

Rink, Dieter

Working Paper

Urban development, housing market and housing policy in Leipzig

UFZ Discussion Paper, No. 1/2022

Provided in Cooperation with:

Helmholtz Centre for Environmental Research (UFZ)

Suggested Citation: Rink, Dieter (2022) : Urban development, housing market and housing policy in Leipzig, UFZ Discussion Paper, No. 1/2022, Helmholtz-Zentrum für Umweltforschung (UFZ), Leipzig

This Version is available at:

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UFZ Discussion Papers

Department of
Urban and Environmental Sociology

1/2022

Urban development, housing market and housing policy in Leipzig

Dieter Rink

January 2022

1. Introduction¹

Leipzig's urban development has been subject to serious, not to say extreme, changes in terms of shrinkage and growth over the past three decades. These had a strong impact on the housing market, which was first very tight and then (very) relaxed for some time. In recent years it has tightened up again. Whether Leipzig has a "housing question" or even a housing shortage is, however, still assessed differently and discussed controversially by relevant actors. The sometimes extreme changes in the housing market have led to several realignments in housing policy. This is reflected not least in the four quite different housing policy concepts adopted by the city council since 1990. In the wake of strong growth and the tightening of the housing market, Leipzig reoriented its housing policy in 2015 with a new concept.

This paper briefly discusses the strategies of the actors and the new housing policy, the starting situation and the developments in the 1990s and 2000s in order to provide the necessary background for understanding the current developments on the housing market. Then the current situation is presented and the specifics of the housing question in Leipzig are elaborated. This is followed by a description of housing policy, its concepts and instruments, the actors and governance structures. Finally, there is a summary of the implementation steps and the difficulties encountered before a conclusion is drawn. The coronavirus pandemic has currently changed some of the parameters of development. Since these are still subject to great uncertainty at the present time, they are addressed in an excursus in which possibilities and plausibilities are discussed.

2. Urban development and housing market

2.1 Urban development

As an old trading and university city as well as an industrial city, Leipzig was the fifth largest city in Germany before the Second World War with a population of about 700,000. During the Second World War, the number of inhabitants fell sharply and in the decades that followed Leipzig became one of the few major European cities with an almost continuously declining population. In 1989, 530,000 people still lived in Leipzig. After German Reunification, great hopes were pinned on saving the city from imminent collapse. But at first a "second economic miracle" did not take place as expected; on the contrary, after the opening of the Wall, the city lost more than thirty thousand inhabitants in the following 14 months alone. As a result of the rapid and transitionless integration into the EU and the world market, as well as the economic and political shock therapy, the city and the industrial agglomeration were de-industrialised by about 80%. Only a few industrial cores remained in Leipzig. Only massive state intervention succeeded in cushioning this crisis socially during this phase. The federal government made billions of euros available for further training, qualification and job creation measures; for Leipzig this was an estimated one billion euros in the 1990s. The transformation crisis was associated with an enormous drop in the birth rate, migration to West Germany and suburbanisation; the city lost mainly young people, including young families. With a population

¹ This discussion paper is the English version of a paper that has already appeared in German (Rink 2021) and is a revised, updated and greatly expanded version of an article on Leipzig (Rink 2020) published in the anthology *Lokale Wohnungspolitik* (eds. Rink/Egner 2020).

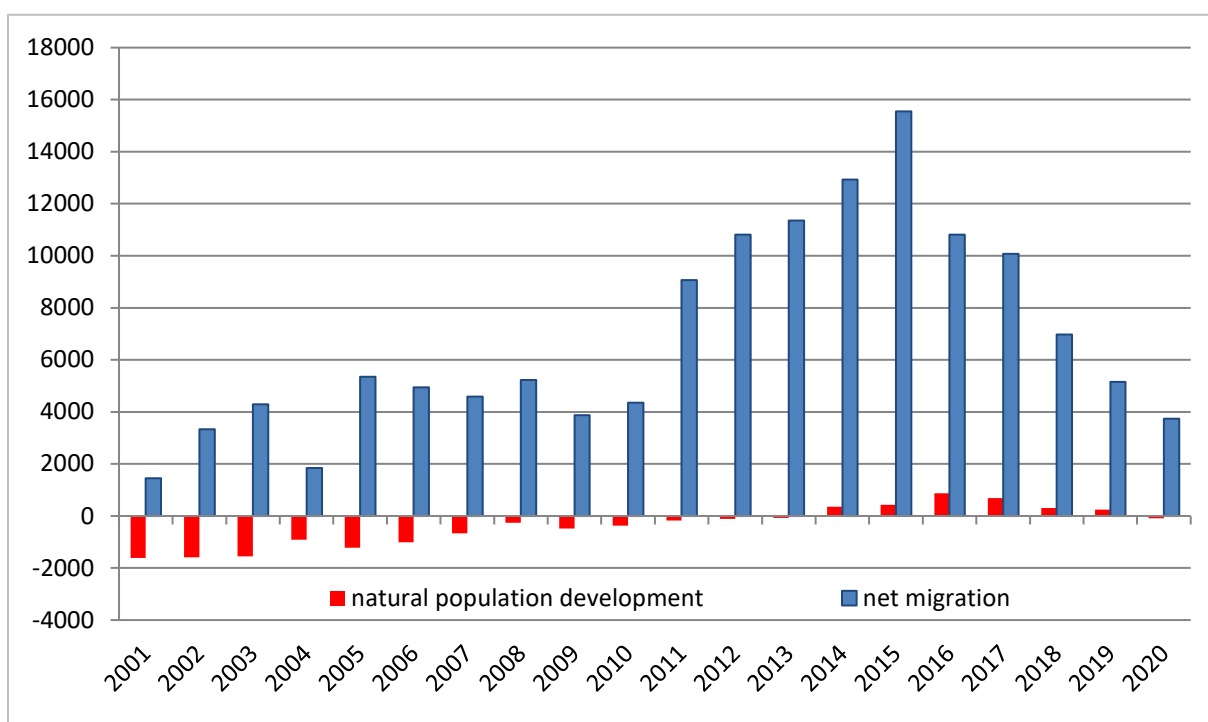
loss of about 100,000 people (about twenty percent), the loss of its industry and an unemployment rate of twenty percent, the city became a paradigmatic example of post-socialist shrinkage in East Germany. As a long-term consequence of deindustrialisation and mass unemployment, Leipzig then became the “capital of poverty” in Germany from the 2000s to the early 2010s (Paritätischer Gesamtverband 2020).

However, in Leipzig—as in all of East Germany—investments were made in the opposite direction to the shrinking trend. In the 1990s, about €1.5 billion went into the renovation and modernisation of the housing stock. In addition, billions more were invested in the repair and new construction of infrastructure. At that time, Leipzig proclaimed itself the “Boom City of the East” and its image campaign “Leipzig is coming” was intended to attract investors. In addition, there were substantial subsidies for the economy and the improvement of practically all infrastructure such as transport, communication, water/sewage, schools, childcare centres, etc. Investments were also made in the environmental sector, for example in the rehabilitation of contaminated facilities, the rivers and the Karl Heine Canal. The first positive results of this extensive support were seen at the end of the 1990s/beginning of the 2000s, for example through the arrival of Porsche and BMW car factories in Leipzig. Companies in the logistics and service sectors have also settled in the north of Leipzig along highway A14 in the direction of Halle and in the vicinity of the airport. The incorporation of numerous surrounding municipalities in 1999 and 2000 brought about the long-awaited turnaround; Leipzig was able to increase its population by 50,000 and come close to the 500,000 mark again. The city of Leipzig experienced moderate growth in the 2000s, with growth rates between 0.5% and 1% annually (see Figure 1). During this decade, the total number of inhabitants grew by just under 30,000, which amounted to approx. 6% and annual growth of approx. 0.6%. It was mainly the largely redeveloped *Gründerzeit* inner-city districts (which are characterised by pre-war architecture) that experienced immigration during this phase; the growth took the form of reurbanisation (Haase et.al. 2012). This immigration came mainly from the southern part of eastern Germany (Saxony, Thuringia and Saxony-Anhalt) (Welz et.al. 2014). This immigration also stabilised as a result of economic growth. Since the mid-2000s, Leipzig has experienced a sustained employment dynamic; from 2005 onwards, the unemployment rate began to fall and the number of jobs began to rise—this encouraged further immigration.

At the beginning of the 2010s, immigration doubled and Leipzig experienced very dynamic population growth (Figure 1). Between 2011 and 2019, the annual population increase ranged from 10,000 to 16,000 people, which corresponds to 2% to 2.5% growth, and it even reached 3% at the peak in 2016. From 2011 to 2020, the total increase in population was around 96,000 people or 17.4%. This means that Leipzig grew by almost as many inhabitants in the 2010s as it shrank in the 1990s. The number of households rose even more sharply by 18.3% as a result of the continuing reduction in household size. For some time in the 2010s, Leipzig was thus the fastest-growing major city in Germany, the paradigmatic example of a “swarm city”. At the end of 2019, the population reached the 600,000 mark. Since 2014, the city has had birth surpluses again for a few years (for the first time in almost 50 years), albeit relatively small ones. By 2020, however, the natural balance was already negative again, which was possibly a consequence of the coronavirus pandemic. It was no longer only young people from eastern

Germany who immigrated to Leipzig—immigrants were also coming from western German cities and conurbations as well as from abroad (Welz et al. 2014). Initially, young people came from the southern EU countries that were worst hit by the financial crisis and from Eastern Europe, then Leipzig experienced refugee immigration from countries such as Syria, Afghanistan, Iraq and the Arab region, especially in 2015/16. The growth now spread to almost all parts of the city; only a few districts recorded stagnation or even shrinkage (Map 1). Towards the end of the decade growth weakened but was still around 1%. Leipzig is thus still an island of growth in a region that is shrinking overall. Even in 2020, the first year of the coronavirus pandemic, Leipzig was still able to record some growth (Rink et. al. 2021). Since 2014, however, there has also been suburbanisation again, especially in the municipalities immediately surrounding the city. Around 1000-1500 people moved into the surrounding area per year (just under 0.25%)—a weak suburbanisation overall. Halle, the second largest city in the region, has been experiencing weak growth for several years, but the rest of the region is shrinking to a greater or lesser extent. In this respect, one can already speak of a polarised development of the region. As the largest core city, Leipzig is growing strongly and Halle, the smaller core city, is growing weakly, while the area surrounding Leipzig is also growing weakly and the rest of the region is shrinking more or less strongly.

Figure 1: Annual population development in Leipzig 2001-2020



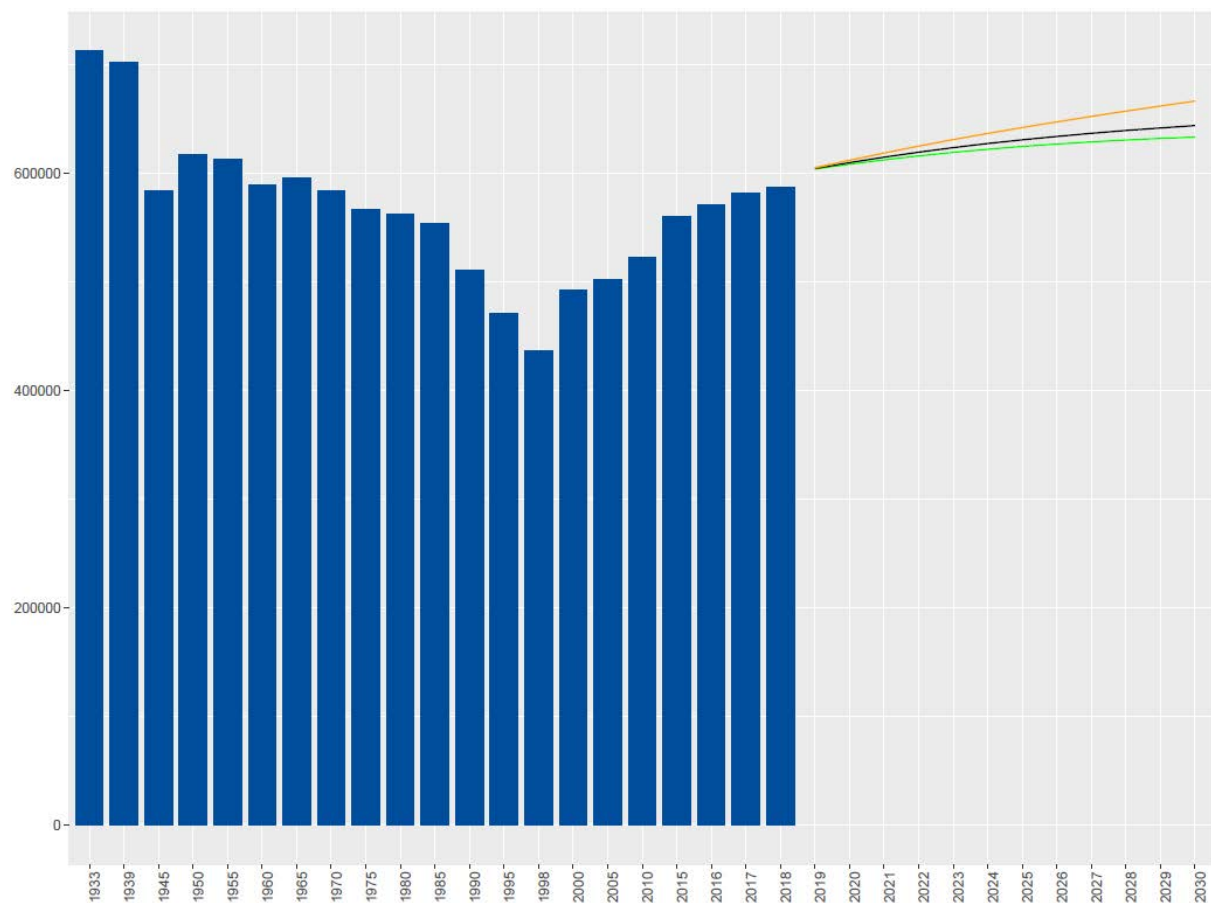
Data source: Office for Statistics and Elections, Population Register 2001-2020

Even more than in the 2000s, population growth during this period was driven by the economic conjuncture. There was a radical revival of the labour market in the city and partly also in the region. Around 80,000 new jobs have been created in Leipzig since 2005 and the unemployment rate fell from 21% in 2005 to 6% in 2019. In 2020 the unemployment rate rose again for the first time as a result of the pandemic, reaching 8%. However, many jobs have been created in

the low-wage sector. According to a study by the IAB Nuremberg, the low-wage share in 2009 was a third (35.4%) and thus Leipzig had the biggest low-wage sector among the 15 largest German cities (Rink/Kabisch 2019: 850). This background of sinking unemployment and job growth makes it possible to explain the dynamic and sustained immigration, especially of young people. The positive image that Leipzig had gained in the 2010s also helped to promote immigration. Leipzig's new attractiveness was portrayed in numerous media reports, culminating in the slogan "Hypezig" (Bishop 2015).

At the peak of immigration in 2016, a very optimistic forecast was made for further population development. It foresaw a population growth to approx. 700,000 inhabitants by 2030—the magic number Leipzig once had before the Second World War (Stadt Leipzig 2016: 10). Against the background of declining immigration towards the end of the 2010s, a new population forecast was drawn up in 2019. It is also still optimistic, but expects moderate growth of between half a percent and one percent by 2030 in all variants (Stadt Leipzig 2019c; cf. Figure 2). Here, in the optimistic scenario, the symbolic figure of 700,000 inhabitants is prognosed to be reached in 2038. The main variant on which planning and policies are based expects 644,000 inhabitants in 2030, which would be an annual growth of just under half a percent (Figure 2). The federal government expects Leipzig to increase to 681,00 inhabitants by 2035, an increase of 15%—this corresponds to the upper variant of the municipal projection of 2019. The Statistical Office of the Free State of Saxony forecasts an increase of 15.9% by 2035 based on the starting year 2018 in variant 1 and 10.8% in a somewhat less optimistic variant 2 (Statistical Office of the Free State of Saxony 2019: 7). Other forecasts also assume continued strong growth in Leipzig. According to the Berlin Institute's population forecast, the number of inhabitants is expected to increase by 16% by 2035 (compared to 2017), making Leipzig the "largest percentage population gainer in Germany" (Berlin Institute 2019: 58). In its new spatial planning forecast 2040, the BBSR expects an overall shrinkage of 6% by 2040 for eastern Germany (including Berlin) (BBSR 2021: 5). "Among the five districts with the highest population growth (at least 14% each), only Leipzig (city) is represented for eastern Germany, in addition to Dachau, Erding, Landshut (city) and Ebersberg" (ibid.: 7). As can be seen, the different forecasts are more or less unanimous in their assumption of moderate to dynamic growth in the medium term over the next 10, 15 or 20 years. These positive forecasts must also be seen against the background of the shrinkage predicted for eastern Germany.

Figure 2: Population development in Leipzig 1933-2018 and forecast until 2030



Data source: Office for Statistics and Elections, respective area status; population projection 2019

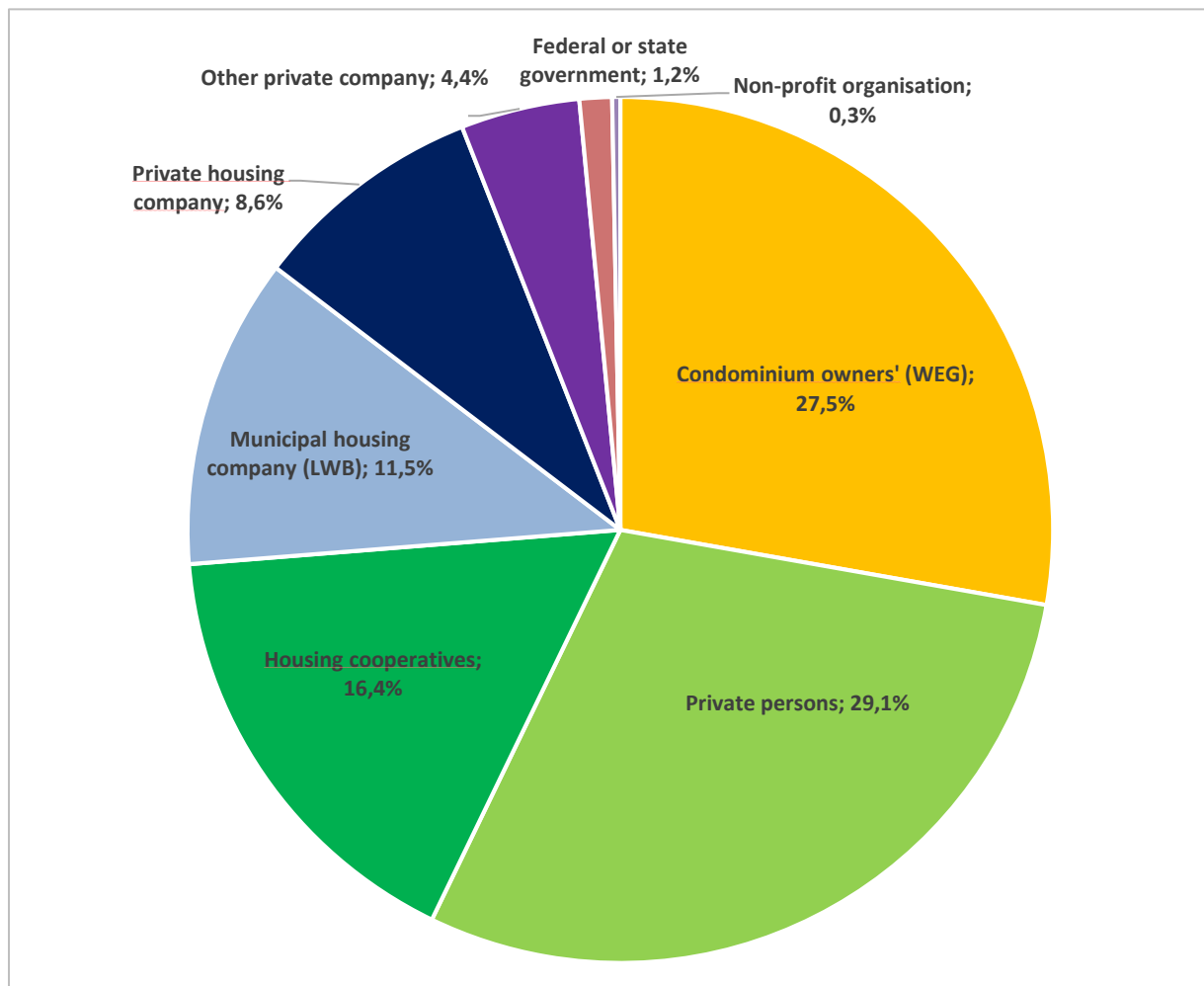
In view of the strongly fluctuating population flows of the past decades, however, there is considerable uncertainty about future developments. In particular, it is unclear how domestic and international migration will develop in the next 5, 10 and 15 years respectively. The coronavirus pandemic is likely to be associated with a reduction in the short term, the effects of which we cannot yet estimate at this point in time (end of 2021). According to the 2019 forecast, Leipzig should already have grown to about 605,000 inhabitants in 2020; in fact, Leipzig—as one of the few major German cities—has grown by about 3,700 inhabitants only due to immigration. The city’s statistics office is sticking to its forecast and continues to see Leipzig as a “growth hotspot” in the Free State of Saxony. The pandemic has not changed the long-term forecasts and according to the head of the statistics office, Christian Schmitt, “Leipzig will continue to grow significantly until 2035” (LVZ of 26/27.9.2020: 19).

2.2 Housing market

The housing market in Leipzig also went through different phases of development and has changed fundamentally since Reunification. The sometimes extreme shrinkage and growth processes have been reflected in strong fluctuations in demand. The starting point for these developments was the poor housing conditions and the very tense housing situation in the 1980s, which had also been the background for the mass protests in autumn 1989. In early November 1989, the television programme *Ist Leipzig noch zu retten?* (Can Leipzig still be

saved?) drastically portrayed the extensive decay of old buildings and the catastrophic housing situation. At that time, about 70,000 people in Leipzig (about 14% of the population) were looking for a (suitable) flat, and at the same time an estimated 25,000 flats (almost 10% of the stock) were empty because of structural defects and uninhabitability. Most of the old flats had no bathroom or toilet and still had stove heating (Döhler/Rink 1996). The “solution to the housing question” propagated by the leaders of the German Democratic Republic (GDR) for 1990 was still a long way off, and not only in Leipzig. The People’s Building Conference in Leipzig brought about a moratorium on demolitions for the entire GDR at the beginning of 1990, and the GDR housing programme came to a standstill in the summer of 1990. Following the West German model, 14 large redevelopment areas were then designated in Leipzig at the beginning of the 1990s and the redevelopment and modernisation of the old building stock began under the aegis of “cautious urban renewal”. Thanks to the special tax deduction for East Germany, a great deal of private capital was channelled into renovation and new construction, and by the end of the 1990s about two-thirds of the pre-war Wilhelminian style housing stock had already been renovated and modernised. At the same time, the GDR housing supply system was replaced and a capitalist housing market was gradually re-established. This also included the restitution or privatisation of formerly publicly owned stock, as stipulated in the Reunification Treaty. When it was founded in 1990, the municipal company LWB had almost 137,000 flats in its portfolio. About 58,000 of its flats were restituted, and a further 23,000 flats were sold in the course of the old debt relief scheme in the 1990s and 2000s. To consolidate the highly indebted company, about 10,000 flats in closed portfolios and in free float were privatised in the 2000s and early 2010s, and some of the buyers were international investors. In addition, about 10,000 flats were demolished in the course of urban redevelopment between 2001 and 2015 (cf. www.lwb.de). The municipal LWB currently has 35,300 flats, which is about 10.6% of the total stock. The housing cooperatives had owned almost 65,000 flats in 1991 (about 25% at that time) and in 2011 they still owned 53,747 (16.4% at that time). The LWB and the cooperatives are largely responsible for ensuring there is affordable housing in Leipzig. In 2018 the average rent of LWB flats was €5.23/m² (www.lwb.de) and for the cooperatives it was €5.03/m² (Leipziger Genossenschaften 2019)—both were significantly below the city average of existing rents. Only 38,000 flats (approx. 15%) were privately owned at the beginning of the 1990s (Döhler/Rink 1996: 278; Stadt Leipzig 1994). In the 1990s large parts of the housing stock were restituted to the former owners or their descendants, or sold to private housing and real estate companies. The 2011 GWZ census showed that private individuals now own the largest share of the housing stock: 95,408 units, or 29% of the stock. In the same year, almost as many housing units (90,176) were owned by homeowners’ associations (WEGs), accounting for 27.5%. Private housing companies already owned 9.6% of the stock (31,543 units) and 4.4% (14,500 units) was owned by other unspecified private companies (all figures: Statistisches Landesamt 2011: 6; cf. Figure 3). As an analysis of the ownership structures of flats built in Leipzig during the *Gründerzeit* revealed, most of the private owners and WEGs reside in western Germany (71.6%), a further 11.7% in eastern Germany, a vanishing minority are based abroad (1.3%) and a relatively small group (15.4%) is localised in Leipzig (Rink/Schotte 2016: 162). We are therefore dealing with a housing structure that is dominated by external owners who manage their flats or portfolios with an eye on profit.

Figure 3: Types of ownership of flats in Leipzig (2011)



Data source: Census, Building and Housing Census (GWZ) 2011

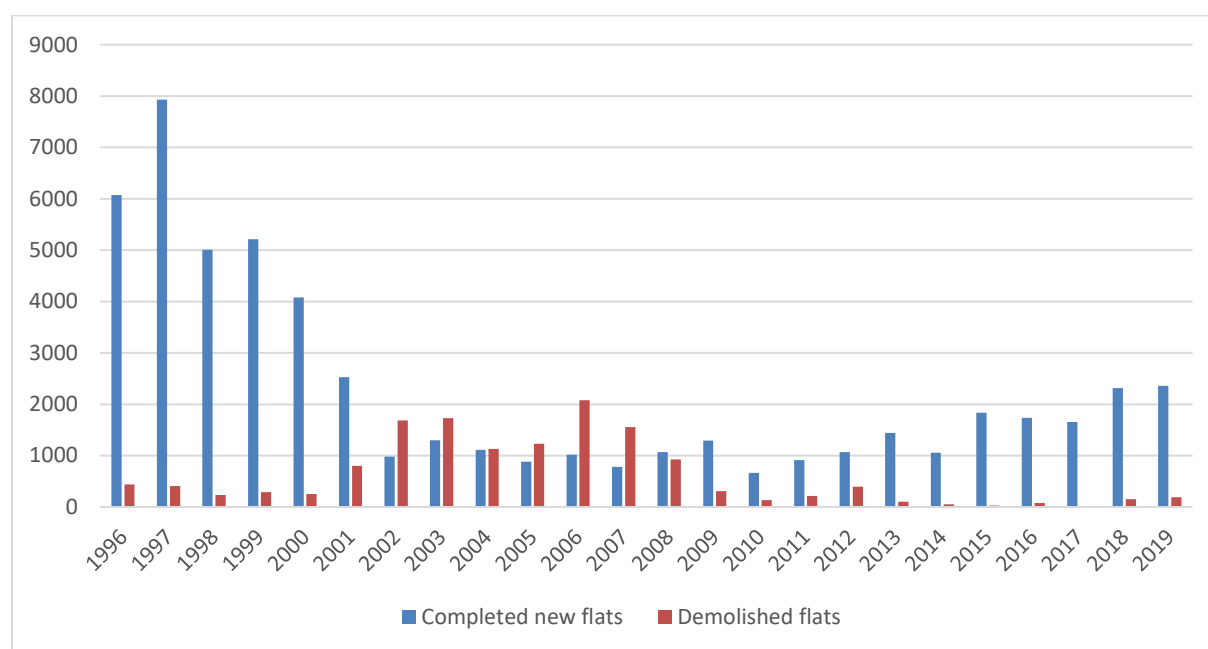
The financialisation of Leipzig's housing market continued in the 2010s. On the one hand, private companies were almost exclusively active in new construction during this decade, and on the other hand, they were also able to expand their portfolios through acquisitions. By 2019/20, listed companies held around 10% of the market in Leipzig, the largest of which are TAG, Grand City Property, Vonovia SE, Deutsche Wohnen and Adler Group. An analysis of sales strategies revealed that there is a shift from private providers to large housing companies that dominate the market through portfolio transactions (Jodeit 2021: 46). Experts see Vonovia as the dominant housing provider in Leipzig in the future (ibid.).

However, the special tax deduction was not only used to renovate, but also to build new housing in order to remedy the glaring housing shortage and substantially expand the stock. Between 1991 and 2000, a total of 47,358 housing units were built in Leipzig, which corresponds to an expansion of supply of 18.3% in relation to the stock (of the enlarged urban area) of 2000 (Statistisches Landesamt 2011: 6; cf. Figure 4). However, in combination with the shrinkage described above, this led to massive supply surpluses. At the turn of the millennium, Leipzig advanced to become the “capital of housing vacancy in Germany” (Rink 2015) with approximately 69,000 vacant flats (21% of the stock at that time) (cf. Figure 5). This led to a

renewed reorientation of urban development and housing policy, which was carried out in the late 1990s/early 2000s. In order to reduce the high vacancy rates and relieve the financial burden on municipal and cooperative housing companies, market consolidation was carried out as part of the urban redevelopment. According to the original plans, about 20-25,000 housing units in Leipzig—about 6-8% of the stock or a good third of the vacant flats—were to be demolished. The city states that it demolished approximately 13,740 housing units between 2001 and 2012 (information from the city planning office), i.e. a little over half of what was originally planned. The lion's share of the demolition was borne by the Leipziger Wohnungsbaugesellschaft: its share of the housing stock was reduced by almost 10,000 flats. In the 2000s, however, new construction by no means came to a standstill; new flats, mainly owner-occupied homes, were also built. From 2001 to the time of the GWZ census (9 May 2011), a total of 11,200 new housing units were built (Statistisches Landesamt 2011: 6). This means that demolition and new construction almost balanced each other out in the 2000s; there were only a few years in which more flats were demolished than built as part of the urban redevelopment (cf. Figure 4). The demolitions therefore hardly contributed to the absolute reduction of vacancies, but they did prevent them from rising further. The housing vacancy rate decreased substantially by about 30,000 units (approx. 9%), essentially due to the parallel increase in demand. In 2011, the GWZ recorded just under 39,000 vacant flats and a very high vacancy rate of 12.1%—the highest among Germany's largest cities (Rink and Wolff 2015).

The amount of demolitions declined sharply after 2008 and is currently negligible; the annual figures are very low (cf. Figure 4). On balance, the number of dwellings increased by about 13,000 in the period from 2011 and 2019, which corresponds to an overall growth of about 3.8%. In purely mathematical terms, there are still more dwellings than households and the housing supply ratio was 100.4% in 2017. Given a non-market active vacancy rate of 2-2.5%, it is likely to be below 100%—a good figure compared to other major German cities. In line with the positive population forecasts outlined above, additional demand of around 3-4,000 flats per year is calculated for the period up to 2030. However, there is a glaring mismatch here, as the demand generated by those moving in is mainly directed towards the low-price segment, yet the refurbished and new flats coming onto the market are almost exclusively in the upper price segments.

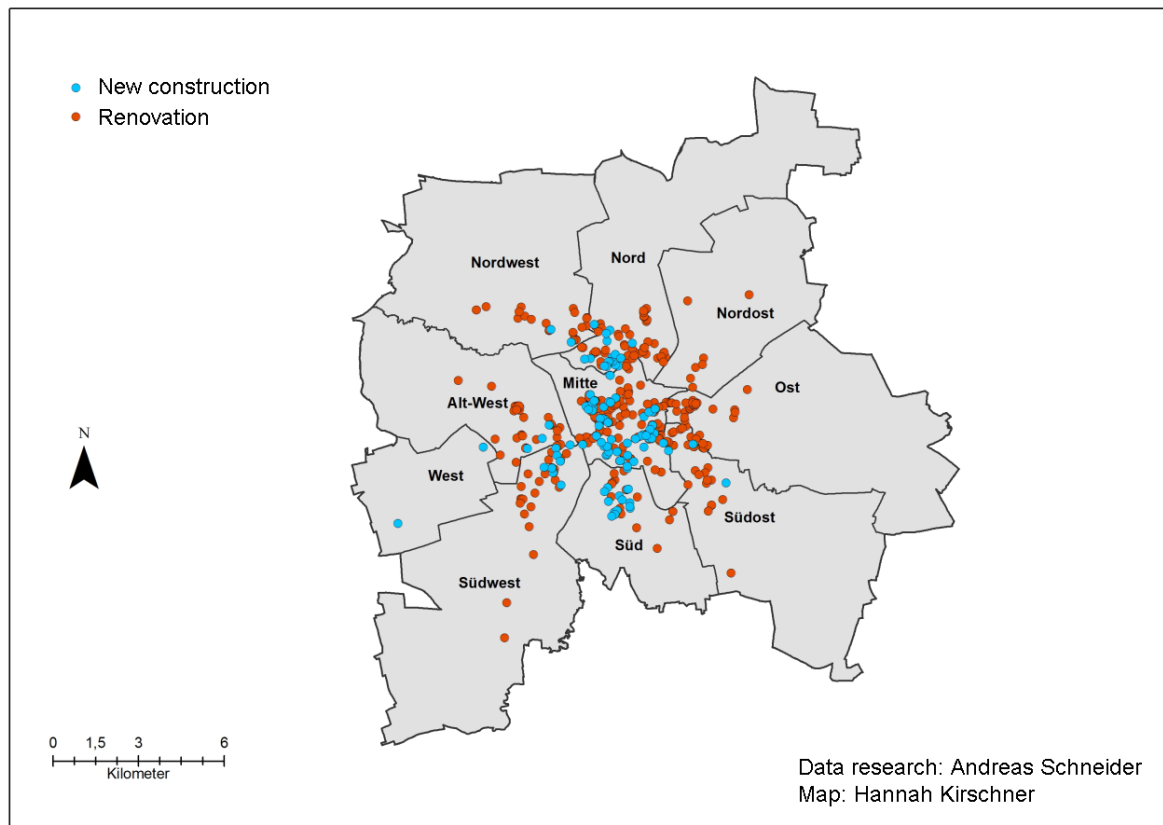
Figure 4: Housing completions and demolitions 1996-2019



Data source: Source: Statistical Yearbooks of the City of Leipzig 1997-2020

As a result of reurbanisation and then in the course of strong growth, the housing market has revived since the end of the 2000s and a new housing market cycle started. Refurbishment and new construction have taken off again, but almost exclusively in the high-priced segment (Rink et al. 2014b). During the 2010s, new construction and refurbishment increased to 1,500-2,000 housing units per year (an annual increase of about 0.5%) and in 2018 and 2019 more than 2,000 additional dwellings came onto the market each year (cf. Figure 4). The housing demand model produced by the German Economic Institute (IW) calculated a demand of 4,201 dwellings per year for the years 2016-2020, but less than 2,000 were completed annually, so Leipzig was deemed to have a housing shortage (Jodeit 2021: 23). Jones Lang Lasalle forecasts a need for 6,660 additional dwellings per year from 2020 until 2030 (ibid.). The Leipzig-based consulting firm Timourou, on the other hand, sees the continuation of the current level of new construction and the further activation of the existing stock over the next five years as being target-oriented (TIMOUROU 2021: 52): “Should the development of demand proceed as forecast in the main variant, further new construction at the previous level will be necessary” (ibid.). However, in the third quarter of 2020, the economic consultancy Empirica identified that there was a high risk of a housing bubble in Leipzig. The reason for this was the increase in the “sub-index multiplier” in the new construction segment, which was in the critical range (empirica AG 2020: 1). The question is also whether saturation or oversupply has not already been reached in the high-priced segments, especially with regard to new construction, but also refurbishment and conversion. The difficulties that have existed in relation to the letting of newly built projects in the last 1-2 years at least point in this direction.

Map 1: Refurbishment and new construction in the upmarket residential segment (2011-2018)



Residential units in refurbishment and new construction projects; own survey 2011-2018 (as of 31.01.2018)

A systematic analysis of refurbishment and new construction in Leipzig over the period from 2011 to 2018 showed that the vast majority were higher-priced and highest-priced new construction and refurbishment projects. When the analysis started in 2011, refurbished and newly built flats were still offered at prices of €6.50 net cold per square metre and above; in 2019/20, these are medium-priced offers or the prices of new social housing (for the definition, see: Rink et.al. 2014b). Newly built flats are now coming onto the market for over €10/m² and in some cases already over €11/m², freshly refurbished or modernised flats are around €8-9/m². In the beginning, the new buildings were well-equipped flats, but now the equipment and the size are being cut in order to lower the prices. The refurbished flats are usually old buildings from the Wilhelminian period with good equipment, some of which are heritage listed. Finally, numerous industrial and commercial buildings have been converted into lofts in recent years, forming a very small but exclusive segment. New construction, refurbishment and conversion are spatially concentrated in the *Gründerzeit* districts close to the city centre in the north (Gohlis, Möckern), in the west (Plagwitz and Lindenau), in the south (Zentrum Süd, Südvorstadt and Connewitz) and in the east (Graphisches Viertel) (cf. Map 1). In addition, owner-occupied homes are also being built on the outskirts of the city. The marketing of the refurbished flats is practically the same as in the 1990s: for the most part they are offered and sold on the investor market. An evaluation of the sales of refurbished flats showed that “the market is dominated by private investors. Based on the evaluation of the corresponding sales contracts by the Leipzig city expert committee, around 95% of the sales contracts for condominiums in refurbished complexes can be assigned to buyers outside Leipzig... This is

therefore a classic ‘investor market’” (Kredt 2014: 18 f.). An evaluation of the ownership structure in five average Wilhelminian-style blocks in Leipzig revealed that about a quarter are owned by homeowners’ associations, and a third by individual owners (Rink/Schotte 2016: 161). A disproportionate amount of current new construction (since around 2010) is privately owned, especially in recent years. Here, 61% of households are now owners themselves, especially in the owner-occupied homes and blocks of flats on the outskirts of the city (Kommunale Bürgerumfrage 2019: 57).

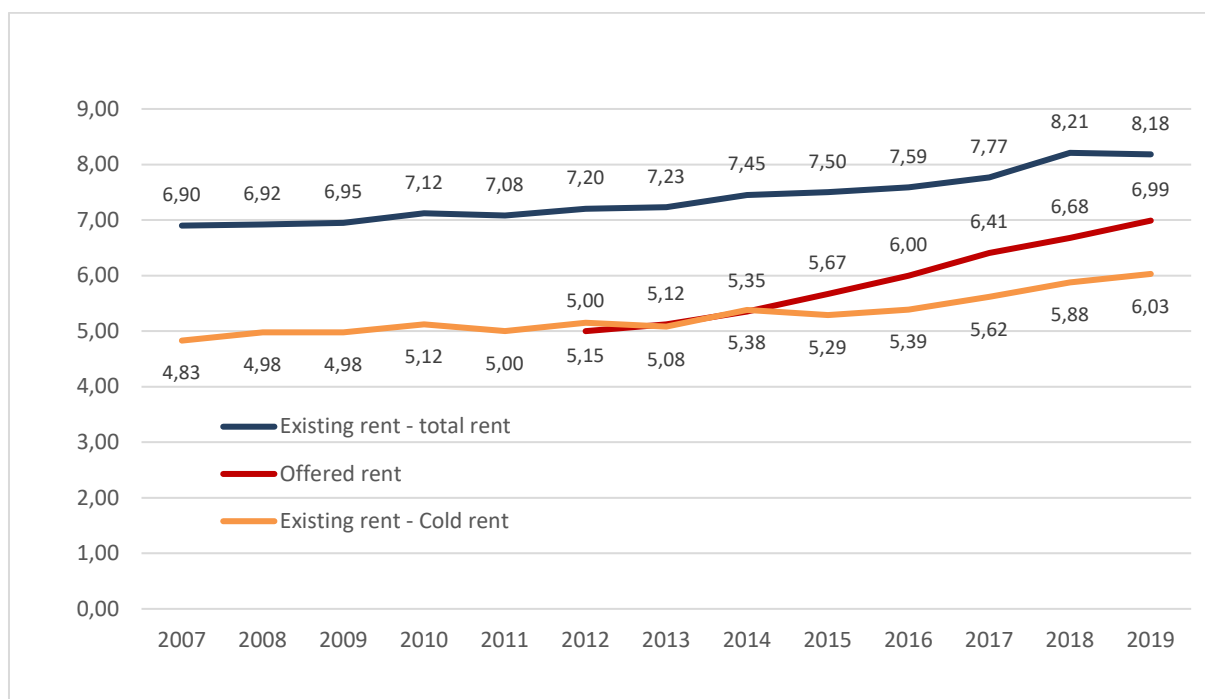
As far as vacancy is concerned, Leipzig, unlike other eastern German cities, already had a high starting level in 1990. It is estimated that at that time around 25,000 flats (just under 10% of the stock) were vacant—a very high figure. These vacancies were concentrated almost exclusively in the inner-city *Gründerzeit* stocks; in the interwar and post-war stocks there was probably only a very low fluctuation reserve at that time. Due to the combination of shrinkage and supply expansion, the vacancy rate doubled in the 1990s, as already mentioned. By the end of the 1990s/beginning of the 2000s, vacancies had spread to virtually the entire city. There were also significant vacancies in the large housing estates and in the new estates on the outskirts of the city. Multi-storey flats and even terraced houses were empty. In the course of reurbanisation, the vacancy rate began to decline first in the city centre, then also in other *Gründerzeit* properties. From the 2010s onwards, a new pattern began to emerge. Apart from small islands of ‘old’ vacancies in Leipzig’s east and west, vacancies were concentrated in the large housing estates, especially in Grünau. In the Wilhelminian-era stock in the city centre, the vacancy rate fell below the fluctuation reserve of 3% in the mid-2010s.

The housing vacancy rate then fell sharply in the 2010s as a result of high demand, with the rate falling from 12.1% in 2011 to around 4.9% in 2019 (around 16,700 flats). However, the market-active rate is lower; the city estimated the market-active vacancy rate was 2.2% in 2019 (Stadt Leipzig 2021: 29). Other observers also assume that Leipzig has a low vacancy rate. For example, according to a Prognos study, Leipzig “as a B-location” is among the “very tight housing markets” (Prognos 2017: 14, 36, 39). A study on the misuse of flats commissioned by the City of Leipzig and conducted by Quaestio revealed 12,000-12,500 vacant flats and a vacancy rate of 3.7% for the period late 2018/early 2019 (Quaestio 2019: 30). Quaestio’s experts estimated the vacancy rate due to fluctuation at around 1.5% (approximately 5,000 housing units) (ibid.: 31). “Of the remaining vacant flats, about 3,000 flats are in completely vacant buildings – mostly in need of refurbishment... For the remaining approx. 4,000 flats, the activation potential is estimated to be more short-term” (ibid.). In this context, Quaestio pointed out that as the market tightens, new causes of vacancy could also gain importance, “motivated by speculation on the property market” (ibid.).

The rent increases for new construction and renewal as well as the dynamic increase in demand have led to some significant price increases in new and renewed rental contracts, where jumps of 10% to 20% have been observed in some cases in recent years. In the meantime, there has also been movement in existing rents, albeit from a low level and with moderate increases slightly below the rate of inflation. Between 2010 and 2019, average net cold rents in the existing stock rose by around 18% overall, which was below the rate of inflation. According to the municipal citizens’ survey, approximately 40% of existing rents increased between 2015

and 2019 (Stadt Leipzig 2020). For 2019, the municipal citizens' survey determined an average rent of €6.03 per square metre (median) (Stadt Leipzig 2020; cf. Figure 5). However, advertised rents are higher and have decoupled from the development of existing rents in recent years, increasing by 38.6% (cf. Figure 5). An analysis of advertised rents based on the Empirica price database for Leipzig with data from 2017 showed that 13% were in the upmarket segment of €8.00-9.99/m² net rent and 5% were in the highest-priced segment of over €10/m² (Rink et. al. 2018). There are clear spatial differentiations, for example, the increase in rents is higher in the city centre than in the peripheral districts. Overall, in the course of the 2010s, what had been a tenants' market changed back to a landlords' market. The Leipzig housing market is not yet tight overall, but is in a phase of increasing tension (TIMOUROU 2021: 50). In parts of the inner city, this is reflected by growing displacement pressure (Rink et. al. 2014a) and a number of gentrification cases (Rink 2015).

Figure 5: Development of existing and offered rents in Leipzig (2007-2019)

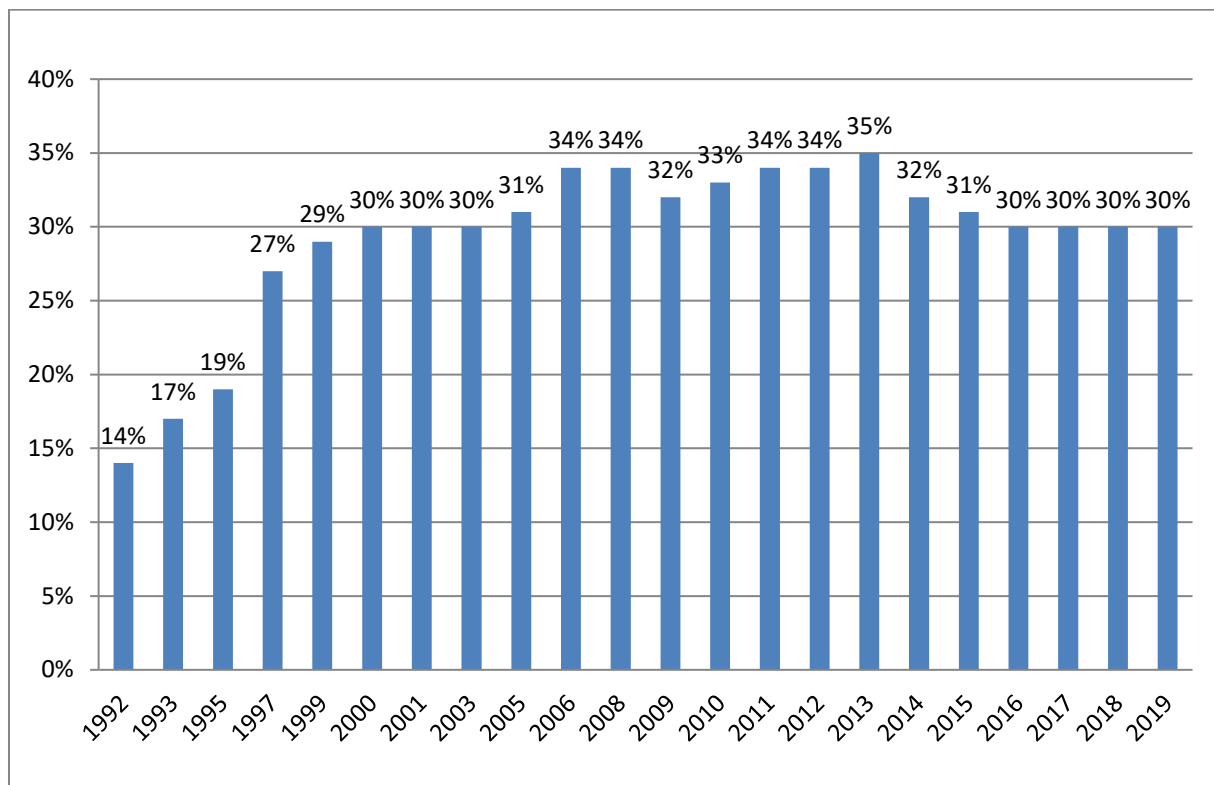


Data source: City of Leipzig, Office for Statistics and Elections, Municipal Citizen Surveys; Empirica Price Database

In terms of rents, Leipzig is still a low-price city and the cheapest of the large cities in Germany, but it is also a low-income city. This is reflected in the development of the rent burden ratio, which has been surveyed for many years as part of the municipal citizens' survey in Leipzig. Here, as with the existing rents, the rent burden ratio strongly increased in the 1990s and reached 30%. After that, the ratio remained at this value for a few years and then, surprisingly, even rose to around 34-35% in the mid-2000s (cf. Figure 6). This could be a reaction to the poor labour market and low incomes at that time. In the late 2000s/early 2010s, when Leipzig was considered the “poverty capital of Germany”, the rent burden ratio was at its highest. After 2013, the rent burden rate then fell slightly to around 30% again (ibid.). A similar development was found in an evaluation of the microcensus data for Leipzig. According to this evaluation, the median was 29.5% in 2006, then 29.2% in 2010, 27.1% in 2014 and 26.1% in 2018—a

decline of 3.4 percentage points over time, so that Leipzig was then below the average of the large cities in 2018, which was 29.8% (Holm et. al. 2021: 109). The decline in the proportion of households with a rent burden ratio of over 30% and over 40% was even more pronounced (ibid.: 111 ff.). The background to this is the falling unemployment figures and rising incomes that came in the wake of the economic conjuncture that started at the beginning of the 2010s. The rent burden ratio in Leipzig is currently at a level that is given as a guideline value; it should not go higher than this if possible. Even at such a mean value, certain groups already have a disproportionate rent burden, such as single-person households, single parents, large families, low-income earners, migrants, refugees and others.

Figure 6: Development of the rent burden ratio in Leipzig 1992-2019



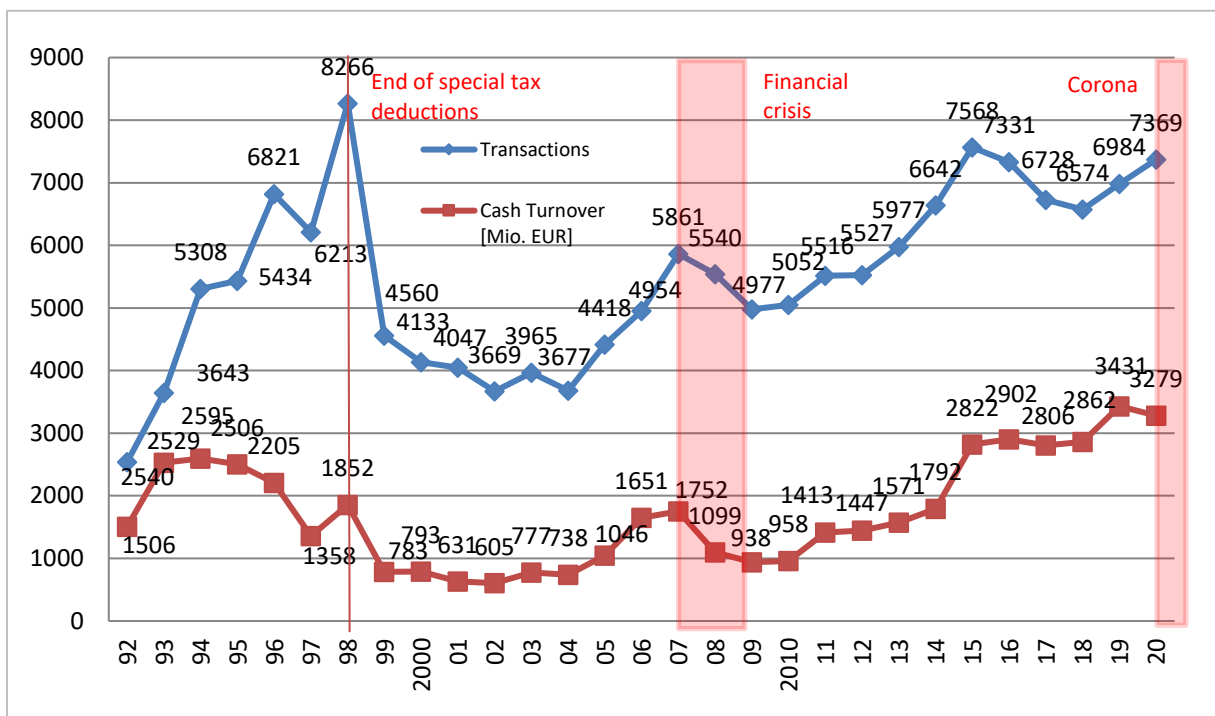
Percentage of net household income spent on total rent

Data source: Office for Statistics and Elections, municipal citizen surveys 1992-2019

At this point, the developments on the real estate market are also interesting, as they have an influence on new construction and renewal. In the 2010s, Leipzig established itself as an “Eldorado for capital investors” from all over Germany, according to several UniCreditBank reports (UniCreditBank AG 2017: 4, UniCreditBank AG 2020: 4). In 2017, estate agent Engel & Völkers pointed out in a market report that Leipzig was increasingly becoming the focus of investors and was one of the up-and-coming cities in Germany (Engel & Völkers 2017). Leipzig was named one of the most sought-after locations for investment properties in 2020 (Engel & Völkers 2020: 8). Furthermore, Leipzig was counted among the top nine cities for property investments (Consus Real Estate AG 2020: 46). And according to the managing director of Leipzig-based Pisa Immobilienmanagement, Leipzig is “a star in the real estate sky” (Pisa Immobilienmanagement 2019: 5).

This development can also be seen in the data on transactions and turnover on the real estate market, which shows its cyclical development very well. One can recognise a first real estate cycle that began in the early 1990s, where there was a rapid increase in transactions and initially also turnover (cf. Figure 8). However, this cycle then peaked in 1998 with just under 8,300 transactions and came to an abrupt end when the tax write-offs under special tax deductions for new buildings and renewals expired. After that, transactions and sales were low for years, and in a number of neighbourhoods in Leipzig there was no movement at all, so that it was even difficult to calculate standard prices for land. In the mid-2000s, however, the real estate market began to pick up again, the number of transactions increased and, somewhat more cautiously, the turnover. However, this upswing was slowed down after a short time by the global financial crisis, and the number of transactions and turnover declined, although not to the previous low levels. The respective lows were reached in 2009/10, after which a slow upward trend set in again. This trend became more dynamic in 2012/13 (ibid.). Transactions then reached their highest value as early as 2015, then fell for three years in a row and rose again in 2019 and 2020. Sales stagnated at the very high level of € 2.8 billion after 2015—an indication of rising prices—and rose to their all-time high of €3.4 billion in 2019. In the first year of the coronavirus pandemic, the number of transactions even increased, while turnover fell slightly (ibid.), which is an initial indication that the real estate market has not yet been affected by the crisis. It is possible that the development will be quite different from what happened during the global financial crisis in the years after 2007, when transactions and turnover declined and took a few years to return to pre-crisis levels (Figure 7).

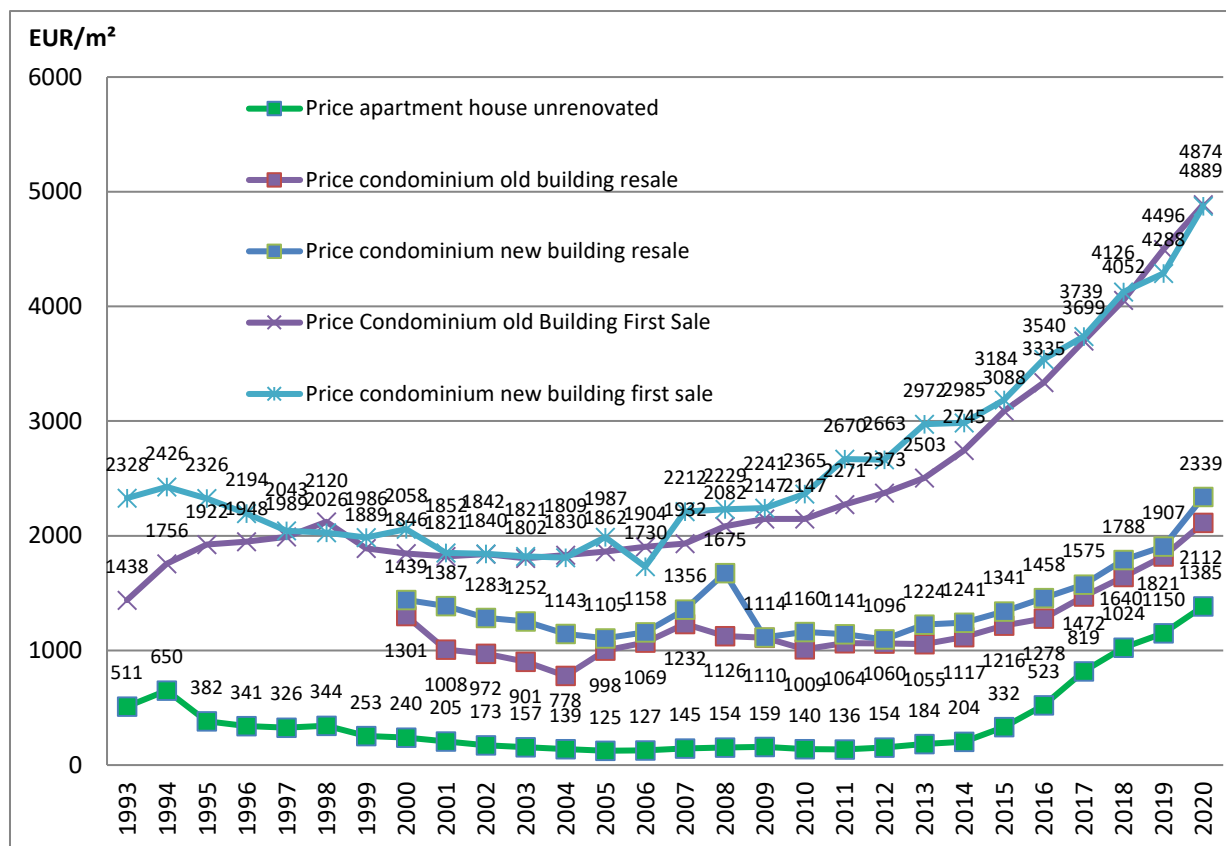
Figure 7: Transactions and turnover on the Leipzig real estate market 1992-2020



Data source: Expert committee of the City of Leipzig 1993-2021

As far as property prices are concerned, prices for refurbished old buildings had experienced an increase from the beginning to the end of the 1990s, after which they stagnated for a few years. Prices then rose slightly before experiencing a dynamic increase that started at the beginning of the 2010s. By 2020 they had more than doubled (cf. Figure 8). In contrast, prices for new construction reached a first peak as early as 1994 and then gradually declined in the course of the construction boom of the 1990s until the beginning of the 2000s. There was a small slump in 2006, then a rise again and a brief period of stagnation during the global financial crisis (ibid.). Since the beginning of the 2010s, new construction prices have been rising at roughly the same rate as those for renovated old buildings. The developments in the resale of old and new buildings were somewhat different; here, prices fell from the beginning to the middle of the 2000s, after which they rose, in some cases significantly, like the resale of new buildings until 2008. After that, prices in both segments fell, in some cases significantly, then stagnated until around the middle of the 2010s and since then have experienced a parallel upward trend, although not as dynamically as other segments. Prices for unrenovated flats and houses initially rose sharply, reaching a first peak of €650/m² as early as the mid-1990s (cf. Figure 8). Thereafter, prices in this segment declined and stagnated at an extremely low level from the early/mid-2000s until the mid-2010s. Since the mid-2000s, however, they have experienced a dynamic increase and reached an all-time high of just under €1,385/m² in 2020. This quite remarkable rise—almost a sevenfold increase—is probably due to a combination of speculation and the increasing shortage of unrenovated housing stock.

Figure 8: Property prices in Leipzig (1993-2020) (in €/m²)



Data source: Expert committee of the City of Leipzig 1993-2021

The most remarkable thing about the price developments in all segments is that they follow cyclical developments far less than transactions and turnover. For example, although there was some decline and a long period of stagnation after the expiry of the special tax deduction, the global financial crisis of 2007 (ff.) only flattened the upswing. In the first year of the coronavirus pandemic, prices continued to rise in all segments. Since Leipzig is an investor market and a lot of capital is currently being invested in real estate in view of the low interest rates, this development could continue. In any case, rising property prices have been exerting increasing pressure on rents for several years. Property prices in Leipzig have decoupled strongly from the development of rents; there are already voices warning of a property bubble, as it is proving increasingly difficult to find tenants who can afford the overpriced flats. Another negative effect of the increased property prices is the rise in the cost of renewals. In view of the sevenfold increase in prices for unrenovated flats, after the renewal they can practically only be offered and rented in the upper price segments—if enough solvent tenants can still be found.

In the next few years, a lot is to be built in Leipzig. Around €2.3 billion are already being invested in three new neighbourhoods (Lindenauer Hafen, Eutritzscher Bahnhof, Westseite Hauptbahnhof) as well as several other larger housing projects, and around 4,350 flats are to be built in these three new neighbourhoods alone (LVZ 2019). In addition, there are numerous smaller investments, the new buildings of the LWB and the cooperatives. The number of new housing units built per year had already risen to over 2,000 in 2018 and could be around 2,500 units per year in the next few years. The municipality expects new construction to increase to over 3,000 housing units/year in its population projection (Stadt Leipzig 2019c: 17). If, in addition to new construction, renewal also increases and immigration is moderate in the wake of the pandemic, then the housing demand could be met purely in terms of numbers. However, there is a mismatch between expensive new and refurbished housing and the demand for affordable housing. This can only be countered through the promotion of social housing, and even that will only partially solve the problem, because the publicly subsidised flats are not inexpensive, but medium-priced. In the segment of (very) expensive new flats, there have been letting problems since 2019 and a new vacancy issue is forming, which could increase in the course of the pandemic and herald an end to the building boom.

2.3 On the role of individual housing market actors

The municipal housing association Leipziger Wohnungsbaugesellschaft (LWB) emerged in 1991 from the former state-owned Gebäudewirtschaft Leipzig (GWL). It took over a large housing stock of 137,000 flats but also a very high debt burden, which consisted of old debts and an initially failed renewal. Since then, LWB has been under constant pressure to consolidate, which has led to major privatisations. In the course of this, there have also been several package sales to various buyers including large international investors. In the 1990s, larger portfolios were restituted and privatised, leaving a core portfolio consisting mainly of prefabricated housing in large housing estates. This was successively refurbished and modernised from the 1990s onwards. The LWB was disproportionately affected by the housing vacancies at the end of the 1990s/beginning of the 2000s. Following a decision made by the city council, the LWB participated in the urban redevelopment in the 2000s and bore the main burden with the demolition of about 10,000 flats—which, of course, also led to an additional reduction of its stock. In the 2010s, the LWB disposed of its so-called ‘scattered holdings’, such

as individual unrenovated houses in inner-city locations. As of 2020, there are still around 35,000 flats in the LWB portfolio, which means it still has a share of around 10% of the city's total housing stock. The LWB has only been in the black since 2011; in 2018, its debt burden still amounted to €589 million. The LWB pursues socio-political goals that are laid down in its corporate objectives, including the provision of housing for recipients of unemployment benefits (Hartz IV), refugees and homeless people. Accordingly, the LWB keeps about one third of its stock in the KdU-eligible segment (i.e. households that receive welfare benefits and are thus eligible for financial support to help cover their housing costs). The average cold rent of LWB flats in 2018 was €5.34/m², which is below the average rent of €5.88/m² determined for Leipzig as a whole. LWB rents have risen moderately in recent years, below the rate of inflation. Since the beginning of the 2010s, the owner targets of the LWB have been changed several times as part of the realignment of Leipzig's housing policy. In accordance with the city council's last amendment resolution in 2017, the LWB is now to increase its stock by about 5,000 to 40,000 units by 2025 in order to maintain its share of the total stock and to be represented in as many districts as possible. The new construction is also to serve socio-political goals, 30% of which is to be carried out with social housing subsidies. The LWB will thus once again play a greater role in housing policy, especially in the affordable segments.

Housing cooperatives have been present in Leipzig for a long time. The first cooperative was founded at the end of the 19th century, followed by further foundations in the 1920s and after the Second World War. The cooperatives successively expanded their holdings, especially in the 1920s and during the GDR period, so they consist mainly of interwar and post-war buildings as well as prefabricated buildings in small and large housing estates. In 1991 there were about 65,000 flats in the cooperatives' stock, which was a high proportion of about 25% of the total stock at that time. In the 1990s there were no more extensions. Instead, the cooperatives concentrated on modernisation and renewal, especially of the older housing stock, but also of the prefabricated housing stock. The cooperatives were also severely affected by the vacancies and participated in the so-called 'Pact of Reason' and urban redevelopment in the 2000s. They bore about a quarter of the demolitions, especially in the large housing estate in Grünau. This, together with sales, reduced their stock to about 53,000 units (2017), which is about 16% of the current total. Like the LWB, the housing cooperatives also rent their portfolios mainly in the low-price segment. For 2019, the six large Leipzig cooperatives reported an average rent of €5.03/m², which is significantly below the city's average rent (press release Leipziger Genossenschaften 22.5.2019). As a result of the increased demand due to immigration, vacancies also decreased in the portfolios of the large cooperatives. In 2019 the market-active vacancy rate (including fluctuation) was reported to be 3,200, which represented a rate of 6.8% (ibid.). Four Leipzig housing cooperatives joined forces several years ago to form the platform 'Wohnen bei uns' (Living with us). During the development of the housing policy concept 2014/15, the cooperatives also cooperated in part with private housing companies and, for example, wrote joint position papers. In doing so, they mainly opposed (overly) strong regulations of the Leipzig housing market, especially the so-called 'rent brake'. The cooperatives have already been investing in their stock again for some years and have been pursuing a very cautious policy of expansion through individual new buildings since the mid-2010s. In view of their remaining vacancies, they are sceptical about political demands for a

significant increase in new construction. In addition to the traditional ones, there are now also two new cooperatives: the Alternative Wohngenossenschaft Connewitz (AWC) emerged from the squats in Leipzig-Connewitz in the 1990s, and in 2018 the Solidarische Wohnungsgenossenschaft (SOWO) was founded by members of Leipzig's housing project scene. However, the two only have very small portfolios: 13 houses are owned by AWC (three more were taken over by the LWB on its own) and SOWO currently has five houses (see: <https://sowo-eg.org/haeuser/>).

New construction and renewal were dominated by private housing and real estate companies in Leipzig in the 2010s. Leipzig-based companies such as Stadtbau, CG Group, CG Elementum and GRK-Holding were already active in the second half of the 2000s and bought up houses and plots of land. Briefly interrupted by the global financial crisis, they then started smaller renewal and construction projects at the beginning of the 2010s and later also larger projects such as the 'Brunnenviertel' in Lindenau with over 500 flats. The refurbished and newly built flats are usually sold on the investment market and then rented out. Unlike in the 1990s, when many small investors purchased flats or shares, it is now also large pension, investment and mutual funds or large housing and real estate companies that acquire entire projects or larger portfolios as a package. Currently, some larger new construction projects are in the planning stage or already underway. For example, Stadtbau and BUWOG/Vonovia are planning roughly 1,600 units at Bayrischer Bahnhof with an investment sum of around €600 million. At the Eutritzscher Freiladbahnhof (Quartier 416), the CG Group has developed a project and IMFAR/STRABAG will start building approximately 2,100 units in 2022, for which about €1 billion will be invested. And the company Leipzig 1 wants to build about 650 housing units on the west side of the main railway station for €300 million (LVZ 2019). The new flats have so far been rented in the upmarket and luxury segment, and the three large projects now have urban development contracts that include 30% subsidised housing (which is currently €6.50/m² cold rent). The private housing and real estate companies have secured a dominant market position in the medium term through their strategic purchases of land and real estate in new construction and renewal. Nationally and internationally active companies have also been active in Leipzig for years, such as Vonovia, Deutsche Wohnen as well as BCRE, Grand City Property and Westgrund. Vonovia alone owns 6,500 flats in Leipzig so far and once the Bayerischer Bahnhof project is completed it will have almost 8,000. This segment is therefore likely to grow steadily in the future; it is already larger than that of the municipal housing company LWB (cf. Figure 3).

3. Housing policy in Leipzig

3.1 Problem definition und agenda setting

In Leipzig, some spectacular cases of displacement in the city centre in 2011/12 triggered public debates on gentrification (cf. Rink 2015). Initially, numerous city council initiatives by various parliamentary groups (Die Linke, SPD, Bündnis 90/Grüne) drew attention to the problems involved. They criticised the ongoing privatisation of municipal properties, demanded the preservation of clubs, and called for the protection of open spaces and temporary uses. The topic of housing policy also made its way onto the agenda and played an increasing role in the election campaigns from 2012 to 2014 (mayoral, municipal and state elections). However, the

question of whether there was a need for housing policy action in Leipzig was very controversial, especially since the last housing policy concept had only been adopted in 2009 (Brecht 2015). While some experts expected a tight market in two to three years with continued high immigration, representatives of the housing industry emphasised that the market would merely ‘normalise’. At first, city politicians and administrators recognised at best a future shortage of affordable housing for which they could prepare in time. In contrast, actors such as the City for All network, which was founded in 2012, warned early on of the shortage of affordable housing. The network pointed out the high poverty rate, the generally low income level and the high rent burden rate in Leipzig (Stadt für alle 2015).

Already in 2011, Leipzig’s population was corrected downwards by about 20,000 inhabitants following the results of the census. The results of the 2011 Building and Housing Census (GWZ) were announced in 2013 and 2014, at the beginning and during the housing policy discussions, respectively, and revealed about 12,000 more vacancies in Leipzig. The Leipzig city administration had assumed there were 27,000 empty flats and a high vacancy rate of 8% in 2012 (Stadt Leipzig 2012: 9), whereas the GWZ had produced 39,000 empty flats and a very high vacancy rate of 12.1% in 2011. This certainly had an impact on agenda setting by taking the pressure off the housing policy debate and defusing critics, such as City for All, by negating one of their most important arguments. The agenda setting then led to the city council’s decision in 2013 to develop a new housing policy concept, and the political parties developed policy positions on this in the following years.

However, the questions of whether new housing construction is necessary, and if so, to what extent, and whether Leipzig has a tight housing market at all, continued to fuel heated discussions and were assessed differently by some stakeholders. The vacancy rate and the related question of the tightness of the housing market remain at the centre of this public debate. For example, the “Leipzig real estate market players (private and cooperative housing companies) estimated that the development of Leipzig and thus also of the real estate market was stabilising for the first time since Reunification” (WR Immocom 2014). They spoke of a “twenty-year transitional situation” or an “exceptional East German situation that is nowhere to be found in normally functioning cities and municipalities” (ibid.: 2). They demanded a “accurate market description” and referred to the much higher vacancy rates in Leipzig demonstrated by the GWZ 2011 with more than 10,000 housing units as well as the still existing availability of affordable housing (ibid.: 1f.). In the following years, vacancies continued to play a central role in the housing policy discussion, and the cooperatives repeatedly took a stand on the issue in several press releases and papers. Most recently, six cooperatives referred to the sufficient vacancy rate and the existing fluctuation. They doubted the vacancy rate of less than 2% stated by the city and in contrast assume a vacancy rate of 4 to 5%, “i.e. a functioning housing market” that is “stable and in equilibrium” (Leipziger Genossenschaften 2019). In addition, the gentrification discussion continues and is updated again and again by displacement cases. Public events are also held, at which the specific cases and the process as a whole are discussed and, in some instances, demands are formulated. While the problem is trivialised by some actors, such as the housing companies, it is problematised and scandalised by civil society actors and parts of the media.

3.2 Background: On the development of Leipzig's housing policy

The City of Leipzig already gave housing policy a major role in its first housing concept from 1994. The overarching goal of the new housing policy was “that all residents find affordable housing according to their financial possibilities and different needs” (Stadt Leipzig 1994: 5). Against the background of the housing shortage left over from the GDR and the modernisation and refurbishment backlog, the city's plan focused on rapidly renewing and improving the housing conditions of the existing stock (ibid.). This was based on the assumption that there would be a considerable need to catch up and an increasing demand, especially for small flats. For example, a population of 500,000 was forecast for 2010 and a demand of 255,000 housing units was calculated (ibid.: 46). Since the number of dwellings in 1991 was only 231,00, there was a shortage that was to be resolved through new construction. In order to finance renewal and modernisation and to contribute to the formation of home ownership, “substantial parts” of the municipal housing stock were to be sold (ibid.: 5). At the same time, this was designed to contribute to another overarching goal, the development of a “functioning housing market” (ibid.). In order to provide for low-income strata, a stock of housing tied to occupancy and rent was to be created. As shown above, considerable public and private investments were made in the 1990s in the renewal of the stock as well as in new construction, while the number of inhabitants and households was declining.

The massive, even extreme housing vacancies around the year 2000 resulting from this constellation then led to a change of political direction and a reformulation of housing policy in a concept adopted in 2002. It was now assumed that the housing supply for all income groups would be secured, since the housing market had developed into a “tenants’ market” due to the vacancy rate (Stadt Leipzig 2002: 10; Brecht 2015: 58). In view of this, “new strategies of urban development and urban renewal policy would be necessary” (Stadt Leipzig 2002: 3). In order to adjust supply to the shrinking demand, demolition measures would be necessary, especially in the large housing estates. To this end, urban renewal envisaged the demolition of about 20-25,000 housing units (about 8% of the stock at that time) between 2002 and 2020. At the same time, however, there was an interest in increasing the attractiveness of Leipzig's housing market in order to attract more residents to the city and increase demand. This was to be achieved by upgrading the old buildings in the city centre, which was accompanied by the ‘Leipziger Freiheit’ image campaign. In order to keep young (middle-class) families in the city, the owner-occupier and townhouse programmes were launched, which supported the creation of properties in existing buildings or through the construction of owner-occupied homes on inner-city brownfield sites. Rent adjustments in the 1990s had led to an enormous increase in the rent burden, and by the year 2000 the figure was expected to reach 30%. This led to “more subject-related support and rent control for ... needy households” (Stadt Leipzig 2002: 10). In the sense of an “overarching urban policy”, the “subject-related tasks of housing policy were to be integrated into social policy and the object-related tasks into urban development and urban renewal policy” (ibid.). An urban development plan for housing and urban renewal had already been developed in 2000, and the housing policy concept was integrated into the urban development plan (Step). In this context, the housing office was dissolved, ‘Housing’ was now no longer an independent area of an alderman. Rather, parts were integrated into the ‘Housing Assistance’ section of the Social Welfare Office and the remaining part was added to the

Department of Urban Development and Construction. In order to systematically observe the housing market and measure the effects of urban redevelopment, a housing market monitoring approach was developed that has been carried out regularly since 2002 and documented in reports (cf.: <https://www.leipzig.de/bauen-und-wohnen/stadtentwicklung/raumbeobachtung-und-monitoring/monitoring-wohnen/>).

In 2008 and 2009, the City of Leipzig participated in the BBSR's 'Municipal Housing Concepts' programme (BBSR 2009: 41 ff.) and developed a new housing policy concept. It was based on the housing market monitoring that had been conducted since 2002 as well as a broad analysis of the housing market. This involved the analysis and formulation of a housing policy and housing supply concept, which was incorporated into the integrated urban development concept (SEKo) as a specialised housing concept. For the first time, this housing policy concept was based on cooperation with housing market actors; the working group set up for this purpose included the housing cooperatives LWB, Haus & Grund Leipzig and the Association of Home Owners (Stadt Leipzig 2009: 3). The housing market development of the 2000s was assessed as positive in the 2009 concept; the population had grown and the vacancy rate had decreased. For 2007, the vacancy rate had been estimated at about 42,000 housing units (approx. 13%), of which about 25,000 were market-active (Stadt Leipzig 2009: 4). Despite the predicted further increase in the number of inhabitants, no fundamental change in the vacancy problem was expected: "Leipzig will continue to have a very relaxed housing market in the future" (ibid.). However, urban redevelopment, i.e. the demolition of flats, would remain "a necessary component of sustainable urban development" (ibid.). In view of the high number of households receiving Hartz IV unemployment benefits and the many low-income households, there is a high demand for affordable housing (ibid.). The concept noted different developments in the housing stock, such as growth in the inner city and further shrinkage in the peripheral large housing estates. The primary goal of Leipzig's housing policy was formulated as "to further develop Leipzig as an attractive and competitive housing location in the region and to create framework conditions so that everyone living in Leipzig can find adequate housing according to their wishes, needs and material possibilities" (ibid.: 8). Central to this is the creation of a sustainable and demand-oriented housing supply, which on the one hand includes new qualities and new forms of housing, and on the other hand the reduction of the permanently non-marketable housing stock (ibid.: 8 f.). In a continuation of the previous concept, emphasis was placed on the creation of ownership, especially by families, in the owner-occupier and townhouse programmes. The LWB was to provide low-cost housing, and in addition, new construction in the medium-priced segment and the promotion of higher-priced housing projects such as lofts for "affluent, creative clientele" (ibid.: 13) were formulated as goals. With this differentiated strategy, which included demolition and renewal, upgrading and new construction, the City of Leipzig cautiously adjusted to the changed framework conditions. In this respect, the housing policy pursued from 2009 onwards represented a correction and supplement to the 2002 concept, but not a new orientation.

3.3 The new housing policy concept of 2015

A reorientation of the housing policy was initiated four years later in 2013 with the decision to develop a new housing policy concept. For this purpose, an expert commission was formed and

a broad participation process was started (see below). The costs of the entire process were partly borne by the housing market actors (the housing cooperatives, the LWB and private housing companies). The decision to develop a new concept was prompted by the fact that Leipzig had grown faster at the beginning of the 2010s than had been expected and forecast in the years before. Due to high levels of immigration, Leipzig was growing “rapidly” and was one of the fastest growing large cities in Germany (Stadt Leipzig 2015a: 6). This created a new situation on the housing market and made it necessary to update the housing policy concept and “reorient” Leipzig’s housing policy (Stadt Leipzig 2015: 6). New housing construction and the preservation of affordable housing now became the focus of housing policy, which was similar to the situation after Reunification (ibid.). When the last housing policy concept was adopted, the housing market had consolidated after a phase of high vacancy rates and intensive urban redevelopment (ibid.: 6). At that time, there were very few sustainable but affordable rental properties that often formed the basis for “alternative forms of housing and creative projects (that) shape the quality of life and the image of Leipzig” (ibid.: 6). These potentials and projects that emerged in Leipzig in times of urban redevelopment should be maintained. The City of Leipzig stated that in light of “dwindling vacancies, moderately rising rents so far and increasing new construction activities, there is not yet a tight housing market in Leipzig” and “no housing shortage” (ibid.: 6, 18). The “uncertainties about the extent of further population growth” are highlighted as a particular challenge (ibid.: 6). The concept was based on an orientation towards moderate to strong long-term population growth, but it also “takes into account the risks of an even stronger or weaker development of demand” (ibid.: 6): the additional demand for housing could not be estimated seriously.

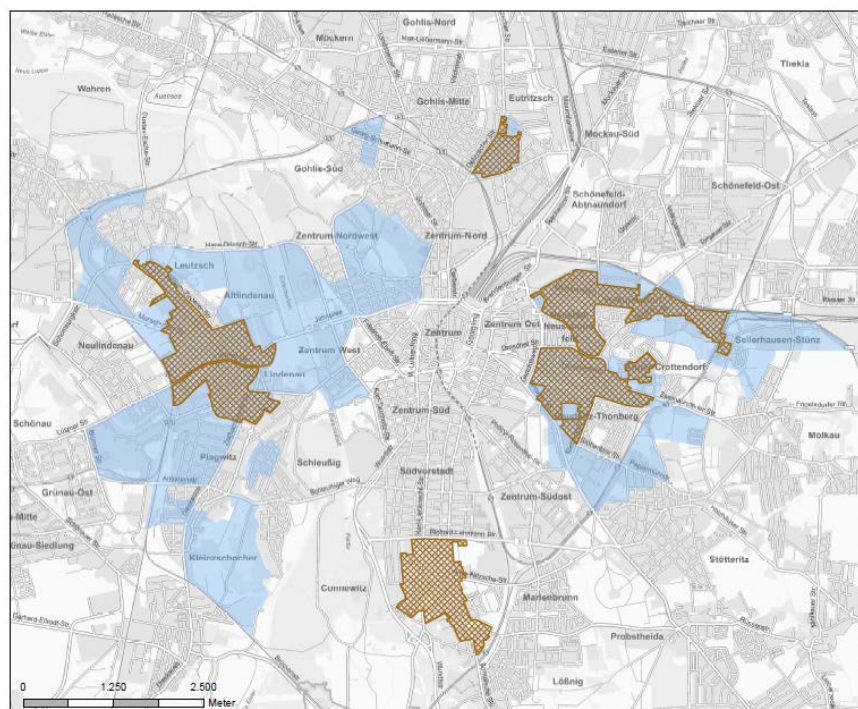
The new housing policy concept was designed to create the framework for growth conditions and formulate long-term guidelines and strategies, as well as define the instruments to be used in the short to medium term (ibid.: 7). The “promotion of deconstruction for housing market consolidation is no longer necessary”, but selective deconstruction promotion should still be possible (ibid.: 19). The concept assumed a volume of new construction of 1,000-1,500 units/year, renewal of about 1,500 units/year, a vacancy rate of about 22,000 units (about 6.5%), of which about 50% were market-active and 50% non-market-active, and a rent burden of 32% (ibid.: 10). The basis of the new concept was the population forecast of 2013, from which three possible development scenarios up to 2020 were derived as a guide: low, moderate and strong growth (a forecast up to 2030 was also prepared). Based on this, overarching goals were formulated in the form of guidelines. The overarching guideline ties in with the housing policy pursued to date: Leipzig is to be further developed as an attractive and competitive residential location. Adequate housing for all should be provided, even under growth conditions, and open spaces for diverse lifestyles should be preserved as a special feature of Leipzig (ibid.: 17). Guideline 1: “Housing in Leipzig – for all, diverse, affordable and economically viable” includes the creation of additional housing, a qualitatively diverse range of housing, the creation and maintenance of affordable housing, and support for cooperative forms of housing (ibid.). Guideline 2: “Sufficient housing for low-income households” once again explicitly addresses the issue of affordable housing, which is to be maintained or created primarily in the existing stock (ibid.). The municipality explicitly acknowledges its special responsibility towards people with low and medium incomes—a clear socio-political positioning. Guideline 3: “Supporting

families, senior citizens and people with disabilities” addresses some specific groups. Guideline 4: “Housing policy as part of integrated urban development” addresses overarching aspects such as sustainable growth and increasing energy efficiency (*ibid.*). This guideline serves to integrate housing policy into the city-wide, integrated urban development policy. Subsequently, the housing policy concept was integrated as a specialised concept into the Integrated Urban Development Concept (INSEK) 2030, which was adopted in 2018. Building on these guidelines, the concept lists and discusses a multitude of instruments and measures, such as the lowering of the rent cap, the ‘rent brake’, the milieu protection statutes, the ban on the misappropriation of housing, the awarding of concepts, urban development contracts, and many more. (*ibid.*: 18 ff.). Reference should also be made here to the cooperative forms of housing, which are to be supported by “advice and guidance, networking and cooperation” (*ibid.*: 20). They thus take on an unusually large, not to say prominent role in the concept, because “diverse forms of housing, cooperative housing projects, self-user initiatives” are defined as “an expression of Leipzig’s diversity” (*ibid.*: 15). However, the implementation would not occur automatically; the application of individual instruments and measures would only be examined when there were “...clear signs of a tight housing market” (*ibid.*: 36). To this end, a specific set of indicators was subsequently developed as part of the housing market monitoring and the tightness of Leipzig’s housing market was measured annually. The City of Leipzig wants to cooperate with all housing market actors in the implementation of the new housing policy, explicitly also with private housing companies as well as civil society initiatives. Broad stakeholder participation with about one workshop per year is planned and the further involvement of the public is to be clarified—these are all new elements compared to the previous concepts. With the new concept, Leipzig’s housing policy has clearly been oriented towards growth. Urban redevelopment and housing market consolidation have been brought to an end. The new concept contains a compromise between alternative demands, social goals and the consideration of the economic interests of housing companies and owners. Ecological concerns, such as energy modernisation, play a relatively minor role in contrast.

After the adoption of the housing policy concept, its implementation began. Since then, housing policy instruments have been successively implemented. Some instruments were only to be used once a tight housing market had been identified; for this purpose, the City of Leipzig used a specially developed index that indicated a tight housing market for the first time in 2017. Public funds were also used for the implementation; municipal funds were also allocated for the first time for the 2016/17 budget, although the amount was not very high. In mid-2017, at the request of Bündnis 90/Grüne, the lowered rent cap was passed by the city council and applied to the Free State of Saxony. It limits rent increases to a total of 15% over three years, among other things. Following approval by the Free State of Saxony, it was introduced at the beginning of 2018 for an initial period of two years and then extended for a further five years in 2020. Initially, the Free State of Saxony did not have a social housing promotion programme; the funds made available by the federal government for this purpose were instead used elsewhere, e.g. to promote age-appropriate renewals. In 2016, the state government launched a programme that was initially limited to the years 2017-2019 and then extended to 2024. From this, Leipzig has been receiving around €20 million in funding per year since 2017 and in 2021 this amount increased to €25 million. This money is granted as a direct subsidy for investments,

it results in a 35% reduction in rent, and the commitment runs for 15 years. So far, contracts to build flats have been signed for 1,659 flats, 165 units have been completed and most are rented (as of March 2021; see www.leipzig.de/bauen-und-wohnen). In the course of planning the new neighbourhood at the Eutritzscher Verladebahnhof, the city negotiated an urban development contract with the developer CG Group, which stipulates a 30% share of affordable housing in addition to the proportional assumption of costs for childcare centres and schools. This contract became the model for the other two planned neighbourhoods at the Bayrischer Bahnhof and on the west side of the main train station. Here, the Munich concept of social land readjustment (SoBon) was applied. If these agreements are also implemented, about 1,500 affordable or subsidised social housing units will come onto the market in the course of the 2020s. In an update of the LWB's ownership targets, the city council reaffirmed its important social policy role in providing for low-income groups. In order to adapt to the growing market, a decision was made to increase the stock and achieve a market share of 10.5% by 2025 "provided that this is compatible with the financial capacity to perform and invest...". In doing so, the LWB is to turn 50% of its stock into rent- and occupancy-linked housing through new construction and the renewal of vacant flats. In 2018, the city council had already decided to introduce preservation statutes and commissioned the administration to conduct corresponding analyses of five neighbourhoods (West, North-West, North-East, East, Connewitz—in a total of 30 out of 310 statistical districts). At the last meeting of the old city council in June 2019, it was then decided to draw up social preservation statutes for a total of 10 areas, including Plagwitz, Lindenau, Kleinzschocher, Leutzsch, Gohlis-Süd and parts of the East and South. After evaluating the studies, the administration submitted legally sound draft statutes for six areas to the city council in 2020, which were adopted by the city council in summer 2020 (cf. Map 2). In spring 2021, a household survey was conducted in several city districts with the aim of establishing further conservation areas.

Map 2: Conservation areas in Leipzig in 2020



Brown grid:
conservation areas

Blue color:
planning decisions

Source: City of Leipzig
Office for Housing and
Urban Renewal 2020

In 2016 the concept allocation began. The property housing office put five plots out to tender in an uncoordinated manner. After vehement criticism by ‘City for All’ and other stakeholders, the tenders were withdrawn and criteria were developed in a participatory process. On this basis, three concept procedures have been carried out so far, and six municipal or LWB properties are currently in the tendering process. The awarding of the concepts are overseen by the Leipziger Freiheit network, which supervises the tenders and advises the building groups (www.netzwerk-leipziger-freiheit.de). Although this ambitious instrument has so far had a limited effect in terms of the number of newly created flats, it has potential and can be the first step towards a different approach to public land, as experience from other cities has shown. Other social policy instruments to be mentioned here are the *Kosten der Unterkunft* (KdU), whereby the housing costs were paid for 31,811 households in need in 2019, and the housing benefit, which 5,478 people received in 2019.

4. Housing policy: Actors and governance structures

4.1 Governance structures

To develop the new housing policy concept, the City of Leipzig set up an expert commission in 2014. In contrast to previous conceptual procedures, a broad approach was chosen. The panel included representatives from

- all city council factions, mostly members of the Planning and Building Committee,
- all housing cooperatives,
- some large private housing companies,
- associations and civil society (Haus & Grund, Mieterverein, Haushalten e.V., Stadt für Alle, Haus- und Wagenrat),
- the cities of the KoopStadt network (Bremen, Nuremberg) as well as from Halle and Dresden,
- and housing market experts (academics, consultants).

The cooperatives formed a block in the expert commission, and in some cases they also appeared in public together with private housing companies and made joint statements (e.g. WR Immocom 2014). The associations and representatives of civil society, on the other hand, did not appear together or united. In Leipzig, the Expert Commission on Housing Policy was a participatory measure whose purpose was to involve all relevant actors in the formulation of a new municipal housing policy. In the course of formulating the concept, six stakeholder and expert workshops as well as four public events were held with between 70 and 260 participants. Discussions took place on topics and problems related to housing in the growing city, on housing forms and on the draft concept itself. These discussions were organised and documented by ‘Leipzig weiter denken’ (Leipzig City Council 2015a: 11). After the concept was adopted, annual meetings were held for several years to provide information and opportunities for dialogue. To implement the housing policy concept, the Leipziger Freiheit network was founded with a coordination office. Its task is to organise cooperation with initiatives and associations and to provide advice for cooperative housing projects. It played a key role in the development of the awarding of the concepts and accompanies the tendering and implementation of the housing projects in this process (Stadt Leipzig 2019b; www.netzwerk-leipziger-freiheit.de). In order to bundle the resources of the administration, the Amt für

Stadterneuerung und Wohnungsbauförderung (ASW) was renamed Amt für Wohnungsbau und Stadterneuerung (AWS) in 2019. This entailed a restructuring and there is now a department responsible only for housing. Finally, there is the AG Wohnen (Housing Working Group), an internal administrative unit made up of various offices, which, for example, draws up the rent index and sets the KdU rates. At the beginning of 2020, Mayor Jung appointed an Alliance for Affordable Housing, which includes representatives of the private real estate industry, the Leipzig housing cooperatives, the municipal housing company LWB as well as representatives of tenants and intermediary interests. The guidelines for cooperation were agreed in a letter of intent; the aim is to reach voluntary binding agreements on the implementation of Leipzig's housing policy. To this end, in 2020, for example, the criteria for the preservation statutes were discussed jointly, and in 2021 the introduction of the controversial 'rent brake' in Leipzig was discussed and pushed through against the votes of mainly the private housing companies and then applied for with the Free State of Saxony. In addition, the possibilities of providing housing for households with market access difficulties were jointly explored.

4.2 Positions and strategies of the local parties

The local political parties and their city council factions took up the public discussions on gentrification in 2012/13 and started (again) to address housing policy. This started the agenda setting, which after a short discussion period resulted in the formulation of a new housing policy. After a relatively short period of discussion, the motion to develop a new housing policy concept was passed with the votes of the red-red-green majority in 2013 (Die Linke, SPD, Bündnis 90/Grüne). Housing policy already played a certain role in the 2014 city council elections, where the first programmatic statements were formulated. As part of the development of the housing policy concept in 2014/15, the politicians gathered further expertise and dealt with the specific problems in Leipzig. In the following years, further expert reports were prepared and hearings were held to accompany the implementation of the housing policy concept. There were intensive political and public debates on the use of individual instruments, especially the milieu protection statutes. In contrast to the common practice of changing political majorities, the so-called 'Leipzig model', all of the city council's housing policy decisions were passed with the red-red-green majority. Over the course of time, a stable political constellation has emerged that has the characteristics of a silent coalition. In the context of the 2019 municipal elections, housing policy was widely discussed and was the top issue; its necessity is recognised by all parties in view of the continued strong population growth.

The Leipzig housing market is assessed differently by different actors, however, and the Freie Demokraten (FDP) argues that Leipzig's rents are affordable compared to other major German cities (FDP 2019: 4), while the Die Linke claims it is "now [a] very tight housing market" and has identified two central problems: 1. Significant displacement processes (gentrification) in various urban areas, which increasingly lead to social differentiation (segregation), and 2. a "growing lack of affordable housing, especially for low-income households" (Die LINKE 2019: 26). In general, the positions can be divided into more market-based and more socially oriented ones. The CDU and the FDP, for example, focus primarily on new construction, which is to be boosted by incentives for investors, the acceleration of planning and approval procedures and an investment-friendly climate. The focus is on owner-occupied housing, so the

Alternative für Deutschland (AfD) wants to give more weight to owner-occupied housing, especially for young families, “through generous subsidies” (AfD 2019: 15) and the FDP wants to increase ownership and owner-occupier rates (FDP 2019: 4). The CDU wants to create “options for all income groups”, which would include “social housing, normal-priced and high-priced options as well as single-family homes” (CDU 2019: 3). Further regulation of the housing market is rejected. The FDP, for example, is decidedly against measures to curb rent prices: “Milieu protection statutes and a local tightening of the rent brake are unsuitable means of limiting rent levels; they represent a disproportionate encroachment on property rights, prevent social mixing in neighbourhoods and cement existing social problems” (FDP 2019: 4). In tackling the tasks of the housing market, the focus is primarily on private investors; the LWB as a municipal company should “focus on its core business and pursue the realistic goal of increasing its core stock to 40,000 flats by 2030”, according to the CDU (CDU 2019: 3). Bündnis 90/Grüne, Linke and the SPD, on the other hand, focus more on a socio-politically oriented housing policy, which includes further regulation of the housing market. This includes, in particular, measures and instruments to curb further rent increases and prevent displacement. The most far-reaching demands in this regard are those of Die Linke, for whom housing policy was not only the top issue of their election campaign but has become the “main social issue” of all politics. Die Linke also sees itself decidedly as the “party of the tenants” (Die Linke 2019: 26). Leipzig’s entire city administration should be consistently aligned to “decisively combat the emerging housing shortage” (ibid.). In order to achieve this, Die Linke proposes a whole range of instruments, including preservation statutes, a “functioning rent brake”, the annual adjustment of the costs of housing, and more. (ibid.: 26 f.). It also wants a new offensive in social housing construction by the federal government and the state, whereas Bündnis 90/Grüne demand an analogous expansion of social housing promotion by the Free State of Saxony to €100 million annually (Bündnis 90/Grüne Leipzig 2019: 25 f.) and the SPD wants 10,000 social housing units to be built in Leipzig by 2030 (SPD 2019). These three centre-left parties favour the LWB as a municipal housing company, the traditional housing cooperatives and new non-profit providers. Bündnis 90/Grüne wants to increase the share of housing stock managed by these companies from currently approximately 27% to 40%, adjusted to the actual number of inhabitants and market development. This goal is to be achieved by founding a Cooperative Real Estate Agency (GIMA), which is to be equipped with sufficient funds and will also feature municipal participation (Bündnis 90/Grüne Leipzig 2019: 27). Bündnis 90/Grüne wants the LWB to “cover at least half of the need for social housing” by 2030 (ibid.: 28), while Die Linke additionally wants “cooperative building land development for all development plans with multi-storey housing with the aim of establishing social housing in the amount of at least 50%” (Die Linke 2019: 29). The housing policy of the centre-left parties is predominantly aimed at the low-income groups and strata. According to Die Linke, people should generally not have to spend more than 30% of their net household income on rent. The tightening of the housing market has also led to an increase in homelessness in Leipzig in recent years and in order to effectively counteract this, the corresponding support services should be improved. Die Linke and Bündnis 90/Grüne advocate a “Housing First” model (Die Linke 2019: 29; Bündnis 90/Grüne Leipzig 2019: 29).

Since the 1990s, municipal politics has followed the so-called ‘Leipzig model’, which is not based on fixed coalitions but works with changing political majorities. In housing policy issues, however, a fairly stable red-red-green constellation has been in place for about 5-6 years. It has been pushing housing policy forward with greater vehemence for some years, which can be seen, for example, in the decisions to introduce various housing policy instruments.

4.3 Housing and rent policy initiatives and their activities

Leipzig has an active and broad-based civil society as well as an established protest culture—and this is also reflected in the field of housing policy. The first individual cases of gentrification at the end of 2011/beginning of 2012 already triggered a considerable response and were initially discussed at public events, some of which had over 300 participants. These events led to the founding of housing and rent policy initiatives and groups. The first to be founded at the beginning of 2012, directly after a public event on the topic of gentrification, was the network Stadt für Alle (City for All), a classic “right to the city” group. This network supports and advises those affected by gentrification, builds a bridge between the affected houses and is active in housing policy. As early as 2013, the network called for the development of a new housing policy and supported corresponding activities of the city council factions. Since it was initially not considered during the formation of the expert commission on housing policy, it organised a public intervention that forced the commission to allow it to participate in the development of the new concept. Afterwards, the network focused on critically monitoring the implementation of the new housing policy, as evidenced by a number of statements and petitions, such as the one on conservation areas in 2018. The House and Trailer Council (HWR) was founded in 2013. It emerged from the housing project scene and acts primarily as an advocate for housing projects and trailer sites. However, it also deals with urban development policy in general and housing policy in particular and was represented in the expert commission on housing policy. The initiative ‘Für das Politische’ (For the Political) was also founded in 2013 against the background of gentrification in Connewitz; it mainly organises campaigns and initiatives. The “right to the city” working group PRISMA was founded by the Interventionist Left in Leipzig in 2014 and is similarly oriented. Its aim is to politicise the housing issue; it has initiated some protests itself and participated in others (Braune 2017). The ‘Leipzig for All’ initiative emerged in spring 2018 following a mobilisation against the gentrification of a house in Leipzig West. It focuses on activities and mobilisations and aims to network with houses affected by gentrification. In addition, there are other groups, such as Südvernetzung or MieterInnenberatung in Leipzig East, which provide information and advice or networking opportunities. In the summer of 2019, a tenants’ initiative was founded in the housing stock of Vonovia in Leipzig North East. This spectrum of actors also includes the Alternative Wohngenossenschaft Connewitz (AWC), which emerged from the squats of the 1990s, the Mietshäusersyndikat and the new SOWO cooperative.

The traditional Tenant Association, founded in 1990, plays a relatively insignificant role in comparison, although it has a very large base of about 19,000 tenant households in Leipzig and the surrounding area. The association represents tenants’ interests in the broadest sense and “advocates the realisation of a social housing and rent policy” (<https://www.mieterverein-leipzig.de>). However, it does not take on a decidedly political role, but instead limits itself to

its ‘traditional functions’, such as providing information, advice and mediation services. The Tenant Association was involved in the development of the latest housing policy concepts and was a member of the expert commission on housing policy; since the beginning of 2020 it has been a member of the Alliance for Affordable Housing. However, it did not make any statements or demands of its own, neither in the phase of drafting or formulating the concept nor in its implementation. The Tenant Association is only partially connected to the other housing and rent policy groups. For example, it participated in a Rent Policy Council in 2016. Since the mid-2010s, there have been attempts to politicise it. These took shape in 2019 when two representatives from rent policy groups (Stadt für Alle and Kontaktstelle Wohnen) were elected to the board of the Tenant Association. The extent to which this will provide impetus for its actions remains to be seen. Stadt für Alle in particular, but also the other groups and initiatives, have repeatedly gone public with statements and larger events. In 2016, for example, they jointly organised a Rent Policy Council with the involvement of the Tenant Association, which resulted in a list of demands and reached a broad public. At the end of 2018/beginning of 2019, there was increased networking between these groups and initiatives. For example, from the beginning of 2019 until the coronavirus lockdown in early 2020, regular ‘plenary meetings’ were held to exchange ideas and organise overarching actions. These groups and initiatives have also organised many smaller mobilisations and protests since 2012. These were usually prompted spectacular cases of gentrification, which were then also the focus of the demands. At first, only a few hundred mostly younger people from the political left took part. At the Parade of the Invisible, which coincided with the city’s millennial anniversary, the topic of the ‘invisible’ victims of gentrification played a prominent role and the ‘parade’ had about 1,000 participants. Further gentrification cases in the west of Leipzig then led to demonstrations in February 2017 with about 1,000 participants and in April 2018 with about 1,500 participants. At the nationwide political mobilisations about rent at the beginning of April 2019, Leipzig was one of the cities with the largest demonstrations with about 2,000-3,000 participants (Rink/Vollmer 2019). This shows that the mobilisation potential in Leipzig has grown over the years and now reaches slightly beyond the left-wing scene. However, the activities and mobilisations from this spectrum of actors were interrupted by the pandemic, and it remains to be seen to what extent this can be picked up again afterwards.

The squats of houses and public squares that have taken place since the beginning of the 2010s should also be seen in the context of increasing politicisation and mobilisation. Squats of individual houses took place in 2012 in the west of Leipzig and in 2014 in the east, both of which were cleared immediately or after some time, and received local and sometimes supra-local media coverage. Only the squat of a Deutsche Bahn site known as the ‘Black Triangle’ was tolerated for longer, from 2016 onwards, but then the squatters were evicted at the beginning of 2019. In addition, there have been some ‘silent squattings’ that have taken on different forms. A number of squats, e.g. in the west and east of Leipzig, drew attention to the loss of open spaces and the displacement of this form of housing. In autumn 2020, there was another squat in Ludwigstraße in Leipzig East run by a group called ‘#Leipzig besetzen’ (#Squat Leipzig). After the owner refused to participate in talks with the squatters they were evicted, which led to several days of protests and riots in Leipzig-Connewitz. These received widespread national media coverage that focused on the housing situation in Leipzig. In

addition, throughout the 2010s there were a series of attacks on real estate companies, building sites and newly built and renovated houses, especially in Connewitz and in the west of Leipzig. In some cases, letters of confession appeared on the websites of left-wing autonomous groups in relation to these acts and they are therefore attributed to the left-wing autonomous scene. A high point was reached with an attack on a construction site in the south-east of the city and an assault on a project manager in autumn 2019. This violence received a considerable public response and was in part very sharply rejected. Although it can be said that these violent provocations did gain the intended public attention, they had no significant influence on construction and renewal activity. So far, not a single new construction or redevelopment project has been prevented. Finally, graffiti activities, paint bag attacks and stone throwing against new or renovated houses have been observed from time to time for several years; the main focus here is also the Connewitz district.

During the 2010s the groups, initiatives and networks brought housing policy issues to the attention of the urban public in various ways. They increased the pressure on the political parties and some of their demands were then reflected in city council motions from the red-red-green spectrum. The groups, initiatives and networks mentioned here, but also other parts of Leipzig's civil society, have undoubtedly made an important contribution towards getting housing policy on the municipal agenda and then making a central issue, as well as towards the explicit consideration of alternative forms of housing in the new housing policy concept.

Excursus: Housing market and housing policy during the coronavirus crisis

At the present time (end of 2021), it is not yet possible to foresee what the consequences of the coronavirus pandemic will be. At the federal level, the government has reacted quickly with immediate regulatory measures and extended protections against eviction. Furthermore, funds were made available for tenants who encountered difficulties paying their rent as a result of the pandemic. Further measures and demands are under discussion, such as a nationwide rent cap—a campaign for this measure was launched at the beginning of 2021 by the Tenant Association, the trade unions, Parität and others. It is currently not possible to seriously estimate what influence the pandemic will have on the local housing market in Leipzig. First of all, immigration to Leipzig will continue to decline in 2022. With approximately 3,700 additional inhabitants, growth in 2020 is moderate and roughly back to the level of the 2000s. Leipzig is thus one of the few major German cities that still has significant economic growth, which is fed entirely by immigration. How immigration will develop in the future is completely unknown, as there are no empirical values for such a situation. If we draw a parallel to the global financial crisis of 2007 onwards, we see that immigration increased in 2008 compared to 2007, but then declined somewhat in 2009 and 2010. At that time, Germany was only slightly affected by the economic consequences of the financial crisis and therefore became a destination country for migration from the worst-hit countries from 2010/11 onwards. At this point, we do not yet know what economic and social consequences will be caused by the coronavirus pandemic. In the course of a probable economic recession, demand on the housing market could decline. This could also affect the supply side and lead to a decline in planned new housing construction. It is possible that planned major housing projects such as the Eutritzscher Freiladbahnhof, the Bayerische Bahnhof and the west side of Leipzig's main train station will be postponed or even

cancelled. Despite the numerous imponderables, we can assume that the municipality would be well advised not to base its housing policy on an abrupt slump, or to put it on the back burner or stop it altogether. The municipality of Leipzig has wisely continued its housing policy.

5. Conclusion and outlook

Urban development and the housing market in Leipzig have gone through quite different phases since Reunification in 1990, including some extreme processes, such as the severe shrinkage in the 1990s, the extremely high housing vacancy rates around 2000 and the strong growth in the 2010s. As has been shown, Leipzig's different, sometimes even contradictory, housing policies have been reactions to these strong or extreme changes—but sometimes with a significant time lag. The housing policy of the 1990s was aimed at eliminating the housing shortage and improving the quality of housing. Federal policy measures (especially Sonder AfA) led to a massive expansion of supply, which, however, ran counter to the shrinkage. The construction of 47,000 new housing units (+18.2%) was offset by a shrinkage of about 100,000 inhabitants (-20%), but only a slight decline in household numbers of about 5%. This caused an extremely high housing vacancy rate and was followed by demolitions after 2000 that took place with federal political assistance in the form of the Stadtumbau Ost programme. This market consolidation through supply reduction again ran counter to reurbanisation and the moderate growth in population and housing demand: 13,000 demolished flats versus 30,000 additional inhabitants. It was not until the end of the urban redevelopment and the adoption of the new housing policy concept in the mid-2010s that housing market development and municipal housing policy were aligned. How this relationship will continue to develop is currently uncertain; in 2020 at any rate, the additional housing demand could be met for the first time through new construction and renovation. In addition, a certain backlog of demand has accumulated in recent years which must first be worked off. In this respect, the tension on the housing market could ease with further dynamism in new construction and refurbishment and a slowdown in immigration.

The establishment of a capitalist housing market in the 1990s was accompanied by neoliberal reforms aimed primarily at privatising public housing stocks. However, the housing policy of the time was also accompanied for the last time by broad welfare state measures, such as state subsidies for housing construction and refurbishment as well as social housing. However, the subsidies for new construction and refurbishment were mainly financed by tax write-offs and aimed at mobilising private capital. This fostered an ownership structure in Leipzig consisting largely of West German owners and capital investors; Leipzig's housing market became an investor's market. The financialisation of the housing market, much discussed in recent years, thus already began during the post-Reunification transformation phase. The market consolidation pursued in the 2000s coupled demolition with the Altschuldenhilfegesetz (Old Debt Assistance Act), and Stadtumbau Ost (Urban Redevelopment East) was the first state subsidy programme aimed purely at demolishing housing. The welfare state orientation of this market consolidation programme is indirectly contained in the fact that municipal and cooperative housing companies were to be saved from insolvency. In the new housing market cycle of the 2010s, the investor model is now coming into full effect again in Leipzig, but this

time largely without state subsidies (exception: depreciation for old heritage listed buildings). The only welfare state element is now the social housing subsidy, which admittedly is of a manageable size in Leipzig for both new construction and refurbishment. In this respect, Leipzig's housing policy in the 1990s and 2000s was strongly determined by federal policy regulations and programmes; only in recent years has it taken on a certain independent character.

With regard to the fact that municipal housing policy has been consistently pursued since the early or mid-1990s, Leipzig shows continuity, unlike some other large German cities. With regard to the orientation of housing policy, two changes of direction can be identified at the municipal level, as seen in the housing policy concepts of 2002 and 2015. The main changes in the new housing policy since 2015 relate to

- the orientation towards growth, i.e. an expansion of supply (again) and
- the affordability of housing, i.e. a stronger social orientation towards the provision of housing for low-income groups.

During the 2010s there was a remarkable shift in housing policy: demolitions ceased and supply expansion was put back on the agenda. The change in Leipzig's housing policy becomes evident, for example, if one looks at the municipal housing company LWB, which was heavily involved in demolitions during the market consolidation in the 2000s and now aims to substantially expand its stock by the mid-2020s. With regard to this new policy cycle, however, it took some time to go from the agenda setting to the implementation. In fact, the effects of the new housing policy will only materialise in the course of the 2020s. Housing policy is inert and this is especially true in a city coming out of a long 'vacancy depression'.

Housing policy in Leipzig generally became more important in the 2010s and has since become very important; it ranks practically second after the school and childcare building programme and is viewed as equally as important as transport policy. But in contrast to the considerable municipal funds spent on the school and childcare building programme—for which the city has even taken on new debt—and the regular budget for transport policy, the budget for housing policy is comparatively modest. It is mainly fed by federal and state funds; hardly any municipal money is spent. During the coronavirus crisis, housing policy has so far not suffered any loss of importance. It continues to be pursued under the more difficult pandemic conditions, as shown by the founding of the Alliance for Affordable Housing at the beginning of 2020 and the decision on conservation areas in the summer of 2020.

Since 2002, housing policy has been incorporated into integrated urban development policy, which has the advantage of overarching control. Housing policy is, of course, also placed in the service of urban development and thus takes on a partly instrumental character; an attractive housing market is supposed to promote immigration and increase the number of inhabitants. With the integration of the new housing policy concept as a specialised concept for housing within the Integrated Urban Development Concept (INSEK 2030) that was adopted in 2018, housing policy is comprehensively oriented towards strong medium-term growth.

The main body responsible for the new housing policy is the city administration, in particular the urban planning office as well as the renamed Office for Housing and Urban Renewal and the Social Welfare Office. On the part of the administration, appropriate governance structures have been created for the implementation of the concept, for example with the Leipziger Freiheit network or through the creation of a housing department in the AWS. Since 2012/13, the red-red-green majority in the city council has advanced housing policy with numerous resolutions. In contrast to the usual practice of changing political majorities (the ‘Leipzig model’), a stable and resilient red-red-green coalition has established itself in this policy field. The expert commission on housing policy played a decisive role during the drafting and formulating of the new housing policy in 2014/15; public participation was also greatest in this phase. The large private housing and real estate companies, which primarily pursue economic goals, have a decisive influence on the design and implementation of the new housing policy. This is also reflected in the composition of the Bündnis für bezahlbares Wohnen (Alliance for Affordable Housing), a new governance structure in the field of municipal housing policy that was established at the beginning of 2020. It was the new urban and housing policy initiatives such as Stadt für alle (City for All) that brought the topic of housing policy into the urban public sphere and onto the political agenda. From their side, there is constant public pressure for the implementation of the new housing policy, as could be clearly observed in relation to the concept allocation and the introduction of preservation statutes. It remains to be seen what role they can play in the Alliance for Affordable Housing.

The effects of the new housing policy are admittedly still modest; so far it has had no significant influence on new construction and renewal. The instruments and measures adopted will only take effect in the future (e.g. social housing promotion, conservation areas and the LWB’s new construction programme). The municipal funds and resources for implementing the housing policy concept are limited. Overall, there is a high dependence on federal and state political resources, decisions and regulations. This is unlikely to change in the foreseeable future, so there will be no quick or easy solution to Leipzig’s housing problems.

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