

## 0.2 Summary

### MONITORING OF SETTLEMENT DEVELOPMENT IN THE STADTREGION<sup>+</sup> 2023

#### Introduction

The reason and starting point for this second PGO monitoring date back several years: In 2007, the Planning Association East (PGO) was commissioned by the state governors to take a closer look at the development in the eastern region, as a growth of 400,000 people had been forecast for the Vienna agglomeration by 2030. The resulting “Strategies for the spatial development of the eastern region” provided an initial spatial-statistical foundation on which it could be discussed whether the forecast growth in what has since been called the “Stadtregion<sup>+</sup>” could be managed sustainably. In 2015, the first monitoring of settlement development in the Stadtregion<sup>+</sup> was carried out. The aim was to record the latest developments and to evaluate the spatial and structural developments: How many of the mathematically expected 400,000 people have moved in? Where has this growth taken place? Have potential areas shifted? Which migration flows determine the development?

One of the key answers of the monitoring at the time was that by 2015, 44% of the predicted population growth had already taken place and was unevenly distributed across the Stadtregion<sup>+</sup>. Since this last observation of settlement development was already seven years ago and there is also a new population forecast from ÖROK (+336,841 people by 2050), a second monitoring was commissioned in 2023 - and the same questions were asked. In addition, the last few years have been marked by events that have had an impact on society as a whole, such as the COVID pandemic, the economic, climate and energy crisis, inflation and armed conflicts. If one looks at the spatial aspects of climate change, pandemics or global migration movements, it is clear that the Stadtregion<sup>+</sup>, as the most populous region in Austria, is particularly affected by these influences or will be in the future.

The Stadtregion<sup>+</sup> consists of the 23 municipal districts of Vienna and 272 surrounding municipalities in Burgenland and Lower Austria. The demarcation and composition of the Stadtregion<sup>+</sup> has been the same since 2008, which means that the analysis results can be directly compared for a long period of time.

#### Structure of the study

The structure of this monitoring is based on the structure of the previous monitoring. The two main chapters include, firstly, the quantitative analysis of settlement development with a focus on population development, demographics and migration); this is followed by the cartographic analysis of settlement development, which, in addition to the topics of population and migration, deals with commuting relationships, urban-regional interrelationships, settlement structures, building land reserves and spatial types in the Stadtregion<sup>+</sup>. What is new is that in this current monitoring, five research-leading questions and 16 research questions are also answered before urban-regional challenges are finally formulated.

## Key results: population development

The population development in the Stadtregion+ has since been characterized by such strong dynamism that the population increase of 400,000 people forecast for 2030 was already reached in 2022; in 2023, the total population even exceeded the three million mark (3,024,773 people). When looking at the relative values of this growth, Vienna is the main focus of growth, accounting for 70% of the increase, while 30% is distributed among the Lower Austrian and Burgenland cities and municipalities in the Stadtregion+ (12% in the northern sub-region, 18% in the southern sub-region). In absolute terms, Vienna grew by 184,760 people between 2015 and 2023, while all other cities and municipalities in the Stadtregion+ recorded a total population increase of 76,252 people.

The cartographic analysis has shown that this growth is largely concentrated in areas where development has already taken place, for example in the “suburbs” around Vienna or in the development axes along high-level road or rail connections within the Stadtregion+. Growth is therefore often accompanied by densification, especially in the surrounding municipalities of the federal capital; in Vienna, it is still the urban districts that bear the brunt of urban development and in which a lot of new living space is being created through numerous urban development projects.

## Key results: migration movements

It is still the same migration movements and migration dynamics that shape development in the Stadtregion+. Vienna is growing primarily due to immigration from outside the eastern region (i.e. from the rest of Austria or abroad). The main factor for positive population growth in the Lower Austrian and Burgenland communities is immigration from Vienna. The large global migration movements of recent years are therefore statistically most strongly reflected in Vienna. The migration patterns within the city region are robust: while Vienna is the immigration destination for young adults aged 19-26 from the Lower Austrian and Burgenland communities, young families are turning their backs on the federal capital and move to another city or community in the Stadtregion+.

## Key results: building land reserves and settlement potential

What was already true for the monitoring in 2015 also applies today after the analysis of the current data: In the Stadtregion+ there are so many dedicated building land reserves that a large part of the growth forecast for the future could be accommodated without having to designate new building land. If, analogous to the previous monitoring, one now only uses the building land reserves of the Lower Austrian and Burgenland municipalities and assumes a hypothetical availability of 30% at a density of 60 people/ha, this results in a theoretical value of 133,167 people who could be accommodated within the existing building land reserves (urban development in Vienna follows a different planning logic, which is why the settlement potential there is not “extrapolated” in the same way).

## Key findings: The coronavirus pandemic and other global challenges

At the spatial-statistical level, no pandemic-related changes can be identified; there is no quantitative evidence of a “flight from the city” or a change in commuting behavior, e.g. due to home office. The urban-regional structures and interrelationships are consistent and have not changed even as a result of the external “meta-events” of recent years. There are no immediate planning challenges associated with this at the level of the Stadtregion+. At the local level of cities and municipalities, the pandemic

has not led to any new, permanent challenges in terms of urban and local development either but is considered to be barely noticeable in many places.

In the context of climate change, however, observations can often be made at the local level that could be signs of an emerging development dynamic that is effective in the urban region: In terms of climate change, this is, for example, the demand for building plots or real estate in cooler (northern) locations in response to the increase in hot days and the now very high importance of urban planning concepts and measures that take climate change into account (sponge city, unsealing, climate-friendly construction, etc.). In terms of statistical indicators of settlement development, this is not yet reflected in the urban region.

## Final observations

The spatial structures and functional interrelationships in the Stadtregion<sup>+</sup> have proven to be just as stable as the migration flows that determine development. Even if migration movements, pandemics and climate change have not yet led to a clearly visible change in settlement structural patterns or functional interrelationships, climate change in particular must be brought into focus even more in the future in the interests of sustainable urban-regional development. In this context, the immense amount of non-activatable building land reserves remains one of the greatest and most important planning challenges in the Stadtregion<sup>+</sup>.

Many planning challenges do not have to be solved by cities and municipalities alone. The aim should be to expand the (planning policy) perspective and the associated actions to the higher level of the Stadtregion<sup>+</sup>. This still requires a more comprehensive awareness of the fact that one is part of a functionally and structurally strongly interwoven urban region and that many planning challenges can be solved more easily and efficiently at the city-region or inter-municipal level than if the individual cities and municipalities do it on their own.