. Also noteworthy is the high proportion of owners not taking out a mortgage or loans in these countries. The proportion of tenants who have to pay a reduced or no rent with 16 % is highest in France.

Despite similar trends such as a general price increase and the attractiveness of urban areas, it is not possible to draw a uniform profile of the housing markets in Germany and neighbouring countries. Housing conditions and market structures vary widely from country to country. Housing markets are developing at different speed.

A whole range of factors can explain these national characteristics: legislation, tax levels, credit conditions, the situation of labour markets and the purchasing power of the population as well as, of course, historical and cultural aspects. However, comparable regional data for a comprehensive analysis of the cross-border links in housing markets often lack.

This article summarises findings, which are presented in detail in the 2020 housing and real estate market report of the BBSR. The report will be published shortly.

### Market rents in the German-Luxembourgian-French border region 2019

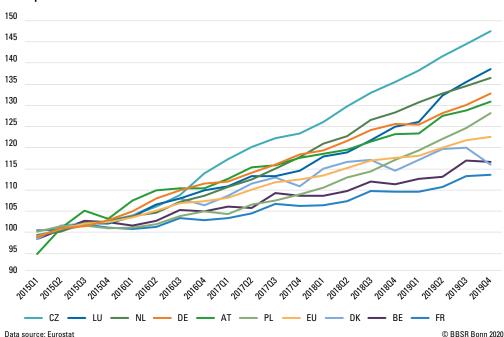


## Rent prices of advertised flats in $\ensuremath{\varepsilon}$ per $m^2$ (2019)



Data source: BBSR Housing Market Monitoring System, IDN ImmoDaten GmbH, LU: Ministry of Housing, Housing Observatory, FR: www.clameur.fr, as of February 2020 Geometric basis: GfK GeoMarketing, NUTS 3 regions

### House price indices 2015 to 2019



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## **BUILDING AND ARCHITECTURE**

## Concept tendering as an alternative to the conventional sale of public real estate

Concept tendering as an instrument to sell public property is getting more and more important to municipalities. The BBSR has published a study on concept tendering called "Baukultur for urban neighbourhoods. Process culture through concept tendering". Robert Temel, urban researcher from Vienna, examined eleven case studys on concept tendering in Germany on behalf of the BBSR as part of the General Departmental Research programme.

The project focused on this alternative instrument of selling public land and buildings and its impact on the quality of Baukultur in the close neighbourhood. With concept tendering, not the best price is the argument to sell a property but the best functional and architectural solution suggested by the buyer.

### Two answers on urgent urban questions

As housing markets are under pressure, concept tendering offers two answers on urgent questions for municipalities: on the questions concerning high-quality urban design and affordable housing. By concept tendering, municipalities keep influence on their sold real estate and on the development of the close surroundings by fixing quality requirements as functional and social aspects. As a result, the development of a site is more

accountable and municipalities keep their role as developers.

The study reveals different approaches in ten municipalities giving an overview on good practice and experiences offering to learn from each other. It presents cases of cities acting with a longer tradition such as Tübingen and Hannover as well as "newcomers" like Landau/Pfalz.

Following an incremental process structure, the study suggests to provide a low threshold for accessing the process in order to get a high-quality solution. Besides, it seems important to have less weight on the price as a criterion.

### Concept tendering as part of Baukultur research

Referring to Baukultur research, concept tendering may semantically be considered as an instrument implementing Baukultur aspects in municipal strategies on several levels: In the context of planning competitions, design commissions and architectural awards, it does not only solve the problem of a particular site. It improves the local knowledge about the benefits of Baukultur for the well-being in the administrative and the political sectors but also among citizens. Concept tendering



Source: Peter Jammernegg, WebArtists

## **BUILDING AND ARCHITECTURE**

further seems to attract and address people with a specific agenda open to participation and social processes. Personally involved as buyers and builders, they specifically increase their knowledge during a concept tendering process. They might be considered as a new form of civic Baukultur initiative which transfers the message of Baukultur to the broader society. As announced in the New Leipzig Charter, the efforts in developing participation processes during the next decade have to be increased and this seems to be another field to be looked at.

The instrument of concept tendering with findings of the research project is part of the international URBAN MAESTRO survey, conducted by UN-Habitat, the Brussels Bouwmeester Maître Architecte and the University College London, and as one of three German innovative governance approaches aiming to improve the quality of the built environment.

As part of the project, an exhibition presented the eleven case studies. It was shown in

twelve cities often connected with a public event. In addition to the German printed version, the BBSR published a digital English version of the publication. You may find the download version at www.bbsr.bund.de.

### Further publications on Baukultur in English:

### 33 Baukultur Recipes

As part of the research project Baukultur konkret on civic Baukultur initiatives 2014-2017 this publication sums up 33 (first) actions dealing with the Baukultur issue. From a variety of literature on architecture and urban design over exhibitions to architectural excursions of municipal administrations, the publication suggests several different accesses and ideas to integrate Baukultur in urban strategies, but also in daily public life. The English digital edition was published in 2020.

#### **Further information:**

www.bbsr.bund.de/BBSR/DE/veroeffentlichungen/sonderveroeffentlichungen/2020/konzeptvergabe-langfassung-dl-en.html

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# Network supports Europe-wide uniform life cycle assessment of building products

A new database brings together life cycle assessment data for building products across Europe. The data, which can be accessed via the website www.indata.network, help specialists from the areas of planning, construction and architecture to determine the environmental impact of buildings over their entire life cycle — and thus to plan and construct buildings sustainably. The offer is aimed at actors in the private and public sector who deal with issues of sustainable building.

The database is based on an initiative of the "International Open Data Network for Sustainable Buildings (InData)". The Federal Institute for Building, Urban and Spatial Research (BBSR) launched the network in 2015. Experts from twelve European countries are now involved. The network emerged from the growing interest in structuring and using information from environmental product declarations for the sustainability assessment of buildings. An environmental product

declaration depicts the environmentally relevant properties of a building product, which are required, for example, to determine the CO2 emissions, the embodied energy and the resource consumption of a building.

The quality-checked data can be retrieved in machine-readable form via an interface from various international providers of environmental product declarations. Each data supplier publishes the data according to uniform criteria via its own network node. Users can use it to carry out queries on the InData website and via a programming interface.

The InData network uses the ILCD+EPD data format originally developed for the ÖKOBAUDAT database operated by the BBSR.

Further information: www.indata.network and www.oekobaudat.de



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## **BUILDING AND ARCHITECTURE**

# Climate-neutral buildings: new brochure on Efficiency House Plus educational buildings has been published



Source: ARIS Architekten

Educational buildings built based on the "Efficiency House Plus" building standard generate more energy, according to the annual energy balance, than they need for their operation. A total of seven pioneering educational buildings with a exemplary have been supported scientifically evaluated since 2015 in the context of the Efficiency House Plus research initiative of the Federal Ministry of the Interior, Building and Community (BMI) and the Federal Institute for Research on Building, Urban Affairs and Spatial Development (BBSR) with funds from the Future Building innovation programme. In the newly published brochure "5 Years of Educational Buildings in the Efficiency House Plus Standard - Insights from the Accompanying Research" they will now be for the first time compactly presented.

The focus of the publication, which is available in English and German, is on funded educational buildings. They include a high-tech institute building, a research hall, two vocational school and training centres, two complex new construction and redevelopment measures at grammar schools and an extension for a primary school. The majority of these pilot projects are currently under construction, some of which will be implemented in several construction phases; some buildings or parts of the buildings have already been completed and occupied.

For the BBSR special publication, the Fraunhofer Institute for Building Physics IBP has carried out an interim assessment of the ongoing model projects. The aim was to work out, interpret and convey the diversity, properties and characteristics of the educational buildings examined. Planning concepts, building simulations and initial results from the real operation of the completed buildings, which have to go through a 24-month monitoring process after their completion, form the starting point for the scientific cross-evaluation.

The brochure, published in time for the German Council Presidency 2020, addresses anyone interested in the Efficiency House Plus building standard and in innovative building concepts. Five years after the start of the funding programme, decision-makers and everyone who stands up for future-proof and sustainable learning conditions can be informed and the first promising results may encourage them to imitate them.

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### **Efficiency House Plus**

Efficiency Houses Plus achieve an energy-efficient "surplus" in the annual balance from renewable sources and may provide this excess energy for other purposes or feed it into the supply network. On the way to a climate-neutral building stock, Efficiency Houses Plus may compensate for existing deficits of other buildings (e.g. listed buildings) that are less efficient or cannot be sufficiently upgraded in terms of energy efficiency. Every newly constructed building with the Efficiency House Plus standard reduces greenhouse gas emissions. The building standard supports the achievement of national and European climate protection goals in the building sector and is an important component on the way to a climate-neutral building stock by 2050.

Due to the high savings potential in terms of the operation of buildings, innovative structural building standards such as the Efficiency House Plus, which use renewable energy sources, are particularly sustainable. Efficiency Houses Plus are technologically open, can be realised in new and existing buildings and are both efficient and sustainable.

## **BUILDING AND ARCHITECTURE**

## Long-term structural data for the construction industry

The global economic outlook is seriously deteriorating due to the corona pandemic. Even Germany, as an export-oriented industrial country, cannot escape a global recession. The worst economic slump since World War II is expected for 2020. The construction sector will also be affected - despite a continued strong housing demand. The data available to date suggest that the construction industry is still coming through the crisis relatively well. But impacts can also be felt here. Above all the export-oriented companies from the industrial and service sectors are reluctant to place construction contracts. The housing sector, however, continues to back the construction boom. In its current forecast on the development of the construction boom, the German Institute for Economic Research is assuming a real increase in the construction volume by 0.8 % in 2020. For 2021, the Institute expects an increase by 0.5 % in its forecast. Real growth in the housing sector is likely to be around 1.5 % in each case and around 3 % in each case of the public construction sector. According to the forecast, the economic construction sector will lose 1.5 % in each case. Nevertheless, there is uncertainty in the construction sector how things will go on in the medium and long term.

In an own study, the BBSR has classified the current crisis against the background of longer-term trends of the construction boom. A historical comparison shows that the construction sector was able to overcome the 2008/2009 financial crisis much better than other sectors. It becomes clear how construction investments affect the overall economic growth and employment. The economic relevance of the construction sector has increased since the financial crisis. Employment and labour productivity in the construction industry have also developed positively. Good construction boom phases are usually driven by a strong housing sector. The existing measures have also increased continuously.

The trend of the construction boom is causing a turnaround in the construction prices. Since 2015, the construction prices have increased significantly more than the general price level. The strong construction demand meets with

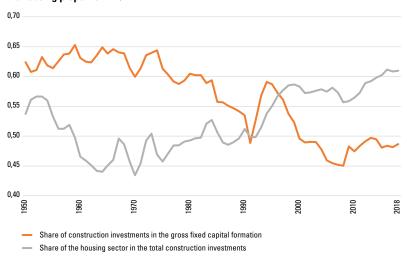
a limited supply with scarce construction capacities. Against this background, the increase in employment is proceeding very slowly. This can be explained by the shortage of skilled workers. In addition, there is likely to be a certain degree of entrepreneurial caution following the strong shrinking processes in the course of the construction recession from 1995 to 2005. Compared to the peak times in the mid-1990s, there are still over a million jobs missing. While the nominal construction volume of around €430 billion is now well above the level of 1995, the real development is still lagging behind the peak values. The labour productivity is still well below the level of the automobile industry. Since 2014, the annual growth rates in the construction sector have been at least as high as the productivity development in the overall economy.

The starting position for the construction industry is better today than it was before the financial crisis: volume of orders and capacity utilisation are very high and the equity capital situation has also improved within ten years. In addition, public economic revival programmes will also help to support demand. The indicators suggest that the major slump in the construction boom will not happen and that the construction sector will come through the crisis relatively well.

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## Share of construction investments in the gross fixed capital formation and development of the housing proportion in %



Source: Federal Statistical Office Data for 1950 to 1969 unrevised data for the former German federal territory, for 1970 to 1990 revised data for the former federal territory. From 1991 revised data for Germany, Database at current prices.

## SPATIAL DEVELOPMENT

## Inspirational territorial and urban analysis jointly developed by BBSR and NIUA

BBSR has been cooperating with the National Institute of Urban Affairs (NIUA) in New Delhi since 2018. This governmental research alliance aims at further developing the continuous spatial and urban monitoring systems of both countries. It focuses on the urban and spatial perspective in the areas of sustainability, resilience and inclusion as well on the digitalisation of regions, cities and communities. Analytical reference points are two guiding documents of the United Nations: the New Urban Agenda as well as the 2030 Agenda for Sustainable Development and its 17 Sustainable Development Goals (SDGs).

Three current volumes of the BBSR series BBSR-Analysen KOMPAKT are the 2020 products of this research cooperation. They take a closer look at some SDGs and their respective sub-goals and they are available in English and German at www.bbsr.bund.de:

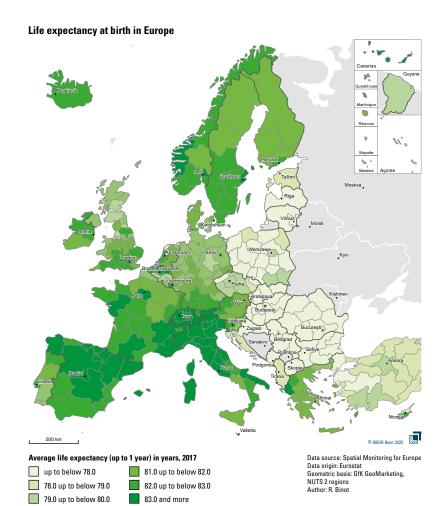
- Spatial Perspective at SDG3 on Good Health and Well-Being (11/2020)
- Spatial Perspective at SDG 4 on Quality Education (13/2020)
- Spatial Perspective at SDG 11 on Sustainable Cities and Communities (15/2020)

In analysing the spatial perspective on SDG 3, SDG 4 and SDG 11, BBSR and NIUA have deliberately chosen a bottom-up approach in order to visualise, on the basis of common reference grids (like the Global Human Settlements Layer – GHSL), common data sets and time spans or points in time commonalities as well as non-commonalities in the urban and spatial development of Germany, Europe and India. The publically available data sets come from respective national (BBSR, DESTATIS, Population Census of India) and supranational sources (EUROSTAT).

Life expectancy at birth in Europe, Germany and India (cf. BBSR-Analysen KOMPAKT 11/2020) is a good example to illustrate the path which the research alliance analytically follows:

A first glance at the situation in Europe reveals the striking difference between east and west. While the average European (EU27-2020) might expect a lifespan of 80.9 years, it is in Spain 83.4 years and in Romania 75.3 years. The European country with the highest life expectancy at birth of 83.7 years is Switzerland. At the regional level, the expectancy of life at birth ranges from 74.3 years in the southeastern part of Bulgaria to 85.1 years in Madrid. Considering Europe as a whole, most of its countries show relatively homogenous regional pictures, a few countries like Spain, Italy, France and Belgium face larger regional differences, the latter in between the parts of the country divided by language.

In districts in Germany, life expectancy at birth is calculated based on mortality tables applying the method of Farr (DESTATIS 2019) as well as annual death and population statistics of the age group of 19 years providing averages of 3 years. On average, a newborn may expect to turn 80.8 years old. Since 1990, the life expectancy at birth has annually increased by 2.5 months; this increase however has slowed down in recent years. Regional differences



80.0 up to below 81.0

no data

## SPATIAL DEVELOPMENT

decrease and amount to 5.5 years with the lowest figure (78 years) in some structurally weak regions of Germany and the highest one (83.5 years) in the prosperous southern part of the country. In addition, the gap between female and male life expectancy at birth is almost disappearing. The effect of the regional level of income, education and the unemployment rate on the regionalised life expectancy at birth is significantly higher than the regional differences in health service supply.

In India, life expectancy at birth is assessed at district level (Shukla 2019). The estimates are based on 2011 Census data of the country applying an indirect approach as taken by Wilmoth et al. (2011). Life expectancy at birth increased in India from 49.7 years between 1970 and 1975 to 69 years between 2013 and 2017. In the rural areas of India, life expectancy at birth rose from 48.0 years (1970-1975) to 67.8 years (2013-2017) while it grew in urban areas from 58.9 years between 1970 and 1975 to 72.4 years between 2013 and 2017. Between 1970 and 1975, the life expectancy at birth of females was slightly lower (49.0 years) than for males (50.5 years). This trend has reversed over four decades. Between 2013 and 2017, the life expectancy at birth of females was reported with 70.4 years and the one of males with 67.8 years respectively. Mortality decline and health gain are not uniform at the various levels of disaggregation leading to a significant heterogeneity in the survival pattern across different regions in India. The range of the life expectancy at birth varies at federal state level between 65.5 years in Uttar Pradesh and 75.2 years in Kerala.

The cartographic products and analytical texts of the BBSR-Analysen KOMPAKT volumes are valuable inputs for synthesis reports to be produced on the European and global level by supranational institutions like UN HABITAT and OECD or associations of cities. This also underlines that the urban and spatial dimension and thus placed-based and people-oriented analytical approaches turn into a visual product usable for the daily work routine of stakeholders and institutions.

The governmental research alliance of BBSR and NIUA and its products may serve as an inspiring blueprint for other bilateral or

multilateral alliances to come. Analysing territories, rural areas and urban areas on the basis of a joint grid like GHSL and common data sets - preferably on local levels - should constitute the entry point of these alliances while simultaneously ensuring that institutions and stakeholders applying the analyses in their daily work routine are on board right from the start.

### **Further information:**

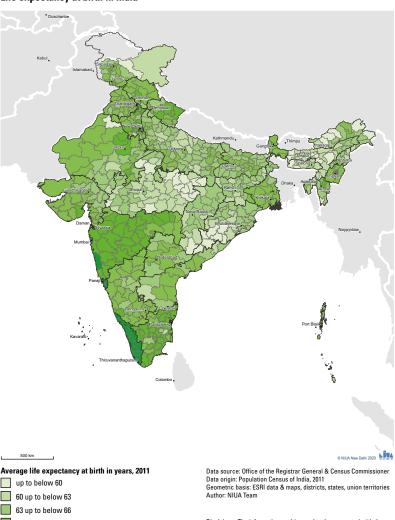
www.bbsr.bund.de/BBSR/EN/publications/ AnalysenKompakt/Issues/ak-11-2020.html

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## Life expectancy at birth in India



up to below 60 63 up to below 66 66 up to below 69 69 up to below 72 72 and more no data

Disclaimer: The information on this map has been created with the highest degree of accuracy possible. However, NIUA cannot be held responsible for errors, omissions or positional accuracy. The depiction

## SPATIAL DEVELOPMENT

## Baukultur and tourism – cooperation in the region



The participants developed innovative concepts for accomodating guests in their city and town centres that are valuable in terms of Baukultur (Weißwasser, Saxony)

> A rich architectural heritage and a highquality architecture increase the tourist attractiveness of rural regions. Successful tourism in turn contributes to added value in these regions - and thus creates more opportunities for good planning and building. This was the finding of the research project "Baukultur and tourism - cooperation in the region", which the Federal Building Ministry and the Federal Institute for Research on Building, Urban Affairs and Spatial Development (BBSR) initiated in 2016.

> For three years, persons responsible from the fields of architecture, urban and landscape planning, protection of historical monuments and tourism worked closely together. They tested different strategies, methods and measures in seven regions - Elbe-Weser, Sauerland, southern Black Forest, Weißwasser/Lausitz, Uckermark/Barnim, Mecklenburg-Strelitz and Mainbernheim. They all aimed to improve existing structural and touristic potential. The regions developed innovative concepts for accomodating guests in their city and town centres that are valuable in terms of Baukultur, formulated mission statements, set up competence centres and initiated advisory services for tourist companies and clients. Forming networks and networking, promoting Baukultur as well as marketing and communication turned out to be important areas on the way to a successful Baukultur and tourism region.

> The goals of tourism professionals and those involved in Baukultur are often similar, even if both groups seem to have different interests at first glance. Authenticity, links to typical regional designs or uniqueness are aspects that are in demand and indispensable in the field of quality tourism but also urban development and architecture.

"The demonstration projects show how important it is that those responsible for Baukultur and tourism think more closely together. Linking both fields promotes the economic development of rural areas. It strengthens people's connection with their own place and makes them feel like getting involved in good planning and building and in the development of the historical building heritage", says the Director of the BBSR, Dr. Markus Eltges.

The BBSR implemented the research project in the context of the "Experimental Housing and Urban Development" (ExWoSt) programme for the German Federal Ministry of the Interior, Building and Community. The project was assisted by the "Arbeitsgemeinschaft BAUKULTOUR" working group. It consists of the urban planning and architecture agency HJPplaner and the tourism consulting agency COMPASS.

The research project built on the findings of the "Regionale Baukultur und Tourismus" (Regional Baukultur and tourism) study, which lasted until 2015. It had already shown that cooperative action by actors from the Baukultur sector and tourism professionals can support regional development. The final publication "Baukultur und Tourismus Unterwegs zu neuen Partnerschaften" (Baukultur and tourism - on the way to new partnerships) was published in German. Interested parties may download it from www.bbsr.bund,section"Veröffentlichungen" (publications).

### **Further information:**

www.bbsr.bund.de/BBSR/DE/ veroeffentlichungen/sonderveroeffentlichungen/ 2020/baukultur-tourismus.html

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## SPATIAL DEVELOPMENT

# Corona regional – statistical and spatial information on COVID-19 pandemic developments in Germany

"Corona regional" (www.bbsr.bund.de/corona-regional) is a German-speaking online information tool developed by the BBSR providing statistical and spatial information on COVID-19 pandemic developments in Germany. Based on data provided by the Robert Koch Institute (RKI) and in-house spatial data, "Corona regional" is able to descriptively showcase statistical information in combination with spatial structures about infections as well as deaths and to offer user-friendly data exploration options using Tableau software.

The platform provides an overview of those regions most/least severely affected by the pandemic, of regional hotspots and how new infections in all 401 counties in Germany have developed throughout the pandemic since the first incidence in February 2020.

Besides exploring the data in the dashboard, users may access maps, diagrams, tabular assessment results, as well as statistics provided by the RKI on the platform.

The combination of RKI statistics with spatial statistics on demographic structure and settlement patterns opens the opportunity to draw comparisons between urban and rural areas. This is mainly based on Siedlungsstrukturelle Kreistypen (typology of German counties by settlement structure) developed by the BBSR, which differentiate German counties into (1) large cities, (2) urban counties, (3) rural counties showing densification, (4) sparsely populated rural counties.

The heat map – as an example for a dashboard provided within the tool – shows the temporal course of the pandemic for different spatial units. The visualisation depicts the daily reported new COVID-19 cases per 100,000 inhabitants for Germany in the upper part and lower spatial units in the lower part. It illustrates at which point in time the displayed spatial units were particularly hard-hit by COVID-19 infections, when infections where quiet low, rising and when there were no infections at all - always in comparison to Germany. In the heat map, the mentioned county types according to the settlement structure, which can be summarised as urban and rural areas, were chosen for visualisation. In comparison to Germany, one can see that the daily infections were and are not following the same trends: The daily average infections in urban areas are slightly higher than in rural areas during the first wave in spring. At the beginning of the second wave in late September, the differences between rural and urban areas are much higher. This holds true for "kreisfreie Großstädte" (large cities) in particular. The link between daily reported COVID-19 cases and area types provides indications and displays if and when there are disparities between urban and rural areas according to the occurrence of COVID-19 infections. Nevertheless, further research is needed. "Corona regional" wants to structure and visualise the existing data to enable scientist and policymakers to explore the data and get further insights into the COVID-19 pandemic in Germany and its spatial proliferation.

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### Case notification rate per 100 000 inhabitants, different spatial units



Source: BBSR, Data: Robert Koch Institute

## **IMPRESSUM**

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## **CURRENT RESEARCH PROJECTS**

## New spaces for the productive city

Project start: Initiated by changes in production methods and new possibilities for mixing uses, the productive city is currently being discussed. Using quantitative and qualitative research methods, the project aims to provide a spatially differentiated, nationwide view.

## Succession of companies in the construction sector

Between 2018 and 2022, it is estimated that around 150,000 family-owned companies in Germany will be handed over. The research project examines the current and future succession events in the construction industry as well as in the expansion industry.

Further information: www.bbsr.bund.de

## Population dynamics in central cities – interactive city portraits

Many medium-sized cities have recently seen a noticeable increase in their populations. They can be very different in their urban design, their respective functionality and their handling of dynamics. The research project aims to sharpen the image of growing medium-sized cities.

## Small garden parks – gardening, meeting, moving, relaxing and experiencing nature

An analysis is intended to show how and under what conditions small garden parks were created in Germany. On this basis, concepts will be developed that can also encourage "imitation" elsewhere.